# Oracle® Self-Service Human Resources

Deploy Self-Service Capability Guide

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Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Release 12.1

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## HRMS Glossary

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**Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Release 12.1**

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# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide.*

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

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

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

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

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

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## Structure


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HRMS Glossary


## Related Information Sources

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

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

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

**Guides Related to All Products**

Oracle E-Business Suite User's Guide

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

**Guides Related to This Product**

Oracle Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief

HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

Oracle Daily Business Intelligence for HRMS Implementation Guide

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

Oracle Daily Business Intelligence Implementation Guide

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

Oracle Daily Business Intelligence User Guide

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

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Performance Management Implementation and User Guide

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

Oracle Succession Planning Implementation and User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Oracle Human Resources Management Systems Approvals Management Implementation Guide

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

the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

**Other Implementation Documentation**

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

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

### Integration Repository

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

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

## Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite

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

# 1

# Introduction to Oracle Self-Service Human Resources (SSHR)

## Overview

Oracle Self-Service Human Resources (SSHR) extends the functionality of standard Oracle HRMS by enabling both employees and managers to participate in Human Resources management via a web browser. SSHR offers secure self-service business transactions and easy-to-use functionality driven by Oracle's proven web and workflow technologies. These technologies enable the data, views, stored procedures, validation routines, and Application Programmatic Interfaces (APIs) used in the standard Oracle Applications to be shared, thus providing seamless integration between Oracle HRMS and Self-Service HRMS.

### Features of SSHR

Key features of SSHR include the following:

- Configurability

  SSHR uses the Oracle Applications Framework (OA Framework) technology to enable flexible personalizations options. For example, you can personalize your self-service pages to reflect your corporate identify, or to reflect the specific business processes in your organization. You can personalize content, appearance, and self-service transactions to suit your requirements and those of the individual user. You can personalize self-service applications to suit role, experience, work content, language, and information needs.

- Intuitive layout

  The pages and windows used in SSHR have an intuitive layout and enable users to carry out business processes and transactions without the need for extensive documentation or instruction. Notes and messages are available on pages if appropriate and meaningful.

- Dynamic routing of transactions

  SSHR utilizes workflow technology to enable you to define dynamic routing and approvals paths for your self-service transactions. You can use Oracle Workflow to configure any process that requires routing, approval, and submission.

- Delivery of workforce intelligence

  By providing manager functions in SSHR, you can deliver intelligence and information to managers, HR Professionals, executives. These users can retrieve and query information simply and quickly.

- Improved accuracy of data

  By enabling users to enter and maintain their own information, data input is more accurate and up-to-date. This also reduces repetitive data entry tasks for HR administrators.

- Streamlined business processes

  By allowing managers, HR Professionals, contingent workers, and employees to work in a paperless environment, you can streamline business processes, reduce administration costs, and improve service. Users can make their own decisions about benefits options and work preferences, for example, and view information online including payslips and tax forms.

- Integration with Oracle Approvals Management (OAM)

  Oracle Approvals Management (OAM) enables you to define routing rules for your transactions. By using OAM with SSHR, you ensure that your self-service transactions are received and approved or rejected by the correct user.

### Scope of SSHR

SSHR functions are available for all major functional areas in Oracle HRMS: Workforce Sourcing and Deployment, Compensation, Benefits, and Payroll Management, and Enterprise and Workforce Management. Within these functional areas, some functions are available in SSHR only, some are available in the Forms Interface only, and some are available in both SSHR and the Forms Interface.

For information on the self-service functions available for each functional area, see: Self-Service Modules, page 1-6.

## What is SSHR?

The following sections answer common questions on SSHR and give an overview of the functionality.

## What does self-service mean?

Self-service means that the originator of a task is also the person responsible for that task. Using a standard web browser, the user accesses HR data and performs a specific task, for example, registering a change of address. By transferring the responsibility for the task to the originator of the task, data accuracy is increased and administration costs are reduced.

## How do self-service applications differ from traditional HR systems?

The key elements that distinguish self-service applications from other systems are:

- easy-to-use user interfaces
- easy access to functions via web browsers
- complex processes reduced to simple steps
- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrollment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure SSHR web pages to suit user requirements.

## How can SSHR meet my enterprise's unique business processes?

SSHR is highly configurable: you can configure web pages and predefined business transactions. You can also create your own business processes. Although SSHR uses the design standards that are common to all Oracle applications, you can change the appearance of the web pages by adding your own logos and by changing field and radio button names. On some pages, you can choose which sections are displayed. If you want to highlight procedures that are specific to your enterprise, you can customize the instructions that provide online help for users.

# Introduction to Self-Service

## SSHR Licenses

To enable SSHR, you must first purchase the appropriate licence from Oracle. For information on licences, contact your Oracle sales representative.

SSHR delivers particular functionality according to your base product licence. If you have licenced SSHR you have access to all SSHR HRMS functionality with the following exceptions:

- Oracle Advanced Benefits (OAB). Although the self-service Benefits functions are available with Standard Benefits which is included in the HRMS licence, additional functionality is available if you purchase OAB. For example, life event restrictions in the Advanced Benefits model allow you to use Self-Service Benefits at any time during the year.

  **Note:** For Standard Benefits customers, it is recommended the Benefits Election function be available only during the annual enrollment period. In other words, you should consider taking your enrollment web pages off-line during periods where you do not want benefits participants to make changes to their elections.

- Oracle Training Administration: You must purchase a separate licence to be able to use the self-service training function.

- Payroll: You must purchase a separate licence to be able to use the self-service payroll functions.

- Oracle Compensation Workbench: If you purchased a Self-Service HR license prior to June 18th, 2007 and have an Oracle Human Resources (HR) license, you can use Compensation Workbench. The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Compensation Workbench. You must purchase a separate Compensation Workbench license in addition to an Oracle Human Resources (HR) license to use the product. A Self-Service HR license is not required to use Compensation Workbench if you purchased a Compensation Workbench license.

  **Important:** If you are licensed to use Compensation Workbench, you must set the HR: Self Service HR Licensed profile option to 'Yes' to avoid this error: 'You do not have permission to use this product', when attempting to use Compensation Workbench.

- Oracle Total Compensation Statement: If you purchased a Self-Service HR license prior to June 18th, 2007 and have an Oracle Human Resources (HR) license, you can use Total Compensation Statement. The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Total Compensation Statement. A Compensation Workbench or Advanced Benefits license purchased on or after June 18th, 2007 allows the use of Total Compensation Statement. A Self-Service HR license is not required to use Total Compensation Statement if you purchased a Compensation Workbench or Advanced Benefits license on or after June 18th, 2007.

- Oracle Performance Management: If you purchased a Self-Service HR license prior to June 18th, 2007 and have an Oracle Human Resources (HR) license, you can use Oracle Performance Management. The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Performance Management. You must purchase a separate Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management self-service functions.

## Key Concepts in Self-Service Human Resources (SSHR)

This section defines some important terms used throughout this Implementation Guide.

**Application Object Library (AOL) function**

An AOL function is an item that can be added to a menu. The item can call a screen or web page or be a hidden function.

See also: Self-Service Function

**Business Process**

Produces the products and services that are recognized outside the business area. They support the organization's objectives, critical success factors, or business objectives. They can be subdivided into sub-processes, for example, the Change Hours workflow process consists of the Work Schedule and Pay Rate subprocesses.

See: The Personalization Framework, page 5-4

**MDS (Meta Data Services) Repository**

An active repository that stores information on the appearance and behavior of self-service pages. Customers can configure changes to the definitions held in the MDS Repository using the Personalization Framework.

See: The Personalization Framework, page 5-4

**Oracle Applications (OA) Framework**

The OA Framework is the technical foundation for the Oracle Self-Service Applications (OSSWA).

**Personalization Framework**

The Personalization Framework allows you to configure the display of Oracle Self-

Service Web Applications (OSSWA) without having to make any changes to the underlying code. Your configurations are stored in the MDS Repository and are preserved during upgrades.

**Region**

A region in the MDS Repository defines a section in a page in Oracle Self-Service Web Applications. The region is defined in terms of elements such as fields and buttons.

**Self-Service Function**

Self-service functions appear as menu options to the SSHR user. The function determines how the self-service modules are called. For example, the same self-service module is used for Personal Information from both the manager and employee menus but the function determines whether the module is called in Employee or Manager mode.

**Self-Service Module**

A set of dynamic web pages and related components (for example, workflow process and definitions stored in the MDS Repository, stored procedures). Examples include Personal Information, Competencies, and Assignment.

**Transaction**

A transaction is a logical unit of work such as a promotion or an assignment change. It may consist of several components, such as changes to salary, locations, and grade, but all the components of a transaction must be handled as a unit to be either approved or rejected.

**Workflow Builder**

Oracle Workflow is embedded within SSHR and manages the flow of information between the HR professional, the manager, the employee, and the applicant. You use workflow to control who and how these participants take part in HR processes by modifying the underlying process definitions.

See: Self-Service Workflows, page 4-3

**Workflow Function**

A workflow activity which is defined as a function and which maps to a PL/SQL procedure that is executed by the Workflow Engine when it encounters this activity in the workflow process.

See: Self-Service Workflows, page 4-3

**Workflow Process**

A workflow process is a series of activities linked by transitions. Each activity can be a function, a notification, or a subprocess.

## Self-Service Functionality

This section provides a brief description of the delivered SSHR functionality.

## Summary of SSHR Functionality

**Note:** In the tables below the Manage or Employee/Worker column refers to the type of activities that the responsibility would do, rather than a function that would specifically appear on a Manager or Employee menu.

### Common Functionality

The following generic modules provide common, low-level functionality that is reused in many of the higher-level functions.

| Module Name | Manager or Employee/Worker | Workflow chainable/Approvals | Localization |
|---|---|---|---|
| Enter Process | Manager | No/No | Global |
| Manager Actions | Manager | No/No | Global |
| Return for Correction | Manager | Yes/No | Global |
| New User Registration | Both | Yes/Yes | Global |
| Review and Confirm | N/A | Yes/Yes | Global |
| Release Information | Both | No/Yes | Global |
| Document Management | Manager | No/No | Global |
| Personal Actions | Employee/Worker | No/No | Global |
| Save for Later | Both | No/No | Global |

#### Enter Process

The Enter Process module enables the user to:

- Select a person from a searchable list of people
- Select a person from their supervisor hierarchy or from their position hierarchy

- Add and remove people from their personal list of employees and workers

A Simple Search enables to search for a person by name. With an Advanced Search, a manager can search for a person or persons who meet particular criteria. You can search on personal, assignment or skills criteria.

#### Integration with Oracle Approvals Management

From version 4.1 onwards, SSHR uses the Oracle Approvals Management (AME) application to define and manage approval logic. For more information on AME, see: *Oracle Approvals Management Implementation Guide*

The existing method of defining customizable PL/SQL packages for approvals is still supported in this release as an alternative to AME.

See: Oracle Approvals Management (AME), page 6-5

#### Manager Actions

The Manager Actions feature enables the user to first select a person and then the function, or action, to be performed. When the user selects the person, a context-sensitive list of available actions is displayed and the user can choose the required action from the list.

See: Actions Page, page 10-5

#### Return for Correction

The Return for Correction feature enable managers to return a transaction either to the initiator of the transaction or a prior approver of the transaction for correction. The person to whom the transaction is returned for correction will receive a notification.

See: Return for Correction, page 10-9

#### New User Registration

New User Registration enables users to register their own details for SSHR and for benefits providers. You set up a generic name and password and you can either enable users to create their own user name or you can use user hooks to create the user name automatically.

See: New User Registration, page 10-67

#### Review and Confirm

The Review and Confirm module shows details of transactions that a user has updated or details about pending transactions that require approval. The user can review the information displayed to ensure that all the details are correct before the changes are finally submitted to the database. If necessary, the user can return to the previous screen to change incorrect information. The user can also perform What If analyses to ascertain the effect any changes will have on an person's benefits.

See: Review and Confirm, page 10-13

#### Personal Actions

The Personal Actions module is the employee/worker equivalent of Manager Actions. The user is presented with a context-sensitive list of actions that they can perform on themselves.

See: Actions Page, page 10-5

#### Document Management

The Document Management modules enables you to automatically generate business documents containing data from self-service actions.

See: Document Management, page 10-16

#### Save for Later

The Save for Later functionality enables a user to interrupt a transaction before the data is submitted. The transaction is saved in a transaction table from which it can be retrieved and continued at a later time. Users can select those transactions which they have explicitly saved for later, or which were partially saved at the time of a system failure or time-out, from the All Actions Awaiting Your Attention list in the Actions page.

See: Save for Later, page 10-14

#### All Actions Awaiting Your Attention

Using the All Actions Awaiting Your Attention function from the Manager, Professional, Employee or Worker responsibilities, SSHR *users* can access their notifications. This function displays all the notifications and actions irrespective of the responsibilities assigned to a user. Oracle SSHR does not distinguish notifications based on the user's access to functions.

> **Important:** SSHR notifications can be used to relaunch a transaction using the Update Action or Continue Action functionality. Therefore, you must ensure that SSHR users are assigned the relevant responsibilities based on their roles in the enterprise.

#### Delete Transactions Pending Approval

The Delete Transactions Pending Approval functionality enables users to delete the transactions that they have initiated before approval.

See: Delete Transactions Pending Approval, page 10-41

#### Allocated Checklists

The Allocated Checklists module allows you to view and maintain the allocated checklists for your direct reports. The checklists contain a list of tasks relevant to a particular HR action, usually a life event, for example, New Hire. From the Allocated

Checklists page, you can perform a task, reassign a task to an alternative performer, and update the task and its status.

See: Allocated Checklists, page 10-40

## Workforce Sourcing and Deployment

### People Management

The following section lists the SSHR functions within People Management.

**Employee Directory**

| Module Name | Manager or Employee/Worker | Workflow chainable/ Approvals | Localization |
|---|---|---|---|
| Employee Directory | Both | No | Global |

**Employee Directory**

The Employee Directory function provides an easily accessible, highly configurable lookup of people within your organization. Users can search for a specific person against a range of data, and traverse the organization hierarchy to view details of a person's manager or direct reports. The directory can be accessed either from Self Service, Portal, or anonymously from any web page.

**Manage Employment Events**

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Assignment | Manager | Yes/Yes | Global |
| Change Location | Manager | Yes/Yes | Global |
| Change Manager | Manager | Yes/Yes | Global |
| Other Employment Information | Manager | Yes/Yes | Global |
| Employee or Contingent Worker Pay (Pay Rate, Assignment Rate) | Manager | Yes/Yes | Global |

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Extra Information Types (EITs) | Both | Yes/Yes | Global |
| Special Information Types (SITs) | Both | Yes/Yes | Global |
| Employee or Contingent Worker Termination (Termination, End Placement) | Manager | Yes/Yes | Global |
| Work Schedule | Manager | Yes/Yes | Global |

#### Manage Employment Events (MEE)

The Manage Employment Events (MEE) functionality consists of a set of low-level, workflow-enabled components which can be chained together in various combinations to match your enterprise's business processes. Some chained processes are predefined for you but you can use the Workflow Builder to configure others if you need to. The MEE components are as follows:

#### Assignment

The Assignment module enables a manager to change a person's assignment information. If the person has multiple assignments, you can display and change any assignment.

See: Assignment, page 9-49

#### Change Location

The Change Location module enables a manager to change a person's work location.

See: Location, page 9-61

#### Change Manager

The Change Manager module enables a manager to transfer an employee or worker to another supervisor, move the direct reports of one supervisor to another supervisor and to assemble a new set of direct reports to a new supervisor.

See: Change Manager, page 9-64

#### Extra Information Types (EITs)

Extra Information Types for SSHR enable you to store additional person and assignment information.

See: Extra Information Types (EITs), page 9-62

#### Other Employment Information

The Other Employment Information module enables you to update and retrieve assignment and employment information in assignment descriptive flexfields and localization-enabled flexfields.

See: Other Employment Info, page 9-62

#### Pay Rate

The Pay Rate module enables a manager to change a person's overall pay rate or update an individual component of the pay rate.

See: Pay Rate, page 9-63

#### Assignment Rate

The Assignment Rate module enables a manager to enter and record contingent worker rates, per assignment, based on assignment rate types, such as overtime or weekend rates.

See: Assignment Rates, page 9-64

#### Special Information Types (SITs)

Special Information Types enable you to store additional information that is not currently captured by the system.

See: Special Information Types (SITs), page 9-61

#### Voluntary Termination of Employment or End Placement

If employees or contingent workers decide to leave the enterprise, they can initiate the process of ending their employment or placement.

Using the Voluntary Termination function:

- Employees can request for termination of their employment.
- Contingent workers can request for ending their placement.

See: Voluntary Termination, page 9-57

#### Termination

The Termination module enables a manager to end a person's relationship with their employer. You can also use the Change Manager workflow process to reassign a terminated supervisor's reports.

You can combine the Termination module with the ICD module to create a severance pay process if required.

See: Termination, page 9-55

#### End Placement

The End Placement module enables a manager to end a contingent worker's work relationship, and specify a reason. You can also use the Change Manager process to reassign the contingent worker's reports.

See: End Placement, page 9-57

#### Reverse Termination

Managers can reverse the termination of employment or placement.

See: Reverse Termination, page 9-58

#### Work Schedule

The Work Schedule module enables a manager to change a person's work schedule.

See: Work Schedule, page 9-60

#### Organization Management

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Organization Manager | Manager | Yes/Yes | Global |

#### Organization Manager

The Organization Manager module enables a manager to maintain organization manager relationships.

> **Note:** Organization manager relationships can only be initially created in the Professional Forms Interface.

See: Organization Manager, page 9-68

#### Personal Information

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Basic Details | Both | Yes/Yes | Global |
| Main Address | Both | Yes/Yes | Global |
| Other Address | Both | Yes/Yes | Global |
| Phone Number | Both | Yes/Yes | Global |
| Emergency Contacts | Both | Yes/Yes | Global |
| Dependents and Beneficiaries | Both | Yes/Yes | Global |
| Contact Extra Information | Both | Yes/Yes | Japan |

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Documents of Record | Both | No/Yes | Global |

#### Personal Information

The Personal Information function enables users to update and maintain their personal records. The Personal Information function covers the following areas:

- Basic personal details

  See: Basic Details, page 9-5

- Address

  See: Main Address, page 9-7

- Other addresses

  See: Other Address, page 9-10

- Phone number

  See: Phone Numbers, page 9-12

- Dependents and beneficiaries

  See: Dependents and Beneficiaries, page 9-16

- Emergency contacts

  See: Emergency Contacts, page 9-13

The Personal Information function can also be chained with Special Information Types (SITs).

See: Personal Information, page 9-3

**Contact Extra Information**

The Contact Extra Information function enables you to enter and maintain additional contact information in SSHR. For example, statutory regulations may require that you provide specific information on dependents and beneficiaries for health insurance and income tax purposes. SSHR enables you to store this information using Extra Information Types (EITs).

See: Contact Extra Information (Japan), page 9-20

**Documents of Record**

The Documents of Record function enables you to store documents such as work permits, visa information, and medical certificates in one place. If required, you can also

upload electronic versions of document.

See: Documents of Record, page 9-23

**Employment Verification**

The Employment Verification function enables you to release employment information and, optionally, salary information, to an external organization for a specific purpose, for example, to complete a mortgage or loan agreement.

See: Employment Verification, page 9-28

**Professional Details**

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Academic Rank | Both | No/Yes | US |
| Competency Profiles | Both | No/Yes | Global |
| Education and Qualifications | Both | No/Yes | Global |
| Resume | Both | No/No | Global |
| Other Professional Qualifications | Both | No/Yes | Global |
| Tenure Status | Both | No/Yes | US |
| Work Preferences | Both | No/No | Global |

**Professional Details**

The Professional Details modules enable users to maintain professional details. They can be used by both employees and their managers, however, certain functions can be restricted for manager access only.

The Professional Details menu contains the following functions:

**Education and Qualifications**

The Education and Qualifications module enables employees and managers to store details on their academic qualifications. Information entered using this module requires an establishment attendance record for qualifications.

See: Education and Qualifications, page 9-24

**Other Professional Qualifications**

The Other Professional Qualifications module enables employees and managers to store

details on professional qualifications. Professional qualifications or certification details do not require an attendance record.

See: Other Professional Qualifications, page 9-25

**Competency Profiles**

The Competency Profile module enables employees and managers to store information on skills and competencies.

See: Competency Profile, page 9-25

**Work preferences**

The Work Preferences module enables employees and managers to store information such as relocation preferences and travel preferences.

See: Work Preferences, page 9-27

**Resume**

The Resume module enables employees and managers to store a resume.

See: Resume, page 9-27

**Tenure Status (US)**

The Tenure Status module enables managers to store information on an person's tenure (completion of professional criteria and extended probationary period).

See: Tenure Status, page 9-27

**Academic Rank (US)**

The Academic Rank module enables managers to store information on the academic rank for employees within Higher Education.

See: Academic Rank, page 9-27

**Views**

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| My Information | Employee/Worker | No/No | Global |
| My Employee Information | Manager | No/No | Global |
| HR Views | HR Professional | No/No | Global |

**My Information/My Employee Information**

My Information and My Employee Information offer users access to employment and assignment records containing information about employment, salary, performance, training, absence, and job applications. Employees can view their personal records and

managers can view the records for the people they manage.

See: My Information and My Employee Information, page 9-72

#### HR Views

The HR Views module offers a summarized view of specific information: Personal Information, Assignment Details, Compensation Activity, and Termination History. This module is used by the HR Professional.

See: HR Views, page 9-71

### Recruiting and Hiring

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Apply for Job | Employee/Worker | No/No | Global |
| Candidate Offers | Manager | No/Yes | Global |
| Hire | Manager | No/Yes | Global |
| French New Hire | Manager | No/Yes | France |
| French Applicant Hire | Manager | No/Yes | France |
| Contingent Worker Placement | Manager | No/Yes | Global |

#### Apply for a Job

The Apply for Job functionality enables employees and workers to search and apply for jobs online.

For more information, see: Apply for a Job, page 9-100

#### Candidate Offers

The Candidate Offers functionality is used by managers to seek approval for a job offer, send it to an applicant, and track the applicant's response.

For information on Candidate Offers, see: *Oracle HRMS Implementing Oracle Self-Service Human Resources 3.4*.

#### Hire

The Hire process is used by managers to enter details about new employees and hire them into their enterprise.

See: Hire or Placement, Place Contingent Worker Processes, page 9-102

#### Contingent Worker Placement

You can use the Contingent Worker Placement process to bring contingent workers into the organization and give them an assignment.

See: Hire or Placement, Place Contingent Worker Processes, page 9-102

#### Applicant Hire and Rehire

Use the Applicant Hire and Rehire page to:

- Hire external applicants who have application assignments with a status of Accepted.
- Hire internal applicants (applicants who are employees in your organization) who have application assignments with a status of Accepted.
- Rehire ex-employees in the same business group in which they were previously employed.

See: Applicant Hire and Rehire, page 9-104

#### Transaction Monitor

HR professionals, managers, and workers can use the Transaction Monitor page to track and view details of the self-service transactions. As the list of all self-service transactions is available on a single-page, users can efficiently track the status of their transactions.

Users can track transactions using the following status values and view their details.

- Pending Approval
- Complete
- Defer
- Error

See: Using Transaction Monitor, page 10-62

#### Organization Chart

Managers can view their organization hierarchy using the Organization Chart. Details of workers in the manager's hierarchy are displayed in the form of panel cards. The application supports different hierarchy viewer layouts.

Using the Organization Chart, managers can:

- View the Contact, Employment, and Salary information of workers in their hierarchy.
- Identify key high potential workers with succession plans, key high potential workers without succession plans, workers whose salary is above the specified grade range and below the specified grade range.
- Launch self-service actions for workers in their hierarchy. These manager actions

are launched in a new page in the Manager Actions tab. This page has a side navigator that helps managers to process and complete multiple self-service transactions for workers in their hierarchy without leaving the page.

- View and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

Workers can use the Organization Chart to view their contact and employment information. They can also search for other workers and view their contact and employment information. Workers can launch personal actions using the Actions link in the personal details panel. When a worker selects an action, the action is launched in a page with a side navigation container in the Personal Actions tab. All the personal actions links appear in the side navigation container on the left side of the page. The worker can complete the transaction launched, and move on to other transactions without leaving the page. Note that workers can launch actions for their primary assignment only.

For more information, see: Using the Organization Chart, page 12-2

## Talent Management

**Note:** The Training, External Training, and Training Plans functions, which were previously available from the Employee Self-Service menu, are now available from the Learner Self-Service responsibility and the Learner Home and External Learning functions. For all other training functionality, see: Oracle Learning Management, *Oracle Learning Management User Guide*.

### Talent Profile

The Talent Profile feature of Oracle SSHR helps enterprises to obtain a complete picture of the talent profile of their workforce to manage and execute their talent processes. Talent Profile captures and displays complete worker talent details on a single-interface.

Managers can use Talent Profile to launch personal actions or manager actions. These personal actions or manager actions are launched in a new page in the Personal Actions tab or the Manager Actions tab respectively. The page that is launched when a manager initiates a personal action or manager action has a side navigator that helps managers to process and complete multiple self-service transactions for themselves or for workers in their hierarchy without leaving the page. Managers can view and perform actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

Workers can use Talent Profile to launch personal actions. The personal action selected,

is launched in the Personal Actions tab. The side navigator available on this page helps workers to complete multiple self-service personal actions without leaving the page. Note that workers can launch actions for their primary assignment only.

See: Talent Profile in Oracle SSHR, page 13-2

## Career and Performance Management

| Module Name | Manager or Employee/Worker | Workflow chainable/Approvals | Localization |
|---|---|---|---|
| Appraisals | Both | No/Yes | Global |
| Apply for a Job | Both | No/Yes | Global |
| Employee Reviews | Both | No/Yes | Global |
| Events and Bookings | Both | No/No | Global |
| Suitability Matching | Both | No/No | Global |
| Succession Planning | Manager | No/No | Global |

### Appraisals

The Appraisals module enables a manager and employee or worker to evaluate employee performance and competencies and to set objectives and actions.

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

> **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.

### Succession Planning

The Succession Planning functionality enables managers to plan for future vacant positions by identifying possible successors for employees, jobs, and positions.

See:Succession Planning, page 11-10.

#### Events and Bookings

The Events and Bookings module enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and employees, enabling managers to book their subordinates onto events.

See: Events and Bookings, page 11-4

#### Suitability Matching

The Suitability Matching functionality enables managers to find suitable people for an existing or planned work opportunity, or find suitable work opportunities for a person. Employees can find opportunities for themselves.

For general information on Suitability Matching, see: Suitability Matching, *Oracle HRMS Enterprise and Workforce Management Guide*.

#### Employee Reviews

The Employee Review functionality enables employees/workers and managers to create or update reviews. Employees and workers can create their own reviews and managers can create reviews for their employees and workers. Both managers and employees can invite reviewers to attend the review.

See: Employee Review, page 11-5

### Compensation and Benefits Management

#### Leave and Absence Management

| Module Name | Manager or Employee/Worker | Workflow chainable/Approvals | Localization |
|---|---|---|---|
| Absences | Both | No/Yes | Global |

The Absences functionality enables employees or managers to enter absence-related information using a self-service interface. Users can submit and update absence requests. Planned, confirmed, and updated requests are then submitted for approval.

See: Absences, page 14-2

Using self-service, employees can view their accrual balance details based on an effective date, and managers can do the same for employees in their team.

See: Accrual Balances Maintained by SSHR: Overview, page 14-2

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

See: How do we track and analyze absences and net accrual entitlement:Leave and Absence Management, *Oracle HRMS Compensation and Benefits Management Guide*

### Benefits

| Module Name | Manager or Employee/Worker | Workflow chainable/Approvals | Localization |
|---|---|---|---|
| Benefits Enrollment | Both | No/No | Global |
| Benefits Enrollment | Employee/Worker | No/No | Federal |

#### Benefits Enrollment

Benefit Enrollments enables an person to:

- Review their current benefit enrollments
- Select benefits
- Add, update, or remove dependents
- Add, update, or remove beneficiaries
- Search for and select primary care providers

See: Self-Service Benefits Enrollments, *Oracle HRMS Compensation and Benefits Management Guide*

For information on US federal self-service benefits, see: Federal Health Employee Benefits Overview, *Oracle HRMS Compensation and Benefits Management Guide (US Federal)*

### Compensation

| Module Name | Manager or Employee/Worker | Workflow chainable/Approvals | Localization |
|---|---|---|---|
| Compensation Workbench | Manager | No/Yes | Global |
| Individual Compensation Distributions (ICD) | Manager | Yes/Yes | Global |

#### Compensation Workbench

The Compensation Workbench enables managers to determine and allocate compensation awards such as salary increases, bonuses, and stock options using a self-service interface. Managers can also view details on their direct reports, prepare budgets, and generate reports.

See: Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

Using self-service, compensation managers can update grade step and grade point of their employee's salaries. Additionally, managers can view the grade step, grade point, grade step date, and point value details using manager view.

See: Grade Step Progression, *Oracle HRMS Compensation and Benefits Management Guide*

See:Implementing Grade Related Pay, *Oracle HRMS Compensation and Benefits Management Guide*

See: Placing an Employee on a Grade Step, *Oracle HRMS Compensation and Benefits Management Guide*

See: Setting up a Grade Ladder, *Oracle HRMS Compensation and Benefits Management Guide*

### Individual Compensation Distributions (ICD)

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, *Oracle HRMS Compensation and Benefits Management Guide*

## Payroll

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Online Payslip | Both | No/No | Australia, US, UK, Canada, Hong Kong, Korea New Zealand, Singapore, South Africa, Netherlands |

| Module Name | Manager or Employee/Worker | Workflow chainable/Approval | Localization |
|---|---|---|---|
| Personal Payment Methods (Direct Deposit) | Both | No/Yes | Global |
| Online Tax Form (W-4) | Both | No/No | US |
| Online W-2 Form | Employee/Worker | No/No | US |
| Commutation Information | Both | | Japan |

#### Online Payslip

The Online Payslip enables a user to view their payslip using a Web browser when the required payroll processes have been run. Payslips are available for all assignments for which payroll has been completed. Employees can display payslips for the most recent payroll period or for previous payroll periods.

See: Online Payslip, page 16-11

#### Tax Information Form (W-2)

The Tax Information form gives summary tax information for tax years from 2001 onwards. The form is used for information purposes only as it contains no updateable fields and cannot be submitted in place of the paper version of the form.

See: Tax Information Form (W-2) (US), page 16-53

#### Tax Withholdings Form (W-4)

The Online Tax Form enables a user to submit US Tax Withholdings forms (W-4 tax forms) using a Web browser. The user can use the form to update withholding information. A defined contact person will then receive notification of the changed information.

See: Tax Withholdings Form (W-4) (US), page 16-35

#### Voluntary Deductions

You can use the Individual Compensation Distributions (ICD) functionality if your enterprise uses voluntary deduction plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, *Oracle HRMS Compensation and Benefits Management Guide*

#### Personal Payment Methods

The Personal Payment Methods functionality enables a user to determine how they are paid. The available payment methods are cash, check, deposit, or a combination.

See: Personal Payment Methods, page 16-3

#### Commutation Allowance

The Commutation Allowance functionality enables a user to view and modify their commutation and transportation allowance details.

# Getting Started

## Overview

This section gives you a brief overview of the minimum tasks you need to complete to set up SSHR.

See: Minimum Requirements for an SSHR System, page 1-32

For a list of all implementation steps, see Implementation Steps for SSHR, page 7-3

#### Notes on Migrating from SSHR Version 3

The following notes provide you with information that is useful if you are upgrading your SSHR installation from 3.x to 4.x or 5.x:

- SSHR 4.x/5.x may be installed in the same instance as SSHR 3.x
- SSHR 3.x components are still supported
- You can have both SSHR 4.x/5.x and SSHR 3.x functions on the same menu
- You can set up equivalent 4.x/5.x functions when they become available. In doing this, you would compare the new and old workflow processes and reapply workflow changes as required.

  See: Self-Service Workflows, page 4-3

  **Note:** Some 3.x workflow attributes are obsolete in SSHR 4.x/5.x as they have been replaced by the Personalization Framework functionality.

- When ready, simply migrate your users to the 4.x/5.x functions. You can switch over to 4.x/5.x functions one at a time, if required.

## Understanding a Typical SSHR Function

This chapter examines a typical SSHR function, Personal Information, and introduces the underlying concepts.

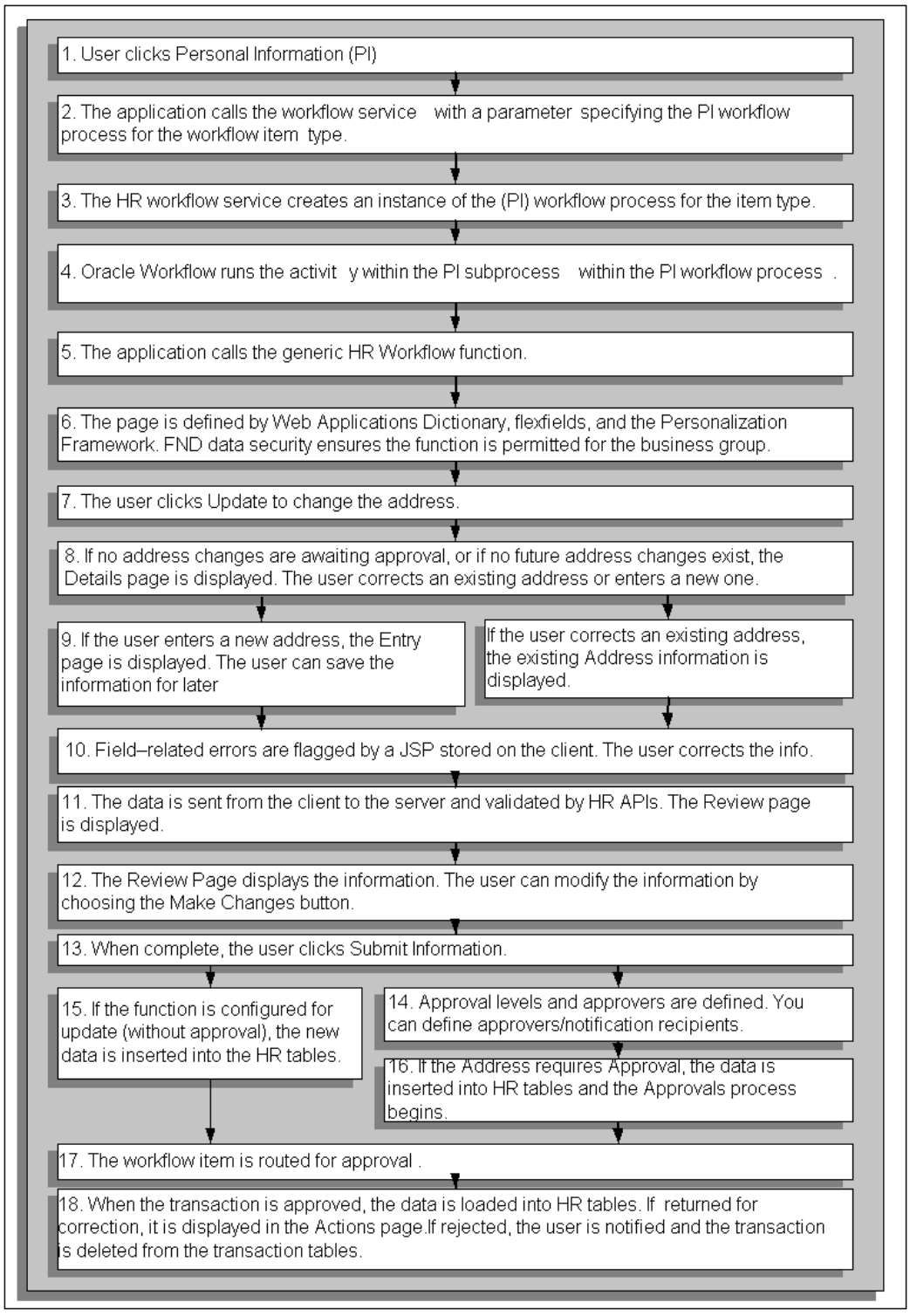
By following the functional flow of the Personal Information function, you should understand how information is passed from the web browser to Oracle Applications, how Workflow is used by SSHR, how the page layout is controlled by the definitions held in the MDS Repository and the Personalization Framework, and how the approvals process operates. The general principles described here can be applied to any other SSHR function.

The chapter includes an example of a typical SSHR Web page to illustrate the different elements that you can configure.

The configuration steps for SSHR functions and their web pages are discussed in detail in the subsequent chapters of the Implementation Guide.

## How an SSHR Function Works

The following flowchart and accompanying text describe the functional flows that occur when a user changes a main address using the Personal Information function.




1. The user chooses the Personal Information function from the user menu.
2. The application calls the HR workflow service (OA.jspsOA.jsp?

akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800) with a parameter specifying the Personal Information workflow process for the workflow item type (HR_MAINT_PERSONAL_DETAILS_PRC).

See: Self-Service Workflows, page 4-3

3. The HR workflow service creates an instance of the Personal Information workflow process for the item type.

   The FND data security is checked to make sure that this function is permitted for the legislation code of the current user's business group. Personal Information is a global function that is available for all legislation codes.

   See: User Access and Security, page 2-3

4. Oracle Workflow runs the Maintain Personal Information activity (HR_PERINFO_OVERVIEW_JSP_FCT) within the Personal Information subprocess (HR_PROCESS_PERINFO_JSP_PRC) within the Personal Information workflow process (HR_PERSONAL_INFO_JSP_PRC).

5. The application calls the generic HR_WORKFLOW_SERVICE.BLOCK function. The HR Activity Type Value workflow attribute for this process activity is set to HR_OVERVIEW_TOP_SS with the Activity Type as JSP.

6. A page is displayed based on the definition of the OverviewPG document in the MDS Repository. The page is influenced by any context-sensitive flexfields and the cumulative effect of any Personalization Framework configurations that relate to this document.

   See: The Personalization Framework, page 5-4

7. If no past address changes are awaiting approval or correction, or if no future-dated address changes exist, the Details page is displayed. The user specifies whether they want to correct an existing address or enter an entirely new one.

   The button displayed to the user will be either Update/View Future Changes or View Pending Approval.

8. If the user chooses to enter a new address, the Entry page is displayed. The user enters the information.

   If required, the user can save the information and submit the transaction later. In this case, the changes entered so far are saved to the transaction tables without server-side validation.

   See: Save for Later, page 10-14

   If the user chooses to correct an existing address, the existing Address information is displayed. The user corrects the information.

9. When the user has entered the information (or is ready to complete the transaction),

they click the Continue link at the bottom of the page. Any field-related errors (bad formatting, missing fields, and so on) are flagged by a JavaScript procedure stored on the client and the user is asked to correct this information.

10. Web page data is sent from the client to the server and server-side validation is performed by HR Application Programming Interfaces (APIs). If all fields are validated, the Review page is displayed.

    See: Review and Confirm, page 10-13

11. The Review page displays the information that the user has entered. If the user now wants to modify the address information, they can choose the Back button to return to the update page to make changes.

12. When the changes are complete, the user returns to the Review page and clicks the Submit Information link to save the changes.

13. The number of approval levels and approvers is determined by the configuration of Dynamic Approvals. If applicable, the user can insert additional approvers and/or notification recipients.

    See: Dynamic Approvals, page 6-9

14. If the Main Address part of the Personal Information function is configured for update without requiring approval, the new address data is inserted directly into the HR tables. (This step is the same process as step 18 for changes requiring an approval.)

15. If the Main Address part of the Personal Information function is configured to require approval, the data is inserted into HR transaction tables and the Approvals process begins for that item.

16. The workflow item is routed for approval according to the configuration of the Approvals process.

17. The approver can either approve or reject the transaction or return it to the user for correction.

    If the transaction is returned for correction, it is displayed for the user in the All Actions Awaiting Your Attention list in the Actions page. The user can reopen the transaction. The previous values are reloaded from the transaction tables ready for the user to make the required changes and resubmit.

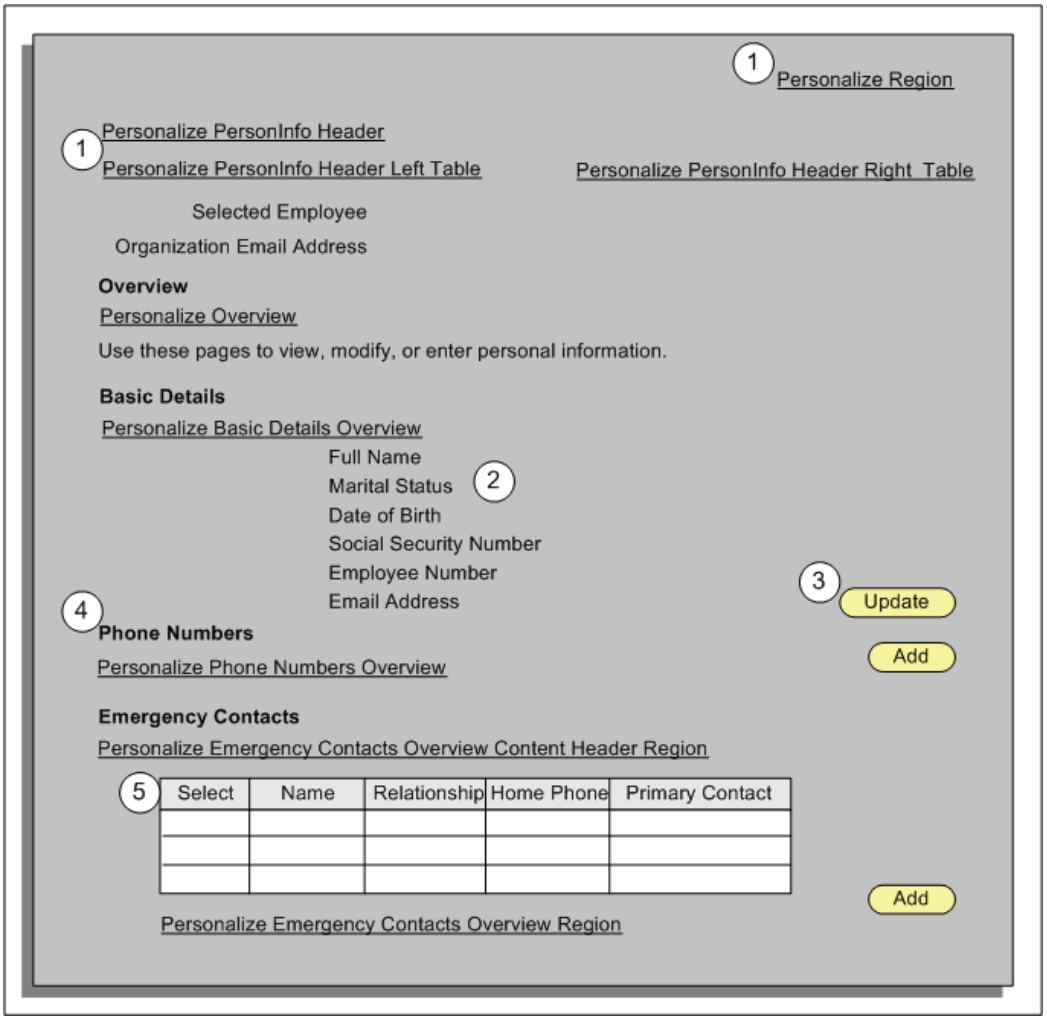
    See: Save for Later, page 10-14

    When the approver approves or rejects the transaction, the user is notified of the transaction status and the transaction details are deleted from the transaction tables. If the transaction is approved, the data is loaded into the HR tables.

## A Typical SSHR Web Page

The following diagram shows a simplified sample web page for the Personal Information function. The different elements that you can configure in the Personalization Framework are listed below.

***Sample Web Page***




The graphic above shows the following elements which you can configure using the Personalization Framework:

1. Add or remove links to enable personalization configuration
2. Change the sequence of fields
3. Add or remove buttons to control user's ability to update fields

4. Rename region items

5. Configure table views

See: The Personalization Framework, page 5-4

## Getting Started with SSHR

The following procedure gives you the basic implementation steps that are required to enable you to run SSHR in a test environment. For information on running SSHR in a production environment, please see the detailed chapters in this Implementation Guide and also the Implementation Steps, page 7-1.

**To set up an SSHR system:**

1. Ensure that Oracle Human Resources R12is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.

2. Ensure that at least one business group has been set up in Oracle HRMS with at least two employee records (one record should be defined as the supervisor for the other).

   See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self-Service Web Applications Implementation Manual* (available on My Oracle Support).

4. Apply the patch for SSHR and make sure that all prerequisites are met, including those for the OA Framework.

5. Complete the install and set-up of the OA Framework.

   See: *Oracle Application Framework Documentation Resources* (available on My Oracle Support - technical note number: 391554.1)

6. If you have licensed SSHR, set the following profile option to "Yes" at the site level.

   - HR: Self Service HR Licensed

     If you have not licensed SSHR, please contact your Oracle sales representative for information on purchasing a licence.

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

7. Add the Manager Self Service and Employee Self Service responsibilities to your users (use either new or existing users).

See: Self-Service Responsibilities and User Menus, page 2-14

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

8. Link the users to (new or existing) employee records in HRMS.

   See: Defining User Access and Menus, page 3-10

   See: Users Window, *Oracle E-Business Suite System Administrator's Guide - Security*

   For information on a typical SSHR function, please see: Understanding a Typical SSHR Function, page 1-26

# 2

# SSHR and User Access

## User Access Overview

SSHR uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses SSHR, which information they can access, and how they access it.

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

This documentation identifies the key concepts relating to SSHR user access and security and to provide information on how to apply these concepts to address the needs of your enterprise.

## Managing User Access in SSHR

The following section answers common questions on SSHR and user access and gives an overview of the functionality.

### How can the HR Department control the self-service activities available to each user?

The security controls - responsibilities, menus, and security profiles - used in standard Oracle applications also apply to self-service users. The seeded SSHR menus (Employee Self Service, Manager Self Service, and Contingent Worker Self Service) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self-service user's record; the manager functions allow the user to select an person from a list of available employees and workers and carry out the required function. The seeded SSHR responsibilities corresponding to each of these menus are useful for exploring the functionality delivered with the product, although they are not intended for production use. Instead, customers can configure their own variations of these menus and responsibilities, combined with appropriate security profiles, to restrict different groups of users to specific functions and employee groups. The Personalization Framework and Workflow Builder tools offer considerable

flexibility in controlling the user's access to specific functions and require that users' transactions are approved before they are committed to the database. You can also control the user's access by configuring the base products. For example, Benefits eligibility profiles and enrollment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

## How do I control access to employee information?

In addition to controlling which self-service functions a user can access, you can also control which employee records a user can access. Employees can only access their own personal information. Manager and HR professionals can access the personal information for selected employees. This access is controlled by security profiles which restrict different groups of users to accessing specific employee groups. When a manager selects a function from the self-service menu, the list of subordinate employees and workers is displayed in a hierarchy. If appropriate, you can permit managers to search for employees and workers in other business groups or organizations and if required, you can restrict this access to view-only and prevent managers from performing any transactions on employees outside of their business group.

## But what happens if an employee wishes to release their personal information to a third party?

In certain situations, for example, after an applying for a different position, an employee may wish to release their personal information to a third party, for example, a new manager. In this case, the employee can use the Release Employee Information function to enable the new manager to access the employee's personal information.

## How are users created for SSHR?

You can follow the standard Oracle procedures to create users and enable self-service by adding the self-service responsibilities to the user. Alternatively, you can use a batch process to create multiple users at one time. The batch processes are particularly useful if you need to create large numbers of accounts after initial installation, or for the new hire process.

# SSHR and User Access

## User Access and Security in Oracle SSHR

The following description gives an overview of the standard security mechanisms used in Oracle HRMS and discusses how they relate to Oracle SSHR.

### Responsibilities

A responsibility combines low-level elements of user access configuration to control which functions the user can access (User Access to Functions) and on whom they can perform these actions (see User Access to People).

You define SSHR responsibilities in the same way as you define responsibilities for Oracle HRMS applications.

> **Note:** When you define your responsibilities, make sure they are available from Oracle Self-Service Web Applications.

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

As an administrator, you can view a list of all owned responsibilities using the Responsibility Ownership functionality in SSHR. This functionality enables you to display a list of people with access to each of your owned responsibilities and revoke access to the responsibilities if appropriate.

See: Responsibility Ownership, page 2-16

### User Access to People

The primary users of SSHR can be divided into two main groups: managers and employees (non-managers).

**Employees (non-managers)**

Employees and workers can only access their own employee records.

**Managers**

Managers can process the records for other employees and workers after selecting them from the Enter Process page. In the Enter Process page the manager can switch between View as:

- **Hierarchy**

  This view presents a hierarchical view of the employees and workers reporting to the current user. This view is based on either the supervisor or supervisor

assignment hierarchy but can be configured to use the position hierarchy by setting the profile option HR: Self-Service Display Position Hierarchy to Yes.

For more information on supervisor hierarchies, see Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

> **Note:** Although Oracle recommend using either a position or supervisor-based hierarchy, you can set up other security structures in Oracle HRMS if you prefer.

- **My List**

  This view contains a user-defined list of people for quick reference.

  > **Note:** If the profile option HR:Expand Role of Contingent Worker is set to Yes, contingent workers will be able to manage other employees.

## Person Search

The Enter Process page enables managers to perform a basic search for any employee within the underlying security profile. Alternatively managers can access the Advanced Search page to apply more detailed search criteria.

The manager can process employees and workers in the resulting list directly or add them to My List for future reference.

> **Note:** You can extend the security profile for managers by enabling the Release Employee Information function.
>
> See:Release Employee Information, page 10-11

Some functions enable managers and HR Professionals to search for ex-employees and terminated employees.

See:

- Online Payslip (Generic), page 16-11
- Configuring the Appraisals Function, *Oracle Performance Management Implementation and User Guide*
- Tax Information Form (W-2) (US), page 16-53

This extended search functionality is controlled by a function parameter.

See: Menu Function Parameter Descriptions, page 3-34

### Configuration Options

You can control user access to the People Search functions by excluding certain functions if required, for example, you can hide the Person Search function so that managers can only process the records for the employees and workers displayed in their hierarchy.

See: Defining User Access and Menus, page 3-10

You can also control how managers search for employees and workers by assigning profile options. For example, you can apply the HR: Cross Business Group profile option to enable managers to search across business groups. If you then set the HR: Restrict Transactions Across Legislations in SSHR profile to Yes, the names of the employees and workers in other legislations will be disabled.

## Security Profiles

SSHR uses security profiles to control a user's access to person records. For example, a security profile can give a manager access to the records for all the employees and workers in the department.

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

**Employees (non-managers) and contingent workers**

You can use the default View All security profile for the corresponding business group for the employee (non-manager) responsibilities because the employee functions restrict the user to accessing only their own record.

**Managers**

If you allow your managers to access the Search functions, you must create suitable security profiles. For most SSHR managers, the most appropriate security profile is a profile based on a supervisor hierarchy. This type of security profile dynamically generates a list of available employees and workers based on either the supervisor hierarchy or the supervisor assignment hierarchy (starting with the current user). The advantage of using a profile of this type is that you can set up a single security profile and use it for multiple users. To activate supervisor security, select either the Restrict by Supervisor (person-based) option or the Restrict by Supervisor (assignment-based) option in the Security Profile window. In this case, the manager can see the records for the persons with at least one assignment for which they are the supervisor and the manager can also see the direct reports for this person.

See: Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

You can choose to build your supervisor hierarchy based on individual assignments. This means that your SSHR manager can only view and update a person's record if the manager is the supervisor for the specific assignment.

See: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration in Oracle HRMS*

**Multiple Assignments**

If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR:Enable Multiple Assignments in SSHR system profile to allow this.

> **Note:** If you are using assignment-based security, you must enable this profile option.

If the profile is set to No, managers can only view and update primary assignments. If the profile is set to Yes, managers can view and update only the assignments that are reporting to them through the security hierarchy.

> **Note:** In the Security Profile window, on the User-Based Security tab, select the Primary Assignments Only check box to restrict managers to viewing and updating primary assignment information only.

See: Defining a Security Profile, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Alternatively, you can choose to disable the Search functions for an SSHR manager responsibility. In this case, you can assign the View All security profile to the users.

## Release Information

You can supplement the list of people who appear in a security profile by enabling the Release Information function. With this function, users can allow other users (who are outside of the security profile) to access their records. Similarly, managers can use the Release Information to allow a second manager (who is outside of the security profile) to access the records for one of their employees.

To illustrate a typical use of this function, imagine that an employee wants to transfer to another organization. The new manager may need to review the employee's absence history before the transfer can take place. However, this manager may be outside the employee's current business group and would therefore, be restricted by HRMS security access. The manager cannot access the employee's data from a Person Search because of the defined security profiles. With the Release Information function, the employee granting access can search for the manager's name across all organizations and business groups and grant access to that person. This enables the manager to view the employee's absence history. However, you must ensure that the manager has a responsibility that satisfies the following conditions:

- includes appropriate manager functions, for example, My Employee Information.
- is associated with a security profile which has the "Allow Granted Access" check

box flagged.

If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the "Allow Granted Access" option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers' capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as Termination. To do this, disable the "Allow Granted Access" check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

See: Release Information, page 10-11

## User Access to Functions

You control user access to specific functions using function security. Functions are attached to menus which are then attached to responsibilities.

### Navigation paths

The traditional navigation path for SSHR users is to select a function, for example, Personal Information or Change Manager, directly from a user menu. From SSHR 4.2, SSHR supports this approach but also introduces a new navigation path which uses the Actions pages.

### Accessing functions from the Actions pages:

Instead of selecting a specific function from the menu, the user selects either the Personal Actions function (for employees and workers) or the Manager Actions function (for managers). SSHR displays a context-sensitive list of available functions.

**Personal Actions**

The Actions page displays a list of available functions for the employee or worker. To generate this context-sensitive list, SSHR takes the submenu defined in the HR: Personal Actions Menu profile option and excludes any legislation-specific functions that do match the legislation code of the user's business group.

**Manager Actions**

The manager is first presented with the Enter Process page from which they can select an employee assignment. They will then proceed to the Actions page which displays a list of functions available for the selected employee or worker. SSHR derives the list of functions by taking the submenu defined in the HR: Manager Actions Menu profile option and excluding any legislation-specific functions that do not match the legislation code of the selected person's business group.

> **Note:** If the manager first selected their own record, the submenu is derived using the HR: Personal Actions Menu profile option.

### Accessing functions directly from a menu:

**Managers**

When a user selects a manager function directly from the menu, they are first presented with the Enter Process page. From this page, they can select an employee for processing. The user is then taken, via the Effective Date page, to the corresponding web page for the function.

> **Note:** Data security starts after the user has selected a person. If the function is specific to a legislation other than the legislation to which the selected person belongs, an error message is displayed.

**Other Employees**

When a user selects an employee function directly from the menu they are taken, via the Effective Date page if appropriate, to the corresponding web page for the function.

> **Note:** Data security is checked after the user has selected a function. If the function is specific to a legislation other than the legislation to which the user belongs, an error message is displayed.

## Access to Workflow Transactions

Workflow administrators can monitor all workflow transactions across the business areas in an enterprise. Now, depending on your business requirements, you can restrict a workflow administrator's access to specific workflow transactions using the HR Self Service Selected Person ID Instance Set. This object instance set uses security profiles to identify the data that workflow administrators can access. For example, you can use this feature to restrict an administrator's access to workflow transactions in a specific organization hierarchy or a business group. Similarly, you can restrict a human resources manager to view only HR transactions and a payroll executive to view only payroll transactions.

See: Restricting Access to Workflow Transactions, page 2-25

## Legislation-specific Functions

Most SSHR functions are global and can be used on employees in any legislation. However, some functions are legislation-specific and must be restricted to employees in the corresponding legislation.

SSHR uses FND Data Security to enforce this restriction. A data security object has been defined on the combination of person and legislation and data security menus have been created for predefined functions. There is one data security menu for global functions and one for each legislation code. The predefined functions are associated with either the global data security menu or with one or more of the country-specific

data security menus as appropriate.

Data security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code.

For example, a function on the global data security menu may be used with any employee but a function that is only on the US data security menu may be used only with employees in a US business group.

In addition to the data security menus that are available for predefined functions, there is a similar set of data security menus to which you can attach your custom functions. The data security grants are already in place.

See: Data Security Menus, page 2-11

## Users and Responsibilities

You define SSHR users in the same way as you define users for Oracle HRMS applications.

See: Users Window, *Oracle E-Business Suite System Administrator's Guide - Security*

However, the Person field of the Users window is particularly important for SSHR as it acts as the link between the professional forms interface and SSHR. It ensures that the user name is linked to the correct person records. For example, if you were to create a user and assign an SSHR responsibility to this user, the correct employee records would only be displayed in SSHR if the user's name is entered in the Person field.

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

### New User Registration

The New User Registration functions enable new users to register their own details and create their own users for SSHR. You can also add a user hook which generates the user name when the user clicks a button on the web page.

You can enable the New User Registration functions for both employees and non-employees. The non-employee registration form is usually used in conjunction with Advanced Benefits.

See: New User Registration, page 10-67

### User Profiles

You apply user profiles to control how the SSHR application runs. You can set profile options at site level, application level, responsibility level, and user level. The individual profile options are specified in the sections on each module.

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

### User Access to Functions

#### Manager and Employee Functions

You can control which functions employees, workers, and managers can access by adding or removing functions from the user menus. For example, you could restrict employee access to the Termination function by only including it in the Manager menu.

See: Defining User Access and Menus, page 3-10

## Access Roles for Self-Service Actions

Access roles specify permission to view or update routed transactions, such as self-service actions. You manage access roles for self-service actions in the Maintain Roles window.

SSHR provides two predefined types that you can use to create access roles that govern update permissions in self-service actions:

- SSHR Update Allowed
- SSHR Update Not Allowed

By default, all users can update an action. If you define a role using the SSHR Update Allowed type and assign it to a user, everyone else can no longer update. If you define and assign a role using the SSHR Update Not Allowed type, everyone else can update.

You do not use both types in the same implementation. Your decision to use one type or the other depends on whether the majority of users require update privileges. If they do, use the Update Not Allowed type to remove edit privileges from the remaining users. If the majority do not require permission to update, use the Update Allowed type to grant edit permission to those who do. If your organization has 40,000 people, of whom only 80 require update privileges for self-service actions, it makes more sense to grant privileges to 80 people than to deny them to 39,920.

> **Note:** Position control and budgeting features also use role types to set up roles for routing and approvals. Do not use the predefined role types of Line Manager, HR Manager, or Budget Manager with self-service actions.

See: Defining Workflow Roles for Transactions, *Oracle HRMS Enterprise and Workforce Management Guide*

## Self-Service Menus and User Access

SSHR uses four types of menu: top-level menus, submenus, hidden submenus, and data security menus. The following section looks at each of these menus in detail.

The predefined menus are overwritten whenever an SSHR patch is applied so any changes you have made to the menus are lost. For this reason, you should create at least one top-level menu for employees and at least one for managers.

> **Note:** You can avoid having to configure several similar menus by adding all employee and manager functions to each of your menus and then defining menu exclusions against the responsibility to exclude specific functions from groups of users.

See: Defining Menus for SSHR, page 3-10

### Types of Menus

**Top-level Menus**

The top-level menus define the choices that the user sees on their menu when they log in to SSHR. For example, the top-level menu for the Employee Self-Service responsibility is the Employee Self Service menu.

See: Defining User Access and Menus, page 3-10

**Submenus**

Submenus group together functions in a logical group on the top-level menu, for example, the Professional Details functions are grouped together in the Manager Professional Details submenu. The predefined submenus for SSHR include:

- Professional Details (for Employee Self-Service)
- Manager Professional Details (for Manager Self-Service)

**Hidden Submenus**

By attaching a submenu to the top-level menu without defining a prompt, you can assign functions to the responsibility but hide them from the user. This means that the user cannot select these functions directly. The following hidden submenus are predefined for SSHR:

- Submenus for Actions
  - Manager Actions Menu (for Manager Self-Service)
  - Personal Actions Menu (for Employee Self-Service)

    - Contingent Worker Personal Actions Menu (for Contingent Worker Self-Service)
    - Appraisals Menu
- Submenus for Pages (Employee Self-Service)
    - Suitability Matching Employee Personal menu
    - Suitability Matching Pages menu
    - HR Self-Service Pages submenu
    - My Information Functions menu
- Submenus for Pages (Manager Self-Service)
    - HR Self-Service Pages submenu
    - Suitability Matching Manager menu
    - Suitablility Matching Pages menu
- Self Service Contingent Worker Functions
- HR Manager Self Service Pages
    - My Employee Information Functions menu
    - SSHR hierarchy and search functions

SSHR uses these submenus to determine the availability of functions in other places. For example, the Manager Enter Process submenu controls the tabbed regions appearing on the Manager Enter Process page. The Manager Actions menu controls which functions are available on the Actions page for a manager to perform on other employees. The Personal Actions menu controls which functions are available to a user on the Personal Actions page. This menu also controls which functions are available from the Actions page when the manager selects their own record.

**Data Security Menus**

SSHR uses the data security menus to determine which functions are global and which are for specific legislations.

The data security menus for SSHR are:

- HR_GLOBAL_SS_FUNCTIONS_SEED

  Contains all the functions that are accessible across legislations (global functions)

- HR_cc_SS_FUNCTIONS_SEED (where cc is legislation code)

  Contains all the functions that are specific to a legislation

- HR_GLOBAL_SS_FUNCTIONS_CUSTOM

  Contains customer functions that are accessible across legislations

- HR_cc_SS_FUNCTIONS_CUSTOM (where cc is the legislation code)

  Contains customer functions that are specific to a legislation

## Menus for Employees (Non-Managers)

If you create a new employee menu and want to use the Personal Actions functionality, you need to add the following submenu to your new menu:

- Personal Actions Menu (or your configured copy of this menu)

If you intend that contingent workers use your new employee menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

You must also add the following functions to your new menu:

- Personal Actions (or your configured copy of this menu)
- Suspended Actions

You must also make sure that, for any responsibilities that use your new employee menu, the values for the following profile options match the names of the personal actions submenus you selected above.

- HR:Personal Actions Menu
- HR:Contingent Worker Personal Actions Menu

## Menus for Managers

If you create a new Manager menu and want to use the Manager Actions functions, you need to add the following submenus to your new menu:

- Personal Actions Menu (or your configured copy of this menu)
- Manager Actions Menu (or your configured copy of this menu)
- SS Hierarchy and Search Functions

If you intend that contingent workers use your new manager menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

You must also add the following functions to your new menu:

- Suspended Actions Mgr

You must also make sure that, for any responsibilities that use the new manager menu, the values for the following profile options match the names of the manager actions and personal actions submenus you selected above.

- HR:Manager Actions Menu
- HR:Contingent Worker Manager Actions Menu
- HR:Personal Actions Menu

## Predefined Self-Service Responsibilities and User Menus

SSHR modules are accessible from predefined responsibilities, each with a corresponding top level menu.

In this version of SSHR, the predefined responsibilities are:

- Employee Self-Service
- Manager Self-Service
- HR User Self Service
- New User Registration
- HR Professional
- Payroll Professional
- Contingent Worker Self-Service
- Responsibility Ownership

The predefined US Federal responsibilities are:

- US Federal Employee Self-Service
- US Federal Manager Self-Service
- US Federal HR Self-Service

The predefined responsibilities for the HR Foundation application are:

- Employee Self Service Foundation
- Manager Self Service Foundation

The additional responsibilities provided by OSSWA (Oracle Self-Service Web Applications are:

- Workflow User Web Applications
- Preferences

> **Note:** These responsibilities are provided as a starting point only. You should create your own responsibilities and menus using the predefined SSHR responsibilities and menus as examples. Otherwise, your changes may be lost during an upgrade.
>
> See: User Access and Security, page 2-3

## User Menus

SSHR includes several predefined top-level menus:

- Employee Self Service
- Manager Self Service
- HR Professional
- Payroll Professional
- Contingent Worker Self Service
- Employee Self Service Foundation

  Which includes the following functions/submenus:

  - Suspended Actions
  - Personal Actions
  - Employee Enter Process submenu
  - Personal Actions Foundation submenu
  - Professional Details

- Manager Self Service Foundation

  Which contains the following functions/submenus:

  - Suspended Actions Manager
  - Manager Actions Tree View

- Manager Enter Process submenu
- Manager Actions Foundation
- Personal Actions Foundation
- Manager Professional Details

US Federal SSHR includes predefined top-level menus:

- Benefits
- My Information
- My Employee Information
- Employee Information

The Employee Self Service menu contains the functions that employees can perform on their own records, for example, the Personal Details function. The Manager Self-Service menu contains the same functions as the employee menu plus additional functions that the manager can carry out for the employees for whom they are responsible.

The HR Professional menu is available for HR professionals who wish to view summarized information on employees.

You can also use the following menu for administration purposes:

- HR Web Administrator

See: Self-Service Menus, page 2-11

### Navigation Options for Functions

Both employees and managers can access functions in one of two ways. They can either use the above menus and select the function using the corresponding menu option or they can display the Actions page through the Manager Actions or Personal Actions menus and select the required function from the list of available actions.

### Legislation-specific Menus

SSHR provides legislation-specific menus to give users access to the functions that are specific to a country.

See: Self-Service Menus, page 2-11

## Responsibility Ownership

The Responsibility Ownership function enables you (as an administrator or

implementor) to view a list of owned responsibilities. You can expand the list of responsibilities to display the menus and functions attached to each responsibility. From the list of responsibilities, you can see the number of people with access to each responsibility both within the organization (in other words, within your HR security access environment) and outside of the organization (outside of your HR security access environment). By clicking on the number of people, you can display the user ID and other information for each user with access to the responsibility and if required, you can revoke access directly in the self-service page. If you choose to revoke access to a responsibility, the affected user receives notification of the change.

> **Additional Information:** When the application generates the notification, it also triggers a business event. You can subscribe to this business event and call Application Programmatic Interfaces (APIs) to end date the responsibility access.
>
> See: Event Subscriptions, *Oracle Workflow Developer's Guide*

You can use the Responsibility Ownership functionality as an extra security measure to review and restrict the number of people outside of your organization with access to particular responsibilities. You can also monitor the number of people with access to each responsibility for auditing purposes.

## Menu and Function Names

You access this module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Responsibility Ownership | Responsibility Ownership |

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Profile Options

Not applicable

### Additional Configuration Steps

1. Before you can use the Responsibility Ownership function, you must create data security grants to link responsibilities to your users.

   See: Creating Data Grants for Responsibility Ownership, page 2-23

   See: Create Data Grant (*Oracle E-Business Suite System Administrator's Guide - Security*)

2. You should create code to subscribe to the following business event:

   - oracle.apps.per.selfservice.respowner.revoke_access

   This code should trigger the fnd_user_resp_groups_api.update_assignment API to end date the responsibility assignment.

   See: Sample Code for Subscribing to Business Event (Responsibility Ownership), page 2-18

## Sample Code for Subscribing to Business Event - Responsibility Ownership

If you are using the Responsibility Ownership function, you should write a PL/SQL code to subscribe to the following business event:

- oracle.apps.per.selfservice.respowner.revoke_access

> **Important:** The code should call the following Application Programmatic Interface (API) which end-dates the responsibility assignment:
>
> - fnd_user_resp_groups_api.update_assignment

Sample code is provided below. You can use this as a basis for your own code.

**Creating a Sequence (CUST_RESP_OWNER_ARCHIVE_SEQ)**

```
CREATE SEQUENCE CUST_RESP_OWNER_ARCHIVE_SEQ
    MINVALUE 1
    MAXVALUE 999999999999999999999999999
    START WITH 1
    INCREMENT BY 1
    CACHE 20;
```

**Creating a Table (CUST_RESP_OWNER_ARCHIVE)**

```
create table CUST_RESP_OWNER_ARCHIVE
(REVOKE_ID varchar2(25),
USER_ID NUMBER(10),
RESPONSIBILITY_ID NUMBER(10),
REVOKE_JUSTIFICATION varchar2(250),
REVOKE_DATE Date,
REVOKED_BY NUMBER(10),
STATUS varchar2(250));
```

### Creating a Package Header

```
CREATE OR REPLACE  PACKAGE cust_resp_owner_bevent AUTHID CURRENT_USER AS
FUNCTION revoke_access_wfevent_subscrb
( p_subscription_guid in raw,
p_event in out NOCOPY wf_event_t)
RETURN VARCHAR2;
END cust_resp_owner_bevent;
/
```

### Creating Package Body

```
CREATE OR REPLACE  PACKAGE BODY cust_resp_owner_bevent AS
PROCEDURE archive_data
(p_user_id IN NUMBER,
p_user_name IN VARCHAR2,
p_resp_id IN NUMBER,
p_resp_appl_id IN NUMBER,
p_security_group_id IN NUMBER,
p_justification IN VARCHAR2,
p_status IN VARCHAR2) IS
l_login_person_id number;
BEGIN
l_login_person_id := fnd_global.user_id;
INSERT INTO CUST_RESP_OWNER_ARCHIVE
(REVOKE_ID,
USER_ID,
RESPONSIBILITY_ID,
REVOKE_JUSTIFICATION,
REVOKE_DATE,
REVOKED_BY,
STATUS)
VALUES
(CUST_RESP_OWNER_ARCHIVE_SEQ.nextval,
p_user_id,
p_resp_id,
p_justification,
sysdate,
l_login_person_id,
p_status);
EXCEPTION
WHEN OTHERS THEN
NULL;
END archive_data;
PROCEDURE remove_resp
(p_user_id IN NUMBER,
p_resp_id IN NUMBER,
p_resp_appl_id IN NUMBER,
p_security_group_id IN NUMBER,
p_error OUT VARCHAR2,
p_justification IN VARCHAR2) IS
cursor csr_user_name(v_user_id in number) is
select user_name
from fnd_user
where user_id = v_user_id;
cursor csr_user_resp_groups is
select description
from fnd_user_resp_groups
where user_id = p_user_id
and responsibility_id = p_resp_id;
l_user_name fnd_user.user_name%type;
l_owner_name fnd_user.user_name%type;
l_description varchar(2000);
l_login_person_id number;
BEGIN
l_login_person_id := fnd_global.user_id;
OPEN csr_user_name(p_user_id);
FETCH csr_user_name into l_user_name;
CLOSE csr_user_name;
OPEN csr_user_name(l_login_person_id);
FETCH csr_user_name into l_owner_name;
CLOSE csr_user_name;
OPEN csr_user_resp_groups;
FETCH csr_user_resp_groups into l_description;
CLOSE csr_user_resp_groups;
BEGIN
Fnd_User_Resp_Groups_Api.update_assignment(
USER_ID => p_user_id,
```

```
RESPONSIBILITY_ID => p_resp_id,
RESPONSIBILITY_APPLICATION_ID => p_resp_appl_id,
SECURITY_GROUP_ID => p_security_group_id,
START_DATE => SYSDATE - 2,
END_DATE => SYSDATE - 1,
DESCRIPTION =>
substr('RO:'||l_owner_name||':'||l_description,1,240)
);
p_error := 'Status SUCCESSFUL!';
EXCEPTION
WHEN OTHERS THEN
p_error := SQLERRM;
END;
--Helpdesk.remove_resp
-- (p_username => l_user_name,
-- resp_code => to_char(p_resp_id),
-- p_error => p_error,
-- p_description =>
--substr('RO:'||l_owner_name||':'||l_description,1,240));
archive_data(
P_USER_ID => p_user_id,
P_USER_NAME => l_user_name,
P_RESP_ID => p_resp_id,
P_RESP_APPL_ID => p_resp_appl_id,
P_SECURITY_GROUP_ID => p_security_group_id,
p_justification => p_justification,
p_status => p_error
);
EXCEPTION
WHEN OTHERS THEN
NULL;
END remove_resp;
FUNCTION revoke_access_wfevent_subscrb
( p_subscription_guid in raw,
p_event in out NOCOPY wf_event_t)
RETURN VARCHAR2
IS
I number := 0;
usrIdCnt number := 0;
l_error varchar2(2000) := null;
BEGIN
usrIdCnt := to_number(p_event.GetValueForParameter('USER_COUNT'));
FOR I IN 1 .. usrIdCnt LOOP
remove_resp
(p_user_id =>
to_number(p_event.GetValueForParameter('USER_ID'||to_char(I)))
,p_resp_id => to_number(p_event.GetValueForParameter('RESP_ID'))
,p_resp_appl_id =>
to_number(p_event.GetValueForParameter('RESP_APPL_ID'))
,p_security_group_id => to_number(p_event.GetValueForParameter
('SECURITY_GROUP_ID'))
,p_error => l_error
,p_justification => p_event.GetValueForParameter('MESSAGE'));
END LOOP;
COMMIT;
RETURN 'SUCCESS';
EXCEPTION
WHEN OTHERS THEN
WF_CORE.CONTEXT('PER_RESPOWNER_UTIL_SS',
'revoke_access_wfevent_subscrb', p_event.getEventName(),
p_subscription_guid);
WF_EVENT.setErrorInfo(p_event, l_error);
RETURN 'ERROR';
END revoke_access_wfevent_subscrb;
END cust_resp_owner_bevent;
/
```

For more information on using PL/SQL, see: Overview of Using PL/SQL in Applications, *Oracle E-Business Suite Developer's Guide*

## Subscribing to the Business Event

Use the Workflow Administrator Web Applications responsibility and Events page to enable the business event: oracle.apps.per.selfservice.respowner.revoke_access. The revoke access feature of the Responsibility Ownership functionality works only if you subscribe to the business event

Follow these steps to subscribe to the business event:

**Enabling the Business Event**

1. Log on to the Workflow Administrator Web Applications responsibility.
2. Click Business Events. The Events page appears.
3. In the Events page, search for the business event: oracle.apps.per.selfservice. respowner.revoke_access.
4. Click Update.
5. In the Update Event page, select the Enabled status and click Apply.

**Creating Subscription for the Business Event**

1. In the Events page, search for the business event: oracle.apps.per.selfservice. respowner.revoke_access.
2. Click Subscription. The Subscriptions: Event: oracle.apps.per.selfservice.respowner. revoke_access page appears.
3. Click Create Subscription. The Create Event Subscription page appears.
4. Select the instance name.
5. Select the event filter: oracle.apps.per.selfservice.respowner.revoke_access
6. Enter 10 in the Phase field.
7. Select Enabled as the Status.
8. Select Message as the Rule Data.
9. Select custom as the Action Type.
10. Click Next.
11. In the PL/SQL Rule Function, enter the PL/SQL rule function in the following

format: <package_name>.<function_name>

for example, cust_resp_owner_bevent.revoke_access_wfevent_subscrb

12. Enter the Owner Name: SSHR.

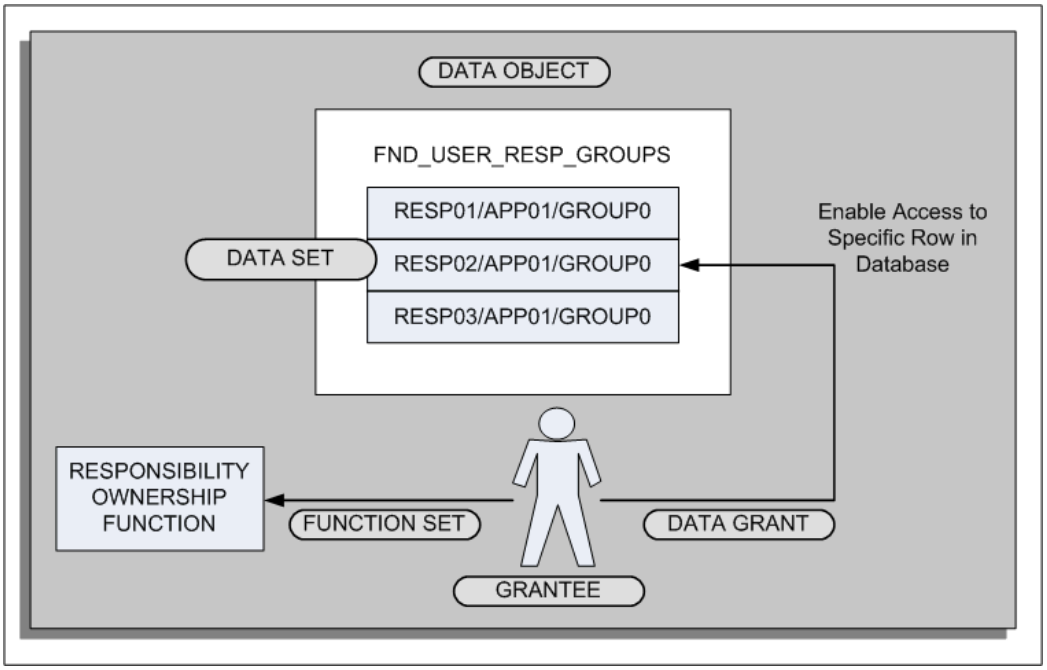
13. Enter the Owner Tag: PER.

14. Click Apply.

## Creating Data Grants for Responsibility Ownership

Data grants enable you to control access to data in the data security system. When you create a data grant, you grant access to a database object to a user. In the case of the Responsibility Ownership function, you use data grants to grant responsibility ownership to a user. The following graphic illustrates the concept of data grants:

***Data Grants for Responsibility Ownership:***




The data grant links the user (grantee) to a specific data set instance (row in the data object). In addition, you link a function set to the user which enables the user to access particular functionality (in this case, the Responsibility Ownership functionality).

For information on using data grants for other purposes, see: Overview of Data Security (*Oracle E-Business Suite System Administrator's Guide - Security*).

### To create a data grant for the Responsibility Ownership:

1. First identify which users should be granted ownership of responsibilities. These users would have an administrative role, for example, an HR Manager, Finance Manager, or System Administrator.

2. Use the Functional Administrator responsibility to create grants.

    1. Select the Grants tab.

    2. From the Grants page, click Create Grant to initiate the creation process and define the data grant.

    3. In the Name field, enter a descriptive name for the grant, for example, < *responsibility name*>-Ownership. You can also enter a description.

    4. Specify the effective date for the grant.

       Navigate to the Security Context region to define the context for applying the grant.

    5. In the Grantee Type field, select Specific User.

    6. In the Grantee field, enter the user ID of the person who you are designating as the owner of the responsibility.

       Navigate to the Data Security region.

    7. In the Object field, enter the following delivered object:

       - FND_USER_RESP_GROUPS

         **Note:** Oracle provides this object for use with the Responsibility Ownership functionality.

    8. For the purpose of the Responsibility Ownership function, you must create a data set that grants access to a *specific instance* in the object table. Select this option (Instance) and continue to the next page to enter the instance information.

    9. The data set instance comprises three segments of information. Enter the information, leaving the remaining fields blank:

| Primary Key | Example |
|---|---|
| Responsibility ID | 50101 |
| Application ID | 800 |
| Security Group ID | 0 |

**Note:** To determine the information for the data set, query the user in the Users window and select Help > Diagnostics > Examine from the Responsibilities block. Query the following fields in the Examine Field and Variable Values window:

- RESPONSIBILITY_ID
- RESPONSIBILITY_APPLICATION_ID
- SECURITY_GROUP_ID

10. In the Set field, enter the delivered set PRIMARY_OWNER.

    **Note:** Oracle provides this function set for use with the Responsibility Ownership functionality.

    In this case, a function set is a data security menu containing the Responsibility Ownership function.

11. Click Finish to complete the data grant creation process. The desginated owners can now log on to SSHR and use the Responsibility Ownership function to administer and control access to their responsibilities.

    See: Responsibility Ownership, page 2-16

You should repeat steps 1 through 11 for each responsibility that you want to review and maintain.

## Restricting Access to Workflow Transactions

You can restrict a workflow administrator's access to specific workflow transactions, depending on your business requirements. To restrict access to workflow transactions, you create a grant for the Workflow Item Attribute Values object using the Functional Developer responsibility.

**Prerequisites**

Before you define restrictions to access workflow transactions, ensure that you:

1. Set up users and responsibilities to use Oracle SSHR.
2. Assign the Workflow Administrator responsibility to users to monitor workflow transactions.
3. Set up security profiles to give access to restricted set of information.
4. Set the HR: Security Profile option at the responsibility level for the Workflow Administrator responsibility.

### To restrict access to workflow transactions:

1. Log on to the Functional Developer responsibility.
2. Search for the predefined Workflow Item Attribute Values (WF_ITEM_ATTRIBUTE_VALUES) object.
3. Click the Update icon to navigate to the Update Object page.
4. Click Create Grant on the Grants tab to initiate the creation process and to define the grant.
5. On the Define Grant page, enter the following details:
   - In the Name field, enter a descriptive name for the grant.
   - Specify the effective date for the grant. Navigate to the Security Context region to define the context to apply the grant.
   - In the Grantee Type field, you can select a single user, a role, or global (all users and roles).
   - In the Responsibility field, specify a Workflow Administrator responsibility to apply the grant to that responsibility.
   - In the Object field, select the delivered object Workflow Item Attribute Values

     **Note:** Oracle provides the Workflow Item Attribute Values object to restrict access to workflow transactions.

6. On the Grant: Select Object Data Context page, select the HR Self-Service Selected Person ID Instance Set (HRSS_WF_ATTR_PERSONID_INSTSET) to create a data set that grants access to a specific instance in the object table.

7. On the Grant: Define Object Parameters and Select Set page:

    1. Review the definition of the grant.

    2. In the Set field, enter the delivered Business workflow item attribute permission set (WF_ADMIN_ITEM_ATTR_PSET) to define the grantee's access.

8. Click Finish to complete the grant creation process. The designated workflow administrators can administer only the workflow transactions that they can access.

You must repeat these steps for each workflow administrator responsibility that you want to review and maintain.

> **Note:** If users in your enterprise perform multiple roles such as a workflow administrator and a HR manager, then ensure that the users have the appropriate workflow responsibility to view their workflow transactions. For example, as a workflow administrator, the user must be able to view HR transactions.

# SSHR User Accounts

## Batch Creation of User Accounts

Every Oracle HRMS user needs to be registered with a user name, password and responsibility. The creation or deletion of these user accounts can often be time consuming, particularly if you are restricting a user's access with a responsibility associated with a security profile and a menu.

A set of concurrent programs have been created for Oracle HRMS applications to automate the creation and management of large groups of user accounts. These programs are particularly useful if you have to create a large number of user accounts at initial installation, for managing new hire user accounts, or for managing accounts for terminated employees.

> **Note:** The creation of users with effective dates in the future is not supported.

The concurrent programs are:

- User Account Employee Extract Process
- Data Pump Engine
- Data Pump Batch Exceptions Report

Before you can use the concurrent programs however, you must write custom logic to reflect your enterprise's unique business rules. A user hook in the hr_user_acct_api is provided for you to do this.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

### Features of the Create Batch Users Process

The Create Batch Users process only creates new responsibilities or profile option values for the new responsibility you create in the batch. This is for Oracle HRMS Applications only. The batch process does not create security profiles either. However, if you create a security profile, in Oracle HRMS, you can assign the security profile to a new responsibility that is created for a user in the batch process. The batch process does not create security attributes for a responsibility or a user.

A naming convention you might use is email ID with a responsibility name. For example, email ID JSMITH associated with the Manager Self Service responsibility could be JSMITH_MSS. If you have set up security profiles for managers in Oracle

HRMS you can associate the security profile name to a user, a responsibility and a security profile. For example, the SEC_PF security profile could be JSMITH_MSS_SEC_PF.

You can create a template responsibility for the batch process. If you create a template responsibility, or use the predefined Manager Self Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibilities attributes, by setting values in the communication area, hr_user_acct_utility, of the API.

## Creating Batch User Accounts with Concurrent Programs

To create batches of users you must first write user hooks with your own custom logic.

See: Writing User Hooks to Create Batch User Accounts, page 2-33.

When you have created user hooks, you can run a set of concurrent programs to manage the batch creation of users on an ongoing basis.

You run the concurrent programs from the Submit Requests window.

### To create batch user accounts with concurrent programs:

1. Run the User Account Employee Extract Process

   This program extracts employee recordsand creates a batch file ofuser accounts to be created or deactivated.

2. Run Data Pump Engine

   This program uses the batch from the employee extract process and calls the HR API to create or deactivate user accounts.

3. Submit Data Pump Batch Exceptions Report

   This program reports errors in the Data Pump Engine.

#### User Account Employee Extract Process

This extract process produces output records which are used by the Data Pump Engine. The Data Pump Engine calls the hr_user_acct_api to create or deactivate user accounts.

The batch name is written to the HR_PUMP_BATCH_HEADERS table. The extracted employee records are written to the HR_PUMP_BATCH_LINES table. The batch line table has defined generic attributes but for each API, the Data Pump generates a view on the HR_PUMP_BATCH_LINES table to reflect the parameters of the API.

The specific views tailored for the hr_user_acct_api are:

- hrdpv_create_user_acct

  Records for creating new user accounts can be mapped to this database view

- hrdpv_update_user_acct

  Records for terminated employees whose user accounts are to be inactivated can be mapped to this database view

  > **Note:** You must use a meaningful batch name. For example, run type and date range or another parameter. The batch name is the only way you can identify which batch to select in the Employee Data Pump process and the Data Pump Batch Exceptions Report processes.

### To run the user account employee extract process:

1. Access the User Account Employee Extract Process concurrent program.
2. Enter a batch name to identify the batch.
3. Enter the following date input parameters:
   - Start Date

     defaults to SYSDATE. This parameter sets the start date from which the records are extracted

   - End Date

     defaults to SYSDATE. This parameter is used in conjunction with the start date parameter to set a date range for the extraction of the records

4. Enter the following organization input parameters:
   - Organization

     this parameter comprises a list of all the business group organizations that the responsibility is associated with. If you select an organization from the list of values, the program only extracts records from the selected organization.

     > **Note:** If you enter values in the Organization parameter, they are superseded by any values you enter in the Organization Hierarchy, Organization Hierarchy Version, and Parent Organization parameters. These parameters always take precedence and replace the values entered in the organization parameter and work together as a set.

   - Organization Hierarchy

     organization hierarchy name for the responsibility's business group. This parameter contains an list of all the organizations hierarchies in the business

group.

- Organization Hierarchy Version

  organization hierarchy version for the responsibility's business group. This parameter contains an list of the organization hierarchy versions selected in the organization hierarchy parameter.

- Parent Organization

  parent organization within the hierarchy. Selecting the parent organization will extract records from this organization and any organizations below the parent organization.

5. Enter the Run Type input parameters by selecting a processing option from the list of values. The processing options are:

   - Create User Account for New Hires

     selects all employees hired between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

   - Create User Accounts for All Employees

     selects all employees as of the end date, within the organization or organization hierarchy. The start date parameter will be ignored and employees terminated before the end date will not be selected either. This run type is used on the initial implementation and is usually used once.

   - Inactivate User Account for Terminated Employees selects all employees terminated between the start date and end date parameter within the organization or organization hierarchy. Once selected, the user account for the terminated employee or worker is end dated. This run type is used on an ongoing basis to end date accounts for terminated employees and workers within the date range.

   - Create and Inactivate User Accounts runs two queries. The first query selects all employees and workers hired between the start date and end date within the organization or organization hierarchy. The second query selects all employees and workers terminated between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

     **Note:** Each employee or worker extracted from the database is recorded in the hr_pump_batch_line table. The hrdpv_create_user_acct view has been defined to map create user

accounts to the hr_pump_batch_line table. The hrdpv_update_user_acct view has been defined to map inactivate user accounts to the hr_pump_batch_line table. You can access these views because the API column name is used to identify the record rather than the generic names used in the hr_pump_batch_lines table.

#### Data Pump Engine

The Data Pump Engine will call the hr_user_acct_api to perform data validation and loading operations. The employee data is recorded in the hr_pump_batch_lines table.

> **Note:** You must run the User Account Employee Extract Process before you run the Data Pump Engine process. The Data Pump Engine depends on the batch id the User Account Employee Extract process creates.

### To run the Data Pump Engine concurrent program:

1. Access the Data Pump Engine concurrent program.
2. Enter the following parameters:
   - Batch Name

     you must enter the same batch name as you did in the Employee Extract Process. The Batch Name is the only information you have to identify which batch to run

   - Validation Mode

     you can set two values, YES or NO. A YES value enables you to review errors in the batch, or related records in a batch, and change them before any are committed to the database.

     A NO value will commit the data to the database if there are no errors. If there are errors the data will not be committed to the database and you can fix the errors and rerun the batch.

     DataPump will set the Line Status to one of the following values:

     - E - Error
     - C - Completed
     - U - Unprocessed

- V - Valid

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

#### Employee Data Pump Exceptions Report

Each person record is recorded in an individual batch line. The data pump exceptions report will show whether the error is from the batch header or batch line. You can identify which person record is in error from the person id in the exception report.

> **Note:** You must run the User Account Employee Extract Process before you run the Data Pump Engine and Data Pump Batch Exception Report processes. The Data Pump Engine and Data Pump Batch Exception Report processes depend on the batch id the User Account Employee Extract process creates.

### To run the Data Pump Batch Exceptions report:

1. Access the Data Pump Process Exceptions Report concurrent program.

> **Note:** You can run the Data Pump Engine and Data Pump Batch Exception Report processes in sequence. See: Overview of Concurrent Processes, *Oracle E-Business Suite System Administrator's Guide - Security*

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

## Writing User Hooks for the Batch Creation of User Accounts

Before you write your user hook, you must review your user population and create a standard user name format, responsibility, and security profile for your enterprise. When you have defined a standard and created any security profiles or security groups you need, you can begin to write your user hook.

You can create a template responsibility for the batch process. If you create a template responsibility or use the predefined Manager Self-Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibility's attributes by setting values in the communication area of the API, hr_user_acct_utility.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

### To set up the prerequisites for writing user hooks:

1. Create a security profile in Oracle HRMS and, using your naming standard, associate the security profile and responsibility to a new user in your user hook code.

2. Implement security groups to manage security profiles with the Enable Security Groups profile option. By implementing security groups, you can associate more than one security profile to a single responsibility.

   **Note:** Before you write user hooks, run the Security List Maintenance concurrent process. This ensures that the security profiles work.

   **Note:** If you plan to use security groups in a responsibility defined for use in Oracle Self-Service Web Applications, or plan to create a new responsibility for use in Oracle Self-Service Web Applications, set the Enable Security Groups profile option at the application level: Oracle Self Service Web Applications.

3. Set up a guest user account in Oracle Applications by setting the GUEST USER PASSWORD profile option. This must be in the format <username/password>. You can obtain and verify the guest user account with your Database Administrator.

4. Use the Define System Profile Option Value in System Administrator responsibility to set a security profile at Site or Application level. This is necessary because security profile option values can be set at Responsibility or User level with the batch process.

   **Note:** The sample user hook is called hrhksmpl.pkb and each code block is documented. You can also find a copy of the sample in the following directory $PER_TOP/patch/115/sql.

   See: API User Hooks, *Oracle HRMS Implementation Guide*

   See: Sample Code, *Oracle HRMS Implementation Guide*

#### Tables Updated in the Batch Process

The batch process inserts records into the following FND tables:

- FND_USER
- FND_USER_RESP_GROUPS

  to enable a new user to use a designated responsibility

- FND_RESPONSIBILITY

  if new responsibilities are created in the custom user hook module for the new user

- FND_RESPONSIBILITY_TL

  stores the translated value of responsibility name

- FND_RESP_FUNCTIONS

  if the new responsibility has function exclusion rules

- FND_PROFILE_OPTION_VALUES

  to set profile option values for any newly created responsibility for the user.

- PER_SEC_PROFILE_ASSIGNMENTS

  if security groups are enabled.

The batch process automates the functionality of the Define User Form and inserts records into the following FND tables:

- FND_USER
- FND_RESP_GROUPS

> **Note:** Security attributes for a user cannot be created in the batch process

The batch process automates the functionality of the Define Responsibility Form and inserts records into the following FND tables:

- FND_USER_RESP_GROUPS
- FND_RESPONSIBILITY_TL

> **Note:** Security attributes for a responsibility cannot be created in the batch process

The batch process automates the functionality of the Profile Option Value Form and inserts records into the following FND table:

- FND_PROFILE_OPTION_VALUES

### To write batch user hooks with your own custom business logic:

1. To create batches of users you need to write PL/SQL programs in the user hooks of the following API:

- hr_user_acct_api

This API contains two procedures:

- hr_user_acct_api.create_user_acct

  used to create a new user

- hr_user_acct_api.update_user_acct

  used to inactivate user accounts, for example on termination of an employee or worker

### To set up the Create User API procedure:

1. Write a PL/SQL program to communicate to the API the user name, password, responsibility, and profile to use when it creates a new user account for the employee or worker in the process.

   There are two user hook points in the create user procedure:

   - hr_user_acct_bk1.create_user_acct_b

     before-process hook point

   - hr_user_acct_bk1.create_user_acct_a

     after-process hook point

   Use the before-process hook for the PL/SQL program. The program enters these values into the global variables or record structures in hr_user_acct_utility.

   > **Note:** You can supply passwords for the new user account or leave the API to generate a random string. The string will be in an 8 character alphanumeric format.

2. Write a PL/SQL program for the after-process hook if you leave the API to generate a password. The program must save the password of the new user account to a file that can be accessed by a system administrator. This is necessary because the password created by the API is encrypted when it is saved to the FND_USER table in the database. You must capture the password before it is encrypted so that you can notify employees of their initial password.

   > **Note:** If you supply a password, you may not need to write a user hook for this after-process hook point.

### To set up the Update User API procedure:

The update user API procedure is used to inactivate employees. The API end dates the employees record in the FND_USER and FND_USER_RESP_GROUPS tables and is not meant for general purpose update.

There are two user hook points in the update user procedure:

- hr_user_acct_bk2.update_user_acct_b

  before process hook point

- hr_user_acct_bk2.update_user_acct_a

  after process hook point

  The before process user hook point is used for your extra validation. The API will not pick up any values from your user hook.

  The after process user hook point executes any extra logic after the main API validation and processing logic has successfully completed and the update process is finished.

### To carry out the remaining steps:

1. Compile the custom package you have created after you have written your user hooks.

2. Register and link your custom package procedures to the appropriate API user hooks when you have compiled the package.

   See: API User Hooks, *Oracle HRMS Implementation Guide*

   A sample script to register and link your custom package and procedures is provided below.

   **Sample code**

```
DECLARE

 ln_api_hook_call_id NUMBER;

 ln_object_version_number NUMBER;

 ln_api_hook_id NUMBER;


  BEGIN


 -- get api_hook_id for the seeded before process user hook package
procedure

 SELECT ahk.api_hook_id

 INTO  ln_api_hook_id

 FROM  hr_api_hooks ahk

   ,hr_api_modules ahm

 WHERE ahm.module_name = 'CREATE_USER_ACCT'

 AND ahm.api_module_type = 'BP'

 AND ahk.hook_package = 'HR_USER_ACCT_BK1'

 AND ahk.hook_procedure = 'CREATE_USER_ACCT_B'

 AND ahk.api_hook_type = 'BP'

 AND ahk.api_module_id = ahm.api_module_id;


 -- insert a row into HR_API_HOOK_CALLS for before process user hook
custom package procedure


 hr_api_hook_call_api.create_api_hook_call(

  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

  p_api_hook_id   => ln_api_hook_id,

  p_api_hook_call_type => 'PP',

  p_sequence   => 1,

  p_enabled_flag  => 'Y',

  p_call_package  => 'MY_USER_ACCT', -- your custom package name

  p_call_procedure => 'CREATE_USER_ACCT_B', -- your custom package
procedure name

  p_api_hook_call_id  => ln_api_hook_call_id,

  p_object_version_number => ln_object_version_number
```

```
);



 -- get api_hook_id for the seeded after process user hook package
procedure

 SELECT ahk.api_hook_id

 INTO  ln_api_hook_id

 FROM  hr_api_hooks ahk

   ,hr_api_modules ahm

 WHERE ahm.module_name = 'CREATE_USER_ACCT'

 AND ahm.api_module_type = 'BP'

 AND ahk.hook_package = 'HR_USER_ACCT_BK1'

 AND ahk.hook_procedure = 'CREATE_USER_ACCT_A'

 AND ahk.api_hook_type = 'AP'

 AND ahk.api_module_id = ahm.api_module_id;



 -- insert a row in HR_API_HOOK_CALLS for after process user hook
custom package procedure

 hr_api_hook_call_api.create_api_hook_call(

  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

  p_api_hook_id   => ln_api_hook_id,

  p_api_hook_call_type => 'PP',

  p_sequence   => 1,

  p_enabled_flag  => 'Y',

  p_call_package  => 'MY_USER_ACCT',

  p_call_procedure => 'CREATE_USER_ACCT_A',

  p_api_hook_call_id  => ln_api_hook_call_id,

  p_object_version_number => ln_object_version_number

 );


  EXCEPTION

 when others then

  dbms_output.put_line('Error in seeding user hook procedures: ' ||
```

```
sqlerrm);
  END;

  /
  commit;
  exit;
```

**Execute User Hook Pre-Processor**

When you have registered and linked your custom package procedure to the API you should execute the user hook pre-processor program. Run the hrahkone.sql found in $PER_TOP/patch/115/sql directory to do this. However, you'll need to know the internal api_module_id for the HR_USER_ACCT_API before running the script. To find the internal api_module_id you should run the script below:

```
  SELECT api_module_id
  ,api_module_type
  ,module_name
 FROM  hr_api_modules
 WHERE module_package = 'HR_USER_ACCT_API';
```

You should see results similar to those below:

```
 API_MODULE_ID API_MODULE_TYPE     MODULE_NAME
 ------------------------------------------------------
      383 BP                       CREATE_USER_ACCT
      384 BP                       UPDATE_USER_ACCT
```

**Note:** Your api_module_id will be different from the one above.

Use your own API module id when executing hrahkone.sql. If you have a customer package for UPDATE_USER_ACCT hook point, you will need to run hrahkone.sql twice. Once for the api_module_id for CREATE_USER_ACCT hook call and second for the UPDATE_USER_ACCT hook call.

3. Enter any new message text for the messages that you issue in your custom package when you have run the pre-processor program. Use an Application Developer responsibility in Oracle Applications to create your message text.

4. Ensure you have set the application level correctly if you use security groups to manage security profiles. For example, in SSHR you must set the application level to Oracle Self Service Web Applications. Set the security profile option to the

application level if you need to associate the responsibility with another HRMS application.

This updates the following tables: per_sec_ profile_ assignments, and fnd_user_resp_groups

5. Make sure that the Enable Security Groups profile option is Yes.

6. Set the Data Pump error parameters. These parameter control aspects of the Data Pump Engine process.

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

   > **Note:** You must set the MAX_ERRORS_ALLOWED parameter to see all the errors logged during the run. This parameter controls how many errors are issued before the engine stops processing. The default value for the parameter is 20 or the chunk size. If you do not set this parameter value, the engine will stop processing after 20 errors.

7. Test the custom packages by running the following programs:. To test, run the User Account Employee Extract concurrent program to create batches of extracted employees. Run the Data Pump Engine concurrent program to process your batch, and run the Data Pump Batch Exceptions

   - User Account Employee Extract concurrent program - to create batches of extracted employees
   - Data Pump Engine concurrent program - to process your batch
   - Data Pump Batch Exceptions concurrent program - to report any errors.

   If necessary, you can rerun the batch after fixing any errors.

   > **Note:** You can use the Pipemon utility to help you debug your code.

See: Creating Batches of Users with Concurrent Programs, page 2-29

# 3

# Extending SSHR

## Configuration Overview

All Oracle Self-Service Applications, including the SSHR modules, are built on the Oracle Applications (OA) Framework to enable maximum flexibility. Although the SSHR modules are delivered with predefined settings which meet the HRMS requirements of the majority of enterprises with little or no configuration, there are many configuration options available to ensure that all your enterprise requirements are met.

This chapter provides an overview of the different configuration steps for SSHR and introduces a common configuration method that you can apply to any SSHR module in conjunction with the function-specific configuration steps. For detailed information on the configuration steps, see the following topics:


- User Access, page 2-1
- Workflow, page 4-1
- Page Layouts, page 5-1
- Approvals, page 6-1

# Extending SSHR

## Guidelines for Configuring SSHR Functions

The best approach to take when configuring SSHR is to first configure a sample function, test it until you are satisfied with the results, and then repeat the steps for the other functions.

Start your configuration process by configuring a module for a particular group of users. It is important to consider both the module and the intended audience at the same time because, if required, you can configure multiple variations of the same module to suit different groups of users. For example, you might choose to implement one version of the Personal Information module for all employees, another version for one set of managers, and another version for a second set of managers.

> **Note:** If function-level personalizations have been delivered by Oracle for a function you wish to copy, be aware that you will lose these personalizations if you create a custom version of the function.
>
> See: Function-level Personalizations, page 5-4

See Supplied Functions, page 3-16 and Menu Function Parameters, page 3-34 for information on parameter use in functions.

### User Access

You make your new version of the SSHR module available to your target group of users by creating an AOL function and attaching it to a menu. The menu is attached to a responsibility which you assign to your users.

You specify whether the AOL function is restricted to the user's own records or whether a manager can use the function to select from a list of employees and workers.

For each responsibility (or combination of responsibility and user), you need to define a security profile to restrict the user to an appropriate business group and, if required, a subset of a business group. A typical subset would be all employees in a specific organization or all employees reporting to the current user.

You also need to consider whether to allow users to access people in other business groups and whether users can access additional people who may grant them access to their records using the Release Employee Information function.

See: User Access and Security, page 2-3

### Process Flows

If the SSHR modules are workflow-enabled (see: Summary of SSHR Modules table, page 1-7), you can choose to modify the predefined process flow if required. For example, you can chain two modules together (where permitted) or introduce additional branching logic.

See: Self-Service Workflows, page 4-3

### Approvals

You must decide whether changes that users make using your modified function are subject to approval and who the approvers are. You can either use the Workflow Builder, PL/SQL, or Oracle Approvals Management to control transaction approvals.

See: Approvals, page 6-9

### Page Layouts

In most cases, the predefined page layouts contain all the fields that users need to perform a transaction. However, you may decide that some changes are required. For example, you could change the field prompts to match terminology used by your enterprise. You can also add more detailed instructions to the web pages, display selected flexfield segments, and hide fields or sections of web pages.

You modify page layouts using the Personalization Framework.

See: The Personalization Framework, page 5-4

### Module-specific Configuration Options

Detailed information on the configuration options for each module is given in the corresponding sections. Each section contains the following information:

- menu and function names
- workflow process names and attributes
- region, tip, and instruction names
- profile options

## Transaction History

The history of all transactions and changes to transactions is stored on the database. If you need to investigate transaction history you can query the tables below using either SQL*Plus, Discoverer workbooks, or Report*Writer reports.

***Data Mining Action History tables***

| Table name | Description | Primary Key |
|---|---|---|
| PQH_SS_TRANSACTION_HISTORY | **Transaction History**<br>This table holds historical information that identifies each transaction. The data in this table is unlikely to change over the course of a transaction. | Transaction ID |
| PQH_SS_APPROVAL_HISTORY | **Approval Changes**<br>This table tracks actions taken by approvers. Each action taken by an approver constitutes a separate entry. | Transaction Id and Approval Id |
| PQH_SS_STEP_HISTORY | **Step History**<br>The Step History table stores changes to existing transactions. | Transaction Id, Transaction Step Id and Approval Id |
| PQH_SS_VALUE_HISTORY | **Transaction Value History**<br>This holds transaction values for every step history created. | |

## Managing Preferred Currencies

You can use the General Preferences page in SSHR to specify a preferred currency for certain SSHR transactions. If, as a Manager, your preferred currency differs from the operating currency for a direct report, you can see the transaction amount in both currencies in selected SSHR pages. The currencies are displayed in the format:

- Operating currency (Preferred currency), for example,
- 5,979.02 USD (5,315.69 EUR)

> **Note:** To use this functionality, you must first define daily exchange rates using Oracle General Ledger. If you do not define daily exchange rates, or attempt to use the preferred currency for future-dated

transactions, only the operating currency is displayed.

The SSHR pages that support this functionality are:

- SSHR Assignment header

  **Note:** By default, the Salary field in the Assignment Header region is not displayed and must be rendered through personalization.

- Pay Rate Review page
- My Employee Information page (Salary field in Header region, Salary view, Training view)
- Individual Compensation Distributions Review page

  **Note:** On this page, the preferred currency is displayed in a separate Preferred Currency field.

For HR Professionals, the following page supports this functionality:

- HR View (Compensation Activity view)

# Managing Dates in SSHR

## Effective Dates

When a user initiates an action the application prompts the user for an effective date. The user can elect for the changes to take place as soon as final approval is made. Or the user can supply an effective date. The application checks the hire date and tells the user to select a later date. The application also informs the user of any pending changes to that person's record.

The application validates the entry to make sure the data is correct using specific criteria. The following checks are carried out in a chained process:

- hire_date

  Checks that the effective date entered is later than the hire date. If it is not, an error will be issued and the user will be unable to continue.

- termination_date

  Checks that the effective date entered is earlier than the termination date. If it is not, an error will be issued and the user will be unable to continue.

- pending_workflow

  Checks if there are changes pending in the workflow tables for the selected person.

  If there are pending changes, the user will be unable to continue with the action unless the profile option HR:Allow Concurrent Self Service Actions is set to Yes.

- future_assignment

  Checks if there are any future assignment changes with respect to the effective date entered.

- insert_mode

  Issues a warning (alert) only if the effective date of the assignment is less than a future-dated change.

  To configure the outcome of the above checks, see Handling Concurrent Transactions, page 3-6 below.

## Handling Concurrent Transactions

The application supports multiple simultaneous actions on the same employee or worker. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes.

Enabling concurrent transactions can give rise to potential data conflicts from either intervening actions or actions dated in the future. Two profile options enable you to control the potentially conflicting data: HR:Refresh Self Service Actions With Data From Intervening Actions, and HR:Manage Self Service Actions When Future-Dated Changes Exist.

### Intervening Actions

If someone approves an action on an employee or worker while a manager is performing a transaction on the same employee or worker, and the effective date of the approved action is prior to the current action's effective date, then a potential conflict exists. The system profile, HR:Refresh Self Service Actions With Data From Intervening Actions, enables you to deal with this potential conflict.

- If you set the system profile to Yes, the application displays a warning message listing the attributes that have been changed by the prior approved action. A refresh of the current data will occur. The manager will then be able to proceed with the transaction.

- If you set the system profile to No, the application displays a warning with the following message: "The database contains future-dated changes to this person's record. Your current setup does not allow you to complete this action. Contact your system administrator." The current transaction will fail.

### Future-Dated Changes

When the application encounters a pending change to the manager's selected person's record, effective subsequent to the current action's effective date, the future-dated change poses a potential conflict with the current action. You can manage these potential conflicts by setting the profile option, HR:Manage Self Service Actions When Future-Dated Changes Exist, to one of the values below:

- Allow Approval (Notify HR Rep)

  After completing the chain of approval, a notification of the transaction will be sent to an HR Representative who can review the change, then apply the necessary changes to the database manually.

  You must define a role based on the predefined type HR Representative, and assign it to each HR manager you want to receive the notification. The first HR manager to act on the notification and apply manual changes does so on behalf of all HR Representatives.

- Stop with an Error

  The manager will be forced to choose an Effective Date subsequent to the future-dated change.

> **Important:** If you enable the system profile HR:Manage Self Service Actions When Future-Dated Changes Exist by setting it to Allow Approval (Notify HR Rep), Oracle highly recommends that you also enable HR:Refresh Self Service Actions with Data from Intervening Actions. Otherwise you should disable HR:Refresh Self Service Actions with Data from Intervening Actions.

> **Note:** A system administrator or other implementer of Self-Service Benefits can access the Change Session Date menu option for testing future dated enrollments. You should remove this menu item in your production environment so that benefits participants do not alter their enrollment date. To remove the Change Session Date item from the menu, query the BEN_SELF_SERVICE_BENEFITS menu option in the Menus window and delete the Change Session Date menu entry.

## Legislation and Customer Overrides

An override enables a user to customize field values and data in a code package . An override is different from a user hook, which enables users to write code and update both fields and HRMS database tables.

Within SSHR, you can use overrides in the following situations:

- To customize the fields used when loading data from Oracle HRMS tables to the Employee Directory repository tables to meet user and legislation requirements. For example, to enable single sign on for the Employee Directory you use an override to add the FND_USER field to the Employee Directory tables..

  For more information, see: Enabling Customer Overrides for the Employee Directory, page 9-40.

- To populate the Employee Directory with data.

  For more information, see: Legislation and Customer Overrides for the Employee Directory, page 9-43.

- To configure the read-only display of job and position fields in the following pages.
  - My Information and My Employee Information

    See: My Information and My Employee Information, page 9-72.

  - Person Header and Assignment Headers in all Manager Self-Service pages.

  - Selected Enter Process pages
    - People in Hierarchy page

      (supervisor hierarchy and position hierarchy)

    - My List page

    - Simple Search page

      **Note:** The overrides are not used in the Advanced Search page as the job and position fields are used for searching.

    - Person Detail page

  See: Examples of Overrides, page 3-9

To enable an override, you must carry out the following steps:

1. Open the required package. This package may be one of the following:
   - perwscor.pkb (for My Employee Information)
   - peredcor.pkb (for the Employee Directory)

     **Note:** The packages reside in the following directory:

     $PER_TOP/patch/115/sql directory

2. Modify the override flag in the package to enable the customer override. The override flag is similar to the following line of code:

   ```
   g_override_flg BOOLEAN:=FALSE
   ```

   Change the BOOLEAN value to TRUE.

3. Insert your code for the override. For examples of code, see the documentation relevant to your function:

   - Customer Overrides for Single Sign On, page 9-40
   - Legislation and Customer Overrides for the Employee Directory, page 9-43
   - My Information and My Employee Information, page 9-72

4. Compile the override and apply to database.

   When the override packages are implemented, they are called by the application.

## Examples of Overrides

**Displaying Position or Job Names**

You can use customer overrides to configure a user-defined format for displaying position or job names. For example, you can choose to replace the defined format for displaying a user's job with a user-defined name format consisting of fewer segments.

For example, instead of displaying a job as:

12345.Global Development.Development Manager.12B

you can display only the third segment (Development Manager).

To make this change, you need to modify the perwscor.pkb code package to include the following code:

> **Note:** The packages are available within $PER_TOP/patch/115/sql directory. The file containing the package header is perwscor.pkh.

```
FUNCTION getJobName(
  p_job_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2//Actual MLS job name
)
return varchar2
```

To make a similar change to the position field, you need to modify the package to include the following code:

```
FUNCTION getPositionName(
  p_pos_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2
)
return varchar2
```

You also need to change the job override and/or position override flag to TRUE in the package. In the following example, only the job override flag is set to TRUE.:

```
g_job_override_flg   BOOLEAN:=TRUE;
g_position_override_flg BOOLEAN:=FALSE
```

## Defining Menus for SSHR

The predefined self-service responsibilities are linked to a menu that contains a number of functions. We recommend that you create a menu based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your organization's structures and business processes. You can base your configuration on the sample menus provided although you should not change the predefined menus directly.

You configure menus in the Menus window.

### To set up menus for self-service:

1. Review the sample functions in the Employee Self-Service User Menu, Contingent Worker Self Service Menus, and the Manager Self-Service User Menu. Decide which functions you want to include in your user menus.

   **Note:** For US Federal, review the Federal Employee Self-Service, the Manager Self-Service, and the Federal HR Self-Service menus.

   See: Self-Service Responsibilities and User Menus, page 2-14

   See: Menu Window, *Oracle E-Business Suite System Administrator's Guide - Security*

2. Create your own menu based on the predefined menus.

3. Make sure that all the functions you require are listed in the Function column of your menu.

4. Make sure the following submenus are attached to your custom menu:
   - Employee Enter Process menu - for employee, worker, and manager menus
   - Personal Actions menu - for employee, worker, and manager menus
   - Manager Actions menu - for manager menus
   - HR Self-Service Pages sub menu - for manager menus

- SSHR hierarchy and search functions - if your menu calls the Hierarchy, My List, and Search functions

5. Make sure that the following functions are attached to your custom menu:
   - Personal Actions V4.0 (or a configured copy) - for employee and worker menus
   - Manager Actions V4.0 (or a configured copy) - for manager menus
   - Suspended Actions - for employee, worker, and manager menus
6. Save your work.

## Defining User Access to Self-Service Functions

To define user access to self-service functions, you need to define a user, assign a responsibility, assign profile values, and assign a menu to the responsibility. The following process takes you through the separate procedures.

We recommend that you create a different responsibility for each target group of users.

### To define a responsibility for a self-service application:

1. Follow the standard procedure for creating a responsibility.

   See: Defining a Responsibility, *Oracle E-Business Suite System Administrator's Guide - Security*

2. Define your responsibilities to be available from Oracle Self-Service Web Applications.
3. Consider whether you should create menu or function exclusions to restrict the employee and contingent worker menus.

### To set your system profiles:

1. Set the system profiles for security groups.

   If Security Groups are not enabled, use the System Profile Values window to link your responsibility to a security profile in the appropriate Business Group.

   If Security Groups are enabled, you can set the security profile at the user level using the Assign Security Profiles window.

   > **Note: Self-Service Benefits users:** If you do not link your responsibility to your business group using the HR:Security Profile, any benefits participants who attempt to enroll will receive an error

message indicating that they cannot enroll.

2. Set any additional required profiles.

   - HR: Security Profile
   - HR:Cross Business Group (if you want users to be able to select employees from different business groups in lists of values)
   - HR:Restrict Transactions across Business Groups in SSHR (if you want to stop your users from performing transactions on employees from different business groups. This profile option works together with the HR:Cross Business Group profile option).
   - HR:Personal Actions Menu (for SSHR)
   - HR: Manager Actions Menu (for SSHR)

     **Note:** You need to restart the Apache listener after changing profile options.

### To define a user:

- Define the people you would like to access Self-Service. There are two ways to do this. You can follow the typical steps for defining a new user and then assign each individual user to a responsibility that enables access to self-service benefits.

See: Users Window, *Oracle E-Business Suite System Administrator's Guide - Security*

Alternatively, you can set up concurrent programs to automate this manual process.

See: Creating Batch User Accounts with Concurrent Programs, page 2-29

## Defining Functions for SSHR

If required, you can create your own SSHR functions using the predefined functions as a basis.

You can then configure how the function is accessed, for example, whether it is available from the Actions pages or from the People Search page.

For information on modifying the related workflow processes, see Configuring Workflow Objects, page 4-8

You create the function in the Form Functions window using the system administrator responsibility.

### To create a function based on a predefined SSHR function:

1. Query the function on which you want to base your function, for example, Personal Information (HR_PERINFO_SS).

2. Insert a new record beneath it in the table.

3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above.

   **Note:** The Function Name and User Function Name fields must be unique so insert your standard prefix in front of the value duplicated from the previous record.

4. In the Parameter field, note that the pItemType parameter value is 'HRSSA' (the internal name for the predefined HR workflow item type). Leave this value unchanged but change the pProcessName parameter from HR_PERSONAL_INFO_JSP_PRC to the name of your configured process.

   See: Self-Service Workflows, page 4-3

5. Change the OAFunc parameter to your configured function name, for example HR_PERINFO_SS

6. If you have created a custom manager function or an Enter Process function (Hierarchy, My List or Search page), you can display a navigation link, or breadcrumb on the web page. To do this add the addBreadCrumb parameter with value N.

   See: Menu Function Parameter Descriptions, page 3-34

7. If you are using Oracle Approvals Management (AME) for your function, add the following parameters:'

   - pAMETranType=SSHRMS
   - pAMEAppId=800

   See: Configuring SSHR Functions to Use Oracle Approvals Management (AME), page 6-17

8. Enter the parameter values in the HTML call field. You enter the parameters as follows: Note that the HTML call field is made up of several parameters:

   - akRegionCode

     You can use a different person selection page instead of the Hierarchy Page. For example, you may want to launch the Search page as the initial page. This is

typically used if you are creating functions for an HR Professional user. Enter the parameter values as follows:

- HR_PERSON_TREE_TOP_SS

  For the Hierarchy page

- HR_PERSON_SEARCH_TOP_SS

  For the Person Search page

- HR_MY_LIST_TOP_SS

  For the My List page

- akRegionApplicationId

  This value is 800.

### To make the function available globally or for specific legislations:

1. If this function is for a specific legislation, add it to the appropriate HR_cc_SS_FUNCTIONS_CUSTOM data security menu. Otherwise, add it to the HR_GLOBAL_SS_FUNCTIONS_CUSTOM data security menu.

   **Note:** You do not need to enter a prompt for the function. Also, make sure that the Granted check box is unchecked.

2. Save your work.

### To add the function to an employee or contingent worker menu in the Menus window:

1. Use the system administration responsibility to display the Menus window.

2. Add the function to the top-level menus and/or submenus as appropriate. For example, you may want to add the function to your configured copy of the Employee Self-Service menu.

   See: Defining Menus for SSHR, page 3-10

### To make a function available from the Actions pages:

1. If this function is appropriate for employees and workers to perform on themselves, add it to your configured copy of the Personal Actions menu.

2. If this function is appropriate for managers to perform on other employees, add it to your configured copy of the Manager Actions menu.

**Note:** You only add the employee version of the function to the Manager Actions menu.

### To make a function available from the Manager menus via the People Search page:

To make this function available to managers directly from the menu via the People Search page, you need to create a matching function. Model your matching function on the corresponding predefined manager function.

You create your matching function in the Form Functions window.

1. Query the predefined manager function on which you want to base your function, for example, Personal Information Manager (HR_PERINFO_MGR_SS).

2. Insert a new record beneath it.

3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above. Insert your standard prefix where required.

4. In the Parameter field, change the pCalledFrom parameter to match the name of your original custom function (as created in the above procedure)

   The HTML call field is OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800. This corresponds to the Person Search page. When the user selects a person from this page, SSHR calls the AOL function specified by the pCalledFrom parameter, appending the selected person_id to the pPersonID parameter specified for that function.

5. Save your work.

6. Add the function to the top-level menus and/or submenus as required.

   **Note:** There is no need to add this type of function to the data security menus or to the actions menus.

# Menu Function Parameters

## Supplied Functions

This section provides you with a list of all the supplied functions for each delivered menu. Against each function you will see the Web HTML call, and a list of parameters which are also used in the Web call, as they appear in the Forms user interface. The next section will provide descriptions of the parameters.

> **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.
>
> To use enhanced Succession Planning features, you must have a separate Oracle Succession Planning license. For more information, refer to the *Oracle Succession Planning Implementation and User Guide*. Otherwise, you can use the succession planning feature available with Oracle SSHR. For a comparison of the succession planning features available in Oracle SSHR and Oracle Succession Planning, refer to the My Oracle Support note: *Talent Profile and Succession Planning in Oracle Self-Service HR and Oracle Succession Planning – A Comparative Note (Doc ID 861499.1)*.

***Payroll Professional Menu***

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| PAY_MGR_EMP_SEARCH | Employee Search | OA.jsp?<br>akRegionCode=HR_PERSON_SEARCH_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=PAY_MGR_EMP_SEARCHp&<br>Destination=PAY_MGR_PAYSLIP_SS&<br>pManagerEnabled=N |

***HR Professional Menu***

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| BEN_CWB_HOME_SWT_MGR_PAGE | Compensation Workbench Home for Administrators | OA.jsp?<br>akRegionCode=BEN_CWB_HOME_PAGE&<br>akRegionApplicationId=805&<br>displayDate=N&<br>displaySwitchManager=Y&<br>OAFunc=BEN_CWB_HOME_PAGE | None |
| HR_VIEWS_SEARCH_INITIAL | HR Views Person Search Initial Screen | OA.jsp?<br>akRegionCode=HR_SUPER_PERSON_SEARCH_TOP1_SS&<br>akRegionApplicationId=800&<br>pViewMenu=HR_VIEWS&<br>pDestination=&<br>OAFunc=HR_VIEWS_SEARCH_INITIAL | OAFunc=HR_VIEWS_SEARCH_INITIAL |
| HR_ALLOCATED_CHECKLIST_SS | Allocated Checklist Function | OA.jsp?<br>page=/oracle/apps/per/checklist/allocated/webui/AllocatedChecklistPG | pCalledFrom=HR_ALLOCATED_CHECKLIST_SS&OAFunc=HR_ALLOCATED_CHECKLIST_SS |
| HR_TRANSACTION_HR_SS | Transaction Monitor | OA.jsp?<br>page=/oracle/apps/per/selfservice/transactionmonitor/webui/TransactionMonitorBasePG&OAFunc=HR_TRANSACTION_HR_SS | OAFunc=HR_TRANSACTION_HR_SS&pCalledFrom=HR_TRANSACTION_HR_SS&pRespIdent=H |

***Manager Self Service Foundation Menu***

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_MY_SUS_ACTIONS_MGR_SS | Suspended Actions Mgr | OA.jsp?<br>akRegionCode=HR_PROCESS_MY_SUSPENDS_TOP_SS&<br>akRegionApplicationId=800 | pMode=LMDA |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_PERSON_TREE_SS | Manager Actions Tree View | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pDestination=HR_ACTIONS_SS&<br>pCalledFrom=&addBreadcrumb=Y |

***Employee Self Service Foundation Menu***

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_MY_SUS_ACTIONS_SS | Suspended Actions | OA.jsp?<br>akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS<br>&<br>akRegionApplicationId=800 | pMode=EDA&<br>pFromMenu=Y |
| HR_PERSONAL_PROCESS_SS | Personal Actions | OA.jsp?<br>akRegionCode=HR_PERSONAL_PROCESS_TOP_SS&<br>akRegionApplicationId=800 | pAssignmentID=&<br>pPersonID= |

***Manager Self Service Menu***

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| BEN_CWB_HOME_PAGE | Compensation Workbench Home | OA.jsp?<br>akRegionCode=BEN_CWB_HOME_PAGE&<br>akRegionApplicationId=805&<br>displayDate=N&<br>WFHomeWorklist=Y&<br>OAFunc=BEN_CWB_HOME_PAGE | None |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| BEN_SS_MGR_ICD_SRCH | Self Service Individual Distribution-Manager | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=BEN_SS_MGR_ICD&OAFunc=BEN_SS_MGR_ICD&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| BEN_SS_MGR_SRCH | Self Service Benefits Enrollment-Manager | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=BEN_SS_MGR_ENRT&OAFunc=BEN_SS_MGR_ENRT&addBreadCrumb=Y |
| CANDIDATE_OFFERS | Candidate Offers | hr_offer_form_web.SETUP | None |
| HR_APPL_HIRE_MGR_SS | Applicant Hire Mgr | OA.jsp?akRegionCode=HR_SEARCH_HIRE_APPL_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEW_HIRE_SS | pCalledFrom=HR_APPL_HIRE_SS |
| HR_CAED_MGR_SS | Release Employee Information Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_CAED_SS&AddBreadCrumb=Y |
| HR_CCMGR_SS | Organization Manager | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_CCMGR_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_CCMGR_JSP_PRC&pCalledFrom=HR_CCMGR_SS& pItemType=HRSSA&pPersonID=& pFromMenu=Y&pManagerEnabled=N |
| HR_CHANGE_HOURS_MGR_SS | Change of Hours Mgr | hr_mee_person_search_tree_web.setup | P_CALLED_FROM=HR_CHANGE_HOURS |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_CHANGE_JOB_MGR_SS | Change Job Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_CHANGE_JOB_SS&<br>pDestination=HR_ACTIONS_SS&<br>pManagerEnabled=N&addBreadCrumb=Y |
| HR_CHANGE_JOB_TERMS_MGR_SS | Change Job and Employment Terms Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_CHANGE_JOB_TERMS_SS&<br>pDestination=HR_ACTIONS_SS&<br>pManagerEnabled=N&addBreadCrumb=Y |
| HR_CHG_COST_LOC_SUP_MGR_SS | Change Cost Center Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_CHG_COST_LOC_SUP_SS&<br>pDestination=HR_ACTIONS_SS&<br>pManagerEnabled=N&addBreadCrumb=Y |
| HR_CHG_COST_TRM_LOC_SUP_MGR_SS | Change Cost Center and Employment Terms Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_CHG_COST_TRM_LOC_SUP_SS&<br>pDestination=HR_ACTIONS_SS&<br>pManagerEnabled=N&addBreadCrumb=Y |
| HR_EIT_MGR_SS | Extra Information Types Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_EIT_SS&addBreadCrumb=Y |
| HR_EMPDIR_ADVSRCH_SS | Advanced Search | OA.jsp?<br>page=/oracle/apps/per/selfservice/empdir/webui/AdvanceSrchPG | None |
| HR_EMPDIR_EMPDETAIL_SS | Employee Detail | OA.jsp?<br>page=/oracle/apps/per/selfservice/empdir/webui/EmpDetailPG | None |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_EMPDIR_EMPPROFILE_SS | Employee Profile | OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpProfilePG | None |
| HR_EMPDIR_HIERARCHY_SS | Organization Hierarchy | OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/HierarchyPG | None |
| HR_EMPDIR_PICPREVIEW_SS | Photo Preview | OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/PicPreviewPG | None |
| HR_EMPDIR_PROXY_SS | Proxy Page | OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpDirProxyPG | OAFunc=HR_EMPDIR_PROXY_SS |
| HR_EMPDIR_SIMPLESRCH_SS | Simple Search | OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/SimpleSrchPG | None |
| HR_EMP_STATUS_CHG_MGR_SS | Employee Status Change Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_EMP_STATUS_CHG_SS&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| HR_EMP_TERMS_CHANGE_MGR_SS | Change Worker Status and Terms Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akREgionApplicationId=800 | pCalledFrom=HR_EMP_TERMS_CHANGE_SS&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| HR_FR_APPLHIRE_MGR_SS | French Applicant Hire Mgr | OA.jsp?akRegionCode=HR_SEARCH_HIRE_APPL_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_FR_APPLHIRE_SS |
| HR_FR_NEWHIRE_MGR_SS | French New Hire Mgr | OA.jsp?akRegionCode=HR_CREATE_SRCH_NEWHIRE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_FR_NEWHIRE_SS |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_LOA_MGR_SS | Leave of Absence Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_LOA_SS&addBreadCrumb=Y |
| HR_PAY_RATE_CHANGE_MGR_SS | Change Pay Mgr | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&<br>akRegionApplicationId=800 | pCalledFrom=HR_PAY_RATE_CHANGE_SS&pDestination=HR_ACTIONS_SS&ManagerEnabled=N&addBreadCrumb=Y |
| HR_PAY_RATE_CHANGE_SS | Change Pay | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_PAY_RATE_CHANGE_SS | pAMETranType=SSHRMS&pAMEAppId=800&PayRate=Y&pProcessName=HR_CHANGE_PAY_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_PAY_RATE_CHANGE_SS&pSalChange=Y |
| HR_MY_SUS_ACTIONS_MGR_SS | Suspended Actions Mgr | OA.jsp?<br>akRegionCode=HR_PROCESS_MY_SUSPENDS_TOP_SS&<br>akRegionApplicationId=800 | pMode=LMDA |
| HR_NEW_HIRE_MGR_SS | Hire Mgr | OA.jsp?<br>akRegionCode=HR_CREATE_SRCH_NEWHIRE_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEW_HIRE_SS | pCalledFrom=HR_NEW_HIRE_SS |
| HR_CWKPLACE_MGR_SS | Contingent Worker Placement Mgr | OA.jsp?<br>page=/oracle/apps/per/selfservice/newhire/webui/CWKPlacementPG=HR_NEWHIRE_SS | pCalledFrom=HR_CWKPLACE_SS |
| HR_CWKPLACE_SS | Contingent Worker Placement | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEWHIRE_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_NEWHIRE_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_CWKPLACE_SS&pFromMenu=Y&pFlowname=CWKPlacement&pEffectiveDate= |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_PAY_RATE_MGR_SS | Change Base Salary Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_PAY_RATE_SS&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| HR_PERINFO_MGR_SS | Personal Information Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_PERINFO_SS&addBreadCrumb=Y |
| HR_PERSON_TREE_SS | Manager Actions Tree View | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pDestination=HR_ACTIONS_SS&pCalledFrom=&addBreadcrumb=Y |
| HR_SIT_MGR_SS | Special Information Types Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_SIT_SS&addBreadCrumb=Y |
| HR_SUCCESSION_PLANNING | Succession Planning Menu | hr_succ_plan_menu_web.setup | None |
| HR_SUIT_MATCH_MENU | Suitabilty Match Menu | hr_suit_match_menu_web.setup | None |
| HR_TERMINATION_COMP_MGR_SS | Termination with Compensation Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800&OAFunc=HR_TERMINATION_COMP_SS | pCalledFrom=HR_TERMINATION_COMP_SS&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| HR_TERMINATION_MGR_SS | Termination Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800&OAFunc=HR_TERMINATION_SS | pCalledFrom=HR_TERMINATION_SS&pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| HR_EMP_TRANSFER_MGR_SS | Transfer Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_EMP_TRANSFER_SS&Destination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y |
| HR_VIEWS_MGR | Manager Views | hr_mee_views_web.setup | p_called_from=HR_VIEWS_MGR |
| HXC_TIMECARDS_MGR | TimeCard Manager | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HXC_TIME_ENTER&addBreadCrumb=Y |
| OTA_ADD_TRAINING_MGR_SS | External Training Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=OTA_ADD_TRAINING_SS&addBreadCrumb=Y |
| OTA_TRAINING_MGR_SS | Enroll and Cancel Training Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=OTA_ENROLL_SS&addBreadCrumb=Y |
| OTA_TRNG_PLAN_MGR_SS | Training Plans Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=OTA_TRNG_PLAN_VIEWS_SS&addBreadCrumb=Y |
| PER_APPRAISAL_PERSON_SEARCH | Appraisal Mgr | hr_person_search_tree_web.setup | p_called_from=PER_APPRAISAL_EMPLOYEE |
| PQH_ACADEMIC_RANK_MGR | Academic Rank Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=PQH_ACADEMIC_RANK&pDestination=HR_ACTIONS_SS&addBreadCrumb=Y |
| PQH_EMP_REVIEWS_MGR | Employee Reviews Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=PQH_EMP_REVIEWS&addBreadCrumb=Y |

| Function Name | User Function Name | Web HTML call | Parameters |
|---|---|---|---|
| PQH_EVENT_BOOKING_MGR | Events and Bookings Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=PQH_EVENT_BOOKING&addBreadCrumb=Y |
| PQH_TENURE_STATUS_MGR | Tenure Status Mgr | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=PQH_TENURE_STATUS&addBreadCrumb=Y |
| HR_ALLOCATED_CHECKLIST_SS | Allocated Checklist Function | OA.jsp?page=/oracle/apps/per/checklist/allocated/webui/AllocatedChecklistPG | pCalledFrom=HR_ALLOCATED_CHECKLIST_SS&OAFunc=HR_ALLOCATED_CHECKLIST_SS |
| HR_REVERSE_TERMINATION_MGR_SS | Reverse Termination Mgr | OA.jsp?page=/oracle/apps/per/selfservice/reverseterm/webui/SearchPG | pCalledFrom=HR_REVERSE_TERMINATION_SS |
| HR_DOR_MGR_SS | Documents of Record | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_DOR_SS&pManagerEnabled=Y&addBreadCrumb=Y |
| HR_TALENT_HOME_FUNC_MGR | Talent Profile Home Function - Manager | OA.jsp?OAFunc=HR_TALENT_ORGCHART&OAHP=HR_TALENT_HOME_MENU_MGR&OASF=HR_TALENT_HOME_FUNC_MGR | None |
| HR_TRANSACTION_MGR_SS | Transaction Monitor | OA.jsp?page=/oracle/apps/per/selfservice/transactionmonitor/webui/TransactionMonitorBasePG&OAFunc=HR_TRANSACTION_MGR_SS | OAFunc=HR_TRANSACTION_MGR_SS&pCalledFrom=HR_TRANSACTION_MGR_SS&pRespIdent=M |

***Employee Self Service Menu***

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_APPL_HIRE_SS | Applicant Hire | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEW_HIRE_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_NEW_HIRE_PLACE_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_APPL_HIRE_SS&pFromMenu=Y&pFlowName=HrCommonInsertOab&pEffectiveDate= |
| HR_CHANGE_HOURS_SS | Change of Hours | hr_mee_workflow_service.create_process | pAMETranType=SSHRMS&pAMEAppId=800&pPayRate=Y&pProcessName=HR_CHG_HOURS_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_CHANGE_HOURS_SS&pEffectiveDate= |
| HR_NEW_HIRE_SS | Hire | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEW_HIRE_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_NEW_HIRE_PLACE_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_NEW_HIRE_SS&pFromMenu=Y&pFlowName=HrCommonInsertOab&pEffectiveDate= |
| HR_EMP_STATUS_CHANGE_SS | Worker Status Change | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_EMP_STATUS_CHANGE_SS | pAMETranType=SSHRMS&pAMEAppId=800&pPayRate=Y&pProcessName=HR_EMP_STATUS_CHANGE_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_EMP_STATUS_CHANGE_SS&pEffectiveDate= |
| HR_EMP_TERMS_CHANGE_SS | Change Worker Status and Terms | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_EMP_TERMS_CHANGE_SS | pAMETranType=SSHRMS&pAMEAppId=800&pPayRate=Y&pProcessName=HR_EMP_STS_TERMS_CHG_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_EMP_TERMS_CHANGE_SS&pAMETranType=SSHRMS&pAMEAppId=800&pEffectiveDate= |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_EMP_TRANSFER_SS | Transfer | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_EMP_TRANSFER_SS | pAMETranType=SSHRMS&pAMEAppId=800&pPayRate=Y&pProcessName=HR_EMP_TRANSFER_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_EMP_TRANSFER_SS&pEffectiveDate= |
| BEN_SS_BNFT_ENRT | Self Service Benefits Enrollment-Employee | OA.jsp?akRegionCode=BEN_EFFECTIVE_DATE_PAGE&akRegionApplicationId=805 | displayDate=N& allowEnrt=Y&sessionDate=&sendFYINotification=N&wfProcessName=FYI_NOTIFICATION_PRC |
| HR_APPLY_FOR_JOB_SS | Apply for Job | OA.jsp?page=/oracle/apps/per/irc/candidateSelfService/webui/EmpJobSearchPG&akRegionApplicationId=800&SeededSearchFlag=N | None |
| HR_CAED_SS | Release Employee Information | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800 & OAFunc=HR_CAED_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_CAED_JSP_PRC& pItemType=HRSSA&pCalledFrom=HR_CAED_SS&pPersonID=& pFromMenu=Y |
| HR_EIT_SS | Extra Information Types | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800 & OAFunc=HR_EIT_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_EIT_JSP_PRC& pItemType=HRSSA&pCalledFrom=HR_EIT_SS&pPersonID=& pFromMenu=Y |
| HR_LOA_SS | Leave of Absence | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800 & OAFunc=HR_LOA_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_LOA_JSP_PRC& pItemType=HRSSA&pCalledFrom=HR_LOA_SS&pPersonID=& pFromMenu=Y |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_MY_SUS_ACTIONS_SS | Suspended Actions | OA.jsp?<br>akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS<br>&<br>akRegionApplicationId=800 | pMode=EDA&pFromMenu=Y |
| HR_PERINFO_SS | Personal Information | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=HR_PERINFO_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=HR_PERSONAL_INFO_JSP_PRC&<br>pItemType=HRSSA&<br>pCalledFrom=HR_PERINFO_SS<br>& pPersonID=& pFromMenu=Y |
| HR_PERSONAL_PROCESS_SS | Personal Actions | OA.jsp?<br>akRegionCode=HR_PERSONAL_PROCESS_TOP_SS&<br>akRegionApplicationId=800 | pAssignmentID=&pPersonID= |
| HR_SIT_SS | Special Information Types | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>& OAFunc=HR_SIT_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=HR_SIT_JSP_PRC& pItemType=HRSSA&<br>pCalledFrom=HR_SIT_SS&<br>pPersonID=& pFromMenu=Y |
| HR_VIEWS_EMP | Employee Views | hr_mee_views_web.setup | p_called_from=HR_VIEWS_EMP& p_mgr=FALSE |
| OTA_ADD_TRAININ G_SS | Enroll and Cancel Training | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=OTA_ADD_TRAINING_SS | pProcessName=OTA_ADDTRNG_JSP_PRC&<br>pCalledFrom=OTA_ADD_TRAINING_SS&<br>pItemType=HRSSA&<br>pFromMenu=Y |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| OTA_ENROLL_SS | Academic Rank Overview | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=OTA_ENROLL_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC&<br>pCalledFrom=OTA_ENROLL_SS& pItemType=HRSSA&<br>pTrainingViewCode=10&<br>pFromMenu=Y |
| OTA_EXTERNAL_LINKING_SS | External Training | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=OTA_EXTERNAL_LINKING_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=OTA_EXT_LINK_JSP_PRC&<br>pCalledFrom=OTA_EXTERNAL_LINKING_SS&<br>pItemType=HRSSA&<br>pActivityVerId=& pEventId=&<br>pFromMenu=Y&<br>pOATrngFunc=OTA_ENROLL_SS&<br>pTrngProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC |
| OTA_TRNG_PLAN_VIEWS_SS | Training Plan Views | OA.jsp?<br>page=/oracle/apps/ota/trainingplan/webui/ViewTrainingPlansPG& retainAM=Y | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pCalledFrom=OTA_TRNG_PLAN_VIEWS_SS&<br>pItemType=HR&<br>pFromMenu=Y |
| PAY_EMP_PAYMENTS_SS | Manage Payroll Payments | OA.jsp?<br>akRegionCode=PAY_MPP_TOP_REGION&<br>akRegionApplicationId=801<br>&<br>OAFunc=PAY_EMP_PAYMENTS_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=PAY_PAYMENTS_JSP_PRC&<br>pItemType=HRSSA&<br>pCalledFrom=PAY_EMP_PAYMENTS_SS |
| PAY_PAYSLIP_SS | Payslip | OA.jsp?<br>akRegionCode=PAY_PAYSLIP_TOP_SS&<br>akRegionApplicationId=801 | pCalledFrom=PAY_PAYSLIP_SS& pPersonID= |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| PAY_W2_SS | Employee W2 | OA.jsp?<br>akRegionCode=HR_CREAT<br>E_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>& OAFunc=PAY_W2_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=PAY_EMPLOY<br>EE_W2_PROCESS&<br>pItemType=HRSSA&<br>pCalledFrom=PAY_W2_SS&<br>pPersonID=& pFromMenu=Y |
| PAY_W4INFO_SS | Employees W4 Information | OA.jsp?<br>akRegionCode=HR_CREAT<br>E_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=PAY_W4INFO_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=PAY_CHANGE<br>_W4_INFO_JSP_PRC&<br>pItemType=HRSSA&<br>pCalledFrom=PAY_W4INFO_SS<br>& pPersonID=& pFromMenu=Y |
| PER_APPRAISAL_EM<br>PLOYEE | Appraisal | hr_workflow_service.<br>create_process | P_PROCESS_NAME=HR_APPR<br>AISAL_DETAILS_PRC&<br>P_ITEM_TYPE=HRSSA&<br>P_PERSON_ID= |
| PQH_ACADEMIC_RA<br>NK_OVRVW | Tenure Status Overview | OA.jsp?<br>akRegionCode=PQH_ACA<br>DEMIC_RANK_OVRVW_T<br>OP&<br>akRegionApplicationId=830<br>2 | pCalledFrom=PQH_ACADEMI<br>C_RANK_OVRVW&<br>pPersonID= |
| PQH_EMP_REVIEWS | Employee Reviews | OA.jsp?<br>akRegionCode=HR_CREAT<br>E_PROCESS_TOP_SS&<br>akRegionApplicationId=800<br>&<br>OAFunc=PQH_EMP_REVI<br>EWS | pCalledFrom=PQH_EMP_REVI<br>EWS&<br>pProcessName=PQH_EMP_RE<br>V_JSP_PRC&<br>pItemType=HRSSA&<br>pPersonID= |
| PQH_EVENT_BOOKI<br>NG_OV | Events and Bookings Overview | OA.jsp?<br>akRegionCode=PQH_EVE<br>NTS_SEARCH_TOP&<br>akRegionApplicationId=830<br>2 | None |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| PQH_TENURE_STATUS_OVRVW | | OA.jsp?akRegionCode=PQH_TENURE_STATUS_OVRVW_TOP&akRegionApplicationId=8302 | pCalledFrom=PQH_TENURE_STATUS_OVRVW& pPersonID= |
| PAY_JP_CMI_SS | Japan Commutation Information Self Service | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akakRegionApplicationId=800&OAFunc=PAY_JP_CMI_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=PAY_JP_CMI_JSP_PRC&pItemType=HRSSA&pCalledFrom=PAY_JP_CMI_SS&pPersonID=&pFromMenu=Y |
| PAY_JP_CMI_MGR_SS | Japan Commutation Information Manager Self Service | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=PAY_JP_CMI_SS&addBreadCrumb=Y |
| PAY_JP_CMI_MAIN_SS | Japan Commutation Information Main Page | OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiMainPG | None |
| PAY_JP_CMI_INSERT_SS | Japan Commutation Information Insert Page | OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiInsertPG | None |
| PAY_JP_CMI_UPDATE_SS | Japan Commutation Information Update Page | OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiUpdatePG | None |
| PAY_JP_CMI_DELETE_SS | Japan Commutation Information Delete Page | OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiDeletePG | None |
| PAY_JP_CMI_VIEW_FUTURE_SS | Japan Commutation Information View Future Change Page | | OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiViewFuturePG |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_TERM_EMP_SS | Voluntary Termination Emp | OA.jsp?<br>akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800&OAFunc=HR_TERM_SS | pCalledFrom=HR_TERM_SS&pDestination=HR_ACTIONS_SS&addBreadCrumb=Y&pEmpFuncEfDt=Y |
| HR_DOR_SS | Documents of Record | OA.jsp?<br>page=/oracle/apps/per/dor/webui/DocsOfRecordForPersonPG&akRegionApplicationId=800 | pItemType=HRCORE&pNtfyReviewerPrc=HR_NOTIFY_DOR_REVIEWER_PRC&pNtfyRevieweePrc=HR_NOTIFY_DOR_REVIEWEE_PRC&pCalledFrom=HR_DOR_SS&OAFunc=HR_DOR_SS&addBreadCrumb=Y |
| HR_TALENT_HOME_FUNC_EMP | Talent Profile Home Function - Employee | OA.jsp?<br>OAFunc=HR_TALENT_ORGCHART&OAHP=HR_TALENT_HOME_MENU_EMP&OASF=HR_TALENT_HOME_FUNC_EMP | None |
| HR_TRANSACTION_EMP_SS | Transaction Monitor | OA.jsp?<br>page=/oracle/apps/per/selfservice/transactionmonitor/webui/TransactionMonitorBasePG&OAFunc=HR_TRANSACTION_EMP_SS | OAFunc=HR_TRANSACTION_EMP_SS&pCalledFrom=HR_TRANSACTION_EMP_SS&pRespIdent=E |

***Contingent Worker Self Service Menu***

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_EIT_SS | Extra Information Types | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800&<br>OAFunc=HR_EIT_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=HR_EIT_JSP_PRC<br>& pItemType=HRSSA&<br>pCalledFrom=HR_EIT_SS&<br>pPersonID=& pFromMenu=Y |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_MY_SUS_ACTIONS_SS | Suspended Actions | OA.jsp?<br>akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS&<br>akRegionApplicationId=800 | pMode=EDA& pFromMenu=Y |
| HR_PERINFO_SS | Personal Information | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800&<br>OAFunc=HR_PERINFO_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=HR_PERSONAL_INFO_JSP_PRC&<br>pItemType=HRSSA&<br>pCalledFrom=HR_PERINFO_SS&<br>pPersonID=& pFromMenu=Y |
| HR_PERSONAL_PROCESS_SS | Personal Actions | OA.jsp?<br>akRegionCode=HR_PERSONAL_PROCESS_TOP_SS&<br>akRegionApplicationId=800 | pAssignmentID=& pPersonID= |
| HR_SPECIAL_INFO | Special Information | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800&<br>OAFunc=HR_SIT_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=HR_SIT_JSP_PRC& pItemType=HRSSA&<br>pCalledFrom=HR_SIT_SS&<br>pPersonID=& pFromMenu=Y |
| OTA_ADD_TRAINING_SS | Enroll and Cancel Training | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800&<br>OAFunc=OTA_ADD_TRAINING_SS | pProcessName=OTA_ADDTRNG_JSP_PRC&<br>pCalledFrom=OTA_ADD_TRAINING_SS& pItemType=HRSSA&<br>pFromMenu=Y |
| OTA_ENROLL_SS | | OA.jsp?<br>akRegionCode=HR_CREATE_PROCESS_TOP_SS&<br>akRegionApplicationId=800&<br>OAFunc=OTA_ENROLL_SS | pAMETranType=SSHRMS&<br>pAMEAppId=800&<br>pProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC&<br>pCalledFrom=OTA_ENROLL_SS& pItemType=HRSSA&<br>pTrainingViewCode=10&<br>pFromMenu=Y |

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| OTA_EXTERNAL_LINKING_SS | Training Link Access | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=OTA_EXTERNAL_LINKING_SS | pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=OTA_EXT_LINK_JSP_PRC&pCalledFrom=OTA_EXTERNAL_LINKING_SS&pItemType=HRSSA&pActivityVerId=& pEventId=&pFromMenu=Y&pOATrngFunc=OTA_ENROLL_SS&pTrngProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC |
| PQH_EVENT_BOOKING_OV | Events and Bookings Overview | OA.jsp?akRegionCode=PQH_EVENTS_SEARCH_TOP&akRegionApplicationId=8302 | None |
| HR_TERM_EMP_SS | Voluntary Termination Emp | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800&OAFunc=HR_TERM_SS | pCalledFrom=HR_TERM_SS&pDestination=HR_ACTIONS_SS&addBreadCrumb=Y&pEmpFuncEfDt=Y |

## Menu Function Parameter Descriptions

This section provides the information you need when configuring your own functions. It tells you how self service functions are defined in the Forms user interface, and lists each menu function parameter, together with the parameter use.

For more information on configuring functions see Guidelines for Configuring SSHR Functions, page 3-1.

The function type for all SSHR functions is SSWA JSP FUNCTION (JSP). The Context Dependence is Responsibility. The Maintenance Mode Support is not relevant to self-service functions. These values should be copied into your own functions.

A function Web HTML call has the following format:

OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplictionID=800&OAFunc=HR_CHANGE_JOB_SS

where the Web HTML call parameters listed in the Forms user interface are separated by "&".

All functions that end in "_SS" (but not those ending in "_MGR_SS") use the following parameters, which are described in greater detail below:

- pAMETranType=SSHRMS
- pAMEAppId=800
- pProcessName=WORKFLOW_PROCESS_NAME
- pItemType=HRSSA
- pCalledFrom=EDA_FUNCTION_NAME
- pEffectiveDate=

The following table describes all available menu function parameters:

**Note:** References to "_SS" functions exclude "_MGR_SS" functions.

| Parameter | Description |
|---|---|
| OAFunc=<function>_SS | Add this parameter to all the self service _SS functions, providing your own function name. This parameter enables you to do personalization for a specified <function>_SS level. |
| pAMEAppId=800 | Add this parameter to all the _SS functions that contain pAMETranType=SSHRMS to specify the application Id for the transaction type. |
| pAMETranType=SSHRMS | Add this parameter to all functions that use AME to process approvals. The parameter provides the transaction type name of SSHRMS. If you define your own transaction type provide that transaction type name here. |
| pCalledFrom=EDA_FUNCTION_NAME | Add this parameter to all the _SS functions that are launched through workflow. It indicates which function calls the current function. Replace EDA_FUNCTION_NAME with the corresponding _SS function name. |

| Parameter | Description |
|---|---|
| pDestination=HR_ACTIONS_SS | Add this parameter to the _MGR_SS functions if the workflow process attached to this function can navigate through the Actions page. |
| pEffectiveDate= | Add this parameter to the _SS function if this function needs the effective date field to be displayed in the actions screen. No value should be set. |
| pFlowName=<processname> | Use this parameter for functions that require special processing. The process names are "COBRA Registration", "Benefits Registration" & "New Hire". |
| pGroupName=<documentgroupshortname> | Use this parameter to provide the Document Group short name for a PDF merge |
| pItemType=HRSSA | Add this parameter to all the _SS and _MGR_SS functions to provide the Item Type. |
| pManagerEnabled=N | Add this parameter to _MGR _SS functions if managers are not allowed to select themselves in the hierarchy tree; the Action icon for the logged-in manager will be disabled. |
| pMode=<value> | Add this parameter to your manager or personal action functions with the value of LMDA for manager action functions and EDA for personal action functions. |
| pPayRate=Y | Use this parameter to validate pay rate related transactions. If this parameter is set to Yes, then only SSHR performs pay rate validations. |
| pProcessName=WORKFLOW_PROCESS_NAME | Add this parameter to all the _SS functions that are launched through workflow. Replace WORKFLOW_PROCESS_NAME with the corresponding workflow process name, for example HR_PERSONAL_INFO_JSP_PRC . |

| Parameter | Description |
| --- | --- |
| pSalChange=Y | This parameter indicates that the process is purely a Salary Change process and does not include Assignment Pages. An appropriate message will be presented on the Effective Date page. If this parameter is absent it defaults to 'N', which indicates that the process includes Assignment related pages. |
| addBreadCrumb=Y | Add this parameter to MGR_SS functions or Enter Process functions if you want to display a navigation link, or breadcrumb, on the page. |
| pEnableTerms=Y | This parameter enables users to include ex-employees (terminated employees) in a person search. This parameter is enabled for selected Manager and Professional functions with a default setting of Y. |
| pRehireReco=Y | When managers search for ex-employees to rehire them using the Applicant Hire and Rehire function, by default the search result displays ex-employees whose rehire is recommended and whose rehire is not recommended. Add this parameter to the Applicant Hire Mgr (HR_APPL_HIRE_MGR_SS) function to display only ex-employees whose rehire is recommended.<br><br>See: Applicant Hire and Rehire, page 9-104 |

| Parameter | Description |
| --- | --- |
| pNtfFyiDetails=Y | Add this parameter to _SS functions to enable notification recipients to view transaction changes on the FYI Notification page after transactions are either approved or rejected. If this parameter is set to Y, then the FYI Notification page displays a Details region with the Proposed column and a Supporting Documents region. 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.<br><br>The FYI notifications retrieve information from the transaction table and not from the base table. Therefor if transaction data is dependent on base table and base table data is deleted, then relevant data is not displayed in FYI notifications.<br><br>**Note:** If you set this parameter, it is recommended that you schedule the Complete Defunct Workflow process to run with "AC" (Approval Complete ) status to delete completed transactions. For example, you can delete completed transactions that are about 15 or 20 days earlier than the current date. |
| &pQkFn=Y | Add this parameter to the self-service functions to hide the Effective Date page in the self-service transactions flow.<br><br>For information on how to use this parameter, see: Control the Display of the Effective Date, Review, and Confirmation Pages for Self-Service Transactions, page 7-12 |

| Parameter | Description |
| --- | --- |
| &pBpRv=Y | Add this parameter to the self-service functions to hide the Review page in the self-service transactions flow.<br><br>If this parameter to hide the Review page is set to Y, then for the last page in the relevant process, the 'Last Page in Flow' attribute must be set to Yes using Oracle Workflow Builder. This indicates that the specific page is the last page in the transaction and the Review page is not available. Another Node attribute "Approval Required Flag" must be set for the same last page node to decide whether "Approvals" are required for that functionality or not.<br><br>**Note:** Note that if either &pQkFn or &pBpRv parameter is set to Y, then the Confirmation page is automatically hidden. If you plan to hide the Review page and approvals are required for the function, then it is not possible to view the list of reviewers or track the approval process. Also, any additional functionality available on the Review page such as adding comments, viewing list of approvers, or adding attachments to transactions will not be available.<br><br>For information on how to use this parameter, see: Control the Display of the Effective Date, Review, and Confirmation Pages for Self-Service Transactions, page 7-12 |

# 4

# SSHR and Workflow

## Workflow Overview

Oracle Self-Service Web Applications utilize the capabilities of Oracle Workflow to manage transaction flows. The workflows are embedded within SSHR and control the flow of information between the HR professional, the manager, the employee or worker, and the applicant.

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

SSHR uses workflow processes to combine related functions into a single transaction (for example, to add Special Information Types to Change Assignment or to Personal Information). and to control the transaction flow between the initiating user and other users such as a manager, an HR professional, or an applicant.

You use the Workflow Builder to look at the delivered processes which have been designed to support typical business processes. If necessary, you can configure different versions of the workflow processes to suit your business processes. You link a workflow process to one or more functions using the Form Functions window. When you have linked the workflow process to the function, you can include or hide the function in your user menus.

See: Defining Functions for SSHR, page 3-12

## Setting Up Workflow for SSHR

### How does Oracle Workflow increase the flexibility of SSHR?

In addition to configuring self-service functions and menus, you can also configure the underlying workflow processes on which SSHR functions are based. You can configure the workflow attributes and process flows to suit the particular requirements of your enterprise.

## Can I change the delivered workflow processes for SSHR?

Although Oracle provides a set of workflow processes for SSHR, we recommend that you leave these processes intact and create your own processes if any process changes are required. The Oracle Workflow Builder enables you to copy the delivered processes and modify them to suit your requirements. The delivered workflow processes are within the HRSSA item type. Although you can make changes within this item type, for example, you can create new processes within this item type, the access level security provided by the Workflow Builder ensures that delivered processes are not modified.

## How can I use the Workflow Builder to create new processes?

You can use the Workflow Builder to create new processes by chaining together separate modules. For example, the Manage Employment Events modules can be chained together as required to create a custom workflow process.

## Workflow processes often create redundant transaction information. Are there any cleanup procedures?

Yes. Oracle provides a workflow cleanup process which clears any redundant transaction data from temporary tables. Such data is created if the system crashes, or if a user ID is removed or disabled, for example.

## Does Workflow generate automatic notifications?

Yes. When Oracle Workflow executes specific events, it generates workflow notifications for specified users, or roles. For example, a manager may receive notification of a training enrollment or salary increase, where the manager must approve the event. Alternatively, a user may receive a notification purely for information purposes, for example, as confirmation that a change to personal details has been submitted to the database.

# SSHR and Workflows

## Self-Service Workflows

This chapter describes how to use the Workflow Builder to review the delivered process flows and to configure alternative flows if desired.

For more information on the Workflow Builder, see Overview of Oracle Workflow for Users, *Oracle Workflow Users Guide*

### Approvals Processes

You also use the Workflow Builder to configure your approvals processes. For more information, see: Approvals, page 6-9

**Access Roles and Workflow**

You use access roles to determine whether a user has permission to update and approve self-service transactions. If a function is marked for approval in the Workflow Builder, SSHR submits the transaction to the automated approval process (AME or Dynamic Approvals). The approvers then receive a notification in their Worklist with a link to open the action. The permissions and privileges defined by the access roles determine whether they can edit, change the effective date, or attach supporting documents to these transactions.

For more information on Access Roles, see Access Roles for Self-Service Actions, page 2-10

## Workflow Objects and Item Types

In Oracle Workflow, all processes are associated with an item type. An item type can include one or more processes and related objects, such as item attributes, functions, and messages. Oracle SSHR delivers a number of predefined workflow item types containing workflow processes that you can work with.

- HR (HRSSA)
- HR Self-Service Benefits
- HR Offer Letter (HR_OFFER) (for SSHR 3.4 only)
- HR Standard (HRSTAND) (for SSHR 3.4 only)

Previous versions of this implementation guide advised customers to make their configuration change to a copy of the delivered item type. Workflow processes that have been implemented using this approach will still be supported, however, for new

configurations, you should make your changes to the delivered item type using the approach described below. The new approach utilizes Oracle Workflow's access level features for preserving customizations.

You update the workflow item type in the Workflow Builder.

> **Note:** We recommend that you do not change the item type directly in the database. Instead, download the item type to a .wft file which you then source control. Make the changes to this file and then upload it to the server.
>
> See: Opening and Saving Item Types, *Oracle Workflow Guide*

#### Workflow Access Levels:

The access protection levels ensure that your customizations are preserved during an upgrade. As long as you set your own access level to 100 or (higher) while working on changes, the access protection ensures that when an upgrade takes place, the "read-only" objects are updated and that customizations made to the "customizable" objects are preserved.

You can change objects if your access level is less than or equal to the object's protection level and greater than or equal to the object's customization level.

> **Note:** If you copy workflow objects and change the access level to 100, the copied objects are displayed without a red tag on the icon. The original objects have a red tag. The absence of the red tag indicates that you can customize the objects.

The following table shows typical settings for workflow objects within the HRSSA item type. The customization level of a customizable object is set to the user's access level at the time when the user customized the object.

| | Most Objects (Default) | Customizable Objects (as delivered) | Customizable Objects (after changes) |
|---|---|---|---|
| Protection level | 20 | 1000 | 1000 |
| Lock at this level | Yes | No | No |
| Customization level | 20 | 20 | 100 |
| Preserve customizations | No | Yes | Yes |

## Notifications

Oracle Workflow generates a workflow notification for a user when the Workflow Engine executes a specific activity within a workflow process. For example, workflow may generate a notification for a manager if a direct report requests leave or enrolls on a training course. This notification may be for information purposes only or may require that the recipient perform an activity, for example, approve a transaction.

For more information on workflow notifications, see: Overview of Notification Handling, *Oracle Workflow User's Guide*.

All the required information appears in the notification message, regardless of how the user receives the information (for example, in an E-mail or using SSHR). The information includes details of the transaction along with personal information and approval information. In addition, changed information is highlighted with a blue dot, enabling you to easily see which information has changed in the self-service transaction. The format and content of the workflow notifications are essentially the same as the Review page.

> **Note:** A self-service user can receive notifications as e-mails by setting the Notification Preferences in the User Preferences web page. To enable E-mail delivery of notifications, the workflow administrator must set up a notification mailer.
>
> For more information, see Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*

From the notification you can select the Printable Page button to display the information in a format suitable for printing. If enabled, you can use the Generate Document link in the Related Applications region to generate a pdf version of the document.

See: Document Management, page 10-16

> **Note:** The Generate Document link is not available from E-mail notifications.

### Accessing Workflow Notifications

SSHR users access their notifications using one of the following methods:

- Using the Workflow User Web Applications responsibility.
- Using the All Actions Awaiting My Attention function from the Manager, Professional, Employee or Worker responsibilities.

- As an E-mail sent to the user's inbox.

  **Note:** The worklist may also contain additional system-generated notifications.

## Personalizing Notifications

You can use the Personalization Framework to configure the notifications to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see:

- Configuring Web Pages, page 5-4
- Adding Instructions to Web Pages, page 5-35

If you personalize your notification regions by selecting the Personalize Page link and setting the scope of the personalization to the appropriate page value, the changes are only applicable to the specific Notification page and E-mail page. If you select a shared region as the personalization scope, the personalizations are replicated in the other pages that use this shared region.

## Notification Messages

The following table provides a list of messages used within workflow notifications.

| Message Name | Workflow Message Name | Workflow Display Name |
|---|---|---|
| HR_TRANSFER_TO_APPRAISEE_MSG | HR_EMBED_APPR_TRANSFER_MSG | Notify Appraisee on Appraisal Transfer |
| HR_APPRAISAL_COM_APPRAISEE_MSG | HR_EMBED_APPRAISEE_MSG | Notify Appraisee of Appraisal Complete (New) |
| HR_APPRAISER_MSG | HR_EMBED_APPRAISER_MSG | Notify Appraiser (New) |
| HR_MAIN_APPRAISER_MSG | HR_EMBED_MAIN_APPRAISER_MSG | Notify Main Appraiser (New) |
| HR_NEW_MAIN_APPRAISER_MSG | HR_EMBED_NEW_MA_MSG | Notify New Main Appraiser (New) |

| Message Name | Workflow Message Name | Workflow Display Name |
|---|---|---|
| HR_APPRAISAL_OTHER_PARTIC_MSG | HR_EMBED_OP_MSG | Notify Other Participant (New) |
| HR_PART_TO_MAIN_APPRAISER_MSG | HR_EMBED_PART_TO_MA_MSG | Notify Main Appraiser on Participation Completion |
| HR_APPRAISAL_REVIEWER_MSG | HR_EMBED_REVIEWER_MSG | Notify Reviewer (New) |
| HR_NOTIFY_PAYROLL_CONTACT_MSG | HR_EMBED_NTF_PAY_CONTACT_MSG | Notify Payroll Contact of Salary Basis Change (Embedded) |
| HR_NOTFY_APPROVER_MSG | HR_EMBED_RN_NTF_APPR_MSG | Notify Approver (Embedded) |
| HR_ON_APPROVAL_NOTIFY_HR_REP | HR_EMBED_ON_APPR_NTFY_HR_REP | On Approval Notify HR Representative (Embedded) |
| HR_V5_RFC_INITIATOR | HR_EMBED_V5_RFC_INITIATOR | Return for correction (Initiator- Embedded) |
| HR_V5_RFC_OTHER | HR_EMBED_V5_RFC_OTHER | Return for correction (Other than Initiator - Embedded |
| HR_TXN_ERROR_MSG | HR_EMBED_TXN_ERROR_MSG | Transaction Error Message (Embedded) |
| HR_NOTIFY_ONSUBMIT_FWD_MSG1 | HR_EMBED_NTF_ONSUBMIT_FWD_MSG1 | Notify Reviewer Onsubmit (Embedded) |
| HR_V5_SFL_INITIATOR | HR_EMBED_SFL_INITIATOR | V5.0 Saved for Later (Initiator - Embedded) |
| HR_V5_SFL_OTHER | HR_EMBED_SFL_OTHER | V5.0 Saved for Later (Other than Initiator - Embedded) |
| HR_CREATOR_COMMAPPLERR_V4_MSG | HR_EMBED_INIT_COMMAPPLERR_MSG | Commit Application Error To Creator V4.0 Embedded |
| HR_CREATOR_COMMSYSERR_V4_MSG | HR_EMBED_INIT_SYSAPPLERR_MSG | Commit System Error To Creator V4.0 Embedded |

| Message Name | Workflow Message Name | Workflow Display Name |
|---|---|---|
| HR_DEPART_COMMAPPLERR_V4_MSG | HR_EMBED_DEPT_COMMAPPLERR_MSG | Commit Application Error To Department V4.0 Embedded |
| HR_DEPART_COMMSYSERR_V4_MSG | HR_EMBED_DEPT_SYSAPPLERR_MSG | Commit System Error To Department V4.0 Embedded |

If required, you could use the Workflow Builder to replace the new message with a custom message.

See: Messages, *Oracle Workflow Developer's Guide*

## Configuring Workflow Objects

### Before you make changes to workflow objects:

1. Open WorkFlow Builder.
2. On the File Menu select Help/About Workflow Builder.
3. Ensure that you are using a version of Workflow Builder that is compatible with the version of Oracle Workflow installed on your server.
4. Set the Access Level to 100.

   See: Workflow Objects and Item Types, page 4-3
5. Deselect the Allow Modifications of Customized Objects check box.
6. Select and display the Human Resources Self-Service Applications item type. Save it to a local file for backup.

   **Note:** We recommend that you maintain source control for the .wft files so that you can track changes to the original objects, move definitions to other database instances using the Workflow Loader, and revert to previous versions if necessary.

### To modify delivered workflow objects:

1. Open WorkFlow Builder.

2. Select and display the Human Resources Self-Service Applications item type or the HR Self-Service Benefits item type.

3. If required, change any configurable item attributes.

   **Note:** Some item attributes can be customized and other objects, such as processes, notifications, messages, and lookup types, are "read-only". You can change the "customizable" attributes directly in the workflow process. In SSHR item types, the only directly configurable objects are item-level attributes (including enterprise e-mail addresses) and dynamic approval levels.

   See: Defining Your Enterprise's Email Addresses, page 4-11

   See: Configuring Approvals with the Workflow Builder, page 6-21

4. If required, create copies of the read-only objects.

   See: Copying Workflow Processes

5. Save your work.

### Copying Workflow Processes

#### To copy a workflow process:

1. Copy the object and rename it.

   For example, you can copy the FYI Notification Process (FYI_NOTIFICATION_PRC) for use with Self-Service Benefits Enrollments. Make sure the new process has the same item type as the original process.

   **Note:** Prefix your copies with a consistent code, for example, a consistent numeral or a four-letter acronym for the company.

2. You may have to copy multiple levels of the process, for example, to make changes to the Basic Details subprocess within the Personal Information process, you would have to copy the overall process (Personal Information) and the subprocesses (Process Basic Details and Process Personal Information).

3. If you have copied (and modified) a subprocess, you will have to insert your copy of the subprocess into your copy of the higher level process in place of the original subprocess.

4. Save your work.

5. Create at least one function to point to the new process.

See: Defining Functions for SSHR, page 3-12

### After applying a patch:

During the application of an SSHR patch, the workflow loader utility ensures that your server has the latest versions of any delivered workflow objects. This upload overwrites any "read-only" objects but preserves any customizations that have been made to "customizable" objects.

If a patch includes new features or bug fixes for delivered objects that you have copied, you need to apply the same changes to your copied objects. Refer to the patch readme file for instructions. You may have to compare your copied object with the original read-only object.

## Configuring Workflow Attribute Values

Workflow attribute values are the values for item types. They are variables that can be set by the application that maintains the item.

You configure workflow attributes in the Workflow Builder.

If you want to modify a predefined process, first make a copy of the process.

See: Self-Service Workflows, page 4-3

### To configure workflow attributes:

1. Open Workflow Builder.
2. If necessary, create a copy of the workflow process you want to modify.
3. Open the Human Resources Self-Service Applications Item Type or the HR Self-Service Benefits Item Type depending on which Item Type you want to modify.

   See: Workflow Objects and Item Types, page 4-3
4. Double-click the process you want to modify. This opens the Process window.
5. Double-click an activity in the Process window to open the Control Properties window.
6. Choose the Node Attributes Tab and select a value name. For information on the attributes that are relevant for each process, see the function-specific documentation.
7. Edit any values defined in a procedure in the Value drop down list.
8. Click OK and save your work.

## Configuring Workflow Error Processes

Every workflow-enabled function has an error process. The process runs when a system error occurs. The process sends a notification and a description to the System Administrator's ID.

### To configure a workflow error process:

1. Edit the workflow error process:
   - HR_STANDARD_ERROR_PRC
2. Change the text of the error message by editing the Self-Service HR System Error Message:
   - HR_SYSTEM_ERROR_MSG
3. Save your work.

## Defining Your Enterprise's Email Addresses

E-mail addresses of key people in your enterprise may be displayed in various pages or error messages throughout SSHR.

You set up the e-mail addresses for your enterprise in the Workflow Builder.

### To change email addresses:

1. Open the Oracle Workflow Builder.
2. Open your configured HR item type (HRSSA).
3. Select Attributes.
4. Select the following attribute and enter the appropriate email address in the Default Value field:
   - HR Department Email ID

     **Note:** You configure the Training Administrator ID (if using Enroll in a Class or Cancel Enrollment) and the Recruitment Supervisor ID (if using Candidate Offers) in the Professional Forms Interface.
5. Save your work.

## Running the Workflow Cleanup Process

The workflow cleanup process enables you to remove workflow processes that are left running if a system crashes or a user ID is disabled or removed. The process cleans up temporary tables by removing redundant transaction information. You can specify which transactions are queried by the process by setting the Transaction Status parameter.

You run the cleanup process by running the concurrent program Complete Defunct HR Workflow Processes from the Submit Request Set window.

Before you run the cleanup process, you must define a request set that runs the Purge Obsolete Workflow Runtime Data (FNDWFPR) concurrent program before the Complete Defunct HR Workflow Resources (HRWFDFCT) concurrent program.

> **Note:** From SSHR 4.1, the Complete Defunct Workflow Processes concurrent process is registered under Oracle Human Resources instead of Oracle Self-Service Web Applications. If you previously scheduled this concurrent process to run when still registered under Oracle Self-Service Web Applications, you must cancel the process and resubmit it using the new Complete Defunct HR Workflow Processes registered under Oracle Human Resources.
>
> See:Concurrent Programs Window, *Oracle E-Business Suite Developer's Guide*
>
> See: Overview of Concurrent Programs and Requests, *Oracle E-Business Suite System Administrator's Guide - Security*

### To run the request set:

1. In the Request Set field, enter the name of your request set.
2. Place your cursor on the Parameters field in the row for the Purge Obsolete Workflow Runtime Data process to open the Parameters window.
3. Select the item type for which you want to remove obsolete workflow runtime data. If you leave the field blank, the process will purge obsolete data for all item types.
4. If applicable, enter an item key.
5. Enter the number of days for which you want to run the process. For example, if you want to purge obsolete data for the last 7 days, enter 7.
6. Select the persistence type of the data to be purged (Temporary or Permanent).
7. Choose OK to close the Parameters window.

8. Place your cursor on the Parameters field in the row for the Complete Defunct HR Workflow Processes process to open the Parameters window.

9. Select the item type to be included in the process.

10. Enter the number of days for which you want to run the process. For example, if you want to run the cleanup process for the last 7 days, enter 7.

11. Select the transaction statuses to be queried in the program. The permitted values for the transaction status parameter are as follows:

***Transaction Status Values***

| Parameter Value | Description |
|---|---|
| ALL | All transaction statuses are queried in the program. |
| C | Transaction returned for correction (in modules with SSHR V4.x and earlier) |
| RO | Transactions returned to approver for correction |
| ROS | Transactions returned to approver for correction and saved for later |
| RI | Transactions returned to initiator for correction |
| RIS | Transactions returned to initiator for correction and saved for later |
| D | Deleted transactions |
| E | Transactions with errors |
| N | Transactions initiated but not submitted for approval |
| S | Transactions saved for later |
| W | Transactions in progress |

12. Choose the Submit button.

# 5

# SSHR Page Layouts

## Page Layout Overview

The OA (Oracle Applications) Personalization Framework, a component of the OA Framework, enables you to modify the appearance and behavior of self-service pages. You can customize your web pages in line with corporate standards and data requirements, and streamline your self-service process flows to reflect working practices.

**Meta Data Services Repository**

The MDS (Meta Data Services) Repository stores the base page definitions for self-service pages and you can create personalizations are which are stored separately from the base page definitions. Your personalizations are preserved during upgrades because upgrades only affect the base page definitions.

For more detailed information on the OA Framework and the OA Personalization Framework, please see the following documentation:

Overview of Oracle Self-Service Web Applications, *Oracle Self-Service Web Applications Implementation Manual*

*Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

For more information on using the Personalization Framework with SSHR, see: Configuring Web Pages, page 5-21.

## Setting Up Page Layouts for SSHR

### How does the Personalization Framework improve the flexibility of self-service functions?

The Personalization Framework enables you to modify the delivered SSHR web pages

to suit the requirements of your enterprise. For example, you can include a company logo on a page or hide/show particular fields. You can also restrict the information displayed to a user and define how information is entered by adding radio buttons, flexfields, lists of values, and read-only fields. You can also configure the sequence of pages and reorder regions and region items to better suit the requirements of your enterprise.

## Can anyone use the Personalization Framework?

For security reasons, not everyone has access to the Personalization Framework functionality. You control access to the Personalization Framework using profile options. If the profile options are set for your user or responsibility, you can access the Personalization Framework.

See: The Personalization Framework, page 5-4.

## How does the Personalization Framework improve security in my enterprise?

The Personalization Framework can control the data that is displayed to a user on a self-service page and can restrict the functions that a user can perform, for example, by defining fields as read-only.

## Can I control approvals?

Yes. You can use SSHR with Oracle Approvals Management (AME) or use standard and dynamic approvals to determine how managers and HR professionals approve self-service transactions.

## Can I use the Personalization Framework to provide instructions to SSHR users?

Yes. You can use the Personalization Framework and Oracle HRMS to create long or short messages for your SSHR users. You can also create field text to assist users when entering data in particular fields. You can replace delivered instructions and messages or add text to items or regions that are delivered without text.

## Can I use the Personalization Framework to configure notifications?

Yes. If your system administrator has enabled the Personalization Framework functionality, you can configure notifications to suit your requirements. You can specify whether notifications are delivered using e-mail or using Oracle Workflow, or use both delivery methods.

## Can I add objects or content to my SSHR pages?

Yes. With OA Framework you can add new items and objects. Available items include flexfields, buttons, tips, and messages.

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

## Can I change the flow of self-service pages?

Yes. You can take advantage of the extensibility functions offered by the OA Framework and change your process logic to suit your business requirements. You can change the sequence of self-service pages and add additional pages and regions if required.

For more information on using the Personalization Framework with SSHR, see: Configuring Page Layouts, page 5-21

# SSHR Personalizations

## The Personalization Framework

Oracle Applications Framework (OAF) technology (which includes the Personalization Framework) enables you to configure web pages for distinct audiences. For example, you can create one set of personalizations for a line manager and one set for an employee. Alternatively, you may personalize a self-service page differently for localizations, organizations, and sites. To enable this flexibility, the OA Framework provides two levels of personalization privileges: *administrator* level and *end-user* level. Administrators can choose to create personalizations at a number of different levels, for example, at the responsibility, site, or function level. These levels are arranged in a hierarchy where lower level personalizations take precedence over higher level personalizations.

See: Personalization Framework Hierarchy, page 5-4

Users can create personalizations for specific regions and items, for example, a user can hide or display particular columns in a table. A user can also personalize a portlet to hide or display particular information. User personalizations are only seen by the creating user.

### Personalization Framework Hierarchy

Configure web pages for different audiences by creating personalizations at different levels. This list shows the available personalization levels (with an example of a typical personalization):

***Administrator Level Personalizations***

| Personalization Level | Example |
|---|---|
| Function | Make certain fields read-only for particular functions. |
| Localization | Rename or hide fields for a particular localization. |
| Site | Define a table format for your site. |
| Organization | Add a corporate logo to all web pages used by your organization. |

| Personalization Level | Example |
|---|---|
| Responsibility | Add display or hide a flexfield for a responsibility. |
| Admin-seeded end user | Create default views for your users. |

***User Level Personalizations***

| Personalization Level | Example |
|---|---|
| Portlet | Personalize the portlet to display news headlines. |
| User | Create personalized views for tables. |

> **Note:** The lower level personalizations, for example, user-level personalizations, take precedence over the higher level personalizations, for example, site-level personalizations.
>
> Not all personalization levels may be available for your self-service application. For example, for iRecruitment, use only site and responsibility levels.

To enable administration-level personalizations, the system administrator sets the personalization profile options for the user in question. The user then logs on to the self-service application and selects a responsibility. If the profile options are set correctly, the user sees the Personalize Region and Personalize Page links on the web page. By clicking on these links, the user can customize the page to the level required.

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

To enable user-level and portlet personalizations, the system administrator defines region items as user-configurable by using the User Personizable attribute in the Personalization Framework. For user and portlet-level personalizations, this attribute generally applies to tables. If a table can be personalized, you can define *views* for the table. For example, you can hide or display columns, filter data, select the number of rows to display, and define searches. You can then select the required view from a drop-down list. You can also define a default view.

## Personalization and Extensibility

Enhanced extensibility functionality enables you to add new functionality and override or extend the delivered business logic. For example, you can add new pages to a functional flow or add new items, such as a field, to a delivered page.

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

## Function-Level Personalizations

Some delivered SSHR functions include function-level customizations which you cannot update or delete. Currently, the following functions include function-level personalizations:

- Change Cost Center, Location and Manager
- Change Cost Center, Terms and Manager
- Change Job
- Change Job and Terms
- Worker Status Change
- Change Worker Status and Terms
- Hire/Applicant Hire/Contingent Worker Placement
- Termination
- Termination with Compensation
- Transfer

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

To personalize one of the above functions, you can either make the personalizations at the site or responsibility level (and override the delivered function-level personalizations) or you can create a copy of the function and make your own personalizations accordingly. However, if you prefer to work with your own custom functions rather than the delivered functions, you should be aware that you will lose any delivered function-level personalizations.

See: Defining Functions for SSHR, page 3-12

See: Function-level Personalizations, page 5-8

## Configurable Profile Options

The following table lists the configurable profile options used with the Personalization Framework.

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| Personalize Self-Service Defn (FND_CUSTOM_OA_DEFINITION) | Site, Responsibility, User | Yes/No | No |
| FND: Personalization Region Link Enabled (FND_PERSONALIZATION_REGION_LINK_ENABLED) | Site, Application, Responsibility, User | Yes/No | No |
| Disable Self-Service Personal (FND_DISABLE_OA_CUSTOMIZATIONS) | Site, Application, User | Yes/No | No |

### Personalize Self-Service Defn

This profile option enables or disables the global Personalize Page link that appears on each self-service web application page. This profile option must be set to enable personalization at the administrator level. When an administrator displays the Page Hierarchy personalization page from the Personalize Page link, the administrator must navigate to the region or item to be personalized by expanding the hierarchy.

### FND: Personalization Region Link Enabled

This profile option enables the Personalize Region link above each region in a SSHR web page. You can set this profile option *in addition to* the Personalize Self-Service Defn profile option. The advantage of setting this profile option is that the Page Hierarchy personalization page focusses on the specific region and the administrator does not have to expand the branches of the hierarchy.

### Disable Self-Service Personal

If this system profile option is set to Yes, the configurations you make will not be applied, regardless of the level at which you make the configurations. Only the original definition of each self-service page will be displayed.

## Function-level Personalizations

Oracle delivers a number of SSHR processes with function-level personalizations. If you copy of one of these processes to create your own version, you lose the function-level personalizations.

The following tables show which personalizations are included in the delivered processes, so you can replicate them if you require. The tables show where the behavior of a region item for a particular process is different than in a standard module. For example, for the Change Job process, the Department item, which is normally displayed in the Assignment page, is hidden. Any region item not included in this table behaves in the default way.

See: The Personalization Framework, page 5-4

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| Change Job (HR_CHANGE_JOB_SS) | Assignment | HRInstruction | |
| | | Department | |
| | | Position | |
| | | Grade | |
| | | People Group | |
| | | Assignment Status | |
| | | Other Assignment Information | |
| | | Statutory Information | |
| | | Payroll | |
| | | Salary Information | |
| | | Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Location | |
| | | Normal End Time | |
| | | Normal Start Time | |
| | | People Group Key Flex | |
| | | Performance Review Period | |
| | | Performance Review Frequency | |
| | | Position Name | |
| | | Salary Basis | |
| | | Salary Review Frequency | |
| | | Salary Review Period | |
| | | Work Hours | |
| | | Additional Information | |
| | | Payroll Name | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| Change Job and Terms (HR_CHANGE_JOB_TERMS_SS) | Assignment | Department<br>Position<br>Grade<br>People Group<br>Assignment Status<br>Other Assignment Information<br>Statutory Information<br>Payroll<br>Salary Information<br>Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Department Name | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Location | |
| | | Normal End Time | |
| | | Normal Start Time | |
| | | People Group Key Flex | |
| | | Performance Review Period | |
| | | Performance Review Frequency | |
| | | Position Name | |
| | | Salary Basis | |
| | | Salary Review Frequency | |
| | | Salary Review Period | |
| | | Work Hours | |
| | | Additional Information | |
| | | Payroll Name | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| Change Cost Center, Location and Manager (HR_CHG_COST_LOC_SUP_SS) | Assignment | HRInstruction<br>Job<br>Position<br>Grade<br>People Group<br>Assignment Status<br>Other Assignment Information<br>Statutory Information<br>Payroll<br>Salary Information<br>Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Job Title | |
| | | Location | |
| | | Employee is a Manager | |
| | | Normal End Time | |
| | | People Group Key Flex | |
| | | Performance Review Period | |
| | | Performance Review Frequency | |
| | | Position Name | |
| | | Salary Basis | |
| | | Salary Review Frequency | |
| | | Salary Review Period | |
| | | Work Hours | |
| | | Additional Information | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | | Payroll Name | |
| Change Cost Center, Terms and Manager (HR_CHG_COST_TRM_LOC_SUP_SS) | Assignment | Job | |
| | | Position | |
| | | Grade | |
| | | People Group | |
| | | Assignment Status | |
| | | Other Assignment Information | |
| | | Statutory Information | |
| | | Payroll | |
| | | Salary Information | |
| | | Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Job Title | |
| | | Location | |
| | | Employee is a Manager | |
| | | Normal End Time | |
| | | Normal Start Time | |
| | | People Group Key Flex | |
| | | Performance Review Period | |
| | | Performance Review Frequency | |
| | | Position Name | |
| | | Salary Basis | |
| | | Salary Review Frequency | |
| | | Salary Review Period | |
| | | Work Hours | |
| | | Additional | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | | Information | |
| | | Payroll Name | |
| Employee Status Change (HR_EMP_STATUS_CHANGE_SS) | Assignment | Position | |
| | | Grade | |
| | | Assignment Status | |
| | | Other Assignment Information | |
| | | Statutory Information | |
| | | Payroll | |
| | | Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Location | |
| | | Normal Start Time | |
| | | Normal End Time | |
| | | Position Name | |
| | | Work Hours | |
| | | Additional Information | |
| | | Payroll Name | |
| Change Worker Status and Terms (HR_EMP_TERMS_CHANGE_SS) | Assignment | Position | |
| | | Grade | |
| | | Other Assignment Information | |
| | | Statutory Information | |
| | | Payroll | |
| | | Salary Information | |
| | | Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Location | |
| | | Normal End Time | |
| | | Normal Start Time | |
| | | People Group Key Flex | |
| | | Position Name | |
| | | Work Hours | |
| | | Additional Information | |
| | | Payroll Name | |
| Transfer (HR_EMP_TRANSFER_SS) | Assignment | Position | |
| | | Grade | |
| | | Other Assignment Information | |
| | | Statutory Information | |
| | | Payroll | |
| | | Salary Information | |
| | | Location | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Employment Category | |
| | | Establishment Name | |
| | | Frequency | |
| | | Grade Name | |
| | | Location | |
| | | Normal End Time | |
| | | Normal Start Time | |
| | | Performance Review Period | |
| | | Performance Review Frequency | |
| | | Position Name | |
| | | Salary Basis | |
| | | Salary Review Frequency | |
| | | Salary Review Period | |
| | | Work Hours | |
| | | Additional Information | |
| | | Payroll Name | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| Termination with Compensation (HR_TERMINATION_COMP_SS) | SSHR Process People | PerInfo Header | |
| | | Assignment Selection | |
| Termination (HR_TERMINATION_SS) | SSHR Process People | PerInfo Header | |
| | | Assignment Selection | |
| Hire (HR_NEW_HIRE_SS) | Assignment | Position | |
| | | Grade | |
| | | Assignment Status | |
| | Assignment Review | Change Reason | |
| | | Assignment Flex | |
| | | Assignment Status | |
| | | Ceiling Point | |
| | | Ceiling Step | |
| | | Employee Category | |
| | | Establishment Name | |
| | | Grade Name | |
| | | Position Name | |
| | Basic Details Review | Effective Date | Hire Date |
| | | Employee Number | Gender |
| | | Disability Code | Person Type |
| | | Full Name | Hire Date |
| | | Effective Date | Gender |
| | | Full Name | |
| | Employment Type | Date of Last Change | |
| | Main Address Update | Effective Date | |

| Function Name | Region Name | Hidden Region Items | Displayed Region Items |
|---|---|---|---|
| | Main Address Review | Effective Date | |
| | Other Assignment Information | Assignment Flex<br>Employee Category | |
| | Other Employment Information | Configurable Pay Info | |
| | PayRate Misc Fields Table | Changed On<br>Last Pay Change | |

## Configuring Web Pages

The Oracle Applications Framework functionality enables you to personalize and extend the predefined web pages and web page regions to suit your business requirements. For example, you can hide or display particular fields or arrange fields or pages in a more appropriate sequence. Alternatively, you can add instruction text to your web pages or to add a company logo. You can carry out all these configuration activities using the Personalization Framework.

> **Note:** You cannot hide fields from display if they are mandatory or required for user input.

For overview information, see: The Personalization Framework, page 5-4.

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

1. Make sure that you are using a responsibility with administration-level personalization access.

   See: The Personalization Framework, page 5-4

2. Navigate to the web page you want to configure.

3. Click the Personalize Page link for the web page or the Personalize Region link for a specific region.

   The Choose Personalization Context page appears, displaying the following personalization levels:

**Note:** If applicable, you can populate these fields with the values for you (as the person logged on) by clicking on the Set to My ... button.

- Scope

  This is the name of the region or page that you are personalizing. You can switch to a different region within the page by selecting a value from the list.

- Function
- Location
- Organization
- Responsibility
- Site

  **Note:** When you define the personalization context, you should take care to consider the personalization hierarchy. For example, if you personalize a function and only enter a value in the Function field, the personalizations are also applicable if the function is used elsewhere, for example, with other responsibilities. If you only select a value in the Responsibility field, the personalizations are only applicable to that responsibility.

  See: Personalization Framework Hierarchy, page 5-4

  Similarly, you should take care when selecting the Scope. If you select the page as the scope and navigate to the required region on the following page, the personalizations only apply to the region in that particular page. However, if you select a shared region in the Scope field, the personalizations are replicated wherever the region appears throughout the application.

4. Click Apply to continue to the next page.

   The Personalize Page or Personalization Region page appears.

   **Making Your Personalization Changes**

5. The page or region contains a hierarchy (Personalization Structure). If you are personalizing a page, the hierarchy contains all nodes for the page. If you are personalizing a region, the hierarchy contains the region and any subregions. Expand the hierarchy to display the required region.

**Tip:** If required, you can search for particular styles or items within the page or region by expanding the Search region.

6. The Personalization Structure table contains links to the personalization functions. Although the content of this table may vary according to the type of element you have selected for personalization, common functions include:

   - Personalize

     Click on this icon to display the Personalization Properties.

     See: Personalization Properties, page 5-23

   - Reorder

     You can change the sequence of regions in a page or items in a region.

     See: Reorder Contents Page, page 5-25.

   - Add Content

     You can add predefined content regions to a selected region.

     See: Add Content Page, page 5-25.

   - Create Item

     You can add items to a selected region.

     **Note:** You can only add an item at the Site, Localization, or Function levels.

     See: Create Item Page, page 5-25

   - Update Item

     You can update the properties for an item created using the Create Item function.

   - Delete Item

     You can delete an item from a page or region.

   Select the required function.

   **Personalization Properties Page**

7. If you select the Personalize icon, the Personalization Properties page appears. The properties and functions available vary according to the type of page element you have selected for personalization.

See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

The personalization properties are arranged in a table. The columns have the following significance:

- Original Definition

  This shows the base definition as stored in the MDS (Meta Data Services) Repository.

- Columns for personalizations

  The columns displayed depend on the personalization levels you selected for the personalization context. They are displayed in order of precedence (lowest to highest). You can enter a value for each of the available personalization levels. If a field does not contain a personalization, it has the value Inherit. In this case, the field inherits its value from the corresponding field in the preceding column. For example, if you enter the prompt Employee Name for a page element at the function level, you can ensure that the same prompt is used for all subsequent personalization levels by selecting the Inherit value for these levels.

- Result/Source

  This column displays the final personalization.

The rows displayed in the Personalization Properties table also vary according to the page element selected for personalization. The rows relate to the attributes that you can personalize for your page element. Common attributes include:

- Prompt

  Enter a prompt for the page element.

- Rendered

  This attribute determines whether a page element is hidden (False) or displayed (True).

- User Personalization

  This attribute determines whether the page element can be personalized by a user (not an administration-level user).

  **Note:** You can clear your personalizations for a particular level by selecting a level in the Clear Personalization field.

8. To submit your personalizations, click the Apply button.

**Reorder Contents Page**

9. To reorder the items on a page, click on the Reorder icon.

   The Reorder Contents page appears. This page contains a reorder region for each personalization level and also displays the base definition.

10. Select the personalization level at which you want to reorder the items on the page. If you do not reorder the items for a specific level, the level inherits the order from the personalization level above it.

11. Use the arrows at the side of the reorder region to region the page items.

12. To submit your personalizations, click the Apply button.

**Add Content Page**

13. To add a content region to a page, click on the Add Content icon.

    The Add Content page appears.

14. Select a predefined content region to add to the page.

    **Note:** You can only add a content region to a boxed layout region that contains only content regions.

15. To submit your personalizations, click the Apply button.

**Create Item Page**

16. To create a new item for your page or region, click on the Create Item icon. To update the properties for an item that you have created using the Create Item page, click on the Update Item icon.

    The Create Item page appears.

17. Select the item type to be created or updated. For example, you can select flexfield, button, or tip.

18. Enter the ID for the new item. This ID should not exceed 30 characters.

    **Note:** The properties displayed for the new item depend on the type of item you are creating.

    See: *Oracle Application Framework Documentation Resources*(My Oracle Support Note # 391554.1)

19. To submit your personalizations, click the Apply button.

## Configuring Page Headers

Self-service pages often include a header region which provides summary information for the user. Manager self-service pages, for example, usually include headers to provide information such as the employee (or worker) name, employee number, job, and department for the person on whom they are carrying out a transaction.

In SSHR there are two header regions: Person Header and Assignment Header. Each header region contains several fields although some fields are delivered as hidden. In other words, the Rendered attribute for the field is set to False. To display these fields, use the Personalization Framework.

**Name Format Personalizations**

The Header regions display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

**Configurable Flexfields**

The following tables show which flexfields are included in the Person and Assignment Headers:

> **Note:** US Federal HR does not include these flexfields in the Person and Assignment headers.

***Person Header***

| Flexfield Name | Flexfield Code |
|---|---|
| Further Person Information | Person Developer DF |
| Additional Personal Details Flex | PER_PEOPLE |

***Assignment Header***

| Flexfield Name | Flexfield Code |
|---|---|
| Add'l Salary Admin Details | PER_PAY_PROPOSALS |
| Additional Assignment Details | PER_ASSIGNMENTS |

### Personalizing Page Headers:

1. Navigate to the page or header region that you want to personalize and choose the appropriate link (Personalize Region or Personalize Page).

2. In the Choose Personalization Context page, select one of the following values in the Scope field:

   - /oracle/apps/per/selfservice/common/webui/SummaryContainerRN

     to personalize the top-level header region containing the Person and Assignment headers

   - /oracle/apps/per/selfservice/common/webui/PersonSummaryRN

     to personalize the Person header

   - /oracle/apps/per/selfservice/common/webui//AsgSummaryRN

     to personalize the Assignment header

3. Make your personalizations.

   See: Configuring Web Pages, page 5-21

   **Caution:** Be aware that if you personalize the header regions, the changes are reflected throughout the application. In other words, if you personalize the Person header to hide the Contingent Worker Name field, this field will not appear on the Person header regions throughout SSHR.

4. Choose Apply to submit your changes.

## Configuring Flexfields

Flexfields are user-defined data structures which are provided with many of the applications database tables. Key flexfields are used to uniquely identify a record. Descriptive flexfields add attributes to an existing object. Each flexfield can consist of multiple flexfield segments, each with its own validation rules.

See: Overview of Flexfield Concepts, *Oracle Applied Technology Guide*

If the self-service function you are using has flexfields enabled, you can access them using the Personalization Framework. The flexfields are not automatically displayed so you can choose to hide or display the flexfields using the Personalization Framework. However, not all self-service functions use flexfields. For a list of the available flexfields for each self-service function, please see the corresponding functional description in this Implementation Guide.

**Note:** It may be the case that flexfields available in the Professional Forms Interface are not available in SSHR.

You can also add flexfields to regions of your web pages using the Personalization Framework.

### To modify the flexfields displayed in a region:

1. Select the region.
2. Configure the region by choosing the Personalize Region link.

   #### To personalize existing flexfields

   1. Expand the hierarchy structure and click Personalize to open the Personalization Properties page.
   2. To hide or display a flexfield, change the value in the Render column to True (to display the flexfield) or False (to hide the flexfield).
   3. To display all flexfield segments, leave the Flex Segment List field blank. To display only selected segments, enter the segments in the Flex Segment List using the following format:

      **context1|segment1|segment||context2|segment 1**

      For example,

      Global Data Element|New Employer|Address||US|Zip Code

   4. Click Save to submit your changes.

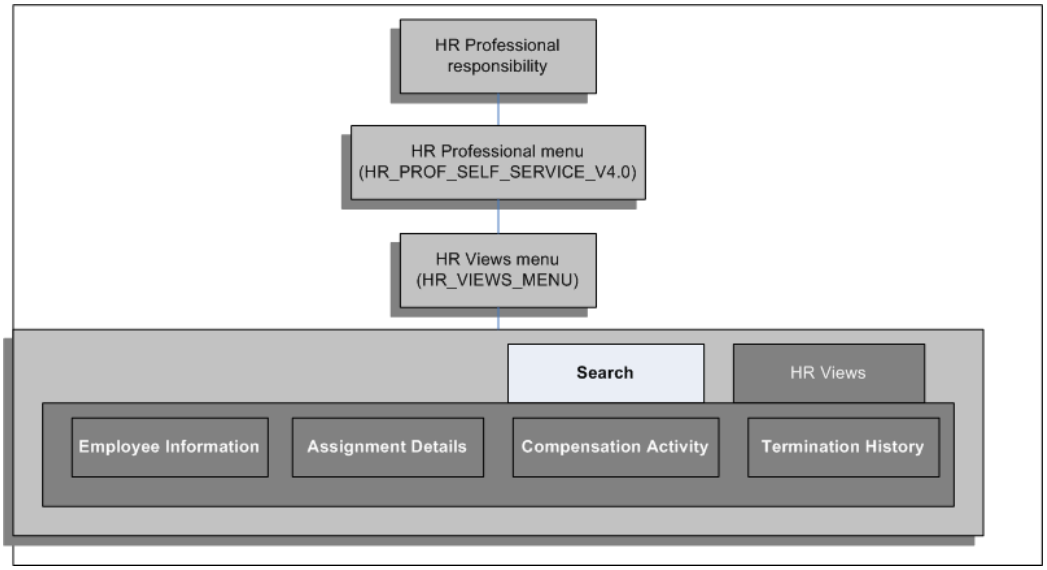
3. Choose Apply to save your personalizations.

## Configuring Tabbed Regions

Tabbed regions appear on several SSHR web pages; for example, the Benefits Self Service page includes the Benefits Enrollments and Current Benefits tabs. The self-service Views functions also use tabbed regions and buttons to enable the user to switch between the different views.

The structure of the tabbed regions is defined by a series of menus and submenus. The graphic illustrates a typical example of a tabbed region in SSHR. In this example, the user selects the HR Professional responsibility which calls the HR Professional menu. The HR Professional menu contains the HR Views menu which, in turn, calls the HR Views submenu and the Search function. The Search function and HR Views submenu form the tabs displayed on the self-service page. The functions attached to the HR Views submenu become the buttons displayed under the HR Views tab.

***Tabbed Regions in SSHR***




The following menus contain tabbed regions:

***Menu Structure for Tabbed Regions***

| Top Level Menu | Submenu/Function | Function | Function |
|---|---|---|---|
| HR Professional (HR_PROF_SELF_SERVICE_V4.0) | HR Views (HR_VIEWS_MENU) | Search function | |
| | | HR Views submenu (HR_VIEWS) | View Employee Information Details |
| | | | View Employee Compensation Activity |
| | | | View Employee Termination History |
| | | | View Employee/Personal Information |
| | Search function | | |

| Top Level Menu | Submenu/Function | Function | Function |
|---|---|---|---|
| Benefits Self-Service (BEN_SELF_SERVICE_BENEFITS | Benefit Enrollments function | | |
| | Current Benefits function | | |
| My Employee Information Functions Menu (HR_MGR_VIEWS_FUNC_MENU) | Simple Search | | |
| | Advanced Search | | |
| | My List | | |
| | My Employee Information | | |
| | Person Details | | |
| | My Employee Information Views Sub Tab Menu (HR_MGR_VIEWS_SUB_TABS) | | |
| | | Employment | |
| | | Salary | |
| | | Performance | |
| | | Training | |
| | | Absence | |
| | | Job Applications | |
| | | Effort Distribution | |

| Top Level Menu | Submenu/Function | Function | Function |
|---|---|---|---|
| | | Contracts | |
| | My Information Functions Menu (HR_EMP_VIEWS_FUNC_MENU) | | |
| | | My Information | |
| | | My Information Views Sub Tab Menu (HR_EMP_VIEWS_SUB_TABS) | |
| | | | Employment |
| | | | Salary |
| | | | Performance |
| | | | Training |
| | | | Absence |
| | | | Job Applications |
| | | | Effort Distribution |
| | | | Contracts |
| | | Salary Details | |
| | Salary Details | | |

***Menu Structure for US Federal HR Tabbed Regions***

| Top Level Menu | Sub menu | Sub Tab | Function |
|---|---|---|---|
| Federal HR Self Service (GHR_HR_MANAGER_ACCESS) | Employee Information (GHR_HR_VIEWS_FUNC_MENU) | Employee Information (GHR_HR_VIEWS_SUB_TABS) | Employment |
| | | | Position |
| | | | Personal |
| | | | Obligation Dates |
| | | | Salary |
| | | | Benefits |
| | | | Awards and Bonuses |
| | | | Performance |
| | | | Personnel Action |
| | | | Training |
| | | | Absence |
| | | | Job Application |
| Federal Manager Self Service (GHR_LINE_MANAGER_ACCESS) | My Employee Information (GHR_MGR_VIEWS_FUNC_MENU) | My Employee Information (GHR_MGR_VIEWS_SUB_TABS) | Employment |
| | | | Position |
| | | | Personal |
| | | | Salary |
| | | | Awards and Bonuses |

| Top Level Menu | Sub menu | Sub Tab | Function |
|---|---|---|---|
| | | | Performance |
| | | | Personnel Action |
| | | | Training |
| | | | Absence |
| | | | Job Application |
| Federal Employee Self Service (GHR_EMPLOYEE_DIRECT_ACCESS) | My Information (GHR_EMP_VIEWS_FUNC_MENU) | My Information (GHR_EMP_VIEWS_SUB_TABS) | Employment |
| | | | Position |
| | | | Personal |
| | | | Salary |
| | | | Benefits |
| | | | Awards and Bonuses |
| | | | Performance |
| | | | Personnel Action |
| | | | Training |
| | | | Absence |
| | | | Job Application |

See also: Setting Up Self-Service Benefits Web Pages, *Oracle HRMS Compensation and Benefits Management Guide*

You can determine which responsibilities can view information by hiding the tabbed region (function exclusion):

- At the responsibility level for a specific responsibility

- At the menu level for all responsibilities

## To configure tabbed regions:

**To exclude a tabbed region for all responsibilities at the menu level:**

Set a function exclusion at the menu level:

1. In the Menus window, query the self-service manager menu, such as HR_VIEWS_SUB_TABS.
2. Locate the row for the prompt and function associated with the tabbed region, such as Training.
3. Click the Grant check box to deselect the tabbed region for all responsibilities that use this menu.
4. Save your work.

**To exclude a tabbed region from one responsibility:**

Set a function exclusion at the responsibility level:

1. In the Responsibility window, query the self-service manager responsibility.
2. In the Menu Exclusions tabbed region, create an exclusion with the type Function.
3. Select the function you wish to exclude in the Name column. See Menu Structure for Tabbed Regions, page 5-29.
4. Save your work.

**To rename the tabbed regions:**

1. In the Menu window, query either the menu representing the tabbed region or the menu containing the functions that represent the buttons.
2. Change the name of the tabbed region or button by changing the value in the Prompt field of the Menus window.

> **Note:** If you change the prompt, the change will be visible for all responsibilities or menus calling that menu or submenu. If you want to use different names for the tabbed regions and buttons for different responsibilities, you must create additional versions of the menu or submenu.
>
> See: Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Save your work.

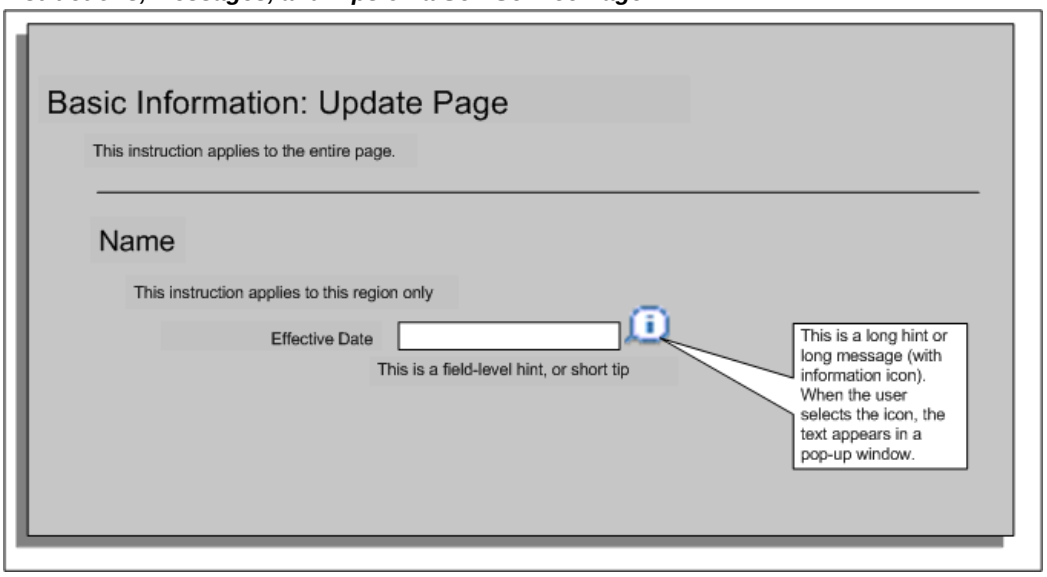
## Adding Instructions to Web Pages

You can change the predefined instructions, messages, and tips attached to your web pages to provide relevant information for your users. You can replace delivered texts or create new texts for regions or item delivered without a text attached, using one of three formats:

- Instructions. These texts appear at the top of a region and generally give advice applicable to the whole region or page.
- Long messages. These texts are attached to a field. When the user clicks the Information icon next to a field, the message opens in a separate window.
- Short tips. These texts are also attached to a field, however, they are displayed underneath the field in blue.

The graphic below illustrates examples of the different types of text:

***Instructions, Messages, and Tips on a Self-Service Page***




**Recommended Approach**

Create text items in the Messages window using the forms interface and add them to your region or item using the Personalization Framework.

### To create a text item in the Messages window:

1. Log on to the database using an Application Developer responsibility.

2. Navigate to the Messages window.

3. Enter the name for your text item.

4. Select Note as the message type.

5. Enter the application and the message text. You can enter a long message, short message, or tip text.

6. Save your work.

### To personalize text on a page:

1. Log on to a self-service application using a responsibility that allows configuration.

   **Note:** To enable configuration, the Personalize Self-Service profile option (FND_CUSTOM_OA_DEFINITION) must be set to Yes at an administration level.

2. Click Personalize Region or Personalize Page.

3. Navigate to the self-service page or region in which you want to replace the text.

   Then select one of the following options:

   - To replace an existing text item, page 5-36
   - To add a text item to a new region or page, page 5-37

### To replace an existing text item:

1. When the personalization structure is displayed, drill down to the region or page element containing the text.

2. Locate the text item on the page. The text item will be one of the following items:

   - Static Styled Text: <name> - for instruction text
   - Message Text Input - for short tips and long messages
   - Message Choice - for long messages attached to a list of values

3. Select the Personalize icon for the item.

4. Replace the value in the Message Name field with the text item that you created in the Messages window.

5. Click Apply to save your changes

### To add a text item to a new region:

If you are adding a text item to a region or page that does not contain a text as standard, you need to carry out the following steps:

1. Create an item with one of the following styles:
   - Static Styled Text: <name> - for instruction text
   - Message Text Input - for short tips and long messsages
   - Message Choice - for long messages attached to a list of values

   See: Create Item Page, page 5-25

2. Enter the ID for the item following the standard naming conventions.

   See: *Oracle Applications Framework Personalization Guide*

3. Set the CSS Class to OraInstructionText.
4. Enter the application short name in the Message Appl Short Name field..
5. Enter the name of the message in the Message Name field.
6. In the Tip Type field, select the appropriate format for your text.

   **Note:** If applicable, you can display a date format example next to a date field. In this case, select dateFormat in the Tip Type field. The OA Framework then automatically displays a date example based on the user's date preference.

7. Click Apply to submit your changes.

## Configuring the Global Button Bar

The Global Button Bar comprises the following buttons by default:

- Return to Portal
- Log Off
- Select Preferences
- Email

- Self-Service Help

Selecting a button enables a user to access the button's function.

You can configure the Global Button bar by removing any, or all, of the buttons from a user's web page. You edit the contents of the Global Button bar in the Menus window. When you remove a button from display a user can no longer access the button's functionality. You can also rearrange the order of the buttons or use a button bar that you create.

### To configure a button on the global button bar:

1. Query the following Menu in the Menus window:
   - ICX_GLOBAL_MENU
2. Consider which of the following functions you want your users to access with the Global Button Bar:
   - Return to Portal
   - Log Off
   - Select Preferences
   - Email
   - Self-Service Help
3. Delete the functions you don't want users to access.
4. Save your work.

   See: User's Window, *Oracle E-Business Suite System Administrator's Guide - Security*

### To remove the global button bar display:

1. Navigate to the web page you want to configure.
2. Choose Personalize.
3. Hide the Global Button bar.

   See Oracle Application Framework Documentation Resource, My Oracle Support note 391554.1

## Personalizing Screen Images

Oracle delivers self-service functions with a default Oracle image in the upper left

corner of the page. This image, together with the header text that identifies the function, is known as *branding*.

You can replace the default Oracle image, with your own image if required. Change the default image in one of two ways: overwrite the default image with an image of the same name or replace the default image with one of your own.

Alternatively, you can add an image to a region or page if required.

The standard size of the branding image and text is *small*. However, if required, you can change the size to *regular* or *medium* by changing the FND: Branding Size profile option value. The profile option settings have the following effect:

- Regular

  - the global buttons appear with corresponding icons and links.

- Medium

  - displays global buttons with links and a lower profile product branding image.

- Small

  - results in global buttons with links and low profile product branding text with a small, generic graphic

### To overwrite the default image with your own image:

1. Create an image.
2. Save and name the image:
   - FNDSSCORP.gif (Oracle image)
   - PERBRAND.gif (Human Resources image)
   - IRCBRAND.gif (iRecruitment image)
   - LOGO.gif (log-in image)
3. Place the gif in the $OA_MEDIA/<Language> directory.

   **Note:** If you have a multilingual install, you must also copy this file to the other language locations.

### To replace the default image with your own image:

1. Create a .gif image.
2. Place the gif in the $OA_MEDIA/<Language> directory.

**Note:** If you have a multilingual install, you must also copy this file to the other language locations.

3. Query the web page regions or page for personalization.
4. The Image URL attribute defines which graphic appears on the web pages. Overwrite the attribute name with the name of your image.
5. Save your work.

### To add a image to a page or region:

1. Query the web page regions or page for personalization.
2. Click Create Item.
3. Create an item with the item style Image.

   See: Create Item Page, page 5-25
4. Click Apply to submit your changes.

## Configuring the Effective Date Prompts

The effective date prompt appears at the top of most self-service web pages and indicates whether the current transaction is effective as of a specific date or whether the transaction is effective on approval.

The two prompts are as follows:

- Effective Date:

  Appears if you specify an effective date on the Effective Date Options page.

- Effective as of Approval Date

  Appears if you specify on the Effective Date Options page that changes should take effect as soon as approval takes place.

There are two different procedures for configuring these prompts:

### To configure the Effective Date prompt:

You configure the Effective Date prompt in the Messages window.

1. In the Messages window, query the following message:

   HR_EFFECTIVE_DATE_PROMPT

The message body appears in the lower half of the screen.

2. Change the text of the message as required. For more information on creating messages, see: Messages Window, *Oracle E-Business Suite Developer's Guide*

   Adding Instructions to Web Pages, page 5-35

3. Save your work.

When you next log on to SSHR to carry out a transaction, your new effective date prompt appears.

### To configure the Effective as of Approval prompt:

1. Click either Personalize Page or Personalize Region.

2. Select the Personalization Context.

   For more information, see: Configuring Web Pages, page 5-21.

3. Navigate through the personalization hierarchy to the element Message Styled Text: <*prompt text*> and click Personalize.

4. To change the text for the prompt, enter the required text in the appropriate personalization level field in the Prompt row. For example, to change the text for all selected personalization levels, enter a new text in the first personalization level column, and select the Inherit value for any other personalization levels.

5. Apply the changes and return to the application.

# 6

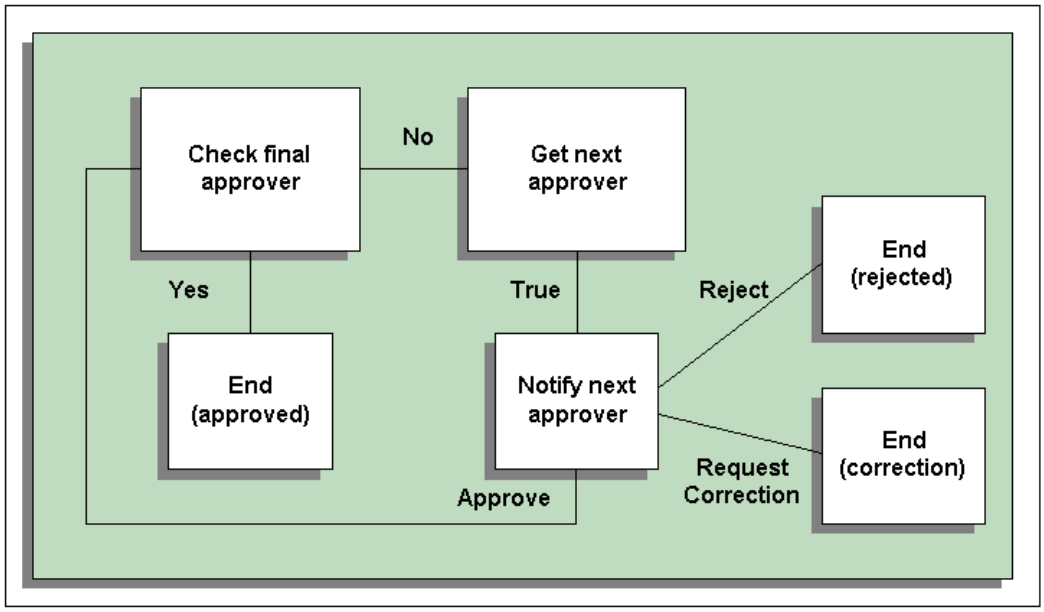
# Approvals

## Approvals Overview

When you define your SSHR functions, you can decide whether they require approval before they are submitted to the HR tables. You can define different approval requirements for different transactions and vary the approval requirements as required. For example, you can configure the workflow processes so that the Address part of Personal Information requires approval but the Phone Numbers part does not. Alternatively, you can vary the Approvals requirements by responsibility so that records changed by employees would need approval but records changed by managers would not.

All approvals mechanisms used in SSHR follow a basic approval loop. The logic checks whether the current approver is the final approver in the hierarchy. If the current approver is not the final approver, the application fetches the next approver who then receives the approval notification. The next approver can either reject the transaction, approve the transaction, reassign the transaction, or send the transaction for correction to anyone in the approvals chain. The approver may also be able to update the transaction, depending on the system configuration.

*The Basic Approvals Loop*




Within the approvals process, the application uses rules to generate a list of approvers for the SSHR transaction. The way in which the list is generated depends on the approvals mechanism you are using (see Approvals in SSHR).

The application uses dynamic approvals by default. The dynamic approvals functionality comprises:

- A self-service user interface which enables the initiating manager to add additional approvers an notification recipients, display the approvers list, and limit the number of approval levels.
- An application which generates the default approvers. The standard tool is Oracle Approvals Management (AME). Alternatively, you can use the customizable PL/SQL packages.

The dynamic approval workflow processes send notifications to approvers and notification recipients identified in the approver list.

## Parallel Approval Process for Oracle SSHR Transactions

To simultaneously notify multiple approvers of Oracle SSHR transactions, you can set up the parallel approval process. You use Oracle Approvals Management (AME) components to set up the parallel approval process.

See: Using the Parallel Approval Process in Oracle SSHR, page 6-11

## Features of Approvals in SSHR

### Does SSHR provide a secure approvals tool?

Yes. Oracle SSHR can use dynamic approvals with Oracle Approvals Management (AME) or with a PL/SQL package to provide a secure approvals environment.

### Why does SSHR use both customizable PL/SQL packages and AME for approvals?

Up until SSHR 4.1, customizable PL/SQL packages were used to define approvals in SSHR. From SSHR 4.1, however, the delivered functions used Oracle Approvals Management (AME) as standard. You can choose to use dynamic approvals instead of AME by configuring your self-service functions accordingly, however, Oracle recommends that you use AME for all your approvals as other approval types may not be supported in future releases.

### What is the advantage of using Oracle Approvals Management?

Oracle Approvals Management enables you to define business rules to control your approvals processes. You can define conditions, rules, and attributes to define an approvals process to meet the requirements of your enterprise. For example, you could create an approvals process in which approval from a particular user is only required if a salary raise is above a set amount. Alternatively, you could set up an approvals process for a particular business process.

### Can the approvals chain be configured to meet my requirements?

Yes. You can configure your approvals processes to include specific approvers or managers. You can also specify that particular users should receive notification of the approval. If you are using Dynamic Approvals, you can still configure your processes using the Workflow Builder.

### Do I need a separate license to use Oracle Approvals Management?

No. Oracle Approvals Management is included if you purchase any application license.

# Approvals

## Approvals in SSHR

The Approvals interface for SSHR functions differs according to the type of approvals you have implemented. From release 4.1, SSHR uses Oracle Approvals Management (AME) to define and manage approval logic for all delivered SSHR functions. You can also use AME with all custom functions that use SSHR version 4 and above.

See: Implementing Oracle Approvals Management (AME), page 6-17

Oracle recommends that you use Oracle Approvals Management (AME) for all SSHR functions, however, all of the following alternatives are available:

- **Dynamic approvals with Oracle Approvals Management (AME)**

  This interface allows you to add approvers to the approvals chain and specify their position in the approvals chain. You can choose whether the approver receives a For Your Information (FYI) notification or whether the approver must approve or reject the transaction. In addition, you can choose the type of approver. You can add the following approver types to the approval chain:

  - Person

    Add a person, for example, John White.

  - User

    Add a user, for example, JWHITE.

  - Position

    Add a position, for example, Senior Manager - Accounts.

    > **Note:** If you select a position, each person with that position has access to the notification. When the first person holding that position approves or rejects the notification, AME processes the notification by either forwarding the approved notification to the next person in the approval chain, or by returning the rejected notification to the initiator.

  When you have selected an approver, you can specify their position in the approvals chain (the insertion point). You can:

  - Select an existing approver as the insertion point.

    You insert the new approver either before or after an existing approver in the list.

- Append the new approver to the list.

  You add the new approver to the end of the approval list or specify whether the new approver is the First or Last Post Approver.

  > **Note:** You can also select an order number as the insertion point, for example, Order: 3. In this case, the new approver is always be third in the approvers list.

For more information on AME, see: *Oracle Approvals Management Implementation Guide*

- **Dynamic approvals without AME**

  This interface comprises the Approvals and Notification Recipient sections, however, the list-modification functionality is less comprehensive than that provided by AME. The manager initiating the SSHR transaction can add additional approvers to the approval chain and nominate additional notification recipients (reviewers). The application sends notifications to these persons on submission or on approval.

  See: Customizing Approvals Using PL/SQL, page 6-15

- **Standardapprovals**

  You can disable the insert approvers and add notification recipients functionality and use standard approvals by configuring the Review activity for the workflow process. Oracle does not recommend this approach.

  See: Review and Confirm, page 10-13

  In this case, no configuration options are available, and the approvers list is as defined by the PL/SQL code. You cannot add approvers to or remove approvers from the approvers list.

## Oracle Approvals Management (AME) Configuration

Oracle Approvals Management (AME) is a web-based application that is integrated with Oracle Workflow and enables you to define business rules to control your approvals processes.

With AME, you use the following components to define your approvals processes. They are associated with a transaction type for a particular application.

- Attribute - this is a business variable, for example, a salary amount, user ID, or workflow process name.

  See: Standard AME Attributes for SSHR, page 6-6

- Condition - a condition compares an attribute value with a set of allowed attribute values. For example, a condition could look at a salary amount. If the salary is greater than a specified value, a particular approver list is created.

- Approval type and approval specifications - these components define the type of approver list that is generated. For example, to generate a supervisor-based approver list with 5 levels, you use the 'supervisory level' approval type with the 'requires approval up to the first 5 approvers' approval specification.

- Rules - a rule links the other components together by associating one or more conditions with the approval type and approval rule.

For more information on the components used in AME, see: *Oracle Approvals Management Implementation Guide*

## Default Use of AME Configuration in SSHR

Oracle SSHR delivers an AME configuration that emulates functionality delivered in the PL/SQL package. This configuration delivers a supervisor-based approvals hierarchy using AME rules.

The default AME configuration consists of:

- a single AME transaction type 'SSHRMS' with

- the following conditions:
  - WORKFLOW_PROCESS_NAME
  - MID_PAY_PERIOD_CHG

- the following rules:
  - SSHR rule for at most 10 Approvers in supervisor chain

    Requires approvals to the top of the approval hierarchy or to 10 levels above the initiator, whichever comes first

  - SSHR Payroll Contact inclusion rule

    Requires pre-approval from payroll contact if the transaction results in a mid-period pay change

## Standard AME Attributes for SSHR

Oracle SSHR provides the following AME attributes to help you define your approvals processes:

| Attribute | Description |
|---|---|
| HR_TRANSACTION_CREATION_DATE_SS | Transaction creation date |
| HR_IS_ASSIGNMENT_CHANGE_SS | Includes change to assignment data |
| HR_IS_SUPERVISOR_CHANGE_SS | Includes supervisor change |
| HR_IS_TERMINATION_SS | Includes termination change |
| HR_IS_LEAVE_OF_ABSENCE_SS | Includes absence change |
| HR_TERMINATION_REASON_SS | Termination reason |
| HR_LENGTH_OF_SERVICE_IN_YEARS_SS | Length of service (years) |
| HR_PROPOSED_JOB_ID_SS | ID of proposed job |
| HR_PROPOSED_POSITION_ID_SS | ID of proposed position |
| HR_PROPOSED_GRADE_ID_SS | ID of proposed grade |
| HR_PROPOSED_LOCATION_ID_SS | ID of proposed location |
| HR_PROPOSED_PAYROLL_ID_SS | ID of proposed payroll |
| HR_ASSIGNMENT_CHANGE_REASON_SS | Proposed assignment change reason |
| HR_ASSIGNMENT_CATEGORY_SS | ID of proposed assignment category |
| HR_APPRAISAL_TYPE_SS | Appraisal type |
| HR_SELECTED_PERSON_ID_SS | ID of selected person |
| HR_PAY_BASIS_ID_SS | ID of payroll basis |
| HR_SELECTED_PERSON_PROPOSED_SUP_ID_SS | ID of proposed supervisor |
| HR_IS_PERSON_BASIC_DETAILS_CHANGE_SS | Includes change to basic details |

| Attribute | Description |
|---|---|
| HR_IS_SELECTED_PERSON_ADDRESS_CHANGE_SS | Includes address change |
| HR_IS_SELECTED_PERSON_CONTACT_CHANGE_SS | Includes contact change |
| HR_IS_RELEASE_INFORMATION_SS | Includes change to release information |
| WORKFLOW_PROCESS_NAME | Workflow process name |
| CURRENT_ASSIGNMENT_ID | ID of current assignment |
| CURRENT_EFFECTIVE_DATE | Current effective date |
| HR_PROPOSED_SALARY_BASIS_SS | Proposed salary basis |
| HR_ABSENCE_TYPE_ID_SS | ID of absence type |
| HR_IS_MID_PAY_PERIOD_SS | Includes mid-period change to pay |

For more information on using attributes, see: *Oracle Approvals Management Implementation Guide*.

## Configuring SSHR Approval Levels in AME

To meet your business needs, you may add additional rules, conditions, or attributes within the delivered SSHRMS transaction type, or you can define a custom transaction type.

For more information on configuring AME rules, conditions, and attributes, see: *Oracle Approvals Management Implementation Guide*

It is relatively easy to make minor changes to the delivered AME configuration and some examples are provided below.

To define a different approval level for all SSHR workflow processes:

- For example, to specify two approval levels: The approval level is currently defined in the rule 'SSHR Rule for at most 10 approvers in Supervisor chain'. You would edit this default rule and change the approval level for the supervisory level approval type to 'requires approval up to the first two superiors at most'.

To define a different approval level for a specific workflow process:

- First you create a new condition with the attribute WORKFLOW_PROCESS_NAME and enter the workflow processes which will have the different approval level as the attribute values.

- Then you create a new rule, for example, '2 approvers in supervisor chain'.
    - Use the 'supervisory level' approval type with the 'requires approval up to the first two superiors at most' approval
    - Finally, attach your new condition to the rule.

To define a new approval level (if the delivered approvals do not meet your requirements):

1. You create a new approval (for example, 'requires approval up to the first 15 superiors at most') in the 'supervisory level' approval type.

To define a particular user as the final approver, or final authority (even if they are not the last person in the approval chain):

- You create a List Modification Condition and specify a user, for example, a manager, as the final approver. You would add this list modification condition to your rules so that the approval chain would stop at this specified approver. Alternatively, you could create a new rule, add the approval type for final approver and add the WORKFLOW_PROCESS_NAME condition so that this final approver rule would apply to selected processes.

For more information on the configuration options offered by AME, see: *Oracle Approvals Management Implementation Guide*

For information about function parameters associated with AME, see Supplied Functions, page 3-16

For descriptions of function parameters, see Menu Function Parameter Descriptions, page 3-34

## Further Approvals Options

### Allow updates of pending transactions

An approver can update an action themselves, or return an action for correction to any recipient on the approval chain. However, the ability to update depends on two configurations:

- The system profile option HR: Allow Approver Updates to Self Service Actions must be set to Yes.

- The recipient must have a workflow role that allows edits.

To update pending transactions, approvers must have a workflow role with the appropriate role type attached to allow them to edit actions. They can then update actions regardless of their position in the approval chain.

There are two supplied role types that control approvers' ability to update pending transactions: SSHR Update Allowed and SSHR Update Not Allowed. These role types should not be used in conjunction with each other; use whichever is simplest.

- SSHR Update Allowed

  If you associate a role with this role type, any approver with that role can update a pending transaction. No one else can perform updates on pending transactions.

- SSHR Update Not Allowed

  If you associate a role with this role type, all approvers with that role are prevented from updating pending transactions; all other approvers can update pending transactions.

Use the Maintain Roles window to associate a role with a role type.

### Route actions to HR representative

You can route actions to an HR representative. The application sends the action to all persons having a role associated with the seeded HR Representative role type. Use the Maintain Roles window to associate a role with this role type.

The first HR representative to process the action does so on behalf of all HR. This is especially useful in situations where the application encounters a future-dated change to a person's record. See Future-Dated Actions in Managing Dates in SSHR, page 3-5.

### Defer Update After Approval

By default, the save of the SSHR transaction to the database is deferred after the final approval. This is to prevent any delay between the final approver clicking the approve button and moving on to the next notification.

The transaction is saved automatically when the Workflow Background Process runs. The system administrator needs to schedule this process to run periodically as needed.

When you run the Workflow Background Process you need to set the following parameters:

- Item Type = HR
- Process Deferred = Yes
- Process Timeout = No
- Process Stuck = No

If you need to modify the default behavior so that transactions are saved immediately

after final approval, set the system profile HR:Defer Update After Approval to No at User/Responsibility/Application/Site level.

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

## Using the Parallel Approval Process in Oracle SSHR

Oracle SSHR provides the ability to route transactions simultaneously to multiple approvers using the parallel approval process. Use Oracle Approvals Management (AME) to set up approval groups for the parallel approval process in Oracle SSHR.

The AME features that Oracle SSHR supports in the parallel approval process are:

- Approver group voting method must be defined as First Responder Wins. All members in the approver group receive the transaction notification. Oracle SSHR considers a transaction as approved if any approver from the approval group first approves the transaction. No further action is required from other group members.
- Parallelization rule is applied only at member level in an approval chain or approval group.

For more information about the parallel approval process in AME, refer to the *Parallel Approval Process* topic in the *Oracle Approvals Management Implementation Guide.*

### How the Parallel Approval Process Works in Oracle SSHR

When a self-service transaction that uses the AME rule with 'First Responder Wins' voting regime is submitted for approval, Oracle SSHR:

- Sends the approval request to all members in the approval group in parallel.
- Enables any member of the approval group to approve, reject, or return the transaction for correction to the transaction initiator.
- Considers a transaction as approved if any one of the approvers approves the transaction as the voting method used is first responder wins.
- Returns the notification to the initiator if any one member of the group returns it for correction.
- Saves changes to the database after the transaction is approved by any one member of the approval group.
- Displays an Action History region in the approval notification of the transaction to enable all members in the approval groups to know the latest status of the transaction. The Action History region displays the name of the approver, the date when a member of the approval group acted on the transaction, and comments if any.

**Note:** The transaction action history information is available in all notifications regardless of whether parallel approval feature is implemented.

If there is more than one level of approval and multiple approval groups are setup for parallel approval, then a member of the next approval group can return the transaction for correction to a member of the previous approval group who approved the transaction. Oracle SSHR routes requests for information notifications either to the initiator of the transaction or to any member of the approval group depending on who submitted the transaction last. As the parallel approval process is based on the first responder wins method, if a request for additional information is pending at any level in the approval process, then another approver from the approval group can either approve or reject the transaction.

**Delegating notifications during the parallel approval process**

If an approver delegates a notification to:

- Another approver in the same approval group, then any member of the approver group apart from the person who delegated the notification can approve or reject the transaction.

- A member in another parallel approval group, then any of the approval group members in that group can delegate the notification to members of that group or other group. Member who receives the notification and other group members can act on the notification.

- A member outside of the approval group, then that member or the person who delegated the notification or approver group members can act on the notification.

**Note:** If approvers use the Transfer Ownership option when reassigning notifications, then the transfer option works in the same way as delegate in case of parallel approvals.

## Setting up the Parallel Approval Process for Oracle SSHR Transactions

To set up the parallel approval process for Oracle SSHR transactions, you must use Oracle Approvals Management (AME). You can use the standard Oracle Self Service Human Resources transaction type for the parallel approval process. Otherwise, if you require additional conditions, rules, or attributes, you can create them using the supplied components as examples. For more information about Oracle Approvals Management, refer to the *Oracle Approvals Management Implementation Guide.*

When you set up the parallel approval process, you must ensure that approval group voting method is 'First Responder Wins'.

### Example: Setup Steps for the Parallel Approval Process

The following example assumes that you use the predefined components delivered with Oracle SSHR and Oracle Approvals Management (AME). You can set up the parallel approval process for any of the Oracle SSHR transactions.

This example explains how to set up the parallel process for the Change Job and Terms (HR_CHANGE_JOB_ TERMS_SS) transactions in the Vision Corporation business group. In this requirement, approvals are required from two approval groups: Change Job Approval Group 1 and Change Job Approval Group 2.

Complete the following steps to define the parallel approval process for the Change Job and Terms transactions:

1. **Define Approver Groups**
    1. Navigate to the Approvals Management Business Analyst responsibility.
    2. Click the Setup icon for the predefined Oracle Self Service Human Resources transaction type.
    3. Click the Approver Groups tab.
    4. Click Create.
    5. Create two approval groups: Change Job Approval Group 1 and Change Job Approval Group 2.
    6. Enter the name and description of the approver groups. Select *First Responder Wins* as the voting regime. Select Static as the usage type. Select the group members. Select required approvers and HR People as the approver type.

        **Note:** You can select Dynamic as usage and write your own queries to retrieve approvers. For more information, refer to the *Oracle Approvals Management Implementation Guide*

        For group 1, enter the order number as 1 and group 2, enter the order number as 2.
    7. Click Apply.
    8. Click the Conditions tab and click Create.
2. **Define Conditions**

    This example uses the predefined WORKFLOW_PROCESS_NAME attribute and HR_CHANGE_JOB_ TERMS_SS function.

1. Select Ordinary as the condition type.
2. Select WORKFLOW_PROCESS_NAME as the attribute.
3. Enter HR_CHANGE_JOB_ TERMS_SS in the string value field.
4. Click Apply.
5. Click the Rules tab.

3. **Define Rules**
    1. Click Create to define a new rule using the approver groups created in the previous steps.
    2. Enter the rule name and select List Creation as the rule type.
    3. Click Next.
    4. Select the condition defined in the previous step (HR_CHANGE_JOB_ TERMS_SS) and click Continue.
    5. Click Next.
    6. Select approval-group chain of authority as the action type. Select Require Approval from Group 1 as the action and click Add Action.
    7. Select approval-group chain of authority as the action type. Select Require Approval from Group 2 as the action.
    8. Click Next and then Finish.

When you complete this setup, Oracle SSHR displays a list of parallel approvers in the Change Job: Review page and routes the change job transactions based on the conditions and rules set up for the function.

## Using the Parallel Approval Process in Other Oracle HRMS Suite of Products

You can configure the parallel approval process in other HRMS products that use the supplied Oracle Self Service Human Resources transaction type or a transaction type that is configured using the supplied type. For example, you can set up the parallel approval process for the following features:

- Standard appraisals in Oracle Performance Management
- Learner enrollments in Oracle Learning Management
- Vacancies in Oracle iRecruitment

## Sample Code for Modifying Approvals Using PL/SQL

If necessary, you can review the logic in the check_final_approver and get_next_approver functions and modify them as required. These functions are within the HR_APPROVAL_CUSTOM package.

Make sure that your returned values are of the correct data type.

The following code shows the logic for the approval functions. If required, you can customize the code to use different approvals routings or to stop at a different grade level.

```
??-- -Check_final_approver
function check_final_approver
           (p_forward_to_person_id in per_people_f.person_id%type
           ,p_person_id            in per_people_f.person_id%type)
         return varchar2 is
--
  cursor csr_pa(l_effective_date in date) is
    select  paf.person_id
    from    per_all_assignments_f paf
    start   with paf.person_id = p_person_id
      and     paf.primary_flag = 'Y'
      and     l_effective_date
      between paf.effective_start_date
      and     paf.effective_end_date
    connect by prior paf.supervisor_id = paf.person_id
      and     paf.primary_flag = 'Y'
      and     l_effective_date
      between paf.effective_start_date
      and     paf.effective_end_date;
--
  l_person_id per_people_f.person_id%type := null;
--
begin
  -- loop through each row. the rows are returned in an order which
makes
  -- the last row selected the top most node of the chain.
  for csr in csr_pa(trunc(sysdate)) loop
    -- set the l_person_id variable to the row fetched
    l_person_id := csr.person_id;
  end loop;
  if p_forward_to_person_id = l_person_id then
```

```
    return('Y');
  else
    return('N');
  end if;
exception
  when others then
       return('E');
--
end check_final_approver;
()
- -Get_next_approver
function get_next_approver
           (p_person_id in per_people_f.person_id%type)
         return per_people_f.person_id%type is
--
  cursor csr_pa(l_effective_date in date
              ,l_in_person_id   in per_people_f.person_id%type) is
    select  ppf.person_id
    from    per_all_assignments_f paf
           ,per_people_f      ppf
    where   paf.person_id             = l_in_person_id
    and     paf.primary_flag          = 'Y'
    and     l_effective_date
    between paf.effective_start_date
    and     paf.effective_end_date
    and     ppf.person_id             = paf.supervisor_id
    and     ppf.current_employee_flag = 'Y'
    and     l_effective_date
    between ppf.effective_start_date
    and     ppf.effective_end_date;
--
  l_out_person_id per_people_f.person_id%type default null;
--
begin
  -- [CUSTOMIZE]
  -- open the candidate select cursor
  open csr_pa(trunc(sysdate), p_person_id);
  -- fetch the candidate details
  fetch csr_pa into l_out_person_id;
  if csr_pa%notfound then
    -- if the cursor does not return a row then we must set the out
```

```
    -- parameter to null
    l_out_person_id := null;
  end if;
  -- close the cursor
  close csr_pa;
  return(l_out_person_id);
end get_next_approver;
()
```

For more information on using PL/SQL, see Overview of Using PL/SQL in Applications, *Oracle E-Business Suite Developer's Guide*

## Implementing Oracle Approvals Management (AME)

There are several settings that you must configure in AME before you can use the functionality in SSHR.

Also, any custom functions you created prior to release 4.1 will use the customizable PL/SQL package as the default approvals mechanism. However, you can modify any custom SSHR functions to point to AME by adding two new function parameters.

> **Note:** The AME rules and conditions always override any other workflow attribute settings that apply to approvals, for example, the attribute settings for the Review activity. If the Approvals Required workflow attribute is set to Yes for a workflow process but AME does not return any approvers, the process completes without requiring approval. As a general set-up recommendation, you should set up processes that currently do not require approval as follows:
>
> - Set the Approvals Required workflow attribute to Yes
> - Configure AME so that no approvers are returned
>
> If you subsequently need to add approvals to your process, you can simply use a different AME condition.

### To set up AME for SSHR:

1. Use an appropriate AME responsibility to check that the value of the following variables is Yes:
   - AllowFYINotifications
   - AllowAllApproverTypes

     If the value for this variable is No, you cannot use the Position approver type.

2. Use the Workflow Builder to set the Timeout value for the Notification activity in your workflow processes.

   See: To Define Nodes in a Process, *Oracle Workflow Developer's Guide*

   See: Timeout Transitions, *Oracle Workflow Developer's Guide*

3. If you have created custom workflow processes, use the Workflow Builder to replace the existing notification processes with the new process Notification Process for Approvers and Notifiers.

   See: Diagramming a Process, *Oracle Workflow Developer's Guide*

### To link a custom function to AME:

You define additional function parameters in the Form Functions window. You should also check the workflow attributes for your workflow process using the Workflow Builder.

1. Query your function.
2. Navigate to the Form tabbed region.
3. Add the following parameter information to the Parameters field for your function:
   - pAMETranType=SSHRMS
   - pAMEAppId=800
4. Save your work.

### To add a custom workflow process to the list of values for the condition attribute for the SSHRMS AME transaction type (required if using the delivered SSHR transaction type):

1. Log on to Oracle Approvals Management using the appropriate AME responsibility.
2. Select the SSHRMS transaction type.
3. Select the Conditions tab and click on the WORKFLOW_PROCESS_NAME condition.
4. Choose the Add Text Value button and enter the name of your new workflow process as an attribute value.
5. Save your work.

## Technical Information:

**Workflow Processes**

- Notification Process for Approvers and Notifiers, which includes the following subprocesses:
  - FYI Notification Process (HR_FYI_NOTIFICATION_PRC)
  - Approvers Notification Process (HR_APPROVAL_NTF_PRC)
  - RFC Notification Process (HR_RFC_NTF_PRC)

**Avoid Errors When Routing Approvals in Oracle SSHR**

Currently, workflow transactions that use the Notification Process for Approvers and Notifiers SSHR approval process end in errors for the following reasons and users cannot track such transactions:

- When an approver does not approve a transaction within the time period, the workflow updates the corresponding Oracle Approval Management (AME) transaction type with the No Response status. Then, the workflow tries to route the notification to the approver's supervisor based on the approval chain. If the supervisor is not available, then the workflow displays an error.
- If the AME transaction type is incorrectly setup, then the workflow cannot route transaction for approvals. This happens because the workflow uses the list of recipients defined in the transaction type.

Using AME, you can define the adminApprover configuration variable for a transaction type. The adminApprover variable identifies the person or user account that AME identifies as the administrator who can correct the hierarchy issue so that transactions get processed without any errors.

Oracle SSHR notifies the administrative approver identified by AME indicating that an exception has occurred for transactions that use the SSHR approval process Notification process for approvers and notifiers.

The administrative approver receives notifications:

- When a user submits the transaction on the Review page, even after receiving the Oracle Approval Management (AME) transaction type incorrect setup error.
- When the approval chain is broken and workflow cannot route the transaction to the next approver. For example, the workflow routes transactions from employee A to employee B, and then from B to employee C. Once the approval process starts, C resigns from the enterprise. When employee B approves the transaction, the workflow process sends a notification alerting the administrator about the break in the approval chain.

- When an approver does not approve a transaction within the time period, and if a supervisor is not available for the workflow to route the transaction.

  **Note:** If you do not use AME.A or above, the workflow processes are as follows:

  - Approvals Process with Correction V5.0 (for dynamic approvals)
  - Approvals Process (for standard approvals)

**Configurable Workflow Attributes**

| Process Name | Function Name | Attribute Name | Description |
|---|---|---|---|
| FYI Notification Process | Notify | Message Name | Specifies the name of the message for the notification. You can create separate messages for notifications sent on submission of the transaction and on approval, for example. |
| FYI Notification Process | Notify | Expand Roles | To assign this notification to a role consisting of multiple users and to send an individual copy of this notification to each user in the role, select Yes. If you select No, only one copy of the notification is delivered to the role as a whole. |

| Process Name | Function Name | Attribute Name | Description |
|---|---|---|---|
| FYI Notification Proces | Notify | Performer | The role to whom the notification is sent. You can select a constant role name or an item type attribute that dynamically determines the role at runtime. |

**Configurable Profile Options**

For information on profile options to control whether users can update pending transactions, see: Further Approvals Options, page 6-9.

## Configuring Approvals in the Workflow Builder

If you are not using Oracle Approvals Management (AME), you configure the predefined approvals processes in the Workflow Builder. You set up the approvals process using workflow attributes.

> **Note:** Oracle recommends that you use AME for your approvals instead of the customizable PL/SQL packages.

### To configure approvals in the Workflow Builder:

1. Open the workflow item type.
2. Navigate to the process you want to modify and double click to open the workflow diagram.
3. Open the Review Page activity for your workflow process.

   > **Note:** You may have to drill down through several subprocesses until you reach the correct Review Page activity.

4. Make a copy of the process and any affected subprocesses. For example, if you are modifying the approvals for the Process Personal Information process, you would have to copy the Process Personal Information process, and the related subprocesses, for example, the Process Basic Details subprocess.

   See: Updating Workflow Objects, page 4-3

5. Select the Review Page activity for your process/subprocess and set the Approval Required workflow attribute (HR_APPROVAL_REQ_FLAG) to YES. This activates approval for your process/subprocess.

   **Note:** The default value varies for different modules.

   See: Review and Confirm, page 10-13

6. Decide how a process should pass through the entire approval chain, in other words, how many levels of approval are required. Set the approval level using the Approval Level attribute (HR_DYNAMIC_APPROVAL_LEVEL). Add an approval level value to the Default Value field. A value of 1 for example will pass the approval one level up the supervisor chain.

   **Note:** The default number of level is 0, meaning that the number of levels is unlimited.

7. Save your work.

# 7

# SSHR Implementation Steps

## Implementation Steps for Self-Service HR (SSHR)

SSHR is supplied with predefined data and functionality, although you must configure this data and functionality for your own implementation of SSHR.

**Note:** If you try to configure functionality before you are familiar with Oracle HRMS and Oracle Workflow, you may make mistakes. Before you complete any step, read the referenced topic information.

**Note:** It is your responsibility to populate data fields.

## Implementation Flowcharts

The flowcharts provide you with a summary of the logical sequence you might follow in any implementation of SSHR. It is not the only sequence you could follow but one we recommend.

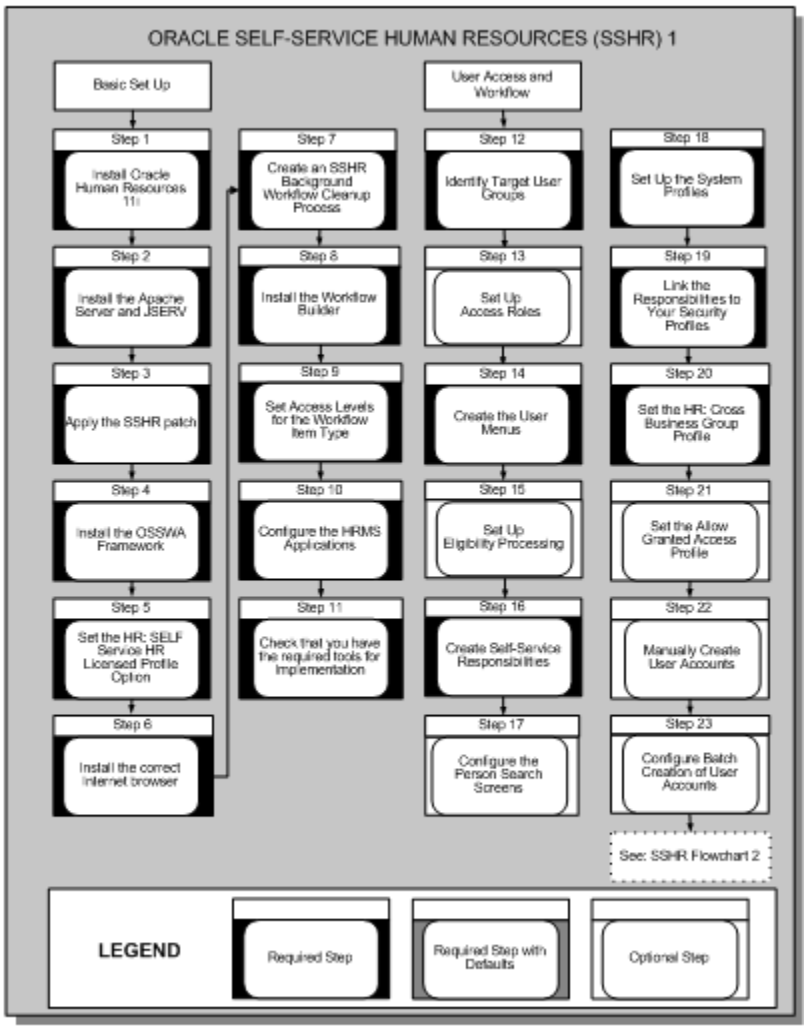
The functional areas of the system you configure to your specific business needs. Steps that are required for all implementations are marked as required.

Some functions have been seeded with default data. The steps where you can use data supplied with the system are marked as seeded.

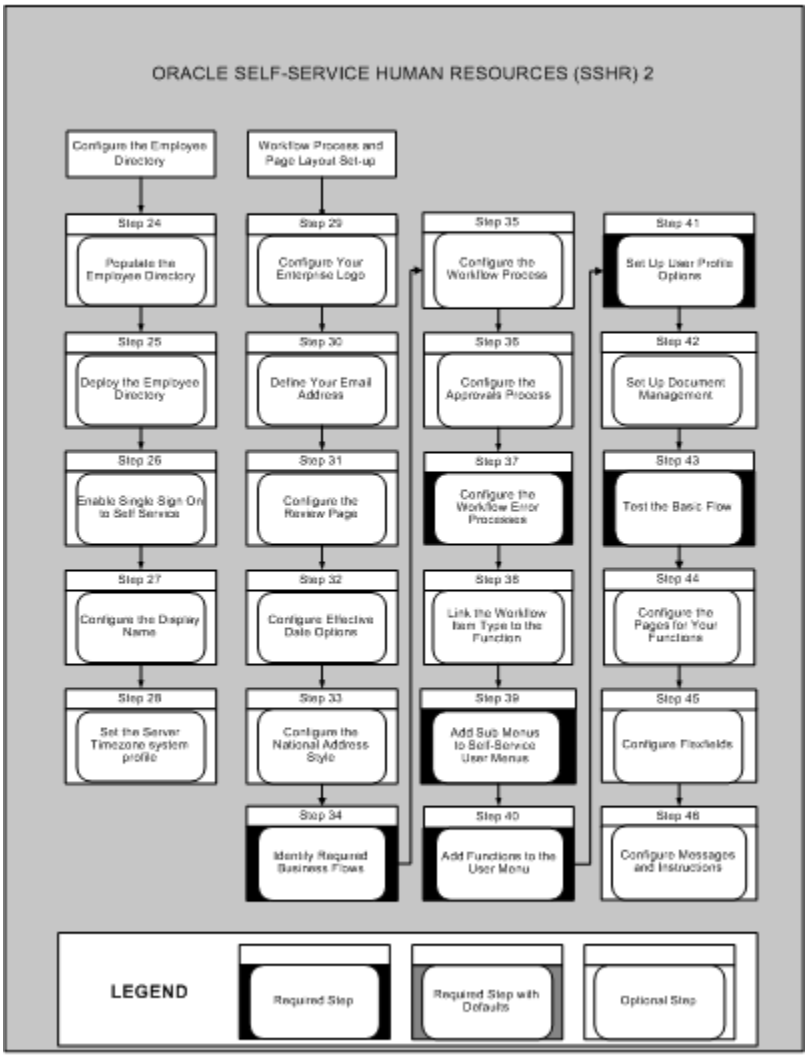
Decision making is an important part of any configuration process. Before you begin to customize SSHR, you must decide how you want to use it alongside your other Oracle HRMS applications.

Adopting a staged, or incremental, approach to configuration lets you focus on those processes you want to use.

***Implementation Flowchart for SSHR, part 1***



***Implementation Flowchart for SSHR, part 2***




# Implementation Steps for Self-Service HR (SSHR)

## To Prepare the Environment for SSHR: *Required Steps*

### Step 1: Check HR Installation *Required Step*

Install the latest Oracle Human Resources patch according to the readme file for SSHR at the time of installation.

**Step 2: Set the HR:Self Service HR Licensed profile option *Required Step***

If you have licensed SSHR, set the following profile option to "Yes" at the site level.

- HR: Self Service HR Licensed

If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.

**Step 3: Check you have the correct Internet browser *Required Step***

Check that you have the correct Internet browser. You can use Netscape Navigator 4.08 or Microsoft Internet Explorer version 4 or 5 or above.

**Step 4: Create an SSHR Background Workflow Cleanup Process *Required Step***

You should remove transaction information from the temporary tables for processes that support Web transactions. To do this, include the Remove Transaction activity in the workflow process.

See: Running the Workflow Cleanup Process, page 4-12

**Step 5: Install the Workflow Builder on Selected Workstations *Required Step***

Members of your Implementation team who will be making changes to workflow process definitions need to have the Workflow Builder installed on their workstations or available from a file server.

**Step 6: Set the Access Levels for the Predefined Workflow Item Type *Required Step***

The predefined workflow item type is used as the basis for all future upgrades. Provided the access and protection levels are set correctly, you can work with the delivered item type and your configurations will not be overwritten.

See: Overview of Oracle Workflow Access Protection, *Oracle Workflow Administrator's Guide*

**Step 7: Configure the HRMS applications *Required Step***

Define work structures, key flexfield, descriptive flexfields, lists of values.

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

**Step 8: Check you have the tools for SSHR implementation *Required Step***

Check that you now have the required tools for implementing SSHR. You should have now installed the following tools:

- Oracle Workflow
- Oracle Applications

- SSHR
- OA Framework

  See: Getting Started with SSHR, page 1-26

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

## User Access Setup (SSHR) *Required Steps*

### Step 9: Identify the Target User Groups *Required Step*

Before starting your implementation, it is important to identify any groups of users in your enterprise who may have different requirements. Most enterprises will differentiate between managers and other workers. In your enterprise, you may identify further distinct groups such as HR professionals, managers in a particular department, or senior managers.

### Step 10: Set Up Access Roles for Self-Service Actions *Optional Step*

If you want to take advantage of security based on access roles when routing and approving self-service actions, you must first activate the system profile option HR: Allow Approver updates to Self Service actions. Optionally, create and assign roles that grant or deny privileges to update actions. All users can update by default. Define and manage access roles in the Maintain Roles window.

See: Access Roles for Self Service Actions, page 2-10

### Step 11: Create the User Menus *Required Step*

User menus group together a number of functions. SSHR includes predefined menus for employees, managers, and system administrators, but we recommend that you create your own user menus using the seeded menus as a basis. To create user menus, use the Menu window.

See: Defining User Access and Menus, page 3-10

### Step 12: Create Self-Service Responsibilities *Required Step*

SSHR is supplied with predefined responsibilities, however, we recommend that you create your own responsibilities based on the seeded responsibilities. Assign a menu to them in the Responsibilities window.

See: Self-Service Responsibilities and User Access, page 2-14

### Step 13: Set Up Eligibility Processing for Self-Service Actions *Optional Step*

You can configure SSHR to automatically determine if a person is eligible for a self-service action. To do this, you set up eligibility profiles, reporting groups (actions), and plans (sub actions), using SSHR Compensation and Benefits functionality as a generic processing engine.

See: Eligibility Processing Setup Example, page 10-34

#### Step 14: Configure the Person Search Screens *Required Step*

Three tabs are displayed on the Person Search page. You can choose whether to display all these tabs or whether to hide one or more tabs from the user. You remove a tab from display in the Menu Exclusions Region of the Responsibilities window.

See: Person Tree, page 10-4

#### Step 15: Set Up the System Profiles *Required Step*

You set up the security profiles to control access to information.

See: User Access and Security, page 2-3

#### Step 16: Link the Responsibilities to Your Security Profiles *Required Step*

Use the System Profile Values window to link the responsibilities you have created to your security profile.

#### Step 17: Set the HR: Cross Business Group Profile *Required Step*

If you want your managers to be able to access data for employees in other business groups, also set the HR: Cross Business Group responsibility.

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

#### Step 18: Set the Allow Granted Access Profile *Required Step*

If you want managers to be able to access data for workers outside their security profile whose information has been released to them using the Release Employee Information function, also set the Allow Granted Access profile option to Yes for the responsibility.

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

See: Release Employee Information, page 10-11

#### Step 19: Manually Create User Accounts *Required Step*

Create at least one user account manually to test the responsibilities and menus. For a small enterprise, you may choose to create all your user accounts manually and skip the next step.

See: Defining User Access and Menus, page 3-10

#### Step 20: Configure Batch Creation of User Accounts *Required Step*

To create and manage the batch creation of user accounts, you must first write API user hooks. User hooks enable you to extend the predefined business rules to reflect your enterprise's business rules. You use the user account hooks for example, to set up your customary user name and password format, responsibilities, and profile options you want to associate with a user.

See: Writing User Hooks to Create Batch User Accounts, page 2-29

## Configuring Workflow Processes and Page Layouts (SSHR) *Required Steps*

### Step 21: Display Your Enterprise Logo *Required Step*

SSHR is delivered with a default Oracle logo in the upper left hand corner of the application. You can replace this logo with your own logo at the Site or Organization level.

Place the logo in the $OA_MEDIA/<Language> directory.

The logos are named FNDLWAPP.gif for SSHR version 3.2 and later, and FNDLOGHR for SSHR 2.0 functions.

See: Replacing the Default Oracle Logo, page 5-38

### Step 22: Define your Email Address *Required Step*

Set up the email addresses for your enterprise. Set up the following addresses using the Attributes Value tab in the Workflow Builder:

- HR email address
- Training administrator email address
- Recruitment supervisor email address

See: Defining Your Enterprise's Email Addresses, page 4-11

### Step 23: Configure the Review Page *Optional Step*

The Review page of most self-service actions displays an Attachments region by default. If you want users to see the What If Analysis region, you must enable the display. Hide Attachments or show What If Analysis via Personalizations.

See: Configuring Web Pages, page 5-21

See:Configuring the Review Page, page 8-7

**Save Attachements**

When managers and workers perform self-service transactions, they can select the Save Attachments check box to save attachments to the self-service transactions and view them in the Oracle HRMS windows.

The Save Attachments check box on the Review page is hidden by default. Enterprises can decide whether to display the check box on the Review page using the Personalization feature. Personalization can be done only at the Function level, depending on the functionality that supports personalization at the Function level.

The following table provides a list of Review pages of self-service HR functions where users can save the attachments to view them in Oracle HRMS windows:

| Self-Service HR Function | Oracle HRMS Window |
|---|---|
| Absence Management | Absence Details |
| Education and Qualification | People |
| Other Professional Qualifications | People |
| Special Information | People |
| Extra Information | People |
| Hire | People |
| Applicant Hire and Rehire | People |
| Release Information | People |
| Transfer | People |
| Termination | Terminate |
| Termination with Compensation | Terminate |
| Personal Information | People |
| Contingent Worker Placement | People |
| Contact Extra Information | People |
| Employee Review | People |
| Worker Status Change, Change Hours, Change Job, Change Costcenter, Location and Manager, Change Costcenter, Terms and Manager, Change Worker Status and Terms, Change Job and Terms, Change Manager | Assignment |
| Change Pay | Assignment |
| Competency Profile | People |

#### Step 24: Configure Effective Date Options*Optional Step*

The Effective Date page of a self-service action presents users with two choices:

- Manually enter an effective date
- Specify that the action takes effect on approval

You can use personalizations to hide either option, effectively making the other option the default choice for all actions. If you hide the manual entry field, the Effective Date page does not appear.

See: Configuring Web Pages, page 5-21

#### Step 25: Configure Your National Address Style *Required Step*

To ensure that the correct address style for your country is used in the application, select one of the predefined address styles. The default address style is determined by the legislation of the business group. To select an address style, use the Descriptive Flexfield Segments window.

See" Descriptive Flexfields and Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

#### Step 26: Identify and Prioritize Required Business Flows *Required Step*

SSHR is delivered with a number of business flows incorporating workflow-enabled functions. First identify which business flows you need to implement for your enterprise. Consider the information flows and approval processes within your enterprise.

For each business flow, repeat steps 30 thru 41. Detailed information is available in the relevant chapters as indicated. Details of the configuration options are available for each SSHR module.

#### Step 27: Configure the Workflow Process *Required Step*

Review the underlying workflow process in the Workflow Builder. If you wish to make changes, first copy the process so that you can make changes to the copy.

See: Self-Service Workflows, page 4-3

#### Step 28: Configure the Approvals Process *Required Step*

Review the seeded approvals processes and, if necessary, configure changes in the Workflow Builder.

Self-service actions now use Oracle AME as a processing engine for routing and approvals.

See: Oracle Approvals Management (AME), page 6-5

**Step 29: Configure the Workflow Error Processes *Required Step***

Each workflow-enabled function has an error process that runs when a system error occurs. The error process sends a notification and a description of the error to the sysadmin ID. You configure the error processes in the Workflow Builder.

See: Configuring Workflow Error Processes, page 4-11

**Step 30: Link the Workflow Item Type to the Function *Required Step***

Use the Form Functions Window and the Parameters field to link the workflow item type to functions. The Parameters field is displayed when you select the Form tab.

**Step 31: Restrict a User's Access to Workflow Transactions, if Required *Optional Step***

If you do not want your workflow administrator to monitor all the workflow transactions in your enterprise, then you can restrict the workflow administrator's access to specific transactions. For example, you can restrict the administrator's access to workflow transactions to a specific organization hierarchy or a business group.

See: Restricting Access to Workflow Transactions, page 2-25

> **Note:** The workflow security functionality works only when the Enable Security Group profile option is not set or set to No at the Application level for Application Object Library.

**Step 32: Add Sub Menus to Self-Service User Menus *Required Step***

Add sub menus to user menus that allow users to see the Effective Date, Sub Actions, Return for Correction, Refresh Attributes, and Document Management pages.

See: Defining Menus for SSHR, page 3-10

**Step 33: Add the Functions to the User Menu *Required Step***

Make sure that your configured functions are available in your user menus.

See: Defining User Access and Menus, page 3-10

**Step 34: Set Up User Profile Options *Required Step***

User profiles control how users access information and how the information is displayed. You define the profiles at either the user or responsibility level in the System Profile Values window.

**Step 35: Test the Basic Flow *Required Step***

Test the workflow process to make sure that it is correct.

See: Testing a Workflow Definition (*Oracle Workflow Guide*)

#### Step 36: Configure the Pages for Your Functions and Notifications *Required Step*

Use the Personalization Framework. Set up user effective date options. See the earlier step, Configure Effective Date Options, page 7-9.

See: Configuring Page Layouts, page 5-4

#### Step 37: Configure Flexfields for the Regions *Required Step*

You can configure the flexfield structures in the Application Developer responsibility, then enable selected segments in the appropriate pages using the Personalization Framework.

See: Configuring Flexfields, page 5-27

#### Step 38: Create Messages for the Regions *Required Step*

You can add predefined messages to your regions or you can create your own messages if required.

See: Adding Instructions to Web Pages, page 5-35

#### Step 39: Define the Name Format in Notifications *Optional Step*

Define the way a person's name appears in your workflow notifications.

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

#### Step 40: Configure Fields in the Pop-up Windows *Optional Step*

In the Hierarchy page, when managers place the mouse over the Details icon, they can view the photo of the worker, and details such as employment and contact in a pop-up window. Using personalization, you can display the Job, Organization, and Mobile fields that are hidden by default.

### Implementing SSHR Functions *Optional Steps*

#### Step 41: SSHR Functions *Optional Step*

In addition to implementing the basic SSHR tools and processes, there are also implementation steps for the following SSHR functional areas:

- Absence Management , page 14-4
- Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Talent Management, page 7-16
- Document Management, page 7-17
- Employee Directory, page 7-17

### Step 42: Control the Display of the Effective Date, Review, and Confirmation Pages for Self-Service Transactions
*Optional Step*

Enterprises can determine whether Effective Date, Review, and Confirmation pages must be displayed for self-service transactions. For example, when top management executives perform self-service transactions, the Review page may not be required as they would like to enter the transaction details and submit the transaction without routing for approvals. To meet such business requirements, Oracle SSHR enables system administrators to control the display of Effective Date, Review, and Confirmation pages for self-service transactions.

> **Note:** Oracle SSHR displays the Effective Date page in a new region at the top of the initial page that appears when you launch a function.

Set the following parameters for relevant functions to control the display of Effective Date, Review, and Confirmation pages in the transaction flow:

- &pQkFn: Set this parameter value to Y to turn off the Effective Date.
- &pBpRv: Set this parameter value to Y to turn off the Review page.

Setting either of the above parameters will bypass Confirmation page in the transaction flow. Note that if either the &pQkFn or &pBpRv parameter is set to Y, then the Confirmation page is automatically hidden.

**Note**: These function parameters are not set for any Personal or Manager Action functions by default. You must set these values, if required, for specific functions to control the display of Effective Date, Review and Confirmation pages.

For the Personal Information function, if the &pQkFn parameter is set to Y and managers or workers click Update in the Basic Details, Main Address, Secondary Address or Tertiary Address regions in the Personal Information page, then the options to correct current details or enter new information appear at the top of the related page and not in a separate Basic Details: Choose Option page.

**Completing the Required Workflow Changes**

If the &pBpRv parameter to hide the Review page is set to Y, then for the last page in the relevant process, the 'Last Page in Flow' attribute must be set to Yes using Oracle Workflow Builder. This indicates that the specific page is the last page in the transaction and the Review page is not available. Another Node attribute "Approval Required Flag" must be set for the same last page node to decide whether "Approvals" are required for that functionality or not. For self-service transaction processes, by default the "LAST_PAGE_IN_FLOW" attribute is set to value "No" and the "HR_APPROVAL_REQ_FLAG" attribute would have value same as it exists on the Review node.

The following functions provide the LAST_PAGE_IN_FLOW attribute:

- Academic Rank

- Change Contact Extra Information
- Change Cost Centre, Location, Manager
- Change Cost Centre, Location, Worker Terms, Manager
- Change Extra Information
- Change Hours
- Change Hours 5.2
- Change Job and Terms
- Change Location
- Change Manager
- Change Pay
- Change Pay 5.2
- Change Special Information
- Change Worker Status and Terms
- Change Worker Status and Terms 5.2
- Education and Qualification
- Employee Review
- Individual Compensation Distribution
- Organization Manager
- Other Professional Qualifications
- Personal Information (All 5 processes)
- Change Hours
- Termination Release Information
- Reverse Termination
- Tenure Status

- Termination
- Termination with Compensation
- Transfer
- Transfer 5.2
- Vehicle Mileage Expense
- Work Schedule
- Worker Status Change
- Worker Status Change 5.2
- Commutation Information
- Documents of Record
- Private Vehicle Allocation

**Example: Adding the Parameters and Making Workflow Changes**

In this example, the following business changes are required for the Change Job function:

- Hide the Effective Date, Review, and Confirmation pages.
- Turn off the approval feature for job changes.

This example uses the following predefined components:

- HR Workflow (hrssa.wft)
- Change Job process (HR_ASSIGNMENT_JSP_PRC)
- Change Job function (HR_CHANGE_JOB_SS)

**Complete the following steps to update the Change Job process (HR_ASSIGNMENT_JSP_PRC)**

1. Open Oracle Workflow Builder.
2. Open the hrssa.wft file.
3. Open the Processes node.
4. Navigate to the HR_ASSIGNMENT_JSP_PRC process.

5. Open the process in the designer mode. HR_ASSIGNMENT_JSP_FCT is the node which is before the HR_REVIEW_CHANGES_JSP_FCT (Review Page Node).

6. Open the node HR_ASSIGNMENT_JSP_FCT and select the Node Attributes tab. View the following attributes:

   ```
   Last Page In Flow
   HR_APPROVAL_REQ_FLAG
   ```

7. Select Yes as the node attribute value for the Last Page In Flow to indicate that this the last page in the transaction business flow.

8. Select No as the node attribute for the HR_APPROVAL_REQ_FLAG to indicate that approvals are not required for the Change Job process.

9. Save your work.

**Set the function parameters to hide the Effective Date, Review, and Confirmation pages:**

1. Log in to the Functional Administrator responsibility.

2. Navigate to the Functions page.

3. Search for the HR_CHANGE_JOB_SS function.

4. Click Edit to add the function parameters.

5. Add the parameters as follows to the existing parameter list:

   ```
   &pQkFn=Y&pBpRv=Y
   ```

6. Click Apply.

7. Bounce the listener to clear cache.

Now, when a user performs the Change Job function, the Effective Date, Review, and Confirmation pages do not appear. Approval is also not required for the change job transaction.

### Step 43: Use the Quick Change Hours and Termination Processes *Optional Step*

Managers can use two processes to quickly perform change hours and termination transactions. If required, enterprises can implement the following processes:

- HR_QK_TERMINATION_JSP_PRC: Using this process, managers can enter termination details of their workers and submit the transaction for approval, without having to navigate to the 'Change Manager' page to reallocate workers who report to the terminated worker, if the terminated worker is a manager.

  For information on how to implement this new process, see: Configuring the

Termination Module, page 8-45

- HR_QK_CHANGE_HOURS_JSP_PRC: Using this process, managers can quickly change the work schedule and assignment category of a worker and submit the transaction, without requiring to change pay.

  For information on how to implement this new process, see: Configuring the Change Pay Function, page 8-37

## Implementing and Configuring the Organization Chart *Optional Steps*

### Step 44: Implement the Organization Chart *Optional Step*

Managers can view their organization hierarchy using the Organization Chart. Details of workers in the manager's hierarchy are displayed in the form of panel cards. The application supports different hierarchy viewer layouts.

Using the Organization Chart, managers can:

- View the Contact, Employment, and Salary information of workers in their hierarchy.
- Identify key high potential workers with succession plans, key high potential workers without succession plans, workers whose salary is above the specified grade range and below the specified grade range.
- Launch self-service actions for workers in their hierarchy.

Workers can use the Organization Chart to view their contact and employment information. They can also search for other workers and view their contact and employment information.

For more information, see: Using the Organization Chart, page 12-2

The Organization Chart is built on Applications Development Framework (ADF) and the component used is hierarchyViewer, which is one of the ADF Data Visualization components. To implement this feature, see: Implementing the Organization Chart, page 12-5

## Configuring Talent Management in Oracle SSHR *Optional Steps*

### Step 45: Enabling Talent Profile *Optional Step*

The Talent Profile feature of Oracle SSHR helps enterprises to obtain a complete picture of the talent profile of their workforce to manage and execute their talent processes. Talent Profile captures and displays complete worker talent details on a single-interface.

See: Enabling Talent Profile in Oracle SSHR, page 13-23

#### Step 46: Set up Information for Succession Planning *Optional Step*

The Succession Planning functionality enables managers to plan for future vacant positions by identifying possible successors for employees, jobs, and positions.

See: Setting up Information for Succession Planning, page 11-12

### Configuring Document Management *Optional Steps*

#### Step 47: Set Up Document Management *Optional Step*

If you want to make formatted documents available to users that contain merged data from self-service actions, create them from PDF or RFT templates and link them to appropriate menu functions by creating groups in Document Management.

See: Document Management, page 10-16

### Configuring the Employee Directory *Optional Steps*

#### Step 48: Populate the Employee Directory *Required Step*

You must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 9-41

#### Step 49: Deploy the Employee Directory *Required Step*

You can choose to deploy the Employee Directory from any of the following environments:

- **Self Service Personal Home Page**

  Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

  See: Self-Service Menus and User Access, page 2-11

  The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-37 to configure this menu.

- **Anonymous login**

  Anonymous login uses the standard Self Service Global Menu to provide global buttons, but does not render the Return to Portal or the Log Off buttons.

  For setup details, and how to add additional global buttons, see: Anonymous Access to the Employee Directory, page 9-38

- **Portal**

  For information on how to deploy the Employee Directory from a portal

environment, see the following notes on My Oracle Support:

132035.1

380484.1

#### Step 50: Enable Single Sign On To Self Service *Optional Step*

The Employee Directory is read only. To enable users to edit their personal information, provide them with single sign on access to Self-Service.

See: Enabling Single Sign On to Self Service, page 9-39

#### Step 51: Set the Server Timezone system profile *Required Step*

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Personal Details page.

### Configuring Links between Oracle SSHR and Information Providers *Optional Steps*

#### Step 52: Enable Info Online Content Container to Access Enwisen *Optional Step*

You can configure access between Oracle SSHR and Enwisen, a third-party information provider to enable end users to access company information or any other related information hosted on the Enwisen web site. The Info Online content container displays hypertext links to information providers.

See: Info Online Links to Enwisen from Oracle Self-Service Human Resources (SSHR) Pages, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Configuring Links between HRMS Products and Enwisen, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### Configuring the *i*Calendar Export Feature in Oracle SSHR *Optional Steps*

#### Step 53: Enable the Export of Absence Details *Optional Step*

Managers and workers can export absence details such as absence dates to the calendar application that they use. To help users download absence schedules to their calendar application, you can enable the Export feature on the Absence Summary page of the Absence Management function. You can enable this feature for Manager Self-Service and Employee Self-Service responsibilities using Personalization.

For information on how to configure the Export feature, refer to this note on My Oracle Support *Configuring the iCalendar Export Feature in Oracle HRMS Applications*, Note ID: 761563.1

### Configuring SSHR for Use Outside Firewall *Optional Steps*

#### Step 54: Set up Oracle SSHR for Use Outside the Firewall *Optional Step*

For information on how to secure Oracle SSHR for use outside the firewall, see:

- *DMZ Configuration with Oracle E-Business Suite 12* (Note: 380490.1) on My Oracle Support
- *Enabling SSL in Oracle Applications Release 12* (Note: 376700.1) on My Oracle Support

# 8

# Configuring Self-Service Modules

# Configuring the Common SSHR Modules

## Configuring the People in Hierarchy, My List, and Search Pages

This topic provides information to configure the People in Hierarchy, My List, and Search pages.

The navigation options from the People in Hierarchy page depend on the path that the manager has taken to navigate to the page. There are two possible paths:

- From the generic Manager Actions menu

  In this case, the manager first selects a person the from People in Hierarchy page or the People in My List page. This takes the manager to the Actions page. A context-sensitive list the SSHR modules or actions available for the selected person.

  > **Note:** The parameter pDestination for the Manager Actions Tree View function (HR_PERSON_TREE_SS) has the value HR_ACTIONS_SS (instead of a specific function value) to ensure that the user navigates through the Actions page.

- From a specific manager self-service menu item

  In this case, the manager selects a specific SSHR function and then selects the person for processing in the People in Hierarchy or People in My List page. When the manager selects a person, the selected function appears.

  See:Defining Functions for SSHR, page 3-12

### People in Hierarchy

The People in Hierarchy region displays a hierarchical view of the current manager's subordinates. Users can expand or collapse the lower levels of management as desired.

By default, the hierarchy uses a supervisor hierarchy (based either on the supervisor or the supervisor assignment).

> **Note:** If you want to build a hierarchy based on the supervisor's assignments, you must specify the hierarchy type using the HR: Supervisor Hierarchy Usage profile option and you must enable multiple assignments using the SSHR:Enable Multiple Assignments in SSHR profile option. See Multiple Assignments, page 9-50.

However, if you prefer, you can display a position hierarchy. To do this, set the profile option HR:Display Position Hierarchy. Set this profile option to Yes if you prefer to

display the position hierarchy.

> **Note:** Oracle recommends that you set up either position or supervisor security if you are using SSHR because the manager self-service functionality enables you to choose whether to display the person hierarchy by either supervisor or position. However, you can set up other types of security if you prefer.

## Personalizing Hierarchy, My List, and Search Pages

> **Important: Changes in Oracle HRMS Version 11.i.10**
>
> Oracle HRMS version 11.i.10 delivers new Hierarchy, Search, and My List pages. This means that the base definitions of these pages in the Meta Data Services Repository have changed. As a result, any personalizations that you may have created on these pages are no longer valid.
>
> In addition, SSHR plans to use the enhanced sorting functionality provided by the OA Framework. However, as this is a future development, sorting support is not currently available for the Hierarchy page.

### Simple Search Personalizations

From some self-service pages, you can search for a person by entering the person's name in the Name field. If you prefer to use different search criteria, you can use the Personalization Framework to enable a drop-down list displaying the Full Name, Last Name, and First Name as search criteria. You can select any of these criteria to be the default criterion by setting the Initial Value attribute (the Last Name is the standard default value).

1. Select the Personalize Page link.
2. Navigate to the QuickSearch region
3. Personalize the Search Filter item by changing the value in the Rendered field to True.

### Searching by First Name

If you choose to personalize the Search function to search by First Name, you must create a function index for the first name (Oracle provides a function index for the last name). To do this, you must use a SQL client to add an additional index to the following table:

- per_people_f

The syntax for creating an index is as follows (for an example, see the function index PER_PEOPLE_F_N2 UPPER("LAST_NAME" which is provided by Oracle):

```
create index <index_name> on <schema_name>.per_all_people_f(upper
(first_name))
```

See: Configuring Web Pages, page 5-21

**Name Format**

The Enter Process pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

**Customer Overrides**

Customer overrides enable you to configure data without making any changes to database tables. In the Enter Process pages (My List, Hierarchy, Person Search), you can use customer overrides to configure a user-defined format for displaying positions and jobs. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 3-7.

**Navigation Links (Breadcrumbs)**

The delivered Hierarchy, My List, and Search pages display navigation links to help you navigate through the pages. For example:

Manager Actions: People in Hierarchy > Manager Actions: People in My List

If you choose to include this functionality in custom versions of the Enter Person pages, set the following function parameter:

- &addBreadcrumb=Y

## Multiple Assignments

If a person has more than one assignment for a given manager, the manager needs to select the Action icon for the relevant assignment in order to carry out the action.

To enable multiple assignments, set the profile option HR:Enable Multiple Assignments in SSHR to Yes at the required level. This allows managers to update all assignments reporting to them. If you set the profile option to No, managers can only view and edit primary assignments.

> **Note:** If you set this profile option to Yes, Oracle recommends that you create supervisor-based security profiles for SSHR managers. See: Security Profiles in Managing User Access, page 2-3

## Transactions Across Business Groups

You can choose to enable your managers to see the names of persons in other business

groups but prevent them from performing any transactions on persons in other legislations. To do this, you use the HR:Restrict Transactions Across Legislations in SSHR profile option in conjunction with the existing HR:Cross Business Group profile.

If you set the HR:Cross Business Group profile to Yes, managers can see the names of persons in other business groups and perform transactions on them. If you then set the HR:Restrict Transactions Across Legislations in SSHR profile to Yes, the application disables the names of the persons in other legislations.

## Menu and Function Names

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Manager Actions Tree View and all manager functions |

See: Defining User Access and Menus, page 3-10

## Workflow

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable Flexfields

Not applicable

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Display Position Hierarchy | Site | Yes/No | No |
| HR:Display Brief Person Name | Site, Application, Responsibility, User | Brief Name/Full Name | Brief Name |
| HR:Enable Multiple Assignments in SSHR | Site, Application, Responsibility, User | Yes/No | No |

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Cross Business Group | Site | Yes/No | No |
| HR:Restrict Transactions Across Legislations in SSHR | All | Yes/No | No |
| HR: Supervisor Hierarchy Usage | Site | | |

**HR:Display Position Hierarchy**

If you set this profile option to Yes, the application displays the position hierarchy on the Enter Person page instead of the supervisor hierarchy.

**HR:Display Brief Person Name**

If you set this profile option to Brief Name (default value), the application displays the person names in the brief format instead of the long name format.

**HR:Enable Multiple Assignments in SSHR**

This profile option controls whether a manager can view and update multiple assignments for a person in SSHR. If you set the profile option to Yes, the application displays all the assignments for a person on the Enter Process page. Otherwise, the application only displays primary assignments.

**HR:Cross Business Group**

This user profile option allows SSHR users to see certain information for more than one business group. For example, managers can view persons in other business groups.

**HR:Restrict Transactions Across Legislations in SSHR**

If you set this profile option to Yes, SSHR managers cannot carry out transactions on persons (within their supervisor hierarchy) who are from different legislations.

**HR: Supervisor Hierarchy Usage**

This profile option determines how supervisor hierarchies are built within Oracle HRMS and SSHR. You can select either a person-based or assignment-based hierarchy.

## Additional Configuration Steps

### Search Page

1. To prevent your users from using the Basic or Advanced Search, hide the corresponding region in the Personalization Framework or use function exclusions

to exclude the Person Search function at the responsibility level.

2. You can configure the search criteria for the Basic and Advanced Searches. You can rearrange the sequence of the criteria by configuring the displayed fields using the Personalization Framework.

   See: Configuring Web Pages, page 5-21

## Configuring the Review Page

You can use the Personalization Framework to configure the Review and Confirm pages to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see the following documentation:

- Configuring Web Pages, page 5-4
- Adding Instructions to Web Pages, page 5-35

### Approvals

If you configure approvals, users can enter approvals comments in this page. If you are using dynamic approvals , the user can view approvers and pre-approval and post-approval notifiers, and add further approvers and notification recipients.

You can set up the approval properties for a process by changing the activity level attributes for the Review workflow functions.

See: Approvals Overview, page 6-1

### Attachments

If you have enable the Attachments region in the Personalization Framework, users can attach supporting documents to the current transaction. An attachment can be a file, a URL, or text.

### What-If

If you have enabled the What If region in the Personalization Framework, users can assess the impact of the change on the employee's eligibility for benefits before committing the change or sending it for approval.

> **Note:** The What If feature will only function if you have Oracle Advanced Benefits (OAB) installed.

## Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Common functionality which is used by all processes.

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| | Review Page | HR_DYNAMIC_APPROVAL_LEVEL |
| | Review Page | HR_APPROVAL_REQUIRED_FLAG |
| | Review Page | Confirm Instruction Application Short Name |
| | Review Page | Confirm Save Instruction Name |
| | Review Page | Confirm Send for Approval Instruction Name |

**HR_DYNAMIC_APPROVAL_LEVEL:**

This attribute is used to specify the number of levels to which this transaction needs to be forwarded for approval in the approval hierarchy. For example, if the value is 1, the transaction is submitted for approval to one level higher than the initiating person. When the transaction has been approved, it is committed to the HRMS application. By default, this attribute reads the approval level from the APPROVAL_LEVEL (Approval Level) item level attribute. If you specify a value for the item level attribute, you can control the approval level for all the processes. If you specify a value for the HR_DYNAMIC_APPROVAL_LEVEL attribute, it overrides the item level attribute for the process for which you have specified the value.

**HR_APPROVAL_REQUIRED_FLAG:**

This attribute is used to specify whether the current transaction requires an approval. The valid values are:

- No: the process does not require approval
- Yes: the process requires approval but the dynamic approval user interface will not be shown in the review page. This means that the initiator cannot add additional approvers or notifiers.
- Yes - Dynamic Approval: the process requires approval and the dynamic approval user interface will be shown in the review page. The initiator can add additional approvers and notifiers.

**Confirm Instruction Application Short Name:**

In addition to the standard confirmation message shown in the confirmation page, you can also configure messages that are specific to the process. You can specify one for a scenario for which approval is required and one for a scenario for which no approval is required. Processes can be set to either Approval Required or Approval Not Required, but not both, using the HR_APPROVAL_REQUIRED_FLAG. For example, you can define a message for Confirm Save Instruction Name and Confirm Send for Approval Instruction Name. You register this message under your custom application.

**Confirm Send for Approval Instruction Name:**

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process does not require approval.

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process requires approval.

> **Note:** You must copy the delivered processes and make changes to the copy. If you make changes to the delivered processes, they will be overwritten when new patches are applied to your system.

See: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

***Review Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Additional Information | Instruction | PQH_SS_REVIEW_ATTACH_INT |
| Additional Information | Instruction Text | PQH_SS_REVIEW_ADDL_INFO_INT |

## Configurable Flexfields

For a list of flexfields for SSHR review pages, please see the corresponding functional descriptions.

## Configurable Profile Options

Not applicable

# Configuring the Special Information Types (SITs) Page

This topic provides information to configure the Special Information Types page.

## Menu and Function Names

Special Information Types

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Change Special Information Types

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### Special Information Page

| Region | Tip Type | Message Name |
|---|---|---|
| Special Information Type Main Page | Instruction | HR_INST_SIT_OVERVIEW |

### Special Information Type Update Top Page

| Region | Tip Type | Message Name |
|---|---|---|
| Special Information Type Update Page | Instruction | HR_SIT_UPDATE_INSTRUC_TEXT_SS |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

### Special Information Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Special Person Information Type Details | Personal Analysis Flexfield | PEA |

### Special Information Type Update Top Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Special Person Information Type Review | Personal Analysis Flexfield | PEA |
| Special Information Type Update Page | Additional Person Analysis Details | PER_PERSON_ANALYSES |

### Review Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Special Information Type Review | Additional Person Analysis Details | PER_PERSON_ANALYSES |
| Special Information Type Review | Person Analysis Flexfield | PEA |

See: Configuring Flexfields , page 5-27

## Configurable Profile Options

Not applicable

## Additional Configuration Steps:

1. Decide how you want to use your SIT modules:
   - standalone - as an Employee or Manager menu
   - chained - as part of a self-service action flow
   - chained - as part of a Personal Information flow

   See: Manage Employment Events Functions and Workflow, page 9-46

2. Enable your SITs using the Special Information Types form. You must enable them for each business group and select at least the Enabled and Other check boxes.

   See: Enabling Special Information Types, *Oracle HRMS Enterprise and Workforce Management*

3. Check the title of the SIT type. This title appears as the region header above the data in the self-service module.

4. Use the Personalization Framework to restrict the SIT types that are displayed. By default, all SIT types that are enabled using the above procedure are displayed in the self-service SIT module (defined by the selected person's business group), however, you can use the Personalization Framework to display only specific types.

   To display only certain special information types, personalize the HR_PERSON_SIT_DETAILS_SS region at the appropriate level (for example, responsibility or function) and in the Flex Settings box for HrSitKeyFlex, list the key flexfield structure codes of only the types you wish to appear. After each structure

code, list the names of the segments you wish to appear for that special information type. Separate multiple segments with single pipe symbols (|) and separate multiple structures with double pipe symbols (||).

> **Note:** If you list a structure code with no segment names, the special information type does not appear on your self-service pages.

If you choose to only display certain SITs, you should also personalize the HR_PERSON_SIT_UPDATE_SS region and the HR_PERSON_SIT_REVIEW_SS region to correspond to the HR_PERSON_SIT_DETAILS_SS region.

See: Configuring Flexfields, page 5-27

## Configuring the Extra Information Types (EITs) Page

This topic provides details to help you configure the Extra Information Types page.

Although EITs and SITs are similar in appearance, configuration steps differ due to underlying structural differences. You can currently set up EITs for the following HR entities:

- People
- Assignment
- Location
- Contacts

### Menu and Function Names

Extra Information Types

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Change Extra Information Types

#### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Change Extra Information Types | EIT | HR EIT TYPE |

HR EIT TYPE

This attribute value defines whether the EIT is a Person or Assignment EIT. The possible values are PERSON or ASSIGNMENT, and the default value is PERSON.

See: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

### Extra Information Type Page

| Region | Tip Type | Message Name |
|---|---|---|
| Extra Information Type Main Page | Instruction | HR_EIT_INSTRUCTION_TEXT_SS |

### Extra Information Type Update Page

| Region | Tip Type | Message Name |
|---|---|---|
| Extra Information Type Update | Instruction | HR_EIT_UPDATE_INSTRUC_TEXT_SS |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

### Extra Information Type Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Extra Information Type Update | Extra Person Information | Extra Person Info DDF |

### Extra Information Type Update Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Extra Information Type Update | Extra Person Information | Extra Person InfoDDF |
| Extra Information Update Page | Extra Person Info Details | PER_PEOPLE_EXTRA_INFO |

### Review Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Extra Information Update Page | Extra Person Info Details | PER_PEOPLE_EXTRA_INFO |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

## Additional Configuration Steps

1. First, you choose how you want to use your EIT modules:
   - standalone - as an Employee or Manager menu
   - chained - as part of a Manage Employment Events flow
   - chained - as part of a Personal Information flow
2. User responsibilities and business group legislation codes restrict the EITs that appear in a self service module. Before you can add the EIT function to an SSHR

process, you must restrict the EITs available to your responsibilities. All EITs are available to all business groups and delivered responsibilities, in other words, there are no predefined legislation restrictions. All EITs are already available to the business group for your responsibility.

You enable EITs in the Information Types Security window.

1. Copy the EITs for the delivered Manager Self-Service or Employee Self-Service responsibility to a custom responsibility.

2. Delete the EITs that are not required for your responsibility.

3. Save your work.

> **Note:** The Context Description for the descriptive flexfield context value for the EIT appears as the region header in the self-service module. You configure the Context Description in the Descriptive Flexfield Segments window.

The self-service EIT module displays all EITs you enable using the above steps.

If your responsibility only covers one business group, you can specify the required EITs directly in the Information Types region. If your responsibility covers multiple business groups, you need to include the EITs from the other business groups with your responsibility.

See: Setting Up Extra Information Types for a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Use the Personalization Framework to restrict which EIT segments appear on your self-service pages.

   To display only certain segments, personalize the region at the appropriate level and list the names of the segments you wish to appear for that EIT. Separate multiple segments with single pipe symbols (|) and separate multiple structures with double pipe symbols (||).

   > **Note:** If you list a structure code with no segment names, the EIT does not appear on the page..

See: Configuring Flexfields, page 5-27

## Configuring the Allocated Checklists Page

This topic provides information to configure the Allocated Checklists page.

## Menu and Function Names

| User Menu Name | Function Name |
|---|---|
| Manager Self-Service | Allocated Checklists |
| HR Professional | Allocated Checklists |
| Super HRMS Manager | Setup/Maintain Checklists |

## Workflow

**Workflow Process Display Name**

- HR Checklist Notifier Workflow (HRCKLFYI)
- HR Checklist (HRCKLTSK)

## Configurable Flexfields

| Page | Flex Name | Flex Code |
|---|---|---|
| Add Task | Additional Allocated Task Details | PER_ALLOCATED_TASKS |
| Update Task | Additional Allocated Task Details | PER_ALLOCATED_TASKS |
| Add Checklist | Additional Allocated Checklist Details | PER_ALLOCATED_CHECKLISTS |
| Update Checklist | Additional Allocated Checklist Details | PER_ALLOCATED_CHECKLISTS |

## Additional Configuration Steps

For a complete overview of the configuration steps for checklists, see: Setting Up Checklists, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

# Configuring Views

## Configuring the My Information and My Employee Information Views

This topic provides information on configuring the My Information and My Employee Information View.

### Personalizations

Using personalizations, you enable only the functionality, information, and controls you want to make available to users. For example, you can display only the column headings of your choice in Summary and Details views. Consider the following personalizations specific to My Employee Information:

- Enable Manager Actions Icon
- Enable Effective Date
- Enable My List
- Enable Search Filter
- Name Format

#### Enable Manager Actions Icon

You can navigate to Manager Actions and initiate a self-service action for employees listed on My Employee Information, My List, or Advanced Search pages. To do this, enable the Action icon. Your Employee Type (EMP or CWK) determines whether you navigate to the Manager Actions or the Contingent Worker Manager Actions function. You can enable the Action icon on the following pages:

- My Employee Information
- My List
- Simple Search
- Advanced Search

See: The Personalization Framework, page 5-4

See: Configuring Web Pages, page 5-21

See: *OA Framework Personalization and Extensibility Guide*.

*My Employee Information*

The main page for My Employee Information displays information in six categories, grouped on the following sub tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications
- Effort Distribution
- Contracts

> **Note:** The Training, Effort Distribution, and Contracts tabs are hidden by default. To display these tabs, see the section Menu and Function Names, page 8-23, below.

Enable the Action icon for each tab by clicking the Personalize Page link. Apply the default scope of Page: 'Oracle Self Service Human Resources: My Employee Information'.

Using the Employment tab as an example, navigate the following nodes:

- Default Single Column: Manager Views
- Sub Tab Layout: (subTabRN)
- Stack Layout: Employment
- Query: Employment.EmpQueryRN

For each tab, navigate the child nodes beneath Query to enable the Action icon when you view selected people from search results or My List:

- Table: Employment
- Image: Action

For each tab, the sibling nodes beside Query (beneath Stack Layout) enable the Action icon for position hierarchies and supervisor hierarchies. Navigate the following nodes beneath Stack Layout:

- H Grid: [Supervisory Hierarchy|Position Hierarchy]

- Image: Action

To enable the Action icon at the function, location, site, organization, or responsibility level, click the Personalize icon and set the value of the Rendered field corresponding to the level.

Repeat the above steps in a similar way for the remaining tabs.

> **Note:** When you personalize at the page level by selecting a scope using the Page: prefix, as shown here, your personalizations are unique to that page. Shared regions can appear on multiple pages. When you select a scope using the Shared Region: prefix (such as Quick Search), your changes propagate to all instances of the region on all pages that use it.

*My List*

To personalize the My List page, click the Manage My List link to display the My List page. Set the scope on the Choose Personalization Context page to Shared Region: My List. Navigate the following nodes:

- Stack Layout: MyList
- Table: People in My List
- Image: Action

For information on how to enable the Manage My List link, see Enable My List, page 8-21, below.

*Simple Search*

To personalize the Simple Search page, enter text in the Quick Search field and press Go to display the page. Click the Personalize Basic Search link, and accept the default scope of Region: Basic Search. Navigate the following nodes:

- Default Single Column: Basic Search
- Table: People
- Image: Action

*Advanced Search*

To personalize the Advance Search page, click the Advanced Search link to display the page. Click the Personalize Advanced search link, and accept the default scope of Region: Advanced Search. Navigate the following nodes:

- Default Single Column: Advanced Search
- Query: Advanced Search

- Table: People
- Image: Action

### Enable Effective Date

Enable the Effective Date field to display snapshot views at a point in time in Hierarchy or My List views.

To do this, click the Personalize Effective Date and View As link, and accept the default scope of Region: Effective Date and View As. To enable the Effective Date field and the Go button, navigate the following nodes:

- Flow Layout: Effective Date and View As
- Row Layout: Effective Date
- Message Text Input: Effective Date
- Submit Button: Go

### Enable My List

Enable My List features by adding the My List entry to the context switcher. See Lookups, page 8-23, below.

The Manage My List page enables you to view or delete My List members. Enable the Manage My List link on the My Employee Information or Basic Search page using the Personalize Page link. Navigate the following nodes:

- Page: [My Employee Information|Basic Search]
- Scope: 'Shared Region: Quick Search'
- Row Layout: Quick Search
- Link: Manage My List

The Add To My List button enables you to add selected people to My List. Enable the Add to My List button on the Basic Search and Advanced Search pages using the Personalize Page link. Navigate the following nodes from the Basic Search page:

- Scope: Shared Region: Basic Search
- Default Single Column: Basic Search
- Table: People
- Table Selection

- Multiple Selection
- Selection Button: Add To My List

Navigate the following nodes from the Advanced Search page:

- Scope: 'Shared Region: Advanced Search'
- Default Single Column: Basic Search
- Query: Advanced Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

### Enable Search Filter

To filter name searches, enable the search filter list for First Name, Last Name, or Full Name on the My Employee Information page, the Basic Search Page, or the My List page. If you do not enable the list, users see only the Name label and the Search field, and the default filter is Last Name. Navigate the following nodes:

- Page: [My Employee Information|Basic Search|My List]
- Scope: Shared Region: Quick Search
- Row Layout: Quick Search
- Message Choice: (SearchFilter)

### Name Format

The My Information and My Employee Information pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

## Overrides

In the My Information and My Employee Information pages, the position and job names are displayed using a concatenated flexfield format. If required, you can use customer overrides to configure a user-defined format for displaying position and job names. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 3-7.

## Menu and Function Names

Navigation is available from the Employee or Manager Self Service menu, or new menus you configure. In addition to including the My Employee Information function in new menus, add the following predefined submenus as-is:

- HR_EMP_VIEWS_FUNC_MENU (My Information Functions)
- HR_MGR_VIEWS_FUNC_MENU (My Employee Information Functions)

Submenus provide Oracle Applications Framework page authentication only, you need not copy or recreate them.

> **Note:** HR professionals can enter My Employee Information using Advanced Search. Add the Advanced Search function to the HR Professional menu.

| Menu Name | User Menu Name | Function Name |
|---|---|---|
| HR_EMPLOYEE_DIRECT_ACCESS_V4.0 | Employee Self Service | My Information |
| HR_LINE_MANAGER_ACCESS_V4.0 | Manager Self Service | My Employee Information |

> **Note:** You cannot change tab sequence, but you can use standard AOL menu exclusion functionality at the responsibility level to show and hide tabs. Make your changes to the My Information Views Sub Tab Menu (HR_EMP_VIEWS_SUB_TABS) or the My Employee Information Views Sub Tab Menu (HR_MGR_VIEWS_SUB_TABS). See: Configuring Tabbed Regions, page 5-28, *To remove a tabbed region or button from display*.

See: Defining Menus for SSHR, page 3-10

## Lookups

To enable My List functionality, enable My List in the following lookup.

| Lookup | Display Name |
|---|---|
| HR_MGRV_APPL_CONTEXT | Information Views Application Context Switcher |

**Note:** You must also enable the navigation button Manage My List to the My Employee Information page, and the navigation button Add to My List to Simple and Advanced Search Results pages.

## Workflow

Not applicable

## Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

### My Information

| Region Name | Tip Type | Message Name |
|---|---|---|
| Employee Views | Instruction | HR_EMPV_PAGE_INSTR |
| Employee History Table | Instruction | HR_EMPV_EMP_TABINSTR |
| Salary History Table | Instruction | HR_EMPV_SAL_TABINSTR |
| Performance History Table | Instruction | HR_EMPV_PERF_TABINSTR |
| Training History Table | Instruction | HR_EMPV_TRNG_TABINSTR |
| Absence History Table | Instruction | HR_EMPV_ABS_TABINSTR |
| Application History Table | Instruction | HR_EMPV_APPLN_TABINSTR |

### My Employee Information

| Region Name | Tip Type | Message Name |
|---|---|---|
| Manager Views | Instruction | HR_MGRV_PAGE_INSTR |
| Training History Table | Instruction | HR_MGRV_TRNG_TABINST |

## Configurable Flexfields

The following tables describe available configurable flexfields.

### My Information

| Region Name | Flexfield Name | Message Name |
|---|---|---|
| Employee History Table | Additional Assignment Details | PER_ASSIGNMENTS |
| Employee History Table | Add'l Period of Service Det's | PER_PERIODS_OF_SERVICE |
| Employee History Table | Add'l Period of Placement Det's | PER_PERIODS_OF_PLACEMENT |
| Employee History Table | Add'l Salary Admin. Details | PER_PAY_PROPOSALS |
| Performance History Table | Review Addl Information | PER_PERFORMANCE_REVIEWS |
| Performance History Table | Additional Appraisal Details | PER_APPRAISALS |
| Absence History Table | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Application History Table | Additional Application Details | PER_APPLICATIONS |
| Employee Views | Add'l Salary Admin. Details | PER_PAY_PROPOSALS |
| Employee Views | Proposal Component Addl Info | PER_PAY_PROPOSAL_COMPONENTS |

## My Employee Information

| Region Name | Flexfield Name | Message Name |
|---|---|---|
| Employment Details | Additional Assignment Details | PER_ASSIGNMENTS |
| Employment Details | Add'l Period of Service Det's | PER_PERIODS_OF_SERVICE |
| Employment Details | Add'l Period of Placement Det's | PER_PERIODS_OF_PLACEMENT |
| Employee History Table | Add'l Salary Admin. Details | PER_PAY_PROPOSALS |
| Employee History Table | Add'l Period of Service Det's | PER_PERFORMANCE_REVIEWS |
| Employee History Table | Add'l Period of Placement Det's | PER_APPRAISALS |
| Salary Details | Add'l Salary Admin. Details | PER_PAY_PROPOSALS |
| Performance History Table | Review Addl Information | PER_ABSENCE_ATTENDANCES |
| Performance History Table | Additional Appraisal Details | PER_APPLICATIONS |
| Training History Table | Additional Delegate Booking Information | OTA_DELEGATE_BOOKINGS |
| Training History Table | Add'l Non OTA Training History Info. | OTA_NOTRING_HISTORIES |
| Employee History Table | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Application History Table | Additional Application Details | PER_APPLICATIONS |
| Application History Table | Additional Assignment Details | PER_ASSIGNMENTS |

## Configurable Profile Options

You can display a position hierarchy instead of a supervisory hierarchy in My Employee Information.

### Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: Display Position Hierarchy | Site | Yes/No | No |
| HR: Enable User Personalization | All | Yes/No | No |

# Configuring the Employee Information View

This topic provides information on configuring the Employee Information view.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR Views | HR Views |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| EPI Address Detail Region | Personal Address Information | Address Structure |
| EPI Additional Person Details | Additional Personal Details | PER_PEOPLE |
| EPI Further Person Information | Further Person Information | Person Developer DF |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Configuring the Assignment Details View

This topic provides information on configuring the Assignment Details view.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR Views | View Employee Assignment Details |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Not applicable

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| AD Current Assignment Region | Job Flexfield | JOB |
| AD Current Assignment Region | Position Flexfield | POS |
| AD Current Assignment Region | Grade Flexfield | GRD |
| AD Additional Assignment Details Desc Flex Region | Additional Assignment Details | PER_ASSIGNMENTS |
| AD Assignment History Detail Region | Job Flexfield | JOB |
| AD Assignment History Detail Region | Position Flexfield | POS |
| AD Assignment History Detail Region | Grade Flexfield | GRD |
| AD Assignment Statutory Info | Soft Coded Key Flex | SCL |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Configuring the Compensation Activity View

This topic provides information on configuring the Compensation Activity view.

**Personalization**

When HR managers or Payroll managers log in to Oracle SSHR using the HR Professional responsibility to view the compensation details for employees in the Compensation Activity tabbed region, they can now view the compensation activity for all element types. Oracle SSHR displays all elements by default. If you want to display only specific elements, then you can use the Personalization feature to set the default priority using the Default Priority column in the Table: Elements Region.

The Compensation Activity view displays all the elements for a worker unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed. If you want to restrict the elements displayed in this view, create an element set (of type Customization Set) containing the elements you want to display, and select this element set in the Element Set Name user profile option.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR Views | View Employee Compensation Activity |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| CA Work Detail Region | Job Flexfield | JOB |
| CA Work Detail Region | Position Flexfield | POS |
| CA Work Detail Region | Grade Flexfield | GRD |
| CA Additional Salary Details Desc Flex Region | Add'l Salary Admin Details | PER_PAY_PROPOSALS |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

| Profile | Configurable Levels | Value | Default Value |
|---|---|---|---|
| Element Set Name | All | Element Set | Null |

See: Defining an Element or Distribution Set, *Oracle HRMS Payroll Processing Management Guide*

## Configuring the Termination History View

This topic provides information on configuring the Termination History view.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR Views | View Employee Termination History |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| TH Work Detail Region | Job Flexfield | JOB |
| TH Work Detail Region | Position Flexfield | POS |
| TH Work Detail Region | Grade Flexfield | GRD |
| TH Additional Periods of Service Desc Flex Region | Add'l Period of Service Det's | PER_PERIODS_OF_SERVICE |
| TH Additional Periods of Service Information Desc Flex Region | Add'l Periods of Service Information | PER_PDS_DEVELOPER_DF |

See: Configuring Flex Segments, page 5-27

### Configurable Profile Options

Not applicable

## Configuring the Search Functions for HR Views

This topic provides information on configuring the search functions for HR views.

### Menu and Function Names

These modules can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR User Self Service (HR_USER_SELF_SERVICE_V4.0) | HR Views Person Search Initial Screen |
| HR Views Menu (HR_VIEWS_MENU) | HR Views Person Search |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable FlexFields

Not applicable

### Configurable Profile Options

Not applicable

# Configuring the Workforce Sourcing and Deploy Modules

## Configuring the Location Module

This topic provides information to configure the Location module.

### Menu and Function Names

Not applicable

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Location

#### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Location | Location | Hr Null Allowed |
| Location | Location | HR Location Required |
| Location | Location | Hr Use Defaults |
| Location | Location | Hr Override Defaults |
| Location | Location | HR Element Warning |

**HR Null Allowed:**

Allows null location for an employee or worker.

**HR Location Required:**

Defines whether the location is required for an employee or worker.

**HR Use Defaults:**

The location can be changed to the default locations which are the user's Organization Location or Position Location. This is enforced by displaying the locations in a poplist.

**HR Override Defaults:**

The location can be changed to any global location or any location in the user's business group. The locations are displayed in a list of values if this attribute is called.

**HR Element Warning:**

Defines whether or not to display the HR element warning.

See: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

### Location Page

| Region | Tip Type | Message Name |
|---|---|---|
| Change Location | Instruction | HR_INST_TOP_COMMON_TEXT |
| Change Location | Long Message | HR_TIP_LOCATION_CODE |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

### Location Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Location | Location Address | Address Location |
| Location | Additional Assignment Details | PER_ASSIGNMENTS |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

# Configuring the Work Schedule Module

This page provides information to configure the Work Schedule function.

## Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Change Work Schedule

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

| Region Name | Tip Type | Message Name |
|---|---|---|
| Work Schedule | Long Message | HR_INST_WORK_SCHED_MAIN |
| Work Schedule | Short Tip | HR_TIP_WORK_START_TIME |
| Work Schedule | Short Tip | HR_TIP_WORK_END_TIME |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

| Region Name | Flex Name | Flex Code |
|---|---|---|
| Work Schedule | Soft coded KeyFlexfield | SCL |

| Region Name | Flex Name | Flex Code |
|---|---|---|
| Work Schedule | Additional Assignment Details | PER_ASSIGNMENTS |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Configuring the Change Pay Function

This topic provides information to configure the Change Pay function.

### Menu and Function Names

Not applicable

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

| Process Display Name | Usage |
|---|---|
| Change Pay | Main Process |
| Hire or Placement | Main Process |
| Worker Status Change | Main Process |
| Change Hours | Main Process |
| Assignment Rate/Payrate | Sub Process |
| Quick Change Hours | Main Process |

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the

Change Pay page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

The Applicant hire process uses the same workflow process as Hire or Placement (New Hire).

#### Quick Change Hours Process

The Quick Change Hours process (HR_QK_CHANGE_HOURS_JSP_PRC) is a change hours process in addition to the existing Change Hours process (HR_CHANGE_HOURS_PRC) that includes the Change Pay transaction page. Using this process, managers can quickly change the work schedule and assignment category of a worker and submit the transaction, without requiring to change pay.

If you want to use the Quick Change Hours process, then you must change the name of process in the predefined or custom HR_CHANGE_HOURS function.

For example, by default, the parameters of the predefined HR_CHANGE_HOURS_SS function are:

```
pAMETranType=SSHRMS&pAMEAppId=800&pPayRate=Y&pProcessName=HR_CHG_HOURS_J
SP_PRC&pItemType=HRSSA&pCalledFrom=HR_CHANGE_HOURS_SS&pEffectiveDate=
```

The process that is used in the predefined function is the HR_CHG_HOURS_JSP_PRC, which is a standard Change Hours process.

To use the Quick Change Hours process, change the value of the pProcessName parameter as pProcessName=HR_QK_CHANGE_HOURS_JSP_PRC.

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Change Pay | HR_CHANGE_PAY_JSP_PRC | Change Pay, Assignment Rate |

See: Configuring Workflow Attributes, page 4-10

## Configurable Tips and Instructions

Not Applicable

## Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| Pay Rate Salary Admin Flex Cell | Add'l Salary Admin Details | PER_PAY_PROPOSALS |
| Pay Rate Multiple Table | Proposal Component Addl Info | PER_PAY_PROPOSAL_COMPONENTS |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: Base Salary Required | Site | Yes/No | Null |

**HR: Base Salary Required**

When you set this profile option to Yes, if a person's assignment has a salary basis assigned but no pay proposal, the Description and Salary fields will be mandatory. The user will be forced to enter values for these fields.

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

## Configuring the Assignment Rate Module

This topic provides information to configure the Assignment Rate module.

### Menu and Function Names

Not applicable

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

| Process Display Name | Usage |
|---|---|
| Change Pay | Main Process |
| New Hire | Main Process |
| Worker Status Change | Main Process |
| Change Hours | Main Process |
| Assignment Rate/Payrate | Sub Process |

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Pay Rate page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Change Pay | HR_P_RATE_JSP_PRC | Pay Rate, Assignment Rate |

See: Configuring Workflow Attributes, page 4-10

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| AssignmentRatePG | Instruction | HR_ASSIGNMENT_RATE_INST |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

Not applicable.

### Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| PO: Services Procurement Enabled | Site | Yes/No | No |

If Oracle Services Procurement is installed and licensed, and the user profile option PO: Services Procurement Enabled is set to Yes, assignment rate information is obtained automatically from Oracle Services Procurement.

## Configuring the Documents of Record Module

This topic provides information on configuring the Documents of Record page.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Documents of Record |
| Employee Self Service | Documents of Record |
| HRMS Navigator (HR Professional menus) | People > Search Documents of Record<br>People > Enter and Maintain > Documents of Record (access from task flow).<br>FastPath > Documents of Record. |

### Workflow

The workflow details for this function are listed below:

#### Workflow Process Display Name:

Notify Document of Record Reviewee Process (HR_NOTIFY_DOR_REVIEWEE_PRC)

Notify Document of Record Reviewer Process (HR_NOTIFY_DOR_REVIEWER_PRC)

### Configurable Workflow Attributes:

The following attributes are used in the Notify Document of Record Reviewee process and Notify Document of Record Reviewer process:

| Activity Display Name | Attribute Display Name | Description |
|---|---|---|
| Notify Document of Record Reviewee/Notify Document of Record Reviewer | Reviewee | Name of person whose document of record is created. |
| | Document of Record Type | Type of document being created. |
| | Valid From | Validity start date for document. |
| | Valid To | Validity end date for document. |
| | Here | URL of document of record page. |
| | Reviewer | Name of person who reviews document of record. |
| | Review Action | Action being carried out, for example, creation or deletion of document. |
| | Effective Date | Effective date for transaction. |

## Configurable Flexfields

| Region | Flex Prompt (SSHR) | Flex Name |
|---|---|---|
| Extra Information | Document Type | Extra Document Information |
| Additional Document Details | AddDocDtlsDff | Extra Document Info Details |

## Configurable Profile Options

None

## Additional Configuration Steps

To supplement the delivered document types, categories, and subcategories, you can create your own objects to suit your business requirements.

See: Creating Document Categories, Subcategories, and Types, page 8-60

## Setting up Approvals for the Documents of Records Function

The supplied Documents of Record function does not use approvals, by default.

The following are the features of the supplied functions:

| Function Name | User Function Name | Web HTML Call | Parameters |
|---|---|---|---|
| HR_DOR_SS | Documents of Record | OA.jsp?page=/oracle/apps/per/dor/webui/DocsOfRecordForPersonPG&akRegionApplicationId=800 | pItemType=HRCORE&pNtfyReviewerPrc=HR_NOTIFY_DOR_REVIEWER_PRC&pNtfyReviewerPrc=HR_NOTIFY_DOR_REVIEWEE_PRC&pCalledFrom=HR_DOR_SS&OAFunc=HR_DOR_SS&addBreadCrumb=Y |
| HR_DOR_MGR_SS | Documents of Record | OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800 | pCalledFrom=HR_DOR_SS&pManagerEnabled=Y&addBreadCrumb=Y |

To use approvals in the Documents of Record functionality, Oracle SSHR uses the following predefined components:

- Oracle Approvals Management (AME) transaction type for Oracle SSHR

  pAMETranType=SSHRMS

  This parameter identifies whether the Documents of Record function requires an approval workflow and AME process or normal verification process.

- Predefined HR workflow item type

HRSSA

- Workflow process delivered with the HRSSA workflow to support the approval process for the Documents of Record functionality:

  PER_DOR_JSP_PRC

Based on your business requirements, to implement approvals in the Documents of Record functionality, you can follow any of the approaches:

1. You can change the parameters of the delivered HR_DOR_SS form function using the Form Functions window.

   Add the parameter values as given in the following example:

   ```
   pItemType=HRSSA&pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=PER_DOR_JSP_PRC&pFromMenu=Y&pApprovalMode=YD&OAFunc=HR_DOR_SS&pCalledFrom=HR_DOR_SS
   ```

2. You can create a custom function to use the approvals feature. Complete the following steps:

   1. Using the Form Functions window, copy the supplied function: HR_DOR_SS and create a custom function.

   2. In the Parameter field of the custom form function, edit the values of the form function to add the following predefined components.

      Add the parameter values as given in the following example:

      ```
      pItemType=HRSSA&pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=PER_DOR_JSP_PRC&pFromMenu=Y&pApprovalMode=YD&OAFunc=HR_DOR_SS&pCalledFrom=HR_DOR_SS
      ```

   3. Create a custom function: HR_DOR_MGR_SS and modify the parameters of this form function to include the custom HR_DOR_SS function.

   4. Add the custom form functions to the Manager Self-Service, Employee Self-Service, and Contingent Worker Self-Service menus, as required.

For more information on how to define functions, see: Defining Functions for SSHR, page 3-12

To base approvals on your business requirements, you can:

- Customize the predefined workflow process PER_DOR_JSP_PRC using the Workflow Builder.

  See: Workflow Objects and Item Types, page 4-3

- Customize the predefined AME transaction type SSHRMS to define conditions, rules, and attributes using Oracle Approvals Management (AME)

  See: Oracle Approvals Management (AME) Configuration, page 6-5

When you implement the approvals process for the Documents of Record functionality, Oracle SSHR displays the following changes:

- On the Create Document of Record or the Update Document of Record page, a Next button is displayed. When workers or managers click this button, the Review page appears.
- The Documents of Record Review page is similar to the standard SSHR Review page. This page displays the following regions:
  - Proposed region with document details.
  - Comments to Approver, where the transaction creator can add comments.
  - Supporting Documents region to add attachments.
  - Approvers region that shows a list of approvers.
  - Add Adhoc Approver to select additional approvers and recipients of the FYI notifications.

    User can click Submit to route the transaction for approval.
- The Update Documents of Record Review page shows two columns: Current and Proposed.
- The Documents of Record for Person page displays the transaction status of a document that is submitted for approval. If the transaction is pending approval, then the Update feature is unavailable. This page displays the document of record details in a table. Users can click the View icon to view further details on the View Document of Record page.
- The Notification page that an approver receives to review the document of record does not display the Return for Correction button and the Update link.

The Save For Later and inadvertent Save For Later feature are not available with approvals for Documents of Record.

## Configuring the Termination Module

This topics provides details about the Termination module.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Termination Mgr |

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

| Process Display Name | Usage |
|---|---|
| Termination | Main Process |
| Quick Termination | Main Process |

#### Quick Termination Process

The Quick Termination process (HR_QK_TERMINATION_JSP_PRC) is in addition to the existing Termination process (HR_TERMINATION_JSP_PRC). Using this process managers can enter termination details of their workers and submit the transaction for approval, without having to navigate to the 'Change Manager' page to reallocate the workers who report to the terminated worker, if the terminated worker is a manager.

> **Note:** If you use the process named HR_QK_TERMINATION_JSP_PRC, then to automatically move the workers reporting to the terminated manager to the terminated manager's manager, the parameter &pQkFn in the HR_TERMINATION_SS function must be set to Y.
>
> Complete the following steps:
>
> 1. Log in to the System Administrator responsibility.
> 2. Navigate to the Function window.
> 3. Search for the HR_TERMINATION_SS function.
> 4. Click the Form tab.
> 5. Change the "Parameters" value to the following:

```
pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_QK_TE
RMINATION_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_TERMIN
ATION_SS&pEffectiveDate=&pQkFn=Y
```

When enterprises use the Quick Termination process, they can set the HR: No Supervisor Error or Warning profile option. This profile option determines the processing behavior of the application when users initiate termination transactions of employees who are managers but do not have a supervisor. If the profile option value is set to Error, then the application does not allow the user to proceed with the termination transaction of a manager who does not have a supervisor. If the profile option value is set to Warning, then the application allows the user to proceed with the termination transaction of a manager who does not have a supervisor. However, as the terminated manager does not have a supervisor the application does not reassign the terminated manager's subordinate workers. In such cases, the HR administrator must assign a supervisor to the subordinate workers using the Oracle HRMS Assignment window.

If you want to use the Quick Termination process, then you must change the name of process in the predefined or custom HR_TERMINATION_SS function.

For example, by default, the parameters of the predefined HR_TERMINATION_SS function are:

```
pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_TERMINATION_JSP_PRC&pI
temType=HRSSA&pCalledFrom=HR_TERMINATION_SS&pEffectiveDate=
```

The process that is used in the predefined function is the HR_TERMINATION_JSP_PRC, which is a standard Termination process

To use the Quick Change Hours process, change the value of the pProcessName parameter as pProcessName= HR_QK_TERMINATION_JSP_PRC.

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Termination Process | Termination Page | Termination Reason Lookup Codes |

## Configurable Tips and Instructions

### Termination Page

See: Configuring Web Pages, page 5-21

| Region | Tip Type | Message Name |
|---|---|---|
| Termination Details | Long Message | HR_INST_TERMINATION |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Termination Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Termination Details | Additional Period of Service Details | PER_PERIODS_OF_SERVICE |
| Termination Details | Additional Period of Service Information | PER_PDS_DEVELOPER_DF |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: No Supervisor Error or Warning | Site, Application, Responsibility, User | Warning<br>Error | |

HR: No Supervisor Error or Warning

Set this profile option if you are using the quick Termination HR_QK_TERMINATION_JSP_PRC function. When enterprises use the Quick Termination process, they can set the HR: No Supervisor Error or Warning profile option. This profile option determines the processing behavior of the application when users initiate termination transactions of employees who are managers but do not have a supervisor. If the profile option value is set to Error, then the application does not allow the user to proceed with the termination transaction of a manager who does not have a supervisor. If the profile option value is set to Warning, then the application allows the user to proceed with the termination transaction of a manager who does not have a supervisor. However, as the terminated manager does not have a supervisor the application does not reassign the terminated manager's subordinate workers. In such

cases, the HR administrator must assign a supervisor to the subordinate workers using the Oracle HRMS Assignment window.

# Configuring the Voluntary Termination Module

This topic provides details about the Voluntary Termination module.

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Voluntary Termination Emp |

## Workflow

The workflow details for this module are listed below:

Workflow: HRSSA

### Workflow Process Display Name:

Termination Process (HR_TERMINATION_JSP_PRC)

Employee or Contingent Worker Termination (sub process)

### Configurable Workflow Attributes:

| Process Display Name | Function Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Termination Process | Termination Page V4.0 (HR_TERMINATION_JSP_FCT) | Termination Reason Lookup Codes Employee (TERM_REASON_LOOKUP_CODES_EMP) |

**Configuring the Termination Reason Lookup Codes Employee Attribute**

The Reason field on the Voluntary Termination page uses the Leaving Reason (LEAV_REAS) lookup type, which managers use when they terminate employees. Values for the Reason field for Termination that are available in Manager Self-Service may not be applicable to the Voluntary Termination process that employees initiate.

Enterprises can control the values that appear in the Reason field on the Voluntary

Termination page at the workflow level using the function level workflow attribute : TERM_REASON_LOOKUP_CODES_EMP that is delivered with the workflow function:

Termination Page V4.0 (HR_TERMINATION_JSP_FCT)

To display specific reasons in the Voluntary Termination page for employees, the system administrator must enter the lookup codes separated with pipe symbol (|).

### Configuring the Change Manager and Change Organization Manager Pages in the Voluntary Termination Flow

By default, when an employee who has direct subordinates requests voluntary termination, Oracle SSHR does not display the Change Manager page. The Bypass Change Manager node attribute of the Branch on Presence of Subordinates V4.0 is set to Yes.

In the event of the employee being a manager to an organization, the Update Organization Manager page does not appear in the voluntary termination business flow. The Bypass Organization Manager attribute of the Branch on Organization Manager function is set to Yes.

Based on your business requirements, to display the Change Manager and Update Organization Manager pages, you must set the following node attributes:

| Function | Node Attribute | Node Value |
|---|---|---|
| Branch on Presence of Subordinates V4.0 ( HR_BRANCH_ON_SUBORDINATES_FCT) | Bypass Change Manager (BYPASS_CHG_MGR) | No |
| Branch on Organization Manager (HR_BRANCH_ON_COST_CENTER_MGR) | Bypass Organization Manager (BYPASS_ORG_MGR) | No |

For information on how to configure workflow attributes, see: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

### Voluntary Termination Page

See: Configuring Web Pages, page 5-21

| Region | Tip Type | Message Name |
|---|---|---|
| Termination Details | Instruction | HR_50704_TERM_NTF_DATE_TIP |

The following warning messages appear when approvers receive voluntary termination notifications:

| Region | Tip Type | Message Name | Default Text | Message Context |
|---|---|---|---|---|
| Notification Details | Warning | HR_50706_ASSIGN_DIRECTS_MSG | This employee has direct reports. Reassign the direct reports to another manager. | This message appears if the employee who requests voluntary termination has directs. |
| Notification Details | Warning | HR_50707_ASSIGN_ORG_MGR_MSG | This employee is an organization manager. Select another organization manager. | This message appears if the employee who requests voluntary termination is an organization manager. |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Voluntary Termination Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Termination Details | Additional Period of Service Details | PER_PERIODS_OF_SERVICE |
| Termination Details | Additional Period of Service Information | PER_PDS_DEVELOPER_DF |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

### Fields Hidden by Default

The following fields on the Voluntary Termination page are hidden by default. Using personalization, these fields can be displayed:

- Last Standard Process Date
- Projected Date
- Final Process Date
- Person Type
- Assignment Status
- Rehire
- Rehire Reason
- Additional Period of Service Details flexfield
- Additional Period of Service Information flexfield

## Configuring the Voluntary Terminate Placement Module

This topics provides details about the Voluntary Terminate Placement module.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Contingent Worker Self-Service | Voluntary Termination Emp |

### Workflow

The workflow details for this module are listed below:

Workflow: HRSSA

### Workflow Process Display Name:

Termination Process (HR_TERMINATION_JSP_PRC)

Employee or Contingent Worker Termination (HR_EMP_OR_CWK_TERM_JSP_PRC), which is a sub process.

**Note**: The Termination process uses the sub process Employee or Contingent Worker Termination. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Voluntary Termination page (Selected Person Type = Employee) and the Voluntary Terminate Placement page (Selected Person Type = Contingent Worker).

### Configurable Workflow Attributes:

| Process Display Name | Function Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Termination Process | CWK Termination Page (HR_CWK_TERMINATION_JSP_FCT) | Termination Reason Lookup Codes Employee (TERM_REASON_LOOKUP_CODES_EMP) |

#### Configuring the Termination Reason Lookup Codes Employee Attribute

The Reason field on the Voluntary Terminate Placement page uses the lookup type Leaving Reason (LEAV_REAS), which managers use when they end placement of workers. Values for the Reason field for ending placement that are available in Manager Self-Service may not be applicable to the Voluntary Terminate Placement process that contingent workers initiate.

Enterprises can control the values that appear in the Reason field on the Voluntary Terminate Placement page at the workflow level using the function level workflow attribute : TERM_REASON_LOOKUP_CODES_EMP that is delivered with the workflow function:

CWK Termination Page (HR_CWK_TERMINATION_JSP_FCT)

To display specific reasons in the Voluntary Terminate Placement page for contingent workers, the system administrator must enter the lookup codes separated with pipe symbol (|).

### Configuring the Change Manager Page in the Voluntary Terminate Placement Flow

By default, when a contingent worker who has direct subordinates requests voluntary termination of placement, Oracle SSHR does not display the Change Manager page. The Bypass Change Manager node attribute of the Branch on Presence of Subordinates V4.0

is set to Yes.

Based on your business requirement, to display the Change Manager, you must set the node attribute value to No:

| Function | Node Attribute | Node Value |
|---|---|---|
| Branch on Presence of Subordinates V4.0 ( HR_BRANCH_ON_SUBORDINATES_FCT) | Bypass Change Manager (BYPASS_CHG_MGR) | No |

For information on how to configure workflow attributes, see: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

### Voluntary Terminate Placement Page

See: Configuring Web Pages, page 5-21

| Region | Tip Type | Message Name |
|---|---|---|
| Termination Details | Long Message | HR_INST_CWK_TERMINATION |

The following warning message appears when approvers receive voluntary termination notifications:

| Region | Tip Type | Message Name |
|---|---|---|
| Notification Details | Warning | HR_50706_ASSIGN_DIRECTS_MSG |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Voluntary Termination Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Termination Details | Additional Period of Service Details | PER_PERIODS_OF_SERVICE |
| Termination Details | Additional Period of Service Information | PER_PDS_DEVELOPER_DF |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

### Fields Hidden by Default

The following fields on the Voluntary Terminate Placement page are hidden by default. Using personalization, these fields can be displayed:

- Person Type
- Additional Period of Service Details flexfield
- Additional Period of Service Information flexfield

## Configuring the Reverse Termination Module

This topics provides details about the Reverse Termination module.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Reverse Termination Mgr |

### Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

The following workflow process is delivered with the HRSSA workflow:

Reverse Termination (HR_REVERSE_TERMINATION_JSP_PRC)

### Configurable Workflow Attributes:

Not Applicable

## Configurable Tips and Instructions

### Search Terminated Employee

See: Configuring Web Pages, page 5-21

| Region | Tip Type | Message Name |
|---|---|---|
| Search Terminated Employee | Instruction Text | HR_50641_INST_SEARCH_EXEMP |
| Search Terminated Employee | Instruction Text | HR_50642_FUTURE_TERM_HELP |

## Configurable Flexfields

### Employee Reverse Termination Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Termination Details | Additional Period of Service Details | PER_PERIODS_OF_SERVICE |
| Termination Details | Additional Period of Service Information | PER_PDS_DEVELOPER_DF |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

## Configurable Tips and Instructions

**Review Page**

Depending on the reverse termination action that managers process, any one of the following message appears on the Review page:

Message Name: HR_50649_REVERSE_TERM_REVIEW

Message token: &REVIEW_MESSAGE: Application adds the following messages dynamically based on the context.

| Region | Tip Type | Default Message Text |
|---|---|---|
| Review | Message | Reverse termination action clears the termination details and reinstates the assignment to the status prior to the termination. Person Type changes from Ex-Employee to Employee. |
| Review | Message | Reverse termination action clears the termination details and reinstates the assignment to the status prior to the termination. Person Type changes from Ex-Contingent Worker to Contingent Worker. |
| Review | Message | Reverse termination action clears the termination details and reinstates the assignment to the status prior to the termination. |

## Fields Hidden by Default

In the search results table of the Search Terminated Employee page, the following fields are hidden by default.

- Rehire Recommendation
- Rehire Reason
- Job

- Grade

Using Personalization you can display the hidden fields, if required.

# Configuring the End Placement Module

This topic provides information on configuring the End Placement module.

## Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

| Process Display Name | Usage |
|---|---|
| Termination Process | Main Process |
| Employee or Contingent Worker Termination | Sub Process |

The Termination process uses the sub process Employee or Contingent Worker Termination. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Termination page (Selected Person Type = Employee) and the End Placement page (Selected Person Type = Contingent Worker).

### Configurable Workflow Attributes:

Not applicable.

## Configurable Tips and Instructions

### Termination Page

| Region | Tip Type | Message Name |
|---|---|---|
| Termination Details | Long Message | HR_INST_CWK_TERMINATION |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Termination Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Termination Details | Additional Period of Placement Details | PER_PERIODS_OF_SERVICE |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

# Document Categories and Types

## Overview of Document Categories and Types

The Documents of Record functionality enables you to create and maintain documents, such as medical certificates, visas, and licenses, in Oracle HRMS. These documents belong to document categories (for example, visa information), subcategories (for example, work visa or business visa), and types (for example, US H1, US H2). The following table provides additional examples:

***Examples of Document Categories, Subcategories, and Types***

| Document Category | Document Subcategory | Document Type |
|---|---|---|
| Absence Information | Sickness | Doctor Certificate |
| | Maternity | Hospital Certificate |
| Personal Information | General | Birth Certificate |
| | General | Driver's License |
| Educational Information | Degree Certificate | Bachelor of Science |
| | Degree Certificate | Master of Science |

Oracle provides some standard document types. However you can also create your own document categories, subcategories, and types to suit the particular requirements of your enterprise.

See: Creating Document Categories, Subcategories, and Types, page 8-60

See also: Documents of Record, page 9-23 for information on using the Documents of Record function in SSHR.

## Creating Document Categories, Subcategories, and Types

Although Oracle provides several document categories, subcategories, and types for use with the Documents of Record functionality, you may need to create new objects to match your specific business requirements. Use the following process to create these objects.

1. To create a new document category, use the Application Utilities Lookups window and the DOCUMENT_CATEGORY lookup type. Enter the name of the new document category in the lookup code region, for example, Professional Information.

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

2. To create a new document subcategory, use the User Types and Statuses window:

   1. Query the DOCUMENT_CATEGORY lookup in the Name field.

   2. Enter the document category, for example, Professional Information, in the System Type column.

   3. Enter the required subcategories in the Code column, for example, Diploma, Certificate, Award.

   See: Creating User Types and Statuses, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. To create new document types, run the Register Document Types (EITs) process.

   See: Running the Register Document Types Process, page 8-61

4. When you have created your document types, you must associate them with a responsibility in the Information Types Security window (in the same way as you associate Extra Information Types with a responsibility).

   See: Setting Up Extra Information Types for a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   For more information on document categories and types, see: Overview of Document Categories and Types, page 8-60

## Running the Register Document Types (EITs) Process

Use this process to create new document types for the Documents of Record functionality.

See: Overview of Document Categories and Types, page 8-60

Run this process from the Submit Requests window.

### To run the Register Document Types (EITs) process:

1. In the Name field, select Register Document Types (EITs).

   The Parameters window appears.

2. In the Document Type field, enter a unique name for the new document type.

   **Note:** When the process runs, the application creates an internal name for the document type. The internal name is the same as the document type name and does not change, even if you subsequently change the document type name, for example, for translation. The internal name is used as the flexfield context.

3. In the Multiple Rows field, specify whether multiple occurrences of the same document type can exist. For example, for a birth certificate, the value would be No.

4. Select the country to which the document is applicable. You can leave the Country Code field blank to create a globally applicable document, for example, a passport document.

5. Enter the Category Code (mandatory) and Sub Category Code (optional).

   See: Overview of Document Categories and Types, page 8-60

6. Specify whether authorization is required for the new document type.

7. Click Submit.

# Configuring Professional Details Modules

## Configuring Education and Qualifications

This topic provides details about the Education and Qualifications module.

**Important: Personalizing Table Header Prompts for Education and Qualifications**

With the introduction of version 11.i.10 of the Oracle Applications Framework (OAF), Oracle has changed the definition of some elements in the Education and Qualifications Review page. If you have previously personalized this page by changing the table header prompts for the tables within the Education and Qualifications Review page, Oracle recommends that you check the personalizations and make the changes again if necessary.

See: Configuring Web Pages, page 5-21

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Education and Qualifications Mgr |
| Employee Self Service | Education and Qualifications |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Education and Qualifications

#### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### Education and Qualifications Overview Page

| Region | Tip Type | Message Name |
|---|---|---|
| Qualification Approved Header | Instruction | HR_INST_NO_QUALIFICATION_FOUND |
| Qualification Overview Page | Instruction | HR_INST_ADD_QUALIFICATION |
| Qualification Approved Header | Instruction | HR_INST_QUALIFICATION_FOUND |

### Add Qualifications Page

| Region | Tip Type | Message Name |
|---|---|---|
| Qualification Add Main Page | Instruction | HR_INST_NEW_QUALIFICATION |
| Qualification Add Main Page | Instruction | HR_INST_EDIT_QUALIFICATION |
| Add Qualification Add School | | HR_INST_SCHOOL_NAME |

### Add Subject Page

| Region | Tip Type | Message Name |
|---|---|---|
| Qualification Add Subject Main Page | Instruction | HR_INST_AWARD_ADD_SUBJECT |
| Qualification Add Subject Main Page | Instruction | HR_INST_AWARD_EDIT_SUBJECT |

| Region | Tip Type | Message Name |
|---|---|---|
| Qualification Add Subject Main Page | Instruction | HR_INST_QUA_ADD_SUBJECT |
| Qualification Add Subject Main Page | Instruction | HR_INST_QUA_EDIT_SUBJECT |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Add Qualifications Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Qualification Add Qualification | Additional Qualification Details | PER_QUALIFICATIONS |
| Qualification Add Qualification | Further Qualification Information | Qualification Developer DF |
| Add Qualification Add School | Additional Establishment Attendance Details | PER_ESTABLISHMENT_ATTENDANCES |

### Add Subject Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Add Subject | Additional Subjects Taken Details | PER_SUBJECTS_TAKEN |
| Add Subject | Further Subject Information | Subject Developer DF |

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: Free Text School Name Allowed in Self Service | All | Null, Yes/No | Null |

The following profile option controls a user's ability to enter school names

**HR: Free Text School Name Allowed in Self Service**

Users can add a school names either in free text, or they can select the school name from a list of values. You can prevent users from entering the school name in free text and only allow them to select the school name from a list of values, by setting the profile option HR: Free Text School Name Allowed in Self Service. If this is set to Yes or Null (the default), then free form entry of the school name will be possible. If you set this profile option to No, the list of values will be used to validate the entry of the school name.

# Configuring Other Professional Qualifications

This topic provides details about the Other Professional Qualifications module.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Other Professional Qualifications Mgr |
| Employee Self Service | Other Professional Qualifications |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Other Professional Qualifications

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### Qualifications Page

| Region | Tip Type | Message Name |
|---|---|---|
| Awards Add Main Page | Instruction | HR_INST_NEW_AWARD |
| Awards Add Main Page | Instruction | HR_INST_EDIT_AWARD |

### Other Professional Qualifications Overview Page

| Region | Tip Type | Message Name |
|---|---|---|
| Award Approved Header | Instruction | HR_INST_NO_AWARD_FOUND |
| Award Approved Header | Instruction | HR_INST_AWARD_FOUND |
| Award Overview Page | Instruction | HR_INST_ADD_AWARD |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Qualifications Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Awards Add Qualification | Additional Qualification Details | PER_QUALIFICATIONS |
| Awards Add Qualification | Further Qualification Information | Qualification Developer DF |

### Add Subject Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Add Subject | Additional Subjects Taken Details | PER_SUBJECTS_TAKEN |
| Add Subject | Further Subject Information | Subject Developer DF |

## Configurable Profile Options

Not applicable

# Configuring Competency Profile

This topic provides details about the Competency Profile module.

## Competency Profile Module

The Competency Profile module comprises the following pages:

| | |
|---|---|
| Competency Overview | /oracle/apps/per/selfservice/competency/profile/webui/OverviewPG |
| Add Competencies | /oracle/apps/per/selfservice/competency/profile/webui/AddCompsPG |
| Correct Competencies | /oracle/apps/per/selfservice/competency/profile/webui/CorrectCompsPG |
| Enter New Levels | /oracle/apps/per/selfservice/competency/profile/webui/NewLevelsPG |
| Search and Select: Competencies | /oracle/apps/per/selfservice/competency/profile/webui/SearchPG |
| Review | /oracle/apps/per/selfservice/competency/profile/webui/ReviewPG |
| Confirmation | /oracle/apps/per/selfservice/competency/profile/webui/ConfirmPG |

## Menu and Function Names

Users can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service > Professional Details | Competency Profile (HR_COMPETENCE_PROFILE_SS) |
| Employee Self Service > Professional Details | Competency Profile (HR_COMPETENCE_PROFILE_SS) |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Self Service Generic Approval Process

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### Review Competencies Page

| Region | Tip Type | Message Name |
|---|---|---|
| Additional Information | Instruction | PQH_SS_REVIEW_ADDL_INFO_INT |
| Additional Information | Instruction | PQH_SS_REVIEW_ATTACH_INT |

### Confirmation Page

| Region | Tip Type | Message Name |
|---|---|---|
| | Instruction | HR_CONFIRM_SMT_4_APPR_SS |
| | Instruction | HR_CONFIRM_APPLD_CHGS_SS |

See: Adding Instructions to a Web Page, page 5-35

## Configurable Flexfields

### Competency Overview Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Person Summary | Further Person Information | Person Developer DF |
| Person Summary | Additional Personal Details | PER_PEOPLE |
| Proposed Changes Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |
| Current Competencies Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |
| History Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |

### Add Competencies Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Person Summary | Further Person Information | Person Developer DF |
| Person Summary | Additional Personal Details | PER_PEOPLE |
| New Competencies Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |

### Correct Competencies Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Person Summary | Further Person Information | Person Developer DF |
| Person Summary | Additional Personal Details | PER_PEOPLE |
| Correct Competencies Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |

### Enter New Levels Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Person Summary | Further Person Information | Person Developer DF |
| Person Summary | Additional Personal Details | PER_PEOPLE |
| New Levels Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |

### Review Competencies Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Person Summary | Further Person Information | Person Developer DF |
| Person Summary | Additional Personal Details | PER_PEOPLE |
| Corrected Competencies Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |
| New Levels Entered Table | Add'l Competence Element Det's | PER_COMPETENCE ELEMENTS |
| New Competencies Table | Add'l Competence Element Det's | PER_COMPETENCE_ELEMENTS |

### Configurable Profile Options

Not applicable

## Configuring Suitability Matching

This topic provides details about the Suitability Matching module.

***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 |

| Category | Option | Access by Responsibility |
|---|---|---|
| Find a Work Opportunity for a Person | Compare Current Assignments | Manager, Employee, HR Professional |

## Menu and Function Names

Suitability Matching is accessible through three menus and corresponding functions as described in the following table.

***Menu and Function Names***

| User Menu Name | Function Name |
|---|---|
| Manager Self-Service (LINE_MANAGER_ACCESS_V4.0) | Suitability Matching Mgr (HR_SUITABILITY_MATCH_MGR_SS) |
| Employee Self-Service (EMPLOYEE_DIRECT_ACCESS_V4.0) | Suitability Matching (HR_SUITABILITY_MATCH_SS) |
| Contingent Worker Self-Service (HR_CWK_DIRECT_ACCESS) | Suitability Matching (HR_SUITABILITY_MATCH_SS) |
| HR Professional (HR_PROF_SELF_SERVICE_V4.0) | Suitability Matching Hr (HR_SUITABILITY_MATCH_HR_SS) |

## Workflow

Suitability Matching uses no configurable workflow processes.

## Tips and Instructions

You can configure all the following tips and instructions directly from the Suitability Matching pages, using the "Personalize..." links.

The following table describes the tips and instructions.

***Tips and Instructions***

| Region | Attribute Name | Message Name |
|---|---|---|
| AddCompetenciesPG | SelectCompInst | HR_INST_ADD_COMP_TO_LIST |
| CompGapsPG | SMCompGapsInst | HR_INST_COMP_GAPS_SS |
| ComparePeopleListPG | PersonListInst | HR_INST_PERSON_LIST |
| CompareSuccessorsListPG | PersonListInst | HR_INST_PERSON_LIST |
| CurrentAssignmentsPG | CurrentAssnInst | HR_INST_ASSIGNMENT_LIST |
| GraphByCompetencePG | GraphCompInst | HR_INST_GRAPH_COMP |
| GraphByPersonPG | GraphPersonInst | HR_INST_GRAPH_PERSON |
| GraphByWorkOppPG | GraphWorkOppInst | HR_INST_GRAPH_WORKOPP |
| PersonCompetenciesPG | PersonCompInst | HR_INST_PERSON_SELECT_COMP |
| PersonListPG | PersonListInst | HR_INST_PERSON_LIST |
| RefineSearchPG | RefineSearchInst | HR_INST_REFINE_SEARCH |
| SMManagerOptionsPG | ManagerOppInst | HR_INST_SUITMATCH_LMDA_OPTIONS |
| SMManagerOptionsPG | WorkOppInst | HR_INST_WORK_OPP_OPTIONS |
| SMManagerOptionsPG | PersonOppInst | HR_INST_PERSON_OPP_OPTIONS |
| SMOptionsPG | HROptionsInst | HR_INST_SUITMATCH_LMDA_OPTIONS |

| Region | Attribute Name | Message Name |
|---|---|---|
| SMOptionsPG | WorkOppInst | HR_INST_WORK_OPP_OPTIONS |
| SMOptionsPG | PersonOppInst | HR_INST_PERSON_OPP_OPTIONS |
| SMPersonOptionsPG | PersonPageOppInst | HR_INST_SUITMATCH_EDA_OPTIONS |
| SMTrainingActivitiesPG | SMTrainActInst | HR_INST_TRAIN_ACT_SS |
| SelectCompetenciesPG | SelectCompInst | HR_INST_SELECT_COMP |
| SelectMultiRolePG | SelectRoleInst | HR_INST_MULTI_SELECT_ROLE |
| SelectRolePG | SelectRoleInst | HR_INST_SELECT_ROLE |
| SelectRolePG | CompareByRoleInst | HR_INST_COMPARE_PEOPLE_ROLE |
| SelectRolePG | SelectPositionInst | HR_INST_SELECT_POSITION |
| SelectRolePG | SelectVacancyInst | HR_INST_SELECT_VACANCY |
| SuccessionOptionsPG | SuccOptionsInst | HR_INST_SUCCESSION_OPTIONS |
| SuitableWorkOppListPG | WorkOppListInst | HR_INST_SUITABLE_WORKOPP_LIST |
| VacancyListPG | VacancyListInst | HR_INST_VACANCIES_LIST |
| WorkOppListPG | WorkOppListInst | HR_INST_WORKOPP_LIST |
| MultiJobLovPG | SearchInst | FND_LOV_GO |
| MultiOrganizationLovPG | SearchInst | FND_LOV_GO |

| Region | Attribute Name | Message Name |
|---|---|---|
| MultiPositionLovPG | SearchInst | FND_LOV_GO |
| MultiVacancyLovPG | SearchInst | FND_LOV_GO |

## Configurable Flexfields

Suitability Matching uses no configurable flexfields.

## Profile Options

The three profile options control the matching options available to each category of user: employee, manager, and HR professional. Each of the values is a menu name. If you want to change the options available to a given user (if you want to hide the succession options from everyone, for example), you can clone a menu and replace the profile value with the name of your new menu. Note that these menus differ in kind and structure from the user menus listed above.

The following table describes the profile options.

***Profile Options***

| Profile | Configurable Level | Values (default value in boldface) | Value Required? |
|---|---|---|---|
| HR: SM Manager Find Work Opp Menu (HR_SM_PERSONAL_ACTIONS_MENU) | Responsibility | **HR_SM_PERSONAL_FUNCTIONS** (at Responsibility: HR Professional)<br>**HR_SM_PERSONAL_FUNCTIONS** (at Responsibility: Manager Self-Service) | Yes |
| HR: SM Manager Find Person Menu (HR_SM_MANAGER_ACTIONS_MENU) | Responsibility | **HR_SM_MANAGER_FUNCTIONS** (at responsibility: HR Professional)<br>**HR_SM_MANAGER_FUNCTIONS** (at responsibility: Manager Self-Service) | Yes |

| Profile | Configurable Level | Values (default value in boldface) | Value Required? |
|---|---|---|---|
| HR: SM Employee Find Work Opp Menu (HR_SM_EMP_PERSONAL_ACTIONS_MENU) | Responsibility | **HR_SM_EMP_PERSONAL_FUNCTIONS** (at responsibility: Employee Self-Service) | Yes |

# Configuring the Work Preferences Module

This topic provides information on configuring the Work Preferences function.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Work Preferences Mgr |
| Employee Self Service | Work Preferences |

See: Defining Menus for SSHR, page 3-10

## Workflow

Not applicable

## Configurable Tips and Instructions

| Region Name | Tip Type | Message Name |
|---|---|---|
| Work Preferences | Instruction | HR_INST_WORK_PREFERENCES |

See: Adding Instructions to Web Pages, page 5-35

### Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| Domestic Options | Add'l Deployment Factor Det's | Add'l Deployment Factor Det's |

### Configurable Profile Options

Not applicable

## Configuring the Resume Module

This topic provides information on configuring the Resume function.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Resume Mgr |
| Employee Self Service | Resume |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

| Region Name | Tip Type | Message Name |
|---|---|---|
| Resume | Instruction | HR_INST_TEXT_RESUME |

See: Adding Instructions to Web Pages, page 5-35

### Configurable FlexFields

Not applicable

### Configurable Profile Options

Not applicable

## Configuring the Tenure Status Module

This topic provides information on configuring the Tenure Status function.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Professional Details | Tenure Status |
| Professional Details | Tenure Status Overview |
| Employee Self Service | Tenure Status |
| Manager Self Service | Tenure Status |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Tenure Status

**Configurable Workflow Attributes:**

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable Flexfields

| Region | Attribute Name | FlexField Name |
|---|---|---|
| Tenure Status Flex | Descriptive Flexfield | Extra Person Info DDF |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Configuring the Academic Rank Module

This topic provides information on configuring the Academic Rank module.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Academic Rank |
| Manager Self Service | Academic Rank |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Academic Rank

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable Flexfields

| Region | Attribute Name | FlexField Name |
|---|---|---|
| Academic Rank Flex | Descriptive Flexfield | Extra Person Info DDF |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

# Configuring Recruitment Modules

## Configuring Applicant Hire and Rehire, Hire or Placement, Place Contingent Worker Processes

These processes provide you with the ability to hire employees or bring contingent workers into your enterprise, but if you want to configure them to fit your particular business needs, you can chain any of the following modules into the process:

- Personal Information (including basic details, address, and phone numbers)
- Assignment
- Employee or Contingent Worker Pay
- Change Manager
- SIT
- EIT
- Other Employment Information
- Work Schedule (not applicable to Place Contingent Worker)

When creating a chained process, the Hire Details, Applicant Search, or Place Contingent Worker page must be the first page, followed by the Personal Information page. Then you can add the Person EIT, Assignment EIT, or the Assignment pages. Following this, any of the remaining pages can be included.

The following table gives a list of the delivered chained processes and what modules are included in them.

***Recruitment Chained Processes:***

| Chained Process | Contains the following modules: |
|---|---|
| Hire or Placement | Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager |
| Contingent Worker Placement | Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager |

| Chained Process | Contains the following modules: |
|---|---|
| French Hire | Personal Information, Assignment, Other Employment Information, Work Schedule, Assignment EIT, Employee or Contingent Worker Pay |

**Note:** These processes are delivered with function level personalizations. If you make a copy either of them in order to make your own changes you will lose these delivered personalizations.

See: Function-level Personalizations, page 5-8

### Menu and Function Names

These processes can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Hire |
| Manager Self Service | Applicant Hire and Rehire |
| Manager Self Service | Contingent Worker Placement |
| Manager Self Service | French Hire |
| Manager Self Service | French Applicant Hire |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Hire or Placement

French Hire

#### Configurable Workflow Attributes:

Refer to the individual topics on each of the modules included in your process for

information on what configurable workflow attributes are available.

## Configurable Tips and Instructions

### Search Hire Applicant Page

| Region | Tip Type | Message Name |
|---|---|---|
| Applicant List | Long Message | HR_GENERIC_PENDING_INST_SS |
| Applicant Entry | Instruction | HR_INST_SEARCH_HIRE_APPLICANT |
| Applicant Entry | Instruction | HR_INST_SEARCH_APPLICANT |
| Applicant Entry | Instruction | HR_INST_APPLICANT_HIRE |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| Basic Detail Update Name Entry | hrpersondevdfflex | Person Developer DF |
| Basic Detail Update Other Entry | hrpersondevdfflex | Person Developer DF |
| Basic Detail Update Other Entry | Add Per Details Flexfield | PER_PEOPLE |
| NewHire Main Address | hraddressflex | Address Structure |
| NewHire Main Address | hraddtladdressflex | PER_ADDRESSES |

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: Cross Business Group | Site, Responsibility | Yes/No | No |
| HR: Propagate Data Changes | Site | Yes/No | No |
| HR: Self Service Hire and Placement Default | Site, Application, Responsibility, User | Yes/No | Yes |
| HR: Base Salary Required | Site | Yes/No | Null |

**HR:Cross Business Group**

Specifies whether people from business groups other than your own can be retrieved in the Search Applicant page.

**HR:Propagate Data Changes**

You use this profile option to control the synchronization of your person records where you have multiple records for one person, for example if a person has local records in two different countries

If you want changes made in one business group to be propagated throughout all business groups, then set this profile option to Yes.

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

For more information see: Person Record Synchronization, *Oracle HRMS Enterprise and Workforce Management Guide*

**HR: Self Service Hire and Placement Default**

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

For the Hire or Placement function, if you set the profile to Yes, the application defaults the Organization value based on the primary assignment, as of the system date, of the person logged in. The application also defaults the following values, but they do not apply to contingent worker placement:

- GRE (if US)
- Payroll

- Salary Basis

The supervisor for the new person defaults to the person logged in.

For both Hire and Applicant Hire and Rehire, this profile also controls which person type is defaulted.

- If the profile is set to No and there is only one person type available, then this person type is defaulted. If there is more than one available then the field remains blank and you can select a value.

- If the profile is set to Yes and there is only one person type available, then this person type is defaulted. If there is more than one available then the field displays the person type set as the default for the system person type of Employee.

**HR: Base Salary Required**

See: Pay Rate, page 9-63.

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

## Further Configuration Steps

**Warning:** Hire or Placement functionality uses code 'NEWH' under lookup_type 'PROPOSAL_REASON' to render the PayRate page. *Do not configure this code*, either by disabling the code or by disabling the localization the Hire or Placement process is running. If you do so, the Hire functionality will break.

# Configuring Absence Management

## Configuring the Absence Management Pages

This topic provides information to configure the Absence Management module.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Leave of Absence | Leave of Absence |

### Workflow

This module does not use workflow to control the page flow. It uses the generic approval process to handle approvals using AME. See: Implementing Oracle Approvals Management (AME), page 6-17.

### Approvals

The HR_LOA_SS function includes two parameters to control the approval process and notifications:

- pApprovalReqd -- You can enter the following values:
  - N - No approval required
  - Y - Yes approval required
  - YD - Yes with Dynamic approval region enabled on the page
- pNtfSubMsg -- You can enter the subject to display for absence email notifications

### Configurable Tips and Instructions

#### Leave of Absence Summary Top Page

| Region | Tip Type | Message Name |
|---|---|---|
| Absence Summary | Instruction | HR_INST_LOA_SUMMARY |

### Create Leave of Absence Page

| Region | Tip Type | Message Name |
|---|---|---|
| Create Leave Of Absence Main | Instruction | HR_INST_LOA_CREATE |
| Absence Details | Instruction | HR_INST_LOA_CREATE_DETAILS |

### Update Leave of Absence Page

| Region | Tip Type | Message Name |
|---|---|---|
| Update Main | Instruction | HR_INST_LOA_UPDATE |
| Update Details | Instruction | HR_INST_LOA_UPDATE_DETAILS |

### Confirm Dates Top Page

| Region | Tip Type | Message Name |
|---|---|---|
| Confirm Dates Main | Instruction | HR_INST_LOA_RETURN |
| Confirm Dates Details | Instruction | HR_INST_LOA_RETURN_DETAILS |

See: Configuring Tips and Messages, page 5-35

## Configurable FlexFields

### Create Leave of Absence Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Additional Absence Details | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Further Absence Details | Additional Absence Detail Information | PER_ABS_DEVELOPER_DF |

### View Leave of Absence Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Additional Absence Details | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Further Absence Details | Additional Absence Detail Information | PER_ABS_DEVELOPER_DF |

### Update Leave of Absence Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Additional Absence Details | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Further Absence Details | Additional Absence Detail Information | PER_ABS_DEVELOPER_DF |

### Confirm Dates Top Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Additional Absence Details | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Further Absence Details | Additional Absence Detail Information | PER_ABS_DEVELOPER_DF |

See: Configuring Flexfields, page 5-27

## Info Online

The Info Online content container is an ancillary region that appears on self-service web pages. The Info Online content container displays hypertext links to information providers. The Absence Management page available from the Manager and Employee Self-Service responsibilities contains the Info Online content container, which is hidden by default. This content container displays the Time Off Policy link (default link) to access, for example, company's absence policies on the Enwisen web site.

To enable users to access Enwisen, complete the following steps. Using the Personalization Framework function:

- Display the Info Online content container.
- Display the default Time Off link or configure links to Enwisen according to your agreement with Enwisen.

**Profile Options**

The following profile options affect the Info Online functionality:

- HR: Enwisen Login URL
- HR: Class Name to Fetch KI Data
- HR: KI Providers Enabled
- HR: KI Topics Enabled
- HR: KI User Options Enabled

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

  See: Info Online Content Container, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

  See: Configuring Links between HRMS Products and Enwisen, *Oracle HRMS*

# 9

# Workforce Sourcing and Deployment

## Workforce Sourcing and Deployment Overview

SSHR provides self-service functions within the following area of Workforce Sourcing and Deployment:

- Recruiting and Hiring
- People Management

This chapter looks in detail at the self-service functions available within this area and provides information on the functionality and configuration options for each function.

## Using SSHR for Workforce Sourcing and Deployment

### How can I use SSHR for my workforce sourcing and deployment processes?

You can use the New Hire processes to hire applicants and to bring contingent workers to your enterprise. These processes enable you to enter data in a series of web pages and to then finally hire the applicant or contingent worker.

### Can I modify these processes to suit the requirements of my enterprise

Yes. The sequence of web pages used in the New Hire processes is defined in the Workflow Builder. To modify this sequence, you can create your own version of the New Hire processes and chain together the required modules in a different sequence.

### Does SSHR carry out any checks when I hire an applicant or contingent worker using the self-service interface?

As in the Professional Forms Interface, SSHR can check for any duplicate persons within the system if required. If you activate this functionality, SSHR displays a list of

any possible duplicate persons.

## Can I access the iRecruitment functionality using the self-service interface?

Although iRecruitment uses a self-service interface and the Oracle Applications Framework functionality, you cannot access iRecruitment directly from SSHR. To access the iRecruitment functionality, you must purchase the appropriate license.

## What are the advantages to the HR Department of using SSHR?

Potential self-service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to more complex tasks, such as informing employees of their current vacation allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

## How does SSHR improve the accuracy of employee data?

Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay check is mailed to the correct address. With SSHR, employees can maintain their own data and ensure that it is correct.

## How does SSHR improve a manager's access to information?

Managers using SSHR can access the information for their employees using a hierarchy tree or, if enabled, the Person Search function. Security mechanisms ensure that managers can only retrieve information for those employees to whom they have access.

In addition, the Employee Directory provides contact information for employees within the enterprise. Users can search for people using different search criteria and look up contact and organizational information.

## Can I use SSHR to carry out standard HR procedures?

Yes. You can use the Manage Employment Events functionality to carry out such procedures as granting a salary increase, reassigning an employee to a new position, or terminating an employee. You can use the Workflow Builder functionality to chain different modules together to create enterprise-specific procedures.

## Can workers use SSHR to apply for jobs online?

Yes. Employees and contingent workers can use the Apply for Job module to search and apply for jobs online. Search criteria includes job location and vacancy date. They can attach a resume to their job application.

# Employee Demographics

## Personal Information Modules

The Personal Information function enables self-service users to enter and update their own personal records. This function is integrated within Oracle Workflow. By using Oracle Workflow and the Personalization Framework, you can design a process to control which personal details a user can change or display. You can also design an approval process for any changes made by employees, workers, or managers. You use the Personal Information function to update basic details such as Marital Status, Title, First and Last Name, Addresses, and Emergency Contacts.

**US Users Only** See: Entering Disability and Veteran Status Details to Comply with OFCCP, page 9-19

### Personalizing the Personal Information Functions

There are several personalization options available to you for the Personal Information functions. Function-specific personalizations are listed in the relevant functional documentation, however, you should note the following general points:

- You can include Extra Information Types (EITs) and Special Information Types (SITs) in your Personal Information process flows.

  See: Configuring Workflow Objects, page 4-8

- You can personalize the Personal Information Overview page to display the Dependents and Beneficiaries region.

- You can make the Personal Information pages read-only by hiding the Update buttons.

- You can add selected fields to the Personal Information pages. To display information on the available fields, click the "About this Page" link at the bottom of the Personal Information pages. This page displays subtabs that display information on the page including the view objects and associated entity objects and attributes.

  **Note:** If the "About this Page" link is not displayed, check the value of the FND: Diagnostics profile option. Set this profile to Yes at the required level.

  For more information on the "About this Page" feature, see: Discovering Page, Technology Stack and Session Information, in the *Oracle Application Framework Documentation Resource*, My Oracle Support note 391554.1.

- If you personalize a field in one of the Personal Information modules, for example, Phone Numbers, and want to replicate this change throughout the Personal Information function, you also need to make the change in the appropriate pages, for example, the Personal Information: Overview page.

When users click Update in the Basic Details, Main Address, Secondary Address or Tertiary Address regions in the Personal Information page, the options to correct current details or enter new information appear in the same page or a separate page, depending on the page configuration.

## Future-Dated Transactions

There are restrictions on future-dated transactions. If you submit an address change with an effective date of 6 months in the future, for example, you cannot enter another address change before the initial transaction is effective. When you display the Personal Information Overview page, you can view any future transactions by clicking the View Future Changes button. This button only appears if a future change exists.

> **Note:** This does not apply to the Phone Number module which does not require an effective date.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Personal Information

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable Flexfields

Not applicable

## Configurable Profile Options

Not applicable

## Basic Details

The Basic Details module records information such as a user's name and marital status.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Process Basic Details

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

#### Basic Details Page

| Region | Tip Type | Message Name |
|---|---|---|
| Basic Detail Update Name Entry | Long Message | HR_TIP_EFFECTIVE_DATE |
| Basic Detail Update Name Entry | Long Message | HR_TIP_PREFIX |
| Basic Detail Update Name Entry | Long Message | HR_TIP_SUFFIX |
| Basic Detail Update Name Entry | Long Message | HR_TIP_PREFERRED_NAME |
| Basic Detail Update Name Entry | Long Message | HR_TIP_PREVIOUS_LASTNAME |
| Basic Detail Update Name Entry | Instruction | HR_INST_BASIC_DETAILS_FORM |
| Basic Details Update Entry | Instruction | HR_PERINFO_FUTURE_CHANGES |

#### Basic Details Action Page

| Region | Tip Type | Message Name |
|---|---|---|
| Basic Details Action Type | Instruction | HR_INST_BASIC_DETAILS_TOC |

See: Adding Instructions to Web Pages, page 5-35

### Configurable Flexfields

#### Basic Details Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Basic Detail Update Other Entry | Further Person Information | Person Developer DF |

| Region | Flex Name | Flex Code |
|---|---|---|
| Basic Detail Update Other Entry | Additional Personal Details | PER_PEOPLE |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Main Address

The Main Address module stores the worker's primary address. You cannot delete this primary addressl.

You choose how to display your address in SSHR by configuring the Personal Address Details descriptive flexfield.

**Address styles for new addresses**

When you enter a new address in SSHR, you must select a country. The SSHR application uses the localization code for this country to select an address style from the segment inclusion list. For example, if you select United States as the country, the application retrieves the first segment with the prefix US from the segment inclusion list. The order of the segment list determines which style is selected by the application. For example, if the segment list contains US_CUSTOM before US and US_GLB, the application chooses US_CUSTOM.

**Address styles for existing addresses**

If you are updating an existing address and you are not required to select a country, or if the address is read-only, the application uses the existing style. The required style must be available in the segment list.

**Generic address styles**

You use the GENERIC address style to provide a style for localizations without a defined style in the flex segment list. For example, if you select India (IN) as the country when entering a new address, and if no IN segment is available in the flex segment inclusion list, the application uses the GENERIC style. For this reason, you must always include a GENERIC style in the flex inclusion list.

If required, you can create your own generic style with the name GENERIC_<*name*>, for example, GENERIC_CUSTOM. If the application finds the GENERIC_CUSTOM style before the GENERIC style in the segment list, the application uses the custom style.

**Changing Address Styles**

If you change from one style to another, you may see differences between the styles and

the address may not appear as expected.

For example, you enter applicant details in iRecruitment and use the US_IRC address style. This style uses the following segments:

- segment1 (Street)
- segment2 (Town or City)
- segment3 (District)

Then you hire the applicant and display address information in SSHR using the US address style. This style uses the following segments:

- segment1 (Street)
- segment2 (Town or City)
- segment4 (Country)

Both segment1 and segment2 are included in both styles and displayed on the SSHR page. However, segment3 from the US_IRC style is not displayed because it is not included in the US style. segment4 is displayed but has no value as it was not available in the original address entry page.

> **Note:** This behavior applies whenever you switch from a XX_xxxx style to a XX style.

For information on the Personal Address Details descriptive flexfield, see: Changing the Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Process Main Address

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

**Main Address Page**

| Region | Tip Type | Message Name |
|---|---|---|
| Main Address Update | Long Message | HR_TIP_MADDR_EFFECTIVE_DATE |
| Main Address Update | Long Message | HR_TIP_MADDR_ADDRESS_TYPE |
| Main Address Update | Instruction | HR_INST_MAIN_CORRECT_ADDRESS |
| Main Address Update | Instruction | HR_INST_MAIN_NEW_CHG_ADDRESS |
| Main Address Update | Instruction | HR_INST_VIEW_FUTURE_CHANGES |

**Main Address Action Page**

| Region | Tip Type | Message Name |
|---|---|---|
| Main Address Action Type | Instruction | HR_INST_MAIN_ADDRESS_TOC |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

**Main Address Page**

| Region | Flex Name | Flex Code |
|---|---|---|
| Main Address Update | Personal Address Details | Address Structure |
| Main Address Update | Additional Address Details | PER_ADDRESSES |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Secondary Address

The Secondary Address module stores additional addresses for a self-service user. Unlike the Main Address, you can delete the Secondary Address for an individual.

For information on address styles for SSHR, see: Main Address, page 9-7

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Process Secondary Address

#### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### Other Address Page

| Region | Tip Type | Message Name |
|---|---|---|
| Second Address Update | Instruction | HR_TIP_SADDR_EFFECTIVE_DATE |
| Second Address Update | Instruction | HR_TIP_SADDR_ADDRESS_TYPE |
| Second Address Update | Instruction | HR_INST_SCND_CORRECT_CHANGES |
| Second Address Update | Instruction | HR_INST_SCND_NEW_CHG_ADDRESS |
| Second Address Update | Instruction | HR_INST_VIEW_FUTURE_ADDRESS |

### Other Address Action Page

| Region | Tip Type | Message Name |
|---|---|---|
| Secondary Address Action | Instruction | HR_INST_SECONDARY_ADDRESS_TOC |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

### Other Address Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Secondary Address Update | Personal Address Information | Address Structure |
| Secondary Address Update | Additional Address Details | PER ADDRESSES |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

Not applicable

## Phone Numbers

The Phone Numbers module stores the telephone information for an self-service user.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Process Phone Numbers

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

#### Personal Information Overview Page

| Region | Tip Type | Message Name |
|---|---|---|
| Phone Numbers Overview | Instruction | HR_PERINFO_PHONES_ABOVE_LIMIT |
| Phone Numbers Update | Instruction | HR_INST_PHONES_FORM |

#### Other Addresses Page

| Region | Tip Type | Message Name |
|---|---|---|
| Second Address Update | Instruction | HR_INST_SCND_NEW_CHG_ADDRESS |
| Second Address Update | Instruction | HR_INST_VIEW_FUTURE_CHANGES |

See: Adding Instructions to Web Pages, page 5-35

### Configurable Flexfields

#### Phone Numbers Details Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Phone Number Details | Additional Telephone Number Details | PER_PHONES |

#### Phone Details Review Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Details Review | Additional Telephone Number Details | PER_PHONES |

### Configurable Profile Options

Not applicable

## Emergency Contacts

The Emergency Contacts module stores the contact information for emergency contacts (telephone information and address). Self-service users can add and delete people from the list of emergency contacts as required. When the user has created or edited a contact, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the contact until it has been approved or rejected by the approver.

**Personalizing the Emergency Contacts Page**

The standard layout for the Emergency Contacts page includes three telephone numbers. You can, however, personalize the page to display your custom phone types if required.

You can also personalize the page to create a read-only view if required.

**Creating Contacts Using SSHR Only**

If you choose to create an emergency contact or dependent using only SSHR (Personal Information function), instead of the forms-based interface, the following situation applies:

- The application creates two records in the per_contact_relationships table:
  - one record with the value EMRG in the contact_type column
  - one record with the value of the actual relationship (for example, spouse, brother) in the contact_type column

    **Note:** Information on whether or not the contact is the Primary Contact is held only for the Emergency Contact record (record with the EMRG value in the contact_type column). This record may have also the primary_flag set to Y or N.

- For the actual relationship record only, the personal_flag column contains the value Y (for Yes).

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Process Contacts

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

**Contacts Page**

| Region | Tip Type | Message Name |
|---|---|---|
| Contacts Main Table Region | Instruction | HR_289383_CONT_EMRG_MAIN_MSG |
| Contacts Main Table Region | Long Message | HR_TIP_SUFFIX |
| Contacts Main Table Region | Long Message | HR_TIP_PREFIX |
| Contacts Main Table Region | Long Message | HR_289371_DEP_BNF_FLAG_TIP |
| Contacts Main Table Region | Long Message | HR_289373_PRMRY_REL_MAIN_TIP |
| Contact Phone Numbers | Instruction | HR_INT_PHONES_FORM |
| Contact Address | Instruction | HR_INST_MAIN_CORRECT_ADDRESS |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

| Region | Flex Name (SSHR) | Flex Title | Flex Code |
|---|---|---|---|
| General Information | Contact Additional Details | Add'l Contact Rel'ship Det's | PER_CONTACTS |
| | Person Developer DF | Further Person Information | Person Developer DF |
| | HrFurtherContRel | Further Contact R'ship Information | Contact Relship Developer DF |

| Region | Flex Name (SSHR) | Flex Title | Flex Code |
|---|---|---|---|
| | HrAddPerDetFlexSs | Additional Person Details | PER_PEOPLE |

### Configurable Profile Options

Not applicable

## Dependents and Beneficiaries

The Dependents and Beneficiaries module stores the names and contact information for a user's dependents and beneficiaries. When the user has created or edited a dependent or beneficiary, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the dependent or beneficiary until the addition or change has been approved or rejected by the approver.

**Creating Contacts Using SSHR Only**

If you choose to create a dependent or beneficiary using only SSHR (Personal Information function), instead of the forms-based interface, the following situation applies:

- The application creates a record in the per_contact_relationships table.
- The record contains the value of the actual relationship (for example, spouse, brother) in the contact_type column.
- The record contains the value of Y (for Yes) in the personal_flag column.

The situation is slightly different if you create an emergency contact.

See: Emergency Contacts, page 9-13

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Personal Information |
| Employee Self Service | Personal Information |

See: Defining User Access and Menus, page 3-10

## Workflow

Not applicable

## Configurable Tips and Instructions

### Contacts Page

| Region | Tip Type | Message Name |
|---|---|---|
| Contacts Main Table Region | Instruction | HR_289383_CONT_EMRG_MAIN_MSG |
| Contacts Main Table Region | Long Message | HR_TIP_SUFFIX |
| Contacts Main Table Region | Long Message | HR_TIP_PREFIX |
| Contacts Main Table Region | Long Message | HR_289372_EMRG_CONT_FLAG_TIP |
| Contacts Main Table Region | Long Message | HR_289373_PRMRY_REL_MAIN_TIP |
| Contact Phone Numbers | Instruction | HR_INT_PHONES_FORM |
| Contact Address | Instruction | HR_INST_MAIN_CORRECT_ADDRESS |
| Contacts Main Table Region | Instruction | HR_289371_DEP_BNF_FLAG_TIP |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

| Region | Flex Name (SSHR) | Flex Title | Flex Code |
|---|---|---|---|
| General Information | Contact Additional Details | Add'l Contact Rel'ship Det's | PER_CONTACTS |
| | Person Developer DF | Further Person Information | Person Developer DF |

| Region | Flex Name (SSHR) | Flex Title | Flex Code |
|---|---|---|---|
| | HrFurtherContRel | Further Contact R'ship Information | Contact Relship Developer DF |
| | HrAddPerDetFlexSs | Additional Person Details | PER_PEOPLE |
| Address | HrAddressFlex | Personal Address Details | Address Structure |
| | HrAdditionalAddress | Additional Address Details | PER_ADDRESSES |

### Configurable Profile Options

Not applicable

## Info Online on the Personal Information Page

The Info Online content container is an ancillary region that appears on self-service web pages. The Info Online content container displays hypertext links to information providers. You can configure access between Oracle Self-Service HR (Oracle SSHR) and Enwisen, a third-party information provider to enable end users to access company information hosted on the Enwisen web site.

See: Configuring Links between HRMS Products and Enwisen, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The Info Online content container that is available on the Personal Information page, is hidden by default. This content container includes the Handbook link, which is a default link.

To enable users to access Enwisen, complete the following steps. Using the Personalization Framework function:

- Display the Info Online content container.
- Display the default Handbook link or configure links to Enwisen according to your agreement with Enwisen.

### Menu and Function Name

You can access the Info Online module from the Employee Self Service responsibility and Personal Information function.

### Configurable Profile Options

The following profile options affect the Info Online functionality:

- HR: Enwisen Login URL
- HR: Class Name to Fetch KI Data
- HR: KI Providers Enabled
- HR: KI Topics Enabled
- HR: KI User Options Enabled

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

  See: Info Online Content Container, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Entering Disability and Veteran Status Details to Comply with OFCCP (US)

Oracle SSHR for US provides the following Employee Self-Service pages to comply with the Office of Federal Contract Compliance Programs (OFCCP). From the **Personal Actions** page, you can navigate to the **Disclose Disability Status** and the **Disclose Veteran Status** functions.

1. The Disclose Disability Status Employee Self-Service function consists of Oracle Application Framework (OAF) self-service HTML page that reproduces Form CC 305 where a self-service user can optionally make a selection regarding their disability status.

   The self-service page contains **Submit** and **Cancel** buttons. Click **Submit** to save the selection. Use the **Cancel** button to revert any selection made. Any selection made by the user will be stored in the HR database. The information that an employee provides in this page is visible in the **Disability Information** and **Disability Entered Date** fields in the **Medical** tab of the **People** window in the professional UI.

2. The Disclose Veteran Status Employee Self-Service function consists of Oracle Application Framework (OAF) self-service HTML page where a self-service user can optionally make a selection regarding their veteran status. Any selection made by the user is stored in the HR database.

   **Note:** To indicate they are not a veteran, employees can select the "I am NOT a veteran" option.

   The self-service page contains **Submit** and **Cancel** buttons. Click **Submit** to save the selection. Use the **Cancel** button to revert any selection made.

If employees are using self-service to provide their veteran status, then they must use the "Disclose Veteran Status" Employee Self Service function. The application captures VETS-related information for VETS-4212 reporting through the Disclose Veteran Status page and once the employee has submitted their veteran status selection, this data is stored in the HR database and is visible in the **Vets 100A** field in the **Employment** tab of the **People** window.

The employee's disability and veteran status information is retrieved when the US OFCCP Disability/VEVRAA Audit Report is run. See Running the US OFCCP Disability/VEVRAA Audit Report, *Oracle HRMS Enterprise and Workforce Management Guide (US)* for more information.

## Contact Extra Information (Japan)

The Contact Extra Information function enables you to enter and maintain additional contact information in SSHR. Statutory regulations often require that employees and workers provide specific information on dependents and beneficiaries for health insurance and income tax purposes and SSHR enables you to store this information using Extra Information Types (EITs).

Both employee/workers and managers can use the Contact Extra Information function. If you are a manager, you first select the person for whom you are entering information, and then select the dependent or beneficiary from the Choose Contact page. If you are an employee, you access the Choose Contact page directly.

> **Note:** You create the dependent and beneficiary information using the Dependents and Beneficiaries page of the Personal Information function.
>
> See: Dependents and Beneficiaries, page 9-16

When you have selected the dependent or beneficiary, the application displays the available EITs for the dependent or beneficiary. You can create one EIT for each of the following groups:

- Health Insurance Law

  Create **one** of the following information types:

  - Health Insurance Dependent - dependent (non-spouse) information for health insurance and pension purposes. The information includes occupation, income, and qualification information.

  - Health Insurance Spouse - information on a spouse for health insurance and pension purposes. The information includes pension number, qualification information, occupation, income, nationality, and disqualification information, if applicable.

- Income Tax Law

  Create **one** of the following information types:

  - Income Tax Dependent - dependent information required if income tax is deducted from the main income earner. The information includes occupation, income, and disability information, if applicable.

  - Income Tax Dependent on Other Employee - dependent information required if income tax is deducted from an alternative income earner. The information includes occupation, transfer details, and relationship details.

  - Income Tax Dependent on Other Payroll - dependent information required for deduction of income tax from a secondary income earner. The information includes employer details, income, and transfer details.

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Contact Extra Information |
| Employee Self Service | Contact Extra Information |

**Note:** The function is also included in the Manager and Personal Action submenus.

See: Defining User Access and Menus, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Change Contact Extra Information Types

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| Dependents and Beneficiaries | Instruction | HR_CEI_CONTACT_NOT_SELECTED |
| Extra Information Types | Message | HR_CEI_CANNOT_UPDATE_DELETE_SS |
| | Message | HR_CEI_CANNOT_UPDATE_FT_CHG_SS |
| | Message | HR_CEI_CANNOT_UPDATE_FT_DEL_SS |
| | Message | HR_CEI_CANNOT_DELETE_FT_CHG_SS |
| | Message | HR_CEI_CANNOT_DELETE_FT_DEL_SS |
| | Message | HR_CEI_DEL_ACT_ENTER_DATE |

## Configurable Flexfields

| Region | Flex Name | Flex Code |
|---|---|---|
| Extra Information Types | Extra Contact Information | Extra Contact Info DDF |

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Display Person Name | Site, Application, Responsibility, User | Brief Name, Custom Name, Full Name | Brief |

**HR:Display Brief Person Name**

If you set this profile option to Brief Name (default value), the application displays the person names in the brief format instead of the long name format.

## Documents of Record

The Documents of Record function enables you to store information on documents such as work permits, visa information, and medical certificates in one place. If required, you can also upload electronic versions of documents as attachments.

As a worker, you can create, maintain, and delete your own documents of record. If your document requires authorization, the verifier receives a notification.

If you select the country name, the document type associated with the country and global document types appear in the Document Type search. When creating a document of record, select the country name and document type based on your requirement. The valid from date value defaults to the Issued Date field. You can retain the date or change it.

> **Note:** The person who registers the document type defines whether it requires authorization.

The default verifier is your supervisor. On verification, you also receive a notification.

> **Note:** If the subject of the document is a contact or other person who does not exist as a user in Oracle HRMS, no notification is received.

As a manager or HR Professional, you can create, maintain, and delete documents for your direct reports and for other individuals whose records you can access.

> **Note:** HR Professional users access the Documents of Record functionality using the forms-based interface. Self-service users (individuals and managers) access the functionality using the appropriate self-service menu.

**Using the Documents of Record Function**

The initial pages for the Documents of Record function differ according to the navigation path selected. If you use the Employee Self-Service responsibility, the first page lists your existing documents of record. Similarly, if you use the Manager Self-Service responsibility, the first page lists any existing documents of record for the worker selected in the hierarchy. From here, you can view, create, maintain, or delete documents of record.

If you are using a HR Professional responsibility and accessing the function from the forms-based interface, you can display a search page (by navigating to People > Search

Documents of Record). Alternatively, to view, create, or maintain the documents of record for a person, display the person's record in the People window and access the Documents of Record function through the task flow (Others button).

As an HR Professional, you can also access the Documents of Record pages by selecting Fastpath > Documents of Record, and then selecting a person for the transactions.

### Document of Record Function with Approvals

If your enterprise has setup approvals for the Documents of Record function, then when you create or update a document of record, the Next button appears on the Create Document of Record or the Update Document of Record page. When you click the Next button, the Documents of Record Review page appears. It shows the details that you can review. You can view the supporting documents that were attached in the Create or Update page. Also, Add Adhoc Approvers region is available, and you can add further approvers and notification recipients.

When you click the Submit button on the Review page, the transaction is routed for approval. The Confirm page contains a confirmation message describing the status of the transaction.

When a transaction is pending approval, the Update feature is unavailable on the Documents of Record for Person and View Document of Record pages. The Documents of Record for Person page displays the document of record details in a table. Users can click the View icon to view further details on the View Document of Record page and also can click the attachment image to view all the supporting documents.

The Notification page that an approver receives to review the document of record does not display the Return for Correction button and the Update link.

## Professional Details Modules

There are five modules within Professional Details: Competence Profiles, Education and Qualifications, Other Professional Awards, Work Preferences, and Resume. In addition, there are two modules for the US localization (Tenure Tracking and Academic Rank). Employees can maintain their own details or managers can maintain the details for their direct reports.

### Education and Qualifications

This function enables users to update a list of qualifications or create a new list of qualifications. The qualifications are academic qualifications obtained at an educational institution. The user can also add, edit, and delete the major subjects for the qualifications. School or establishment attendance information is required for an education qualification. If approvals are setup, then when the user creates or edits a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, then the user cannot edit the qualification until it has been approved or rejected by the approver.

The Education and Qualifications overview page shows the list of approved education qualifications for a person and also those qualifications that are pending approval.

Managers and workers can attach documents supporting their education qualifications. If the Save Attachments check box is available in the Attachments region, then they can select this option to make these attachments available in the Oracle HRMS People window.

**Education and Qualifications Function for Managers**

When managers access the Education and Qualifications function, they can view the list of direct reports in their hierarchy. They can view the education and qualification details of these employees or add information about their qualification.

## Other Professional Qualifications

This function allows users to add other types of professional qualifications such as an award or certification to an existing list of qualifications or to create a new list of professional qualifications.

Managers and workers can attach documents supporting their other professional qualifications. If the Save Attachments check box is available in the Attachments region, then they can select this option to make these attachments available in the Oracle HRMS People window.

If approvals are setup, then when the user creates or edits a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the professional qualification until it has been approved or rejected by the approver.

> **Note:** *Academic* awards are entered in the Education and Qualifications page. See: Education and Qualfications, page 9-24

**Other Professional Qualifications Module for Managers**

When managers access the Other Professional Qualifications module, they can view the list of direct reports in their hierarchy. They can view the other professional qualifications details of these employees or add information.

## Competency Profile

The SSHR Competency Profile function enables users to view and update existing competency profiles. The function is available to predefined Manager and Employee responsibilities.

### Using the Competency Profile Page as Managers

When managers navigate to the Competency Profile page, they can view the list of employees in their direct-reports hierarchy. For each of the employees, the Competence

Profile page displays the following tabbed regions.

- The Current Competencies tab shows the recorded employee's competencies and levels, except the competencies that are pending approval. You can add competencies or make changes to the competency levels. The link 'Correct' allows a correction to be made to a competence, this should not be used for actual level changes as no history is retained.

  You can add competencies using the competencies defined in Oracle HRMS.

  **The Status Field**

  The Status field, which is read only, can contain the value Achieved or In Progress.

  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 SSHR populates the field only when you save the competency profile. When a worker achieves all outcomes for a unit standard competency, its status is Achieved. Otherwise, its status is In Progress.

- The History tab shows the history of competencies and levels for the employee.

- The Awaiting Approval tab shows changes made to the competency profile that are still pending approval.

Managers can compare employee's competencies to those of current or potential future jobs, positions, or vacancies using Suitability Matching. See: Suitability Matching, page 11-7

### Using the Competency Profile Page as Employees

Using the Competency Profile page, employees can:

- View their current competencies and levels in the Current Competencies tabbed region.

- Add competencies to their profile using the competencies defined in Oracle HRMS.

- Make changes to their competency levels using the New Levels Attained button.

- View history of competencies and levels in the History tabbed region.

- View changes made to their competency profile that are still pending approval.

### Adding Attachments

Managers and workers can attach documents supporting their competencies. If the Save Attachments check box is available in the Attachments region, then they can select this option to make these attachments available in the Oracle HRMS People window.

## Work Preferences

The Work Preferences function enables users to store information about their preferred work location and their relocation and travel preferences. Employees can enter the information for themselves and managers can enter the information for their direct reports.

## Resume

The Resume module enables you to use standard attachment functionality to store and update your own resume. You can upload a resume, add a link (URL) to an online resume, or edit the resume text. A manager can also store a resume for an employee or worker or update the resume with new information.

## Tenure Status (US)

Tenure is a unique term in the "Education Industry" that means the completion of professional criteria and an extended probationary period. This results in a person attaining permanent employment with the institution. The Tenure Status module captures the following information:

- Tenure status
- Date determined
- Projected tenure date
- Adjusted tenure date
- Reason for adjustment
- Subject to tenure quota?

## Academic Rank (US)

The Academic Rank module is a method for promotional progression within Higher Education. The Academic Rank module captures the following information:

- Academic rank
- Start date and end date
- Next academic rank
- Projected date

## Employment Verification

The Employment Verification function enables you (as an employee) to release employment and salary information to an external organization to complete a mortgage or loan application, for example.

To release this information, you select the required template (Employment Information or Employment with Salary Information) and provide the recipient's e-mail details. By default, the recipient's access to the released information expires after either 5 days or 5 visits, whichever occurs first.

The recipient of the information receives an e-mail notification containing an access URL, which links to an HTML page containing the released information.

> **Note:** The external recipient sees current data, in other words, data that is valid at the time of request by the verifier. If an employee releases the information today and the recipient views it tomorrow, they see the current employment information about the employee. If the employee has been terminated, an error message is displayed and no information is available.

**Personalizing the Employment Verification Pages**

As a system administrator, you can personalize the Employment Information and Employment with Salary Information templates. You can use the Personalization Framework to display items that are hidden by default, and you can create new items to display, if applicable.

See: The Personalization Framework, page 5-4

> **Note:** Any personalization changes that you make to the template pages are also apparent in the pages displayed to the external recipient.

You can also change the default values for the expiry period and maximum number of visits by changing the initial value of the Expires in or Visits item in the Recipient Information region.

### Menu and Function Names

You can access this module from the following menus and functions:

| Menu Name | Function Name |
|---|---|
| Employee Self-Service | Employment Verification |

| Menu Name | Function Name |
|---|---|
| Employment Verification Global Menu | Employment Verification External |

## Workflow

There are no workflow processes for this function. The following workflow item type contains the associated workflow messages:

- HRVERF (Employment Verification)

## Configurable Flexfields

| Region | SSHR Flex Name | Flexfield Title |
|---|---|---|
| | Person Developer DF | Further Person Information |
| | PerPeople DDF | |
| | Salary Flex | |
| | PerAsg DFF | Additional Assignment Details |
| Employment and Salary | Person Developer DF | Further Person Information |
| | AddnPersonDetails | Extra Person Information |
| | AssignDescFlex | Extra Assignment Information |
| Employment | Person Developer DF1 | Further Person Information |
| | AddnPersonDetails1 | Extra Person Details |
| | AssignDescFlex | Extra Assignment Information |

## Configurable Profile Options

HR: Verification External Node

You use this profile option to set the URL for the external node, for example, http://abc1234.us.organization.com. This node redirects the access request from outside the security firewall to the HTML page containing the released information.

## Additional Configuration Steps

1. To enable the workflow to send notifications to the external recipients, you must configure the Workflow Mailer.

   See: Implementing Notification Mailers, *Oracle Workflow Administrator's Guide*

2. You can run the following purge processes with the Employment Verification functionality:

   - To purge obsolete runtime data, for example, workflow role information and FYI notifications:

     See: Running the Workflow Cleanup Process, page 4-12

# Employee Directory

## The Employee Directory Module

The Employee Directory provides an easily accessible, highly configurable lookup of people within your enterprise. Users can search for a specific person against a range of data, and navigate through the organization to view details of a person's manager or direct reports. You can set up the Employee Directory to search for people from a single business group or from multiple business groups as required.

The directory extracts information from the Employee Directory repository. The repository tables hold a snapshot of de-normalized HRMS data. In addition, users can upload their personal picture to the repository.

The Employee Directory includes the following features:

- **Anonymous access to the Employee Directory repository with simple and advance search features**

  You can provide users with anonymous access to the read-only directory. Users can use basic or advanced search facilities to find people and their assignment details.

- **Controlled access to the HRMS data during major reorganization processes within the company**

  The repository data is independent of the HRMS data, and therefore remains static if your organization is undergoing internal change. The directory data will not change until you refresh the repository.

- **Constant and immediate availability**

  The directory is available continuously, and supports concurrent users.

- **Presentation of complex Oracle HRMS data**

  The associated HRMS data is de-normalized into the Employee Directory repository tables, enabling users to view a range of data relating to workers and their assignments in a simple layout. In addition, the directory is not dealing with temporal data.

- **Time zone support**

  The Employee Details page can display the local time at the worker's location.

- **MLS support**

  If your configuration includes the MLS dictionary, you can display organization, position, and job values in the local language.

- **Multi-assignment support**

  You can view multiple assignments for each worker.

- **Support for multiple data sources**

  You can import data from heterogeneous data sources.

## Search Facility

The simple search field enables users to enter a value to match against any of the following columns in the repository for the worker's primary assignment:

- First Name
- Last Name
- Full Name
- Preferred Name
- E-mail Address
- Work Phone Number
- Alternate First Name
- Alternate Last name

> **Note:** To search on a telephone number enter the numbers only, without spaces or other characters. The telephone number search format can be altered using the override packages. For an example, see: Customer Override for Single Sign On, page 9-40

The Advanced Search page enables users to search on multiple values. You can configure this page to display the most appropriate search fields for your requirements.

See Configuring Web Pages, page 5-21

## Deploying the Employee Directory

You can choose to deploy the Employee Directory in any of the following ways:

- **Self Service Personal Home Page**

  Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

  See: Self-Service Menus and User Access, page 2-11

The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-37 to configure this menu.

- **Portal**

  For information on configuring Portal, see the following notes on My Oracle Support:132035.1

## Populating the Employee Directory

Before you can use the Employee Directory you must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 9-41

## Editing Personal Details

From the directory, users can log on to Self Service modules to update their personal information. For example, a user can log on to the employee directory to update a phone number or change name information. See: Enabling Single Sign On to Self Service, page 9-39

## Personal Picture

Users can upload their personal picture into the repository using the Update Profile page if you have enabled Single Sign On. See: Enabling Single Sign On To Self Service, page 9-39.

The repository stores the images as locally.

## Name Fields

The Display Name is a format which is used in the following places:

| Page | Item |
|---|---|
| Employee Detail | Header title (Employee Detail Region) |
| | Name |
| | Tree |
| | Manager |

| Page | Item |
|---|---|
| | Representative1 |
| | Representative2 |
| | Representative3 |
| | Representative4 |
| Organization Hierarchy | Employee Name |
| Simple Search | Employee Name |
| Advanced Search | Employee Name |
| Employee Profile | Page title |
| Profile Preview | Page title |

You can change the format of the Display Name by using the override procedures. The change will affect the format of the name in all of the above items.

The following fields display a value depending on the legislation associated with a person:

| Field name | Description |
|---|---|
| First Name | Displays a value for the person's first name |
| Last Name | Displays a value for the person's last name |
| First Name Alternate | Displays a multi-byte first name |
| Last Name Alternate | Displays a multi-byte last name |

The values held by each of the above fields can be altered by using the override procedures.

See: Setting Up Legislation and Customer Overrides, page 9-43

You can configure the pages at the required levels to display whichever name fields are appropriate for your enterprise.

## Page Layout Configuration

You can configure the Employee Detail page at all personalization levels. You can configure the other pages at Function, Responsibility, User, and Site levels.

> **Note:** Responsibility and User level personalizations are not available for Anonymous access.

On the Employee Detail page, the application automatically displays the Employee Detail region. If you enable other regions, the application will only display them if they contain data.

If you enable additional telephone number fields, map them to a lookup code of type "PHONE_TYPE".

See: Configuring Web Pages, page 5-21

## Menu and Function Names

| User Menu Name | Function Name |
|---|---|
| Employee Directory Functions Menu | Employee Directory |

See: Defining User Access and Menus, page 3-10

## Workflow

Not applicable

## Configurable Tips and Instructions

***Simple Search Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Page Layout Region | Instruction | HR_EMPDIR_SIMPLE_SEARCH_INSTR |
| Search Results Region | Instruction | HR_EMPDIR_MULTI_ASG_INSTR |

***Advanced Search Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Search Header Region | Instruction | HR_EMPDIR_ADV_SEARCH_INSTR |
| Search Results Region | Instruction | HR_EMPDIR_MULTI_ASG_INSTR |

***Employee Detail Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Employee Detail Cell | Instruction | HR_EMPDIR_EMPDETAIL_INSTR |

***Organization Hierarchy Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Hierarchy Region | Instruction | HR_EMPDIR_HIERARCHY_INSTR |

***Employee Profile Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Page Layout Region | Instruction | HR_EMPDIR_EDITPROFILE_INSTR |
| Photo Region | Instruction | HR_EMPDIR_PIC_INSTR |
| Edit Employee Information Region | Instruction | HR_EMPDIR_EMPUPD_INSTR |

***Picture Preview Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Page Layout Region | Instruction | HR_EMPDIR_PREVIEW_PIC_INSTR |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

With anonymous login, the application has no context of business groups, responsibilities, or personal profiles, to support flexfields. However, you can import flexfields using the override packages. If you do so, it is your responsibility to map the flexfields to MLS if you require multi-lingual support.

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Employee Directory Global Menu | Site | Any menu name with menu type of Global | Employee Directory Global Menu |
| Server Timezone | Site, User | List of values based on FND_TIMEZONES_VL | None |

### HR:Employee Directory Global Menu

This system profile enables you to specify a menu to provide global buttons in addition to the standard Self Service Global Menu buttons when the Employee Directory is accessed anonymously.

### Server Timezone

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Employee Details page.

**Note:** The Client Timezone profile option also exists within Oracle

applications. If you enable this profile option at User level, there will be implications for other windows and pages. This is because other DATETIME fields on other windows and pages are automatically converted to the time zone defined by the Client Timezone profile. This time zone may be inconsistent with the time zone defined by the Server Timezone profile option. To avoid this situation, the system administrator should carry out the following steps:

- Prevent the Client Timezone profile option being set at the User level. To do this, use an Application Developer responsibility to change the delivered profile option definition. See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

- Use the Personalization Framework functionality to remove the Time Zone field from the Preferences page.

## Anonymous Access to the Employee Directory

Follow the steps below to set up anonymous access and to configure the global button bar.

To secure the Employee Directory function and to restrict access to employee data through Intranet and external servers, Oracle SSHR provides the Employee Directory responsibility that contains Employee Directory function.

The predefined GUEST user grant for the Employee Directory Functions menu no longer works. To enable GUEST user to access the Employee Directory functions, you must assign the Employee Directory responsibility to the GUEST user using the Users window.

### To provide users with anonymous access to the Employee Directory:

1. Log in to Oracle Applications using the System Administrator responsibility.

2. Navigate to the Users window and query the GUEST user.

3. In the responsibilities window, assign the Employee Directory responsibility and save.

4. Ensure your HTML form includes an Action referencing "/OA_HTML/EmpdirLogin.jsp". This action takes the user to the simple search field, logged in anonymously. See the example code below.

5. Ensure the HTML form has the following two elements:

- A Text element with the name "srchText"

  This element places a text field in your form into which the user can enter search criteria in order to access people in the Employee Directory.

- A Hidden element with the name "L", and the required language code for MLS

  This element provides field labels and data for the directory in the chosen language.

See the example code below.

6. Function level personalization is not automatically available for anonymous access. If you want to enable Function level personalization, add a Hidden element with the name "OAFunc" pointing to the function being personalized.

   See the example code below.

**Example HTML form**

```
<form NAME="people"
ACTION="http://qapache.us.oracle.com:5122/OA_HTML/EmpdirLogin.jsp"
METHOD="POST" target="_top">
     <table WIDTH="100%" cellpadding="0" cellspacing="0">
     <tr><td WIDTH="1%" valign="TOP">
     <table WIDTH="130">
     <tr><td valign="TOP">
     <input TYPE="text" NAME="srchText" SIZE="9">
     <input TYPE="hidden" NAME="L" value="US">
     <input TYPE="hidden" NAME="OAFunc" value="ORACLE_PROXY_SS">  --
this line is optional
</form>
```

### To configure the Global Buttons for anonymous login:

1. If you require additional buttons, such as Files Online, or Calendar, make entries to the Employee Directory Global Menu, or to any customer defined menu of menu type Global.

   **Note:** Global buttons are defined as FND Form functions.

2. Set the system profile HR:Employee Directory Global Menu to point to the Employee Directory Global Menu (the default), or the menu you have defined in the previous Step.

## Enabling Single Sign On to Self Service

The Employee Directory is read only. To enable users to edit their personal information, or to add or edit their image, follow the procedures below to provide them with single sign on access to Self-Service:

1. Define an FND user for each person that requires access to Self-Service, if they are not defined as FND users already.

   See: Defining User Access to Self-Service Functions, page 3-11

2. In the Descriptive Flexfield Segments window, configure a segment in the Additional Personal Details Descriptive flexfield to hold the FND_USER names, using any available attribute.

   See: Defining Descriptive Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

3. Map the segment to the USER_NAME column in the PER_EMPDIR_PEOPLE repository table by editing the PER_EMPDIR_PEOPLE_OVERRIDE package body.
   See: Customer Override for Single Sign On, page 9-40

## Enabling Customer Overrides for the Employee Directory

You can use overrides with the Employee Directory to customize the fields available when you synchronize the data from Oracle HRMS tables with the Employee Directory repository tables. For example, to enable single sign on to self-service applications from the Employee Directory, you can perform a customer override to add your FND_USER names to the directory. This means that the Employee Directory repository tables are modified in line with the customer or legislation override.

> **Note:** If legislation and customer overrides exist, customer overrides take precedence over legislation overrides.

All customer override package bodies are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information on overrides, see: Legislation and Customer Overrides, page 3-7.

### Set up Customer Override for Single Sign On:

1. Open the package body PER_EMPDIR_PEOPLE_OVERRIDE in a text tool.

2. Modify the line

   ```
   g_override_flg BOOLEAN := FALSE;
   ```

   to

   ```
   g_override_flg BOOLEAN := TRUE;
   ```

   This change enables the override package.

3. Add the following code into the before_dml procedure:

```
IF p_srcSystem = 'PER' THEN
   per_empdir_ss.personTbl.person_key(p_rec_locator) :=
            upper(per_empdir_ss.personTbl.attribute26
(p_rec_locator))
            ||' '||per_empdir_ss.personTbl.person_key(p_rec_locator)

            ||' '||substr(personTbl.work_telephone(p_rec_locator),
                                  length(personTbl.work_telephone
(p_rec_locator))-4, 4);
   per_empdir_ss.personTbl.user_name(p_rec_locator) :=
            upper(per_empdir_ss.personTbl.attribute26
(p_rec_locator));
END IF;
```

Instead of "attribute26", use the attribute name you used to configure the segment in the Additional Personal Details Descriptive flexfield.

The preceding code assigns the user name to an available column in the repository. In addition it adds the user name to the person_key, which enables searches on the user name.

It also formats the work telephone number and adds it to the person_key, enabling searches on a preferred telephone format. This is where you can determine how the telephone number is formatted for the simple search field.

## Populating the Repository

Use the following procedures to load HRMS data into the Employee Directory repository. Prior to loading the data, you can optionally configure the data for your legislation and country requirements.

1. Use the supplied override packages to override values in the repository table columns for individual legislation teams and customers if required. The overrides are effective when you refresh the repository in either Complete or Incremental refresh mode.

   See: Setting up Legislation and Customer Overrides, page 9-43

2. In the Submit Request window, run the concurrent program Refresh Employee Directory. This program populates the repository with data from HRMS tables.

   See: Submitting a Request, *Oracle E-Business Suite User's Guide*

   The Refresh Employee Directory concurrent program uses the following parameters:

| Parameter | Options | Description |
|---|---|---|
| **Refresh Mode** | Complete/Incremental | Use the Complete refresh mode for the initial population of data to the Employee Directory repository tables and intermittently in the future.<br><br>A Complete refresh rebuilds all the data in the repository and clears deletes. This process requires downtime. Perform a full refresh once every six months or so to clear deletes from the repository, depending on the rate of staff turnover.<br><br>Use Incremental refresh mode at regular intervals to synchronize the data between Oracle HRMS and the Employee Directory. The frequency depends on how current you require the data to be. |
| **Refresh Date** | Leave this blank to use the system date. | The concurrent program will collect data applicable to this date.<br><br>**Warning:** *Oracle recommends you leave this parameter blank for scheduled refreshes.* If you insert a date, every time the concurrent program runs, it will collect data for the same date - in other words, the data will never be updated. |

| Parameter | Options | Description |
|---|---|---|
| **Source System** | A valid host system | This parameter identifies the host system. You should select 'PER'. By default 'PER' identifies Oracle HRMS. |
| **Process Multiple Assignments** | Yes/No (default) | Use the default option of No to process only primary assignments. Set it to Yes to process secondary assignments as well. |

**Note:** If you run the Refresh Employee Directory concurrent program in Complete Refresh mode with Process Multiple Assignments set to Yes, subsequent runs in Incremental Refresh mode with Process Multiple Assignments set to No will have no effect. Incremental Refresh mode does not remove previously populated secondary assignments.

Conversely, if you run this program in Complete Refresh mode with Process Multiple Assignments set to No, then subsequently run in Incremental Refresh mode with Process Multiple Assignments set to Yes, secondary assignments will be populated.

## Legislation and Customer Overrides for Employee Directory

When you refresh the repository data, the system calls override packages to populate the repository tables with data from Oracle HRMS. You can edit these packages to override values at legislation or customer level.

All customer override package bodies for the Employee Directory are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory. The legislation override package body is in the peredlor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information, see: Customer and Legislation Overrides, page 3-7.

1. Identify which segments you want to override for any table in the Employee Directory repository, and note the attribute name for each.

2. Identify the correct override call to edit.

   The following table shows which Employee Directory repository tables map to the Oracle HRMS tables:

***Entities Denormalized from Oracle HRMS***

| EMPDIR table name | HRMS table name |
|---|---|
| PER_EMPDIR_PEOPLE | PER_ALL_PEOPLE_F |
| PER_EMPDIR_ASSIGNMENTS | PER_ALL_ASSIGNMENTS_F |
| PER_EMPDIR_ORGANIZATIONS | HR_ALL_ORGANIZATION_UNITS, HR_ALL_ORGANIZATION_UNITS_TL |
| PER_EMPDIR_JOBS | PER_JOBS, PER_JOBS_TL |
| PER_EMPDIR_POSITIONS | HR_ALL_POSITIONS_F, HR_ALL_POSITIONS_TL |
| PER_EMPDIR_LOCATIONS | HR_LOCATIONS_ALL |
| PER_EMPDIR_LOCATIONS_TL | HR_LOCATIONS_ALL_TL |
| PER_EMPDIR_PHONES | PER_PHONES |

The following table shows which override call to use to override values in the repository tables at legislation or customer levels.

***Legislation and Customer Override Calls***

| Table | Legislation Override Call | Customer Override Call | Record Structure (Instance) |
|---|---|---|---|
| PER_EMPDIR_PEOPLE | PER_EMPDIR_LEG_OVERRIDE. PEOPLE | PER_EMPDIR_PEOPLE_OVERRIDE. BEFORE_DML | PER_EMPDIR_SS. PersonTblType (personTbl) |
| PER_EMPDIR_ASG | PER_EMPDIR_LEG_OVERRIDE. ASG | PER_EMPDIR_ASG_OVERRIDE. BEFORE_DML | PER_EMPDIR_SS. AsgTblType (asgTbl) |
| PER_EMPDIR_ORGS | PER_EMPDIR_LEG_OVERRIDE. ORGS | PER_EMPDIR_ORGS_OVERRIDE. BEFORE_DML | PER_EMPDIR_SS. OrgTblType (orgTbl) |

| Table | Legislation Override Call | Customer Override Call | Record Structure (Instance) |
|---|---|---|---|
| PER_EMPDIR_JOBS | PER_EMPDIR_LEG_ OVERRIDE. JOBS | PER_EMPDIR_JOBS _OVERRIDE. BEFORE_DML | PER_EMPDIR_SS. JobTblType (jobTbl) |
| PER_EMPDIR_POSI TIONS | PER_EMPDIR_LEG_ OVERRIDE. POSITIONS | PER_EMPDIR_POSI TIONS_OVERRIDE. BEFORE_DML | PER_EMPDIR_SS. PosTblType (posTbl) |
| PER_EMPDIR_LOC ATIONS | PER_EMPDIR_LEG_ OVERRIDE. LOCATIONS | PER_EMPDIR_LOC ATIONS_OVERRID E.BEFORE_DML | PER_EMPDIR_SS. LocTblType (locationTbl) |

3. In the package body modify the line

```
g_override_flg BOOLEAN := FALSE;
```

to

```
g_override_flg BOOLEAN := TRUE;
```

This change enables the override package.

4. Edit the procedure to override data, using the attribute name you identified in Step 1. For an example showing how to edit an override call, see: Customer Override for Single Sign On, page 9-40

If you have enabled the override packages, they are called when the repository data is refreshed. See: Populating the Repository, page 9-41

# Manage Employment Events

## Manage Employment Events Modules and Workflow

The Manage Employment Events module groups together workflow processes that relate to changes in an employee's assignment. The functions available enable you to control all actions relevant to your employees in your organization, from hiring employees through their separation from the organization.

You can build and configure these workflow processes to suit the requirements of your enterprise. The basic Manage Employment Events modules are: Assignment, Location, Work Schedule, Change Manager, Employee or Contingent Worker Termination (containing Termination and End Placement), Employee or Contingent Worker Pay (containing Pay Rate and Assignment Rate), Individual Compensation Distributions, Special Information Types, and Other Employment Information.

### Chained Manage Employment Events Processes

Oracle Workflow enables you to combine different Manage Employment Events modules into one workflow process. Such processes are known as chained processes. SSHR includes a number of predefined chained processes that appear as functions on the user menus.

> **Note:** You can also include the Individual Compensation Distributions (ICD) module in chained processes, if required.

The following table gives a list of the delivered chained processes.

***Manage Employment Events Chained Processes:***

| Manage Employment Events Chained Process | Contains the following Manage Employment Events modules: |
|---|---|
| Change Pay | Employee or Contingent Worker Pay |
| Change Conditions | Assignment, Location, Work Schedule |
| Change Cost Center, Terms and Manager | Assignment, Other Employment Info, Location, Change Manager |
| Change Cost Center, Location and Manager | Assignment, Location, Change Manager |

| Manage Employment Events Chained Process | Contains the following Manage Employment Events modules: |
|---|---|
| Change Extra Information Types | EIT, EIT Update |
| Change Hours | Work Schedule, Pay Rate |
| Change Job | Assignment |
| Change Job and Terms | Assignment, Other Employment Info |
| Change Location | Location |
| Change Manager | Change Manager |
| Change Pay Rate Process | Employee or Contingent Worker Pay |
| Change Special Information Types | SIT, SIT Update |
| Change Supervisor Process | Change Supervisor |
| Deploy Person | Assignment, Location, Work Schedule, Change Manager |
| Worker Status Change | Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay, SIT |
| Change Worker Status and Terms | Assignment, Other Employment Info, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay |
| ICD and Termination Integration | Termination Page, Change Manager |
| Employee or Contingent Worker Termination (Termination, End Placement) | Termination (or End Placement) Page, Change Manager, Organization Manager Detail |
| Termination with Compensation | Termination Page, Change Manager, Organization Manager Detail, Other Compensation |
| Transfer | Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay |

## Ordering Manage Employment Events Workflow Processes

The order of workflow processes must be carefully designed to ensure business rules are maintained and implemented. If you choose to create your own chained processes and functionality, you must consider the following rules when designing the sequence of functions:

| Function | Restriction |
|---|---|
| Assignment | If the Assignment module is present in a chained process, it must appear first. |
| Change Manager | If used in a chain with Employee or Contingent Worker Termination, it should follow the Termination or End Placement page. |
| Extra Information Types | Can appear anywhere in the chain |
| Individual Compensation Distributions | Can appear anywhere in the chain |
| Location | Can appear anywhere in the chain |
| Other Employment Information | Can appear anywhere in the chain |
| Employee or Contingent Worker Pay (Pay Rate, Assignment Rate) | Can appear anywhere in the chain |
| Special Information Types | Can appear anywhere in the chain |
| Employee or Contingent Worker Termination | If used in a chain with Supervisor, it should precede Supervisor |

You can configure your own processes in any number of ways but they must comply with the restrictions listed above. For example, you could configure a process that follows this sequence:

- Step 1: Assignment
- Step 2: Location
- Step 5: Work Schedule

But, you cannot configure a process in this order, as you will break business rules:

- Step 2: Location
- Step 1: Assignment
- Step 5: Work Schedule

As long as you maintain the order of steps you can configure whichever workflow processes your enterprise needs.

# Assignment

The Assignment module is used in some delivered Manage Employment Events menu functions, for example, the Employee Status Change chained process. It can be added in any of your own business processes that you model in the Workflow Builder.

## Assigning a Salary Basis

You use a salary basis in Oracle HRMS to establish the duration of a salary. For example, an hourly salary basis (for example, 1,000 yen per hour) or an annual salary basis (for example, 18,000 pounds per year).

For more information on salary bases, see Salary Basis, *Oracle HRMS Compensation and Benefits Management Guide*.

If you enable the Salary Information region, users can assign newly hired employees and workers to a salary basis, or change the salary basis of an existing employee or worker. If they change the salary basis mid-way through a payroll period, the application ends the existing salary element entry. This may not be desirable for payroll calculations, therefore if a user changes the salary basis of an employee or worker assigned to a payroll on any effective date other than the first day of the payroll period, the application sends a notification to a payroll contact as part of the approval process. The payroll contact can accept or reject the change, or return it to the originator requesting a change to the effective date (normally setting it to the first day of the next payroll period).

> **Note:** This notification is sent only for employees and workers assigned to a payroll. Also, this notification is sent to your payroll contact only if you have enabled approvals for this transaction. You must also set up the payroll contact using a workflow item attribute (Payroll Contact User Name). This notification is only sent for *changes* to salary basis and not for new hires or the first assignment of a salary basis to an existing employee or worker.

If you want to enable self-service users to assign a salary basis, you must enable the Salary Information region item in the HR_ASSIGNMENT_SS and HR_ASSIGNMENT_REVIEW_SS regions.

If a salary basis is assigned without a pay proposal, the Description and Salary fields on the Pay Rate page will be mandatory if the profile option HR: Base Salary Required is set to Yes.

## Multiple Assignments

If an employee or worker has more than one assignment, the manager must select the relevant assignment before carrying out the employee action.

> **Note:** To enable a manager to select an assignment, the profile option HR: Enable Multiple Assignments in SSHR must be set to Yes at the required level.

## Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Assignment

The Assignment module is used in several example chained processes including:

- Employee Status Change
- Change Job
- Transfer

### Configurable Workflow Attributes:

| Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|
| Assignment | Use Grade Points |
| | Set Grade Ceiling |
| | Use Step/Grade No Update |
| | Display Job Attachment |

| Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|
| | Display Position Attachment |
| | HR Element Warning |
| | Asg Change Reason Lookup Codes |
| | HR Use Default Location |
| Item Level Attributes | Item Attribute Display Name |
| | Payroll Contact User Name |

See: Configuring Workflow Attribute Values, page 4-10

**Use Grade Points**

Defines whether the ceiling point can be displayed.

**Set Grade Ceiling**

Defines whether the ceiling point can be updated.

**Use Step/Grade No Update**

Defines whether the grade can be changed if grade steps exist.

**HR Element Warning**

Controls whether hr element changes are displayed as a warning or an error.

**Asg Change Reason Lookup Codes**

Allows system administrator to specify which change reason lookup codes should be displayed (subset of change reason lookup codes). You enter the codes as follows:

- Reason1|Reason21|...

**Display Job Attachment**

Whether attachments are displayed for the job when there are no job comments. If there are comments for the job, no attachments are displayed.

**Display Position Attachment**

Whether attachments are displayed for the position when there are no position comments. If there are comments for the position, no attachments are displayed.

**HR Use Default Location**

The location can be changed to the default organization or position locations. If the organization/position is then changed for a user, the user's location will be the default

location for the organization/position.

**Payroll Contact User Name**

The Applications user name of the payroll representative who should be notified when a user changes a salary basis in the middle of a payroll period. This attribute is mandatory if you use the Salary Basis functionality.

## Configurable Tips and Instructions

### Assignment Page

| Region | Tip Type | Message Name |
|---|---|---|
| Assignment | Instruction | HR_INST_TOP_COMMON_TEXT |
| Job | Instruction | HR_INST_ASG_JOB_SS |
| Position | Instruction | HR_INST_ASG_POSITION_SS |
| GRE | Instruction | HR_INST_ASG_GRE_SS |
| Payroll | Instruction | HR_INST_ASG_PAYROLL_SS |
| Location | Long Message | HR_INST_CHANGE_LOCATION |
| Location | Long Message | HR_INST_WORK_AT_HOME_LOC |

* These instructions are delivered as hidden, although they can be displayed and personalized.

## Configurable Flexfields

### Assignment Page

| Region | Flex Name | Flex Code |
|---|---|---|
| Specific Job Information | HrFlex1 | Job Developer DF |
| Extra Position Information | HrFlex1 | Extra Position Info DDF |
| Department Working Conditions | HrFlex1 | Org Developer DF |
| People Group | People Group Key Flex | GRP |
| Other Assignment Information | Additional Assignment Details | PER_ASSIGNMENTS |
| Statutory Information | Work Sched Key Flex | GRES_AND_OTHER_DATA |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Use Grade Defaults | Site, Application, Responsibility, User | Yes/No | Yes |
| HR:Override Grade Defaults | Site, Application, Responsibility, User | Yes/No | No |
| HR: Position Default Options for SSHR | Site, Application, Responsibility, User | Default with No Warning | Default with User Decision |
| | | Default with User Decision | |
| | | Default with Warning | |
| | | No Defaulting | |

The following profile options control a user's ability to use grade defaults and position defaults.

### HR:Use Grade Defaults

This profile option determines whether the user can only select a valid grade for a

parent organization, job, or position. The list of values for the Grade field is determined by the entry in the Organization, Job, or Position field.

If this profile value is No, the user can select any grade for the organization, job, or position.

### HR:Override Grade Defaults

This profile option determines whether the user can select a different (non-default) grade for an organization, position, or job.

If this profile value is No, the user cannot override the default grade.

### Interaction of Default Profile Options

The above profile options work together to control the behavior of grades in SSHR. The following situations are possible:

| **Profile Option** | | **HR: Use Grade Defaults** | **HR: Use Grade Defaults** |
|---|---|---|---|
| | **Value** | **Yes** | **No** |
| **HR: Override Grade Defaults** | **Yes** | The user can select any valid grade. | The user can select any grade, either valid or invalid. |
| **HR: Override Grade Defaults** | **No** | The user can select any valid grade or retain the current grade (even if invalid). | The user can only select valid grades. |

### HR: Position Defaulting Options for SSHR

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

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

# Termination

The Termination page enables:

- Managers to end an employment or end a placement.

  **Note:** A manager can only terminate an employee if the manager has access to the primary assignment for the person.

  See: Terminating Employment or Ending Placement, page 9-55

- Managers to terminate secondary assignments or end secondary placements

  See: Terminating Secondary Assignments or Ending Secondary Placements, page 9-56

- Employees to initiate the process of ending their employment. Contingent workers can initiate ending their placements.

  See: Voluntary Termination , page 9-57 and Voluntary End Placement, page 9-58

## Terminating Employment or Ending Placement

The Termination page enables a manager to end an employment relationship. When the manager selects the Termination function from the menu, a person hierarchy is displayed to enable the manager to select an employee or contingent worker for termination. This hierarchy is usually supervisor or position-based.

For more information on the hierarchy, see Enter Process, page 10-4.

**Multiple Assignments and Termination**

If your organization uses multiple assignments and assignment-level security is enabled, it may be the case that an assignment-based hierarchy only displays a subset of a person's assignments. A person may have secondary assignments that are not visible to the manager.

For more information on security, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

**Change Manager Function**

If the terminated employee or worker has direct subordinates, the system automatically displays the Change Manager page to reassign the terminated supervisor's subordinates to another supervisor.

In the event of the employee or worker also being a manager to an organization, the Update Organization Manager page may appear for you to assign a new manager. This depends on how your security profile is set up.

For more information see: Organization Manager, page 9-68

### Reversing Terminations

Oracle SSHR enables managers to cancel or reverse a termination. For more information, see: Reverse Termination, page 9-58

## Terminating Secondary Assignments or Ending Secondary Placements

Using the Termination page, managers can:

- Terminate or end secondary assignments for employees
- End secondary placements for contingent workers

Managers can perform these actions using their self-service responsibility and need not depend on their HR personnel to complete these tasks.

When you click the Termination function to initiate termination of secondary assignments, the Termination: People in Hierarchy page displays both the primary and secondary assignments of the manager's directs depending on the HR: Enable Multiple Assignments in SSHR profile option value set. This profile option controls whether a manager can view and update multiple assignments for an employee in SSHR. If the profile option is set to Yes, the Hierarchy page displays all the assignments that the manager has access to. If the profile is No, then only primary assignments are displayed.

You can use the Primary column to identify the assignment type. When you click the Action icon to terminate the secondary assignment, the Termination: Perform Action page appears. Click Yes and enter the termination effective date. The Assignment page displays the assignment details and current assignment status. In the Proposed Assignment field, select Terminate or End Assignment. The subsequent Change Manager page shows the subordinates reporting to the secondary assignment only. These subordinates have to be reassigned to proceed further. The Change Manager page appears during the Secondary assignment termination only if there are subordinates reporting to the manager's secondary assignment.

The following paragraphs explain how the setting of the HR: Manage Self Service Actions When Future-Dated Changes Exist profile impacts the termination of secondary assignments:

- The application displays an error if future dated changes exist, and the profile value is set to Stop with Error.
- If future dated changes (other than termination of employee or the assignment) exist and the profile value is set to Notify HR, then the application displays a warning message. The transaction can be submitted which on approval notifies the HR representative. The HR representative can review the change and then apply the necessary changes to the database manually. If the future dated change is of type termination of employment or of the secondary assignment, then a manager will not be able to process the termination and an error message is displayed.

### Reviewing Requests for Ending Employment or Ending Placement

Using Oracle SSHR, employees can request for ending their employment or contingent workers can request for ending their placement.

When an employee or a contingent worker raises such a request, their managers receive the notification. If the employee or contingent worker is a supervisor with directs, then the notification displays a message that the manager must reassign directs to another manager. If the employee is an organization manager, then the manager can select another organization manager. Based on the approvals set in the enterprise, the voluntary termination of employment or ending placement is processed.

## End Placement

The Terminate Placement page enables a manager to end a contingent worker's work relationship and specify a reason. This changes the person type to Ex-Contingent Worker and ends all assignments. If the contingent worker has direct subordinates, the system will automatically display the Change Manager page to reassign the contingent worker's subordinates to another supervisor.

If the contingent worker is also a manager of an organization, the Update Organization Manager page may appear to enable you to assign a new manager. This depends on how your security profile is set up.

See: Ending a Placement, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Manager, page 9-68

## Voluntary Termination

The Voluntary Termination feature facilitates online process for voluntary exit from the enterprise. If employees or contingent workers decide to leave the enterprise, they can use this feature to initiate the process of ending employment or placement.

Using the Voluntary Termination function:

- Employees can request for termination of their employment.

  See: Requesting Termination of Employment, page 9-57

- Contingent workers can request for ending their placement.

  See: Requesting End Placement, page 9-58

### Requesting Termination of Employment

Using the Voluntary Termination function of the Employee Self-Service responsibility, employees can initiate the process of ending their employment. The date that the employee enters on the Effective Date Options page is the effective date of the

termination. This date defaults to the Termination Date field on the Voluntary Termination page. The notified date is for information purpose and is the date on which the employee informs the company about resignation. The employee can select the reason for resignation and enter comments on resignation. When the employee submits the transaction, Oracle SSHR routes the transactions for approval based on the approvals setup.

# Voluntary Terminate Placement

## Requesting Termination of Placement

Using the Voluntary Termination function of the Contingent Worker Self-Service responsibility, contingent workers can initiate the process of ending their placement in the enterprise. The date that the contingent worker enters on the Effective Date Options page is the effective date of ending placement. This date defaults to the Termination Date field on the Voluntary Termination page. The contingent worker can select the reason to leave the enterprise. When the contingent worker submits the transaction, Oracle SSHR routes the transaction for approval based on the approvals setup.

# Reverse Termination

There are a number of reasons why managers may want to cancel a termination of an employee or contingent worker. For example, during the notice period a worker may decide to continue with the employer. Managers may need to revert the termination even after the last day of employment is passed. Oracle SSHR enables managers to cancel or reverse the termination of employment or placement. Managers can process reverse termination actions using Oracle SSHR.

On the actual termination date, a worker's person type will be employee or contingent worker. The day next to the actual termination date, the worker's person type changes to ex-employee or ex-contingent worker

Managers can process reverse termination provided an employee is not rehired or a contingent worker has not started a new placement.

## Searching for Workers to Reverse Terminate

Managers can search for workers who have an actual termination date to initiate the process of reverse termination. They can search for workers in a business group or use search criteria such as last name, job, or position.

In the Person search field, managers can select any one of the options:

- All

  When selected, the search includes employees and contingent workers whose actual termination date is earlier than the current date, later than the current date, or is

equal to the current date

- Employee

  When selected, the search includes employees whose actual termination date is earlier than the current date, later than the current date, or the current date.

- Contingent Worker

  When selected, the search includes contingent workers whose actual termination date is earlier than the current date, later than the current date, or the current date.

The Actual Termination Date field criteria helps managers to perform searches using different date criteria.

For example:

- Using the Is Condition, managers can search for workers whose termination date is equal to a specific date entered in the date field. For example, managers can select the Is condition, and search for workers with termination date of 01-APR-2010.

- Managers can enter a date range to search for terminated employees or contingent workers whose termination date is set at a future date. For example, if the current date is 01-MAY-2010, they can select the 'Is Between' condition and enter dates 01-FEB-2010 and 01-JUN-2010. The search result displays workers who are terminated and whose termination date is set to a future date.

- Managers can also search for workers whose termination date is later or earlier than the entered date.

  **Note:** If an ex-employee's rehire is pending approval or an ex-contingent worker's new placement is pending approval, the search results display these workers. However, managers cannot process reverse terminations for these workers.

Using the Show Future Dated Terminations Only check box, managers can filter the search results for workers (employees and contingent workers) whose actual termination date is later date than the current date.

## Viewing Search Results

The search results table includes columns such as full name, business group, location, and actual termination date to help identify a worker to process reverse termination.

In the Current Person Type column, the record indicates the person type as on the current date.

- For a worker, whose actual termination date has passed as on the current date, the search results display the worker as an ex-employee or ex-contingent worker

person type.

- For a worker whose actual termination date is set at a future date, the search results display the worker as an employee or contingent worker person type.

Managers can click the Details icon to view information of the worker before reversing the termination. The search results show the leaving reason. You can review this information before processing reverse termination.

### Processing Reverse Termination

On the Reverse Termination and Review pages, the worker's assignment details are read-only. Managers can review the details and submit the transaction for approval. When managers submit the reverse termination transaction, Oracle SSHR routes the transaction for approval based on the approvals setup in the enterprise.

When an approver receives the reverse termination notification for approval, the Update and Return for Correction functions are not available on the Notification page.

### Changes after Reverse Termination Action

The following sections explain changes to the worker records after a reverse termination action is approved:

- When managers process reverse termination for an employee after the actual termination date, the reverse termination action clears the termination details and restores the assignment to the status prior to the termination. The person type changes from Ex-Employee to Employee

- When managers process reverse termination for a contingent worker after the actual termination date, the reverse termination action clears the termination details and restores the assignment to the status prior to the termination. The person type changes from Ex-Contingent Worker to Contingent Worker

- When managers process reverse termination for an employee or a contingent worker prior to the actual termination date or on the date equal to the actual termination date, the reverse termination action clears the termination details and restores the assignment of the employee or contingent worker to the status prior to the termination. The person type remains Employee or Contingent worker.

## Work Schedule

The Work Schedule workflow process enables a manager to change the work schedule and employment category for an employee or worker. A work schedule is the number of days and hours worked and the start and end times for the employee or worker. The employment category defines the type of employment, for example, full and part-time employment.

**Note:** Part of the Work Schedule page information is displayed from the Soft Coded Key Flexfield.

See Configuring Flexfields, page 5-27

## Location

The Location function enables a manager to change the work location for an employee or worker.

The Location function is available under the predefined Manager responsibility. If required, you can set up approvals processes for the Location function.

The Location region includes the Home Worker check box. This check box is available for all localizations, although it is delivered as hidden. **US users:** If you select the Home Worker check box for an employee or worker, the employee or worker is assumed, for tax purposes, to work 100% from their primary address (or tax override address if there is one) for this assignment.

For more information on the tax implications of the Home Worker check box for US users, see Entering Federal Tax Rules for an Employee, *Oracle HRMS Payroll Processing Management Guide*.

## Special Information Types (SITs)

Special Information Types (SITs) enable you to store additional information that is not currently captured by the system.

**Example**
Example of a Special Information Type

To capture information on an employee's linguistic ability, you could create an SIT entitled Languages with the following segments:

- Language
- Written fluency level
- Spoken fluency level

Alternatively, you could create a create an SIT to capture an employee's vehicle information and include the following segments:

- Vehicle type
- Value
- License type

- License number

See: Special Information Types, *Oracle HRMS Enterprise and Workforce Management*

## Extra Information Types (EITs)

Extra Information Types (EITs) are a type of flexfield that allows you to set up unlimited amounts of extra information. They are often used by localizations for capturing local information.

**Example of an Extra Information Type:**

You can capture passport information for an employee or worker by creating an EIT entitled Passport Details with the following segments:

- Country
- Passport number
- Issue date
- Expiry date

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

**Entering Details for EIT Segments and Additional Details for Each of one the EIT Segments**

Depending on how an EIT is setup, when you enter a value for a EIT segment, you can capture additional information for that segment as the application automatically sets the context for the dependent flex. For example, you are entering Academic Rank Details EIT and you select Lecturer as the value in the Academic Rank segment. If the Lecturer value requires more information based on the setup, then the application sets the context of dependent flex and displays segments for the Lecturer value.

## Other Employment Information

The Other Employment Information module enables you to store assignment and employment information in descriptive flexfields and Developer Descriptive Flexfields (DDFs).

### Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Change Other Employment Info

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| Other Employment Info | Long Message | HR_INST_TOP_COMMON_TEXT |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

| Region | Flex Name | Flex Code |
|---|---|---|
| CAGR | CAGR Flexfield | CAGR |
| Assignment Info | Additional Assignment Details | PER_ASSIGNMENTS |
| Assignment Info | Soft Coded KeyFlexField | SCL |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

Not applicable

# Change Pay

You must use the Change Pay function to enable a manager to change an employee's

overall salary. You can do this by attaching the salary basis to an employee and then change the pay.

Using the Change Pay function, you can do the following:

- Enter and update pay details using the Worker Status Change, Change Pay, Hire, Applicant Hire, Change Hours, and Transfer functions.
- Propose new current or future-dated pay proposals
- Propose one or multiple salary changes in a single transaction
- Update or delete any future-dated proposal that was not processed by payroll
- View Annual Equivalent, Annual Full Time Equivalent, and Annualization Multiple all in your preferred currency
- View employees pay change history, average pay of their peers, a comparison of their salary with their peers
- Attach the salary basis and enter pay details in the same flow

## Assignment Rate

If you are not using Oracle Services Procurement to provide purchase order information for contingent workers, the Assignment Rate module enables you to record contingent worker rates. You can change a contingent worker's rate for an existing assignment, or enter a rate for a new assignment. You select the assignment rate name from a list, select the currency, and enter a value. Optionally, you can specify an end date, after which the rate is no longer in effect.

Your implementation team defines one or more assignment rate names in the forms-based interface. An assignment rate name identifies a combination of rate type (such as Standard Rate or Weekend Rate) and rate basis (such as Hourly Rate or Weekly Rate).

If you are using Oracle Services Procurement, the Assignment Rate module displays information from the purchase order line for the assignment. You cannot update this information in the Assignment Rate page.

If you install and license Oracle Services Procurement at a later date, any rate information you recorded using the Assignment Rate module is no longer visible.

## Change Manager

The Change Manager function enables a user to perform the following operations on a selected employee or worker and assignment:

- specify which other employees or workers report to the selected manager

- reassign the selected employee or worker to report to a different manager
- reassign the subordinates of the selected employee or worker to one or more managers

**Multiple Assignments and the Change Manager Function**

In a manager-subordinate relationship, the manager's ID is stored against the subordinate's assignment. If the profile HR: Enable Multiple Assignments in SSHR is set to No, only primary assignments are displayed. If the profile HR: Enable Multiple Assignments in SSHR is set to Yes, other assignments will also be displayed. In situations where a subordinate employee or worker has more than one assignment, it is important to select which of the assignments is to report to the manager. In practice, this means that you may have to select between multiple assignments when you select the employee or worker for whom you are using the Change Manager function and when you select the direct reports for the selected employee or worker. In these cases, the lists of values will contain several fields (including Job, Department, Assignment Number, Location, Grade, Position, and Business Group) to help you select the correct assignment. If you are using an assignment-based security profile, you can also specify an assignment for a manager if you are reassigning a selected employee or worker, or the subordinates for the selected employee or worker, to a different manager.

> **Note:** You can choose to display the additional fields mentioned above (Job, Department, Assignment Number, and so on) as fields on the Change Manager pages using the Personalization Framework. If you display these fields, they are populated when you select a manager assignment.

If you are using assignment-level security, only those assignments for which you are the named supervisor are displayed. This means that you can only perform the Change Manager function on those available assignments.

For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

## Menu and Function Names

Not applicable

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Change Manager

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Change Manager | Change Manager | HR_MANAGER_REQUIRED_INDICATOR |

HR_MANAGER_REQUIRED_INDICATOR

If this attribute has a value of "Y", the employee or worker must have a manager. If no manager is entered, the application generates an error. If this attribute has a value of "N", the supervisor_id field of the per_all_assignments_f record can remain blank.

See: Configuring Workflow Attribute Values, page 4-10

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| New Manager | Instruction | HR_INST_SUPERVISOR_MAIN |
| Direct Reports of Selected Employee | Instruction | HR_INST_SUPERVISOR_DIRECT |
| New Direct Reports | Instruction | HR_INST_SUPERVISOR_NEW_DIRECT |
| Manager Update | Instruction | HR_INST_TOP_COMMON_TEXT |
| Direct Reports | Long Message | HR_TIP_SUPERVISOR_DR_DATE |
| New Direct Reports | Long Message | HR_TIP_SUPERVISOR_NDR_DATE |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

Not applicable

## Configurable Profile Options

Not applicable

# Organization Management

## Organization Manager

The Organization Manager function enables you to maintain organization manager relationships. A manager can only be initially assigned to an organization in the professional forms interface. However, you can view and update organization managers according to your security profile in SSHR.

For more information on organization manager relationships, see Selecting and Viewing Managers for Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*.

If you terminate an employee who is also the manager of one or many organizations, one of the following will occur:

- The Update Organization Manager page displays for you to assign new managers to the organizations for which the terminated person was the manager.
- If you have organization hierarchy security set up and the employee or worker is the manager of multiple organizations, the Update Organization Manager page displays only the records to which you have access and can update.
- If you do not have access to any records, the Update Organization Manager page does not appear.

If you have supervisor security enabled, the Organization Manager Actions Section on the Overview page will automatically display with any records that have been end dated and require you to assign a new manager.

> **Note:** There can only be one organization manager relationship at any single point in time.

### Menu and Function Names

This Module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Organization Manager |

### Workflow

Details of Workflow for this module are listed below:

### Workflow Process Display Name:

Organization Manager

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Organization Manager | Organization Manager Overview | Restrict Organization Classification |

### Description of Attributes

You can restrict the Organization Manager module to one organization classification by entering an organization classification code into the attribute. You can find the organization classification code for a classification from the ORG_CLASS Lookup Type. For example the code for HR Organization is HR_ORG.

## Configurable Tips and Instructions

### Manager Overview Top Page

| Region | Tip Type | Message Name |
|---|---|---|
| Organization Manager Actions Section | Instruction | HR_CCMGR_ACTIONS_SS |
| Organization Manager Overview Form | Instruction | HR_CCMGR_OVERVIEW_INSTR_SS |
| Organization Manager Search Section | Long Message | HR_CCMGR_DIRECT_REPORTS_TIP |
| Organization Manager Actions Section | Long Message | HR_PENDING_INSTR_SS |

### Manager Update Top Page

| Region | Tip Type | Message Name |
|---|---|---|
| Organization Manager Update Form | Instruction | HR_CCMGR_UPD_PAGE_INSTR_SS |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

Not applicable

## Configurable Profile Options

Not applicable

## Additional Configuration Steps

Not applicable

# Views

## Information Overview

This topic and related links provide configuration details for My Information, My Employee Information, and HR Views pages.

### My Information and My Employee Information

My Information enables employees or contingent workers to view their employment and other related details. SSHR previously referred to this function as Employee Views. My Information includes past and present records, and you can also view future changes in the areas of training, absence, and job applications.

My Employee Information enables managers and HR professionals to review the same records available to users of My Information for anyone within their security access. SSHR previously referred to this function as Manager Views. In Details views, past, present, and future data is available.

You can view the details of people by the hierarchy, search results or from 'My List' functionality, giving you immediate access to records that connect people with their work context. You can use advanced search criteria to find people, and save your searches for later reuse. Lists of people display all assignments in addition to the primary, providing you with a complete picture of their duties. You can specify an effective date to review records as of a given point in time.

The application groups the information on six tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications

See: My Information and My Employee Information, page 9-72

### HR Views

The HR Views module is aimed at HR Professionals. It offers a summarized view of employee-related information: Personal Information, Assignment Details,

Compensation Activity, and Termination History.

Each area of information is displayed on separate pages or tabbed regions. From each page, the user can click a button and display different information.

See: Configuring Tabbed Regions, page 5-28

Navigate to HR Views functionality using the responsibility HR User Self Service and the function HR Views. All information is for viewing only. To modify information, users must log on with the Manager Self Service responsibility.

> **Note:** HR Views show information that is more appropriate for HR professional users hence it is delivered under the HR Professional responsibility. Employee access using HR Views is controlled by the HRMS security access associated with the current user.

See: Employee Information View, page 9-74

See: Assignment Details View, page 9-74

See: Compensation Activity View, page 9-74

See: Termination History View, page 9-75

See: Search Functions for HR Views, page 9-75

## My Information and My Employee Information

My Information enables employees and contingent workers to view their employment, grade step and grade point of their salary and other related details.

My Employee Information enables managers to view employment, grade step and grade point of salaries and other related details of people within their security access. HR Views enables HR professionals to view details of people from hierarchy, search results, or 'My List' views.

The hierarchy display usually uses the supervisor hierarchy. However, if required, you can display a position-based hierarchy.

For more information, see: Enter Process, page 10-4.

> **Note:** If you are using assignment-level security, you cannot access any terminated or expired assignments.
>
> For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

If you use user-based security profiles either based on user-based organizations, user-based positions, or user-based custom security, then you can enable HR users to access ex-employee and future-dated employee records. For more information, see the section *Access to Ex-Employee and Future Dated Employee Records* in Security Profiles, *Oracle*

*HRMS Configuring, Reporting, and System Administration Guide*

**Viewing Grade Step and Grade Point Information**

Employees and managers must use the following fields in the Details region of the Salary tab, on the My Employee Information page for grade step and grade point related information, using Employee Self-Service and Manager Self-Service:

- Grade Step: Displays the value of an employee's Grade Step
- Grade Point: Displays the value of an employee's Grade Point
- Grade Step Date: Displays the current effective date of the Grade Step
- Point Value: Displays the value which is associated with the Grade Point

**Viewing Adjusted Service Date and Years of Service**

In addition to using the latest start date to calculate years of service, Oracle SSHR uses the adjusted service date to calculate adjusted years of service. Employees, managers, and HR professionals can view the Adjusted Years of Service and the Adjusted Service Date on the following Oracle SSHR pages:

- My Information for employees
- My Employee Information for managers
- HR Views for HR professionals

In addition, the HR Views page displays the Years of Service field and the Compensation Activity tabbed region displays the Latest Hire date.

> **Note:** To calculate adjusted years of service for employees or managers, the Adjusted Service Date must be available either in Oracle HRMS or Oracle SSHR person records.
>
> In Oracle HRMS, you enter Adjusted Service in the Benefits tabbed region of the People window. For more information, see: Entering Additional Personal Information (People Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
>
> In Oracle SSHR, you enter Adjusted Service Date using the Hire or Applicant Hire function available through the Manager Self-Service responsibility.

**Viewing Salary Information**The Salary tab displays salary details of employees who are on a grade ladder, or whose salary is processed using the Salary Administration window.

## Employee Information View

The Employee Information view displays the details relevant to an employee or worker. This information need not relate to their job or employment contract.

The Employee Information page displays any specific fields which you have defined as flexfields and can also display a country-specific section which will display localization fields, for example, the national identifier or visa information.

All the information in the Employee Information view relates to the current record for the employee or worker and no history is displayed.

## Assignment Details View

The assignment of an employee or worker identifies their role and payroll within a business group. The assignment is made up of a number of assignment components, for example, the organization and payroll.

The Assignment Details view displays this assignment information for a particular employee or worker, and also enables you to display additional related information, for example, the hire date or assignment number If multiple assignments are enabled, the HR Professional can select which assignment information to display. If multiple assignments are not enabled, the primary assignment information is displayed.

See: Multiple Assignments, page 9-50

## Compensation Activity View

The Compensation activity view displays the salary and benefits information for an employee. If multiple assignments are enabled, the HR Professional can select the required assignment.

See: Multiple Assignments, page 9-50

> **Note:** The self-service My Employee Information function also contains a Salary view, although this tab does not contain information about the employee's benefits.

The Compensation Activity view displays all the elements for a worker unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed. Your HR administrator can restrict the elements displayed in this view.

When HR managers or Payroll managers log in to Oracle SSHR using the HR Professional responsibility to view the compensation details for employees in the Compensation Activity tabbed region, they can view the compensation activity for all element types. Oracle SSHR displays all elements by default. Based on your enterprise

requirements, your HR administrator can display only specific elements using the Personalization feature.

## Termination History View

You terminate an employee or worker when he or she leaves your organization. Information about the employee or worker remains on the system but all current assignments are ended.

The Termination History view displays any termination history for an employee or worker. If a worker's contract is terminated and the worker is subsequently rehired, the application updates the information displayed in the view so that the worker is not displayed as *Terminated*.

The worker's record may contain more that one termination, for example, if they have been rehired more than once.

> **Note:** If the worker has been rehired, the SSHR application displays the last termination date.

## Search Functions for HR Views

The first Search function for HR Views is displayed when an HR Professional selects the HR Views option from the self-service menu (when using the HR User Self Service responsibility). At this point, the user can only search for a worker.

The second Search function for HR Views is displayed when the HR Professional has searched for a worker. At this point, the user can either view data for the selected worker or search for another worker.

# Views - US Federal

## Information Overview (US Federal)

This topic and related links provide configuration details for My Information (employee view) and My Employee Information (manager view), and Employee Information (HR professional view) pages.

### My Information

Employees can use *My Information* to view employment and other related details. My Information displays records as of the current date. Employees can view present and past records for all categories, but future-dated changes only for benefits, training, absence, and job applications.

See: My Information and My Employee Information, page 9-72

### My Employee Information

You can use *My Employee Information* to review the same records available in My Information for anyone within your security access.

The self-service application displays information according to the selected hierarchy (Supervisory or Position), in a flat list from user-defined search results, or from 'My List' functionality. You can use the advanced search criteria to find people, and save searches for later reuse.

Using the Details view, you can review a specific employee's past, present, and future-dated records.

> **Note:** If you want to view the summary information as of an effective date, you can personalize the summary to enable the effective date field.

See: My Information and My Employee Information, page 9-72

### Employee Information

Of the three views, *Employee Information* displays the most extensive summary of the employee's record. As an HR professional, you can review the same data available to managers as well as data unavailable to managers such as probation and service obligation information, and sensitive data such as the employee's date of birth and social security number. Unlike the manager's My Employee Information view, you can also view Correction and Cancellation records.

You navigate to Employee Information using the responsibility Federal HR Self Service. You can view details on these page, but to change this information, you must switch to a responsibility that gives you edit access to that data. You can view past, present, and future-dated records for employees within your security profile as of the current date.

See: Employee Information View, page 9-85

The Employee Information view includes the advanced search function. You can personalize the search criteria to include other criteria and to rearrange the order (for example, placing the Last Name as the first search criteria). You can further personalize Employee Information to include the My List feature, and to show or hide attributes and tabs. The self-service application displays the information according to the selected hierarchy (Supervisory or Position), from user-defined search results, or from 'My List' functionality.

See: Search Functions for HR Views, page 9-75

## Employee Summaries

The view pages summarize information entered elsewhere in the application. The Employee page lists the records that match your search criteria, and displays high-level details for each employee record. For a detailed summary, you can click the employee's name. The Details page displays information in the header and the following tabbed regions:

- Employment
- Position
- Personal
- Obligation Dates (Employee Information only)
- Salary
- Benefits (on My Information, Employee Information only)
- Awards and Bonuses
- Performance
- Personnel Actions

  You can view:

  - Notification of Personnel Actions (NPAs) using each view
  - Requests for Personnel Action (RPAs) using My Employee Information or Employee Information

- Cancellation or Correction actions using Employee Information

In addition to these tabs, you can use the Personalization Framework to display the Training, Absence, and Job Application tabs.

### Personalize Views

You can take advantage of the Oracle Framework functionality to personalize My Information, My Employee Information, and Employee Information. You can configure these views so that employees, managers, and HR professionals see only the data items that you choose. Through the use of Framework Personalization, you can rename data items, rename columns, hide unwanted items, display delivered hidden items, and reorder data items or columns. For example, you might display data fields that are normally hidden, such as step and rate.

See: Personalization Framework, page 5-4

You can also hide sub-tabs for individual responsibilities or for all responsibilities.

See: Configuring Tabbed Regions, page 5-28

## My Information and My Employee Information (US Federal)

*My Information* enables employees and contingent workers to view their employment and other related details.

*My Employee Information* enables managers and HR professionals to view the employment and other related details of employees and contingent workers within their security access. Managers and HR professionals can view the details of people from hierarchy, search results, or 'My List' views.

> **Note:** If you are using assignment-level security, you cannot access any terminated or expired assignments.
>
> See: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

The hierarchy display usually uses the supervisor hierarchy. If your organization arranges its reporting lines by position, you can display a position-based hierarchy by changing the HR:Display Position Hierarchy profile. The position hierarchy displays the position attached to the primary assignment.

See: Enter Process, page 10-4.

### Personalizations

Using personalizations, you enable only the functionality, information, and controls you want to make available to users. For example, you can display only the column

headings of your choice in Summary and Details views.

Consider the following personalizations specific to My Employee Information:

- Effective Date
- My List
- Search Filter
- Name Format

See: The Personalization Framework, page 5-4

See: Configuring Web Pages, page 5-21

See: *OA Framework Personalization and Extensibility Guide*

### Enable Effective Date

The current system date is the default date for the summary and hierarchy views for My Information (employee view), My Employee Information (manager view), and Employee Information (HR view).

For managers who want to view the summary section of My Employee Information as of an effective date, you can enable the Effective Date field. (The hierarchy view always display records as of the current date.) Click the Personalize Effective Date and View As link, and accept the default scope of Region: Effective Date and View As. To enable the Effective Date field and the Go button, navigate the following nodes:

- Flow Layout: Effective Date and View As
- Row Layout: Effective Date
- Message Text Input: Effective Date
- Submit Button: Go

### Enable My List

Enable My List features by adding the My List entry to the context switcher. See Lookups, page 8-23, below.

The Manage My List page enables you to view or delete My List members. Enable the Manage My List link on the My Employee Information or Basic Search page using the Personalize Page link. Navigate the following nodes:

- Page: [My Employee Information|Basic Search]
- Scope: 'Shared Region: Quick Search'

- Row Layout: Quick Search
- Link: Manage My List

The Add To My List button enables you to add selected people to My List. Enable the Add to My List button on the Basic Search and Advanced Search pages using the Personalize Page link. Navigate the following nodes from the Basic Search page:

- Scope: Shared Region: Basic Search
- Default Single Column: Basic Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Navigate the following nodes from the Advanced Search page:

- Scope: 'Shared Region: Advanced Search'
- Default Single Column: Basic Search
- Query: Advanced Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

### Enable Search Filter

To filter name searches, enable the search filter list for First Name, Last Name, or Full Name on the My Employee Information page, the Basic Search Page, or the My List page. If you do not enable the list, users see only the Name label and the Search field, and the default filter is Last Name. Navigate the following nodes:

- Page: [My Employee Information|Basic Search|My List]
- Scope: Shared Region: Quick Search
- Row Layout: Quick Search

- Message Choice: (SearchFilter)

### Name Format

The My Information and My Employee Information pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

## Personalization for End Users

Personalization for end users is disabled by default. To enable it, set the profile "HR: Enable User Personalization" to Yes.

End user personalization is not the same as implementer personalization. The former enables users to create their own view of the data by hiding columns, and filtering the data for each tab. If you enable this feature using OA Framework technology, users can enable items that implementers have disabled.

## Overrides

In the My Information and My Employee Information pages, the position and job names are displayed using a concatenated flexfield format.

For more information on overrides, see: Legislation and Customer Overrides, page 3-7.

## Menu and Function Names

Navigation is available from the Employee or Manager Self Service menu, or new menus you configure. In addition to including the My Employee Information function in new menus, add the following predefined submenus as-is:

- GHR_EMP_VIEWS_FUNC_MENU (My Information Functions)
- GHR_MGR_VIEWS_FUNC_MENU (My Employee Information Functions)

Submenus provide Oracle Applications Framework page authentication only, you need not copy or recreate them.

HR professionals can enter My Employee Information using Advanced Search. Add the Advanced Search function to the HR Professional menu.

| Menu Name | User Menu Name | Function Name | Default Prompt |
|---|---|---|---|
| GHR_EMPLOYEE_DIRECT_ACCESS | Federal Employee Self Service | My Information | My Information |

| Menu Name | User Menu Name | Function Name | Default Prompt |
|---|---|---|---|
| GHR_EMPLOYEE_DIRECT_ACCESS | Federal Employee Self Service | SS Benefits Enrollment - Federal | Benefits |
| GHR_LINE_MANAGER_ACCESS | Federal Manager Self Service | My Employee Information | My Employee Information |

**Note:** You cannot change tab sequence, but you can use standard AOL menu exclusion functionality at the responsibility level to show and hide tabs. Make your changes to the My Information views sub tab menu (GHR_EMP_VIEWS_SUB_TABS) or the My Employee Information views sub tab menu (GHR_MGR_VIEWS_SUB_TABS).
See: Configuring Tabbed Regions, page 5-28

See: Defining Menus for SSHR, page 3-10

## Lookups

To enable My List functionality, enable My List in the following lookup.

| Lookup | Display Name |
|---|---|
| HR_MGRV_APPL_CONTEXT | Information Views Application Context Switcher |

You must also enable the navigation button Manage My List to the My Employee Information page, and the navigation button Add to My List to Simple and Advanced Search Results pages.

## Workflow

Not applicable

## Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

## My Information

| Region Name | Tip Type | Message Name |
|---|---|---|
| Employee Views | Instruction | HR_EMPV_PAGE_INSTR |
| Employee History Table | Instruction | HR_EMPV_EMP_TABINSTR |
| Position History Table | Instruction | HR_EMPV_SAL_TABINSTR |
| Personal History Table | Instruction | GHR_EMPV_POS_TABINSTR |
| Salary History Table | Instruction | HR_EMPV_SAL_TABINSTR |
| Benefits History Table | Instruction | GHR_EMPV_BEN_TABINSTR |
| Awards and Bonuses History Table | Instruction | GHR_EMPV_AWRD_TABINSTR |
| Performance History Table | Instruction | HR_EMPV_PERF_TABINSTR |
| Personnel Actions History Table | Instruction | GHR_EMPV_PA_TABINSTR |
| Training History Table | Instruction | HR_EMPV_TRNG_TABINSTR |
| Absence History Table | Instruction | HR_EMPV_ABS_TABINSTR |
| Application History Table | Instruction | HR_EMPV_APPLN_TABINSTR |

The Salary tab on the My Information and My Employee Information pages displays salary details of employees who are on a grade ladder, or whose salary is processed using the Salary Administration window.

## My Employee Information

| Region Name | Tip Type | Message Name |
|---|---|---|

| | | |
|---|---|---|
| Manager Views | Instruction | HR_MGRV_PAGE_INSTR |
| Awards and Bonuses History Table | Instruction | GHR_MGRV_AWRD_TABINST |
| Personnel Actions History Table | Instruction | GHR_MGRV_PA_TABINST |
| Position History Table | Instruction | GHR_MGRV_POS_TABINST |
| Personal History Table | Instruction | GHR_MGRV_PRSNL_TABINSTR |
| Training History Table | Instruction | HR_MGRV_TRNG_TABINST |

## Configurable Flexfields

The following tables describe available configurable flexfields.

### My Information

| Region Name | Flexfield Name | Message Name |
|---|---|---|
| Absence History Table | Additional Absence Details | PER_ABSENCE_ATTENDANCES |
| Application History Table | Additional Application Details | PER_APPLICATIONS |

### My Employee Information

| Region Name | Flexfield Name | Message Name |
|---|---|---|
| Training History Table | Additional Delegate Booking Information | OTA_DELEGATE_BOOKINGS |
| Training History Table | Add'l Non OTA Training History Info. | OTA_NOTRING_HISTORIES |

| | | |
|---|---|---|
| Application History Table | Additional Application Details | PER_APPLICATIONS |
| Application History Table | Additional Assignment Details | PER_ASSIGNMENTS |

### Configurable Profile Options

You can display a position hierarchy instead of a supervisory hierarchy in My Employee Information.

#### Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: Display Position Hierarchy | Site | Yes/No | No |
| HR: Enable User Personalization | All | Yes/No | No |

## Employee Information View (US Federal)

The Employee Information view consolidates employee and contingent worker records as of the current date. From the Employee Information self-service page, you can display a more detailed view of a worker's record, including historic and future-dated records, such as salary entitlements.

> **Note:** You can only view details for workers within your security profile.

### Menu and Function Names

You can access worker information using the following menu and function.

| User Menu Name | Function Name |
|---|---|
| Federal HR Self Service | Employee Information |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

The following table describes configurable tips and instructions.

### Employee Information

| Region Name | Tip Type | Message Name |
|---|---|---|
| Employee Views | Instruction | GHR_HRV_PAGE_INSTR |
| Employment | Instruction | GHR_HRV_EMP_TABINSTR |
| Position History | Instruction | GHR_HRV_POS_TABINST |
| Personal History | Instruction | GHR_HRV_PRSNL_TABINSTR |
| Obligation Dates | Instruction | GHR_HRV_OBLG_DT_TABINSTR |
| Salary | Instruction | GHR_HRV_SAL_TABINSTR |
| Benefits History | Instruction | GHR_HRV_BNFT_TABINSTR |
| Awards and Bonuses History | Instruction | GHR_HRV_AWRD_TABINST |
| Performance | Instruction | GHR_HRV_PERF_TABINSTR |

| | | |
|---|---|---|
| Personnel Actions History | Instruction | GHR_HRV_PA_TABINST |
| Training History | Instruction | HR_MGRV_TRNG_TABINST |
| Absence | Instruction | HR_MGRV_ABS_TABINSTR |
| Job | Instruction | HR_MGRV_APPLN_TABINSTR |

## Configurable FlexFields

Not applicable

## Configurable Profile Options

Not applicable

# Personnel Actions - US Federal

## Processing Personnel Actions (US Federal)

Oracle US Federal Human Resources enables managers and employees to initiate and process personnel action transactions using self-service for certain nature of action codes (NOACs).

### Processing Personnel Actions as Managers

Managers can use the US Federal Manager Self Service responsibility to initiate personnel actions for employees in their supervisor hierarchy. They can use the following menus available with the US Federal Manager Self Service responsibility:

- **Personnel Actions**

  Using this menu, managers can initiate the following personnel actions for the nature of action codes (NOACs):

  - Return to Duty: Managers can initiate actions pertaining to 280 or 292 NOACs for their employees.
  - Non Pay/Duty Status: Managers can initiate actions pertaining to 430, 460, and 473 NOACs for their employees.
  - Resignation: Managers can initiate resignation actions pertaining to 312, 317, 351, and 353 NOACs for their employees.
  - Retirement: Managers can initiate retirement actions pertaining to 300, 301, 302, 303, and 304 NOACs for their employees.
  - Award/One-Time Payment - Managers can initiate Award actions pertaining to 840, 841, 842, 843, 844, 845, 846, 847, 848, and 849 NOACs for their employees.
  - Change to Lower Grade, Level or Band: Managers can initiate action pertaining to 713 NIAC for their employees.
  - Extension of NTE: Managers can initiate actions to pertaining to 769 or 773 NOACs for their employees.
  - Promotion: Managers can initiate promotion actions pertaining to 702 and 703 NOACs for their employees.
  - Reassignment: Managers can initiate promotion actions pertaining to 721 NOAC for their employees.

- **RPA Actions – Status**

  This option displays a page with the list of all RPA actions submitted by the logged in user or employee and their status.

  This page has two main sections.

  - The first section displays the list of RPA actions submitted and waiting for the manager's approval.
  - The second section displays the list of RPA actions that are approved by the manager and are under HR Representative.

- **Phased Retirement**

  Using self-service, managers can initiate the following phased retirement actions on behalf of their employees:

  - Begin Phased Retirement
  - End Phased Retirement
  - End Phased Retirement

  Managers can initiate phased retirement actions pertaining to 307, 308, 615, and 616 NOACs for their employees.

- **Change Actions**

  Using this menu, managers can initiate the following personnel actions for the nature of action codes (NOACs):

  - Name Change: Managers can initiate name change action pertaining to 780 NOAC for their employees.
  - Work Schedule Change: Managers can initiate change in work schedule/Part time hours actions pertaining to 781, 782 NOACs for their employees.
  - Data Element Change: Managers can initiate change in data element action pertaining to 800 NOACs for their employees.
  - Duty Station Change: Managers can initiate data station action pertaining to 792 NOACs for their employees.

- **Non RPA Personnel Actions**

  Using this menu, managers can initiate the following non RPA actions.

  - Personal Information: Managers can enter or modify personal details for their employees: Email Address, Telephone Information and Contact Information.

- Educational/Language Information: Managers can enter or modify Educational Information (US Fed Education) and Language Information (US Fed Language) for their employees.
- Non Monetary Awards: Managers can enter or modify Non- Monetary Awards for their employees.
- Furlough Indicator: Managers can enter or modify Furlough Indicator for their employees.

## Processing Personnel Actions as Employees

Employees can use the US Federal Employee Self Service responsibility to initiate personnel actions.

The following menus are available with the US Federal Employee Self Service responsibility:

- **Personal Information**

  Personal Information: This is a non RPA action. Employees can enter or modify personal details: Email Address, Telephone Information and Contact Information.

- **Educational/Language Information**

  This is a non RPA action. Employees can enter or modify Educational Information (US Fed Education) and Language Information (US Fed Language).

- **Disability Designation**

  This is a non RPA action. Employees can enter or modify disability designation.

- **Non Monetary Awards**

  This is a non RPA action. Employees can enter or modify non-monetary awards.

- **Personnel Actions**
  - Return to Duty: Employees can initiate the action pertaining to 292 NOAC.
  - Non Pay/Duty Status: Employees can initiate actions pertaining to 460 and 473 NOACs.
  - Resignation: Employees can initiate resignation actions pertaining to 312, 317, 351, and 353 NOACs.
  - Retirement: Employees can initiate retirement actions pertaining to 300, 302, 303, 304 NOACs.

- Extension of NTE: Employees can initiate actions pertaining to 773 NOAC.

- **RPA Action – Status**

  This option displays a page with the list of all RPA actions submitted by the logged in user or employee and their status.

  This page has 2 main sections:

  - The first section displays the list of RPA actions submitted and waiting for manager's approval.

  - The second section displays the list of RPA actions that are approved by the manager and are under HR Representative.

- **Change Actions**

  - Name Change

  - Work Schedule Change

- **Phased Retirement**

  Using self-service, employees can initiate the following phased retirement actions:

  - Begin Phased Retirement

  - End Phased Retirement

  - Request Full Retirement

  Employees can initiate actions pertaining to 307, 308, 616, and 616 NOACs.

## How Personnel Action Transactions are Processed?

When managers or employees initiate personnel action transactions, the application displays the relevant questionnaires related to the nature of action. Employees or managers can provide their answers to process the transaction. They can review the questionnaire and approval details and click the Submit button. When the Submit button is clicked, the application routes the transaction to the approver based on the approval rules setup for such business transactions. After approvals are complete according to the approvals setup, the application initiates the RPA action and routes the transaction to the Mass Group Box set up at the Personnel Office. The HR Administrator can open the RPA from inbox and provide the remaining details if required and perform the Update HR action. After processing Update HR, a notification will be sent to the initiator on the successful completion of the initiated action.

# Configuring Personnel Actions (US Federal)

This topic provides information on the Personnel Actions menus and any configuration steps that are required to be performed.

## Menu and Function Names

This module can be accessed from the following menus and functions:

See: Defining Menus for SSHR, page 3-10

### Federal Manager Self Service (GHR_LINE_MANAGER_ACCESS)

The Federal Manager Self Service menu provides the following Personnel Actions menus for managers:

- **RPA Actions Manager menu (Federal)**

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Return to Duty | | | Return To Duty Manager |
| Non Pay/Duty Status | | | Non Pay Status Manager |
| Resignation | | | Resignation Manager |
| Retirement | | | Retirement Manager |
| | | | Non Pay Status Employee Manager |
| | | | Resignation Employee Manager |
| | | | Retirement Employee Manager |
| | | | Return To Duty Employee Manager |
| | | | Personal Actions |
| | | | Personal Actions Review |

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Award/One-Time Payment | | | Award Manager |
| Change to Lower Grade, Level or Band | | | Change to Lower Grade Manager |
| Extension of NTE | | | Extension of NTE Manager |
| | | | Extension of NTE Employee Manager |
| Promotion | | | Promotion Manager |
| | | | Promotion Employee Manager |
| Reassignment | | | Reassignment Manager |
| | | | Reassignment Employee Manager |
| RPA Actions - Status | | | Personal Actions List (Manager) |
| | | | Award Employee Manager |
| | | | NPDS Personal Action |
| | | | NPDS Review Page |
| | | | GHR NPDS Notification Standard Review Container |
| | | | GHR RTD Notification Standard Review Container |

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| | | | GHR Promotion Notifications Standard Review Container |
| | | | GHR LowerGrade Notifications Standard Review Container |
| | | | GHR Notifications Standard Review Container |
| Phased Retirement | RPA Phased Retirement Manager menu (Federal) | STANDARD | |
| Recruit and Fill | | | Recruit and Fill Manager |
| Change Actions | RPA SS Change Actions Manager menu (Federal) | STANDARD | |
| | | | GHR Recruit Fill Notifications Standard Review Container |
| | | | Change to Lower Grade Employee Manager |

- **Non RPA Actions Manager menu (Federal)**

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Personal Information | | | GHR Personal Information Mgr |

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Education/Language Information | | | GHR Special Information Types Mgr |
| | | | GHR Personal Information-Mgr Func |
| Non Monetary Awards | | | Non Monetary Awards Manager |
| | | | Non Monetary Awards Employee Manager |
| Furlough Indicator | | | Furlough Indicator Manager |
| | | | Furlough Indicator Employee Manager |

### Federal Employee Self Service (GHR_EMPLOYEE_DIRECT_ACCESS)

The Federal Employee Self Service menu includes the following Personnel Actions menus for employees:

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Personal Information | | | GHR Personal Information Emp |
| Educational/ Language Information | | | GHR Special information Types Emp |

| Prompt | Sub Menu | Sub Menu Type | Function |
|---|---|---|---|
| Personnel Actions | RPA Actions Employee menu (Federal) | | Return To Duty Employee |
| | | | Non Pay Status Employee |
| | | | Resignation Employee |
| | | | Retirement Employee |
| | | | Personal Actions |
| | | | Personal Actions Review |
| | | | GHR Notifications Standard Review Container |
| | | | Extension of NTE Employee |
| | | | Personal Actions List |
| | | | NPDS Personal Action |
| | | | NPDS Review Page |
| Change Actions | RPA Change Actions Employee menu (Federal) | | Name Change Employee |
| | | | Work Schedule Change Employee |
| | | | Name Change Employee Manager |
| | | | Work Schedule Change Employee Manager |
| | Employee menu (Federal) | | GHR WS Change Notifications Standard Review Container |
| Phased Retirement | RPA Phased Retirement Employee menu (Federal) | STANDARD | |

## Setting up Oracle Approvals Management (AME) for Personnel Actions Approval

Oracle US Federal Human Resources provides questionnaires to initiate and process personnel actions. When employees or managers answer the questionnaire and submit the personnel action transaction, the application routes the transaction for approval based on the AME setup defined for the business transaction approval. For information on how to setup AME rules for approvals, refer to the *Oracle HRMS Approvals Management Implementation Guide.*

After the final approval is in for a personnel action transaction, the application initiates

the RPA action and routes it to the Mass Group Box set up at the Personnel Office. The HR administrator can open the RPA from inbox and provide the remaining details if required, and perform the Update HR action. After processing the Update HR, a notification will be send to Initiator for successful completion of initiated action.

## Personalization Steps to Display the Leave Without Pay Not-to-exceed (date) in the Employee and Manager Self-Service Pages

The system administrator must complete the following personalization steps to display the Leave Without Pay Not-to-exceed (date) on Header of the Return to Duty Page.

1. Select Personnel Actions.
2. Select Return to Duty Action.
3. Select Personalize Default Single Column.
4. Click the Personalize link of Message Styled Text: Leave Without Pay Start Date and set Rendered to True at Function: Return to Duty level.
5. Select Apply and Click on Personalize link of Message Styled Text: Leave Without Pay End Date and set Rendered to True at Function: Return to Duty level.

## Personalization Steps to Display the Assignment NTE dates for Change to Lower Grade, Level or Band in the Manager Self-Service Pages

The system administrator must complete the following personalization steps to display the Assignment NTE dates for in the Header of the Change to Lower Grade, Level or Band page.

1. Select Personnel Actions.
2. Select the Change to Lower Grade, Level or Band Action.
3. Select the Personalize Default Single Column.
4. Click Personalize link of Message Styled Text: Assignment NTE Start Date and set Rendered to True at the Function level: Change to Lower Grade, Level or Band.
5. Select Apply and Click the Personalize link of Message Styled Text: Assignment NTE Date and set Rendered to True at Function level: Change to Lower Grade, Level or Band.

## Personalization Steps to Display the Assignment NTE dates for Promotion in the Manager Self-Service pages:

The system administrator must complete the following personalization steps to display

the Assignment NTE dates in the Header of the Promotion page:

1. Select Personnel Actions.
2. Select the Promotion Action.
3. Select the Personalize Default Single Column.
4. Click the Personalize link of Message Styled Text: Assignment NTE Start Date and set Rendered to True at the Function level: Promotion.
5. Select Apply and Click the Personalize link of Message Styled Text: Assignment NTE Date and set Rendered to True at Function level: Promotion.

## Configurable Tips and Instructions

| Region/Page Name | Tip Type | Message Name |
|---|---|---|
| Oracle Federal Human Resources Self-Service Actions page | Instruction | GHRInstructionNote |

See: Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

Flexfield Title: Self-Service Actions

| Action Name | Code | Name |
|---|---|---|
| Return to Duty | GHR_EMP_RETURN_TO_DUTY | US Federal Employee Return To Duty |
| | GHR_MGR_RETURN_TO_DUTY | US Federal Manager Return To Duty |
| Non Pay/Duty Status | GHR_EMP_NON_PAY_DUTY_STATUS | US Federal Employee Non Pay Status |
| | GHR_MGR_NON_PAY_DUTY_STATUS | US Federal Manager Non Pay Status |

| Action Name | Code | Name |
|---|---|---|
| Resignation | GHR_EMP_RESIGNATION | US Federal Employee Resignation |
| | GHR_MGR_RESIGNATION | US Federal Manager Resignation |
| Retirement | GHR_EMP_RETIREMENT | US Federal Employee Retirement |
| | GHR_MGR_RETIREMENT | US Federal Manager Retirement |

You must compile the Descriptive Flex 'Self-Service Actions' by following these steps:

1. Log in to the System Administrator or Application Developer responsibility.
2. . Navigate to Application > Flexfields >Descriptive > Segments.
3. Search for Flex-field Title 'Self-Service Actions'.

   Once you set up or modify your structures and segments, you must freeze your flexfield definition and save your changes.
4. Click the Compile button to compile the flexfield.

## Configurable Profile Options

Not applicable

# Recruitment

## Apply for Job

Employees and contingent workers can use the Apply for Job module to search and apply for jobs online.

Using this module they can:

- Search for available jobs using the location code and date posted criteria. The location code is the name of a location as entered in Oracle HRMS. This code distinguishes between different locations in the same city and identifies exactly where a job is based.

- View job details such as job title, organization name, location, and the date the vacancy is posted.

- Apply for jobs from the Job Details page using the Apply button. Applicants can click the Apply Now icon to apply for a specific job from the job search results table. They can attach a resume to their job application. If a resume exists in the database from a previous application, then the latest resume overwrites the previous one. The fields in the Basic Details region are read-only. For information on updating basic details, see: Basic Details, page 9-5

  **Note:** Applicants can upload only one document per application. To upload more than one document, such as a resume and a covering letter, they must include both in the same document. Applicants can contact their HR representative to withdraw the job application.

**View Application Information**

Applicants can view and track their job applications using the My Information module. Currently they can only view applications for vacancies in their own business group.

See: My Information and My Employee Information, page 9-72

**Manager Access to Applications**

Managers can use the My Employee Information module to see the applications of their direct reports.

They can process the applications using the Oracle HRMS Mass Updates of Applicants window. To view applicants for vacancies, managers must have access to them through the security profile.

See: Updating Applicant Assignments by Group, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: Hiring an Applicant (People Window and Application Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See also: Hire or Placement, Place Contingent Worker Processes, page 9-102

## Menu and Function Name

Apply for Job function (HR_APPLY_FOR_JOB_SS) is part of the Contingent Worker Personal Actions, Contingent Worker Self Service, Personal Actions, and Employee Self Service menus.

## Workflow

Not applicable.

## Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

***Available Jobs Page***

| Region Name | Tip Type | Message Name |
|---|---|---|
| Search | Instruction | IRC_CUST_APL_JOB_SCH_INSTRUCTS |

***Enter Application Details Page***

| Region Name | Tip Type | Message Name |
|---|---|---|
| Page Level | Instruction | IRC_412188_UPLOAD_RESUME_APPLY |

## Flexfields:

The following table presents a list of flexfields:

***Enter Application Details Page***

| Region Name | Item Name | Flexfield Name | Flexfield Code |
|---|---|---|---|
| Basic Details | PersDetsFlexFiel d | Additional Personal Details | PER_PEOPLE |
| Basic Details | PersonDeveloper Flex | Further Person Information | Person Developer DF |
| Basic Details | Notification PreferencesFlex | Additional Notification Preference Details | IRC_NOTIFICATION_PREFEREN CES |

**Note:** A system administrator can use Personalization Framework to display any hidden fields or flexfield segments in the Basic Details region. However, note that these are read-only. Applicants cannot update the basic information using this page.

## Hire or Placement, Place Contingent Worker Processes

SSHR's workflow processes Hire or Placement and Place Contingent Worker enable you to enter information about new employees or contingent workers.

Use the Hire page to hire new people, who are not required to have assignments with a status of Accepted. You can also use the Hire page to process the hiring of an ex-employee in a business group that is different from the business group in which the ex-employee was previously employed.

Use the Applicant Hire and Rehire page to:

- Hire external applicants who have application assignments with a status of Accepted.
- Rehire ex-employees in the same business group in which they were previously employed.
- Hire internal applicants (applicants who are employees in your organization) who have application assignments with a status of Accepted.

See: Applicant Hire and Rehire, page 9-104

**Note:** After you hire iRecruitment applicants as employees, 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, *Oracle HRMS Compensation and Benefits Management Guide*

## Applicant Search

When hiring an applicant, the results displayed in the Search Applicant page are restricted according to your security profile. In addition, any applicant who is also a current or future employee in your enterprise is also excluded from the SSHR Search Applicant page.

## Duplicate Person Checking

When entering a new person:

- If the HR: Cross Business Group and HR: Cross BG Duplicate Person Check profiles are set to Yes, then the application checks for duplicate person records in multiple business groups.

- If the HR: Cross Business Group profile option is set to Yes and the HR: Cross BG Duplicate Person Check is set to No, then the application does not search for duplicate person records either across multiple business groups or in a single business group.

For information about the searches that Oracle HRMS performs when you set up the HR: Cross BG Duplicate Person Check and HR: Cross Business Group profile options, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

For more information about the duplicate person check, see: People in a Global Enterprise, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If an existing record is found, then a list of the possible matches is displayed in the Potential Duplicate People page. You can do one of the following:

- If a potential duplicate exists in outside of the current business group you can create a link between the two records by selecting it. This indicates that they are the same person.

- If the potential duplicate exists in the same business group, then when you click on the existing record an error is displayed as you cannot have two record for the same person in one business group.

- If this is a new person select No Match to indicate that the new record is not connected to any other records and continue entering information.

# Applicant Hire and Rehire

Use the **Applicant Hire and Rehire** page to:

- Hire external applicants who have application assignments with a status of **Accepted**.
- Hire internal applicants (applicants who are employees in your organization) who have application assignments with a status of Accepted.
- Rehire ex-employees in the same business group in which they were previously employed.

## Applicant Search

When hiring an applicant, the results displayed in the Search page are restricted according to your security profile.

You can use the **Person Type** field to search for:

- All Applicants: This search includes internal applicants who are employees with accepted applications and external applicants with accepted applications.
- An internal applicant, who is an employee with an accepted application.
- An external applicant with an Accepted application assignment status.
- Ex-employee who is not required to have an application.

> **Note:** You cannot view employees whose termination date is later than the system date. For example, John Smith's termination date is 10-Nov-2009. On the system date of 01-Nov-2009, you set the Effective Date to 11-Nov-2009, which is a future date and search for ex-employees. The search results do not include John Smith.

## Duplicate Person Checking

When entering a new person:

- If the HR: Cross Business Group and HR: Cross BG Duplicate Person Check profiles are set to Yes, then the application checks for duplicate person records in multiple business groups.
- If the HR: Cross Business Group profile option is set to Yes and the HR: Cross BG Duplicate Person Check is set to No, then the application does not search for duplicate person records either across multiple business groups or in a single

business group.

For information about the searches that Oracle HRMS performs when you set up the HR: Cross BG Duplicate Person Check and HR: Cross Business Group profile options, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

For more information about the duplicate person check, see: People in a Global Enterprise, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If an existing record is found, then a list of the possible matches is displayed in the Potential Duplicate People page. You can do one of the following:

- If a potential duplicate exists in outside of the current business group you can create a link between the two records by selecting it. This indicates that they are the same person.
- If the potential duplicate exists in the same business group, then when you click on the existing record an error is displayed as you cannot have two record for the same person in one business group.
- If this is a new person select No Match to indicate that the new record is not connected to any other records and continue entering information.

## Hiring an External Applicant

You can hire external applicants who have application assignments with a status of Accepted. You can search for external applicants using search criteria such as, last name, vacancy and select the person type of All Applicants or External Applicant.

Provide basic details, phone and address information. You can enter new assignment data, propose a pay, and select a manager for the new employee assignment. You can review the new hire details and submit the transaction for approval, if approvals are setup in your enterprise.

## Hiring an Internal Applicant

Using Oracle Self-Service HR, managers can hire internal applicants (employee applicants) who apply to internal vacancies in the organization. You can search for an employee applicant who has an accepted application, view details, and hire the employee applicant into an assignment. The security profile attached to your responsibility controls the internal applicants that you can search.

The Select the assignment mode to hire internal applicant region automatically appears when the applicant search results include employee applicants.

You can select any of the assignment modes to hire the employee applicant:

- **Create Secondary Assignment**

  This option makes the applicant assignment the employee's secondary assignment.

Oracle SSHR makes no change to the existing employee primary assignment. This is the default selection.

The **Applicant Hire and Rehire: Assignment** page displays the accepted applicant assignment data. Oracle SSHR creates a new secondary assignment with the default data from the accepted applicant assignment. You can propose a new pay for the secondary assignment and change manager, if required. The Applicant Hire and Rehire: Review page displays the Assignment region with current and proposed data.

- **Make New Assignment Primary**

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

  The **Applicant Hire and Rehire: Assignment** page displays the accepted applicant assignment data. You can propose a pay for the new assignment and change manager, if required. The **Applicant Hire and Rehire: Review** page display the **Assignment** region with current and proposed data. The **Primary Assignment** field displays information about change in assignment. Current Primary Assignment region also displays the change in assignment information.

- **Merge with Primary Assignment**

  This option copies information from the applicant assignment to the employee primary assignment, but *does not copy empty fields*. For example, if London is defined as the location for the employee primary assignment but a location is not available in the applicant assignment, then London remains the location for the new employee assignment.

  When you select the **Merge with Primary Assignment** option, you can change the existing personal information and accepted applicant assignment details. Oracle SSHR displays the existing salary proposals and disables the Update and Delete buttons for the existing salary proposals that have an effective date prior to the hire date. You can propose a new salary, change the manager for the applicant, and assign new directs to the applicant. The supervisor of the primary assignment is displayed if the accepted application does not have a supervisor. You can select a new supervisor. If there are directs, then you can reassign the directs if required.

  The **Review** page displays the current details and proposed changes. The assignment data that you view in the Proposed region is the data that will merge with the current primary assignment.

- **Replace Primary Assignment**

  This option 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.

When you select this option, you can change the existing personal information and accepted applicant assignment details. Oracle SSHR displays the existing salary proposals and disables the **Update** and **Delete** buttons for the existing salary proposals that have an effective date prior to the hire date. You can propose a new salary, change the manager for the applicant, and assign new directs to the applicant. The logged in manager is displayed if the accepted application does not have a supervisor and if the HR: Self Service Hire and Placement Default Values profile is set to **Yes**. You can select a new supervisor. If there are directs, then you can reassign the directs if required.

The **Review** page displays the current details and proposed changes. The assignment data that you view in the Proposed region is the data that replaces the primary assignment data.

You can review the employee applicant details and submit the transaction for approval, if approvals are setup in your enterprise.

## Hiring Oracle iRecruitment Applicants

To hire iRecruitment applicants using the **Applicant Hire and Rehire** function, your enterprise must complete specific implementation steps in Oracle iRecruitment. For more information, refer to Implementation Steps for iRecruitment, *Oracle iRecruitment Implementation and User Guide*

As manager, when you initiate the hire process from iRecruitment, if the offer has a proposed start date, then this date appears in the Effective Date field. If there is no proposed start date for an offer, then the application displays a date one day later than the system date. You can override the date that automatically appears as the effective date to specify a new hiring date.

**Hiring an External iRecruitment Applicant**

To complete the hiring process, you can provide basic details such as , phone and address information. You can enter new assignment data, propose a pay, and select a manager for the new employee assignment. You can review the new hire details and submit the transaction for approval, if approvals are setup in your enterprise.

**Hiring an Internal iRecruitment Applicant**

If you initiate the hire process for an employee applicant, then the Select the assignment mode to hire internal applicant region automatically appears. You must select the appropriate assignment mode to hire the employee applicant. For more information, see: Hiring an Internal Applicant, page 9-105

## Rehiring an Ex-Employee

Managers can directly rehire ex-employees into the same organization. Ex-employees are not required to have an application.

**Note:** You cannot rehire an ex-employee if the final process date for the previous employment is not provided. The rehire date must be later than the final process date.

For an ex-employee, you can view details such as the termination date, leaving reason, and rehire recommendation. You can review these details before processing the rehire.

To rehire the ex-employee, you can update basic details that default from the previous assignment. You can also assign a new manager to the ex-employee. The **Review** page displays the current and proposed basic details, phone, and address. For assignment data and change manager details, the application displays only the proposed column.

You can review the rehire details and submit the transaction for approval, if approvals are setup in your enterprise.

# 10

# Common SSHR Modules

## Common Modules Overview

This chapter contains information on how to configure modules that provide common, low-level functionality used in many of the higher-level functions described in later chapters.

The common modules are:

- Enter Process
- Actions Page
- Return for Correction
- Release Employee Information
- Review and Confirm
- Dates
- Save for Later
- Document Management
- New User Registration

## Using Common SSHR Functions

### Which common functions does SSHR provide?

SSHR includes a number of common functions which are not associated with any particular area of Oracle HRMS. These functions are useful in the everyday operation of

SSHR and are intended to improve your self-service processes. An example of a common function is the Enter Person process which is used in the manager self-service functions to select an employee or worker for a transaction.

## Is it always necessary to select the function first and then the employee?

No. If you select the Manager Actions function from the self-service menu, you select your employee or worker first and can then select the required function from a list of all available functions for the person. The list is context-sensitive. If you are an employee or worker, you can select the Personal Actions function from the menu and you can select the required function from a list of available functions. Again, this list is context-sensitive.

## Are there any review mechanisms in place?

Yes. Before you submit a transaction to the database (as an employee or manager), you can check your data on the Review page. This page shows a summary of any new or changed information and enables you to make any last-minute changes before submitting the transaction to the database. You can also enter comments for approvers in this page.

## Is there any way to provide approvers with additional information?

If you need to provide additional information for an approver, you can add comments in the Review and Confirm page. Also, if the Attachments region is enabled in the Review and Confirm page, you can add an attachment, for example, a file, URL or piece of text.

## Can I save transactions before submitting them to the database?

Yes. You can use the Save for Later button on the Review page to save a transaction to be completed at a later point. Approvers can also use this functionality to return transactions to the initiator for additional information or correction. Suspended and returned transactions are accessed from the All Actions Awaiting Your Attention table on the Actions page.

## Can SSHR generate notifications and other business documents?

Yes. The Document Management functionality enables you to automatically generate business documents and notifications using the data from self-service transactions. For example, you could use this functionality to create a Notification of Change or a standard letter. You define which fields are included in the documents using the PDF Forms technology.

## Can I enable my employees and contingent workers to create their own SSHR users?

Yes. You can use the New Employee and Non-employee Registration functionality to enable your users to create their own users. Employees and non-employees can register with the self-service application and create their own user names and passwords.

# Common SSHR Modules

## People in Hierarchy, My List, and Search Pages

The Hierarchy, My List, and Search pages are collectively known as the Enter Process pages.

The Hierarchy page is generally the starting point for all manager self-service functions. It enables managers to select a user record for processing in SSHR.

The navigation options from the People in Hierarchy page depend on the path that the manager has taken to navigate to the page. There are two possible paths:

- From the generic Manager Actions menu

  In this case, the manager first selects a person the from People in Hierarchy page or the People in My List page. This takes the manager to the Actions page. A context-sensitive list the SSHR modules or actions available for the selected person.

- From a specific manager self-service menu item

  In this case, the manager selects a specific SSHR function and then selects the person for processing in the People in Hierarchy or People in My List page. When the manager selects a person, the selected function appears.

### People in Hierarchy

The People in Hierarchy region displays a hierarchical view of the current manager's subordinates. Users can expand or collapse the lower levels of management as desired.

By default, the hierarchy uses a supervisor hierarchy (based either on the supervisor or the supervisor assignment).

When you move the mouse over the Details icon, you can view the photo of the worker, and details such as employment and contact in a pop-up window.

### My List

The My List functionality enables managers to store people whose records they frequently access in a list for quick record retrieval. When a manager searches for a person, they can click the Add to My List button to add that person to the list. When the manager next selects the My List option from the People in Hierarchy page, the names of these saved employees are displayed in a table. A pop-up window displays the people in My List when you place the mouse over the My List link.

### Advanced Search Page

As an alternative to the simple search, you can select Advanced Search to specify advanced search criteria. When you select this option, the following standard search fields are available:

- First Name
- Last Name
- Assignment Number
- Job

If these fields are not sufficient, you can add additional fields from a list. You can also specify whether the search must include all criteria or whether records that meet only some of the criteria are valid. If required, you can save the search criteria to use again.

> **Note:** When you search for employees using the Basic or Advanced Search, SSHR excludes the log-in person from the results.

### Person Details

A manager can access the personal details for any person included in the Hierarchy or My List simply by clicking the Details icon for the person. SSHR displays the Person Detail view for the person, enabling the manager to display Employment, Salary, Performance, Absence, and Application information for the person. Training information is also available although this tab is hidden as standard. When the Person Details are displayed, the views displayed are summary views. To display more detailed information, expand the view.

For more information, see: Employee Information View, page 9-74.

### Multiple Assignments

If a person has more than one assignment for a given manager, the manager needs to select the Action icon for the relevant assignment in order to carry out the action. Managers can view multiple assignments depending on the setting of the HR:Enable Multiple Assignments in SSHR profile option.

## Actions

The Actions page displays a list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected.

The list is driven by the hidden submenu defined for the HR: Manager Actions Menu profile option. The default menu for this profile option is the predefined Personal Actions Menu (HR_LINE_MANAGER_PERS_FUNCTIONS).

The list of functions displayed in the Actions page is also defined by the person's legislation code.

See: Data Security Menus, page 2-11

The Actions page can be accessed in one of the following ways:

- Managers can click on the Actions icon for a specific assignment to display the actions relevant to the employee or worker
- Self-service users can select the Personal Actions menu option from their menu and display their personal actions

## Eligibility

The Available Actions list is, by default, limited to those actions the user is currently eligible for.

For information on setting up eligibility see: Eligibility Processing Setup Example, page 10-34.

For further information on eligibility see: Initiating a Self Service Action, page 10-54.

Viewing and processing of ineligible actions is controlled by two profile options:

- HR:Allow Use of Eligibility for Self Service Actions
- HR:Allow Processing of Ineligible Self Service Actions

When HR:Allow Use of Eligibility for Self Service Actions system profile is set to No (the default), this page does not display the Eligibility column and only eligible actions for the selected person are listed. When this profile option is set to Yes, the page displays the Eligibility column and all actions are listed. The Eligibility column distinguishes between eligible and ineligible actions.

However, a user will not be able to process an ineligible action unless HR:Allow Processing of Ineligible Self Service Actions is also set to Yes. This will enable users to process actions for which the selected person is currently ineligible, but may be eligible by the effective date. The action will still fail if the person is not eligible for the action by the given date.

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

## Concurrent transactions

The application supports multiple simultaneous actions on the same person. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes. When this profile option is set to No, the Pending column is displayed which indicates to the user whether pending transactions are present. The user can then review the pending transaction. When you set the profile option to Yes, the Pending column will not be displayed, and users will be able to perform actions against all assignments.

When concurrent transactions are activated potential data conflicts may arise. For information on how to deal with these see Managing Dates in SSHR, page 3-5.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Manager Actions |
| Employee Self Service | Personal Actions |
| Manager Self Service | Suspended Actions Mgr |
| Employee Self Service | Suspended Actions |

See: Defining User Access and Menus, page 3-10

## Workflow

Not applicable

## Configurable Tips and Instructions

***Actions Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Actions Awaiting Your Attention | Instruction | PQH_SS_PERSON_NTF_INT |

| Region | Tip Type | Message Name |
|---|---|---|
| Available Actions | Instruction | HR_SS_INST_ACTIONS_DUAL |
| Selected Action | Instruction | HR_SS_INST_ACTIONS_SINGLE |
| Selected Action | Instruction | HR_INST_ACTIONS_SINGLE_SUS |

***Effective Date Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Effective Date Options | Instruction | PQH_SS_EFFECTIVE_DT_HDR |

***Refresh Page***

| Region | Tip Type | Message name |
|---|---|---|
| Intervening Actions Found | Instruction | PQH_SS_CONC_REFRESH_INT |

***Sub Actions Page***

| Region | Tip Type | Message name |
|---|---|---|
| Assignment Header | Instruction | PER_SS_ASOF_APPROVAL_DT_DESC |
| Sub Actions | Instruction | PQH_SS_SUB_ACTIONS_INT |

See: Adding Instructions to Web Pages, page 5-35

### Configurable FlexFields:

Not applicable

### Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Allow Use of Eligibility for Self Service Actions | Site | Yes/No | No |
| HR:Allow Processing of Ineligible Self Service Actions | Site | Yes/No | No |
| HR:Allow Concurrent Self Service Actions | Site | Yes/No | No |
| HR: Manager Actions Menu | All | All Manager Actions menus | Manager Actions Menu |
| HR:Personal Actions Menu | All | All Personal Actions menus | Personal Actions Menu |
| HR:Contingent Worker Manager Actions Menu | All | All Contingent Worker Manager Actions menus | Contingent Worker Manager Actions Menu |
| HR:Contingent Worker Personal Actions Menu | All | All Contingent Worker Personal Actions menus | Contingent Worker Personal Actions Menu |
| HR:Actions - Validation | All | All Actions Checked, Preselected Action Checked, All Validation Post Selection | All Actions Checked |

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

## Return for Correction

The Return for Correction page is available from the Pending Approval Notification

page.

When a manager clicks on a Return for Correction link in a notification they navigate to the Return for Correction page. Here they can select a previous approver or the initiator of the action and submit for correction with comments. A notification is sent to the selected user.

The receiver of the Return for Correction can then restart the approval notification from the following places:

- All Actions Awaiting Your Attention page
- Actions Awaiting Your Attention in Perform Action page
- Return for Correction notification

## Menu and Function Names

This page can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| HR Self-Service Pages | HR Return for Correction Page |

## Workflow

Not applicable.

## Configurable Tips and Instructions

***Return For Correction Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Comments Region | Error | PQH_SS_RFC_RESPONSE_INT |
| Person Selection Region | Error | PQH_SS_RFC_SELECT_PERSON_INT |
| Top Content Region | Error | PQH_SS_RFC_CONTENT_INT |

### Configurable Flexfields

Not applicable.

## Release Information

The Release Information function enables an employee or worker to share information about themselves with another person, often a manager, who would not usually have access to their records. Similarly, a manager can use this function to share information about one of their direct reports with a second manager.

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

If the employee or worker subsequently decides that the information should no longer be shared, they can use the Revoke Access functionality to block access to their information.

The Release Information function is available under predefined Manager and Employee responsibilities. Configuration options enable you to set up approvals processes for granting access.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Release Information Mgr |
| Employee Self Service | Release Information |

See: Defining User Access and Menus, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Release Employee Information

#### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

### CAED Page

| Region | Tip Type | Message Name |
|---|---|---|
| CAED: Grant Access to | Instruction | HR_INST_CAED_GRANT_ACCESS |
| CAED Granted Employee Header Region | Instruction | HR_INST_CAED_EXISTING_GRANTS |
| CAED Pending Employee Header | Instruction | HR_INST_CAED_PENDING_GRANTS |
| CAED Control Access To Employee Data | Instruction | HR_INST_CAED_TOP_TEXT |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

Not applicable

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR: CROSS_BUSINESS_GROUP | Site | Yes/No | No |

The Cross Business Group profile option determines whether employees from other business groups are retrieved in the employee search.

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

## Additional Configuration Steps

1. Configure the predefined user menus to include the Release Information function.

   See: Defining User Access and Menus, page 3-10

2. If you want your managers to have access to employee and worker data, ensure that the Allow Granted Access check box is flagged for the security profile assigned to the manager. This enables the manager to review the user's data.

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

## Review and Confirm

Most functions display at least the Review page. The Review page displays a corresponding region for each web page section that you have updated as part of the preceding transaction. Inside each region is a list of current database and proposed transaction data. Changed information is highlighted with a blue dot, enabling you to easily identify which information has changed in the transaction.

The Confirm page contains a confirmation message and appropriate navigation buttons.

### Approvals

If your enterprise has setup approvals, then you can enter approvals comments in this page. If dynamic approvals are used, you can view approvers and pre-approval and post-approval notifiers, and add further approvers and notification recipients.

When you click the Submit button on the Review page, the transaction is committed to the Human Resources system or sent for approval. The Confirm page is then displayed. The Confirm page contains a confirmation message describing the status of the transaction.

### Attachments

If the Attachments region is available, you can attach supporting documents to the current transaction. An attachment can be a file, a URL, or text.

When you click Add or View Attachments List, the Attachments page is displayed to edit, delete, or simply view attachments in the Attachments table. The Add displays the Add Attachment page.

**Save Attachments**

If the Save Attachments check box is available in the Attachments region, then you select this option to save the attachments so that the attachments are available in the relevant windows of Oracle HRMS. For example, when a manager performs the Change Job self-service transaction and saves an attachment, this attachment is available in the Assignment window of Oracle HRMS.

### What-If

If the What If region is available, you can assess the impact of the change on the

employee's eligibility for benefits before committing the change or sending it for approval.

> **Note:** The What If feature will only function if you have Oracle Advanced Benefits (OAB) installed.

### Printable Pages

The user can print a copy of the submitted transaction for their records if required. Enable the Printable Page button in the Personalization Framework to enable this feature.

When the user clicks on the Printable Page button the transaction data will be formatted for printing. How the data is formatted depends on whether you have configured any documents in Document Management that correspond to this action. You can use Document Management to produce formatted documents containing merged data, using Acrobat Forms technology. See Document Management, page 10-16. If documentation has not been configured, users will simply see a printer-friendly version of the Review page.

## Save For Later

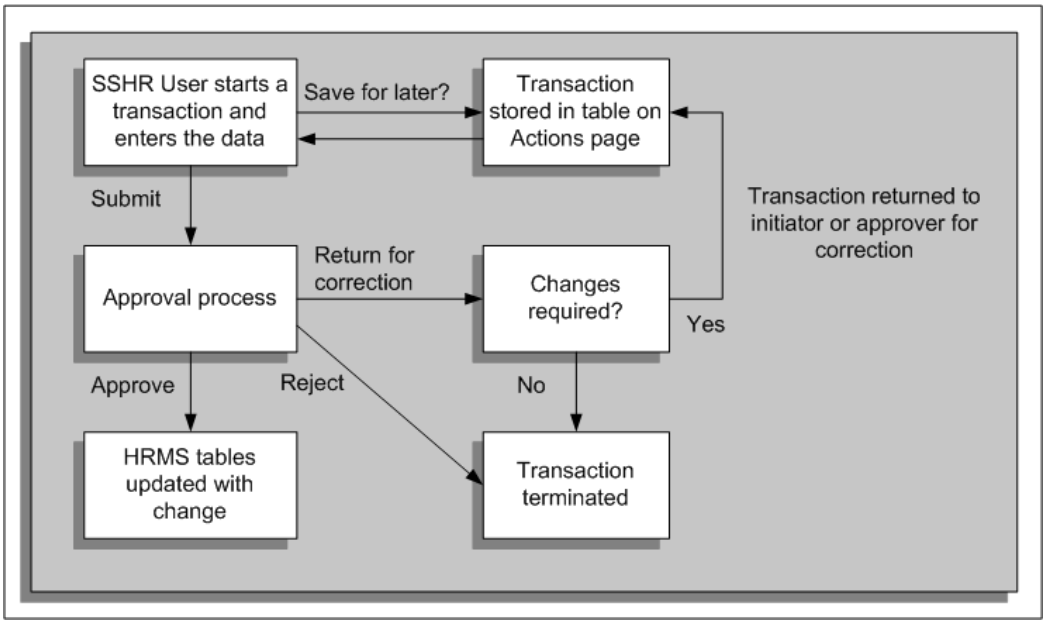
The Save for Later functionality enables a user to interrupt transactions before they are complete. The user can then save them so that they can be completed at a later point. When users save a transaction for later the application sends them a notification.

In addition, approvers can return transactions to the initiator or a previous approver for correction. In this case, the initiator can reopen the transaction, correct the information, and resubmit it for approval. The approvers can include informational notes to clarify the reason for returning the transaction.

Both suspended transactions and returned transactions are displayed in the All Actions Awaiting Your Attention list on the Actions page.

Users can also access their saved functions using the All Actions Awaiting Your Attention menu option on the employee and manager menus.

***Save for Later Functionality***




The graphic above shows how transactions can be saved for later and returned for correction.

Route 1 (Save for Later): When a user initiates a self-service transaction, or receives a transaction for correction, they can either submit the transaction for approval immediately or save the transaction for subsequent processing. If the user submits the transaction immediately, the transaction is subject to the usual approval processes. If the user chooses to save the transaction for later, it is suspended and the user can restart it or delete it from the All Actions Awaiting Your Attention table in the Actions page.

Route 2 (Return for Correction): When a user has submitted a transaction for approval, the approver can either approve the transaction, reject the transaction, or return it for correction. If the approver returns the transaction for correction, the initiator can subsequently restart or delete it from the All Actions Awaiting Your Attention table in the Actions page of the initiator.

> **Note:** If a transaction is interrupted due to user inactivity, or a system failure, the interrupted transaction is also stored as a suspended transaction and the user will receive a notification.

The application will notify users whenever they have saved a transaction for later.

> **Note:** Users save a transaction for later by clicking the Save for Later button. To disable this button you need to set the profile option HR:Self Service Save for Later to No (the default is Yes). This will hide the Save

for Later button on all transaction pages and the Review page.

### Workflow Process for Save for Later Transactions

Oracle SSHR uses the HR Save for Later (hrssfl.wft) workflow item type to route the save for later transactions. The HR Save for Later Notification Process within the workflow controls the for save for later transactions. This process sends FYI notifications when save for later transactions occur and recipients can launch the transactions from notifications later.

## Document Management

Document Management features enable you to automatically generate business documents containing data from self-service actions. Examples of business documents might include a Request for Action, Notification of Change, standard letter, or contract. You set up your documents in two stages:

- Create formatted PDF documents, using PDF or RTF form fields as place holders for transaction attribute values
- Configure document groups and attribute mappings in the HRMS Document Management function

### Create Formatted Documents

#### PDF Templates

Create formatted documents in any word processing or page layout application, then generate a PDF file. In a PDF editing application, add named form fields to contain data from the action. The form field names are the tags you map to your action's attributes in Document Management.

#### RTF Templates

Alternatively, you can prepare your document in RTF format and add RTF form fields. When you use an RTF template, the application converts it to PDF format when you generate your document. You can also insert conditional programming statements available using RTF technology to display or hide fields based on the values of other fields. For example, you can display or hide data based on the department or e-mail address.

### Configure Document Groups and Attribute Mappings

Using an HRMS Manager responsibility, run Document Management from the Main

Menu.

### Document Management Page

Use this page to search for existing document groups. Click the Create Group button to navigate to the Define Group page and create a new document group. Use document groups to define a collection of documents and associate them with their corresponding workflow process. To create the link between the document group and the workflow process, add the function parameter pGroupName=<*documentgroupshortname*> using a System Administrator responsibility.

From the Results list, you can add, update, or remove documents from the group. You can also delete a document from the database here.

### Define Group Page

From this page, you can create a new document group by entering a Group Name and Short Name. You can also search for existing groups. Enter a Group Name and Short Name. Once you have defined a group, you can also change the Document Type of any documents belonging to the group here.

### Map Documents Page

Use this page to add a document to the selected group. You can select from a list of documents in the database that are not yet part of a group, or you can add a new document. You can search by Document Name or Short Name, and Effective Date.

### Define Document and Update Document Pages

Use these pages to define or update a document. On the Define Document page, specify a Document Name, Short Name, and Document Category (such as Self Service Human Resources or Compensation Workbench).

Click the Update icon for an existing document to access the Update Document page. You can view Details pages displaying document and group information by clicking the View Document or View Group icons, respectively. You can also maintain versions of documents when their properties or contents change, and keep version histories showing the effective dates. You specify the document`s effective date (which automatically end dates any previous version), then upload a new file or select a file that already exists in the database.

Here you also specify any FastFormula you want to use to populate document tags with returned values from the database, or override tag values with literals.

### Define Document: Attribute Mapping

Use this page to merge data from transaction data attributes to form fields. The page displays a list of tags (form field names) found in the selected template, with corresponding Transaction Data Attribute fields. To merge data from attribute values to

each form field, search for and map available attributes in the attribute field corresponding to the tag.

You can include both current and proposed values in a document, and also Header Information attributes containing details from the selected person's record. For details, see the table Pages and Regions that Support Attribute Mapping. A Value column tells you if the chosen attribute is Current or Proposed. You can delete mappings and maintain datetracked versions within the selected document by changing the effective date of a given tag/attribute combination.

### Define Documents Properties

If you select an existing document on the Map Document to Group page and press Continue, the Define Documents Properties page appears. You can also change the Document Type here. Available types include Pre Approval, Post Approval, and Both.

You generate pre-approval versions of documents when you press the Printable Page button on the Review page of an action, while it is still in process. You generate post-approval versions on final approval. Initiators receive a notification containing a link to the Document Information page, containing post-approval versions of available documents.

### Delete Document Page

Use this page to delete a document from the database. Alternatively, you can reinstate a previous document version by clicking Delete for that version and choosing to delete all future changes. You can also access Document Details and Group Details from this page.

## Pages and Regions that Support Attribute Mapping

HRMS supports the listed mapping attributes from the following pages and regions:

**Assignment Header Region**

Current Business Group

Current Contingent Worker Name

Current Department Name

Current Derived Locale

Current Employee Name

Current Employee Number

Current Employment Category

Current Grade

Current Job Name

Current Location

Current Manager Name

Current Organization Email Address

Current Payroll

Current Position

Current Salary

Current Salary Basis Name

Current Salary Frequency

**Assignment Page**

Additional Information

Assignment Attribute 1-30

Assignment Attribute Category

Assignment Status

Billing Title

Ceiling Step

Change Reason

Current Additional Information

Current Assignment Status

Current Ceiling Step

Current Change Reason

Current Department Name

Current Employee Category

Current Employment Category

Current Establishment Name

Current Frequency

Current Grade Ladder

Current Grade Name

Current Internal Address

Current Job Title

Current Location

Current Normal End Time

Current Normal Start Time

Current Notice Period Length

Current Notice Period Units

Current Payroll Name

Current People Group Key Flex

Current Performance Review Frequency

Current Performance Review Period

Current Position Name

Current Probation Period End Date

Current Probation Period Length

Current Probation Period Units

Current Project Title

Current Projected Assignment End

Current Purchase Order Line

Current Purchase Order Number

Current Salary Basis

Current Salary Review Frequency

Current Salary Review Period

Current Supervisor

Current Supplier ID for Assignment

Current Supplier ID for Worker

**Assignment Page**

Current Supplier Name

Current Supplier Site

Current Title

Current Work Hours

Currently a Home Worker

Department Name

Employee Category

Employee is a Manager

Employee is a Manager Currently

Employment Category

Establishment Name

Frequency

Grade Ladder

Grade Name

Home Worker

Internal Address

Job Title

Location

Normal End Time

Normal Start Time

Notice Period Length

Notice Period Units

Payroll Name

People Group Key Flex

Performance Review Frequency

Performance Review Period

Position Name

Probation Period End Date

Probation Period Length

Probation Period Units

Project Title

Projected Assignment End

Purchase Order Line

Purchase Order Number

Salary Basis

Salary Review Frequency

Salary Review Period

Supervisor

Supplier ID for Assignment

Supplier ID for Worker

Supplier Name

Supplier Site

Work Hours

**Change Manager Page**

Current Manager Name

Employee Name

Manager Name

**Change Pay Page**

Annual Change Amount

Change Amount

Change Percentage

Comments

Currency

Current Comments

Current Salary

Current Salary (Annual Equivalent)

Current Salary Effective Date

Pay Basis

Proposal Reason

Proposed Salary

Proposed Salary (Annual Equivalent)

Salary Basis Change Type

Salary Effective Date

**Competency Profile Page**

Current Level

Current Start Date

Name

Proposed End Date

Proposed Level

Short Name

**Education and Qualifications Page**

Attendance End Date

Attendance Start Date

Award On

Awarding/Examining Body

Comments

Completed Amount

Completed Units

Current Attendance End Date

Current Attendance Start Date

Current Award On

Current Awarding/Examining Body

Current Comments

Current Completed Amount

Current Completed Units

Current Fee

Current Fee Currency

Current Full-Time

Current Grade

Current Group Ranking

Current Projected/Actual Completion Date

Current Reimbursement Condition

Current School

Current Status

Current Study Start Date

Current Title

Current Total Amount

Current Tuition Method

Current Type

Fee

Fee Currency

Full-Time

Grade

Group Ranking

Projected/Actual Completion Date

Reimbursement Condition

School

Status

Study Start Date

Title

Total Amount

Tuition Method

Type

**Other Employment Information Page**

Bargaining Unit Code

CAGR Grade

CAGR Key Flex

Collective Agreement

Contract

Current Bargaining Unit Code

Current CAGR Grade

Current CAGR Key Flex

Current Collective Agreement

Current Contract

Current Union Member

Union Member

**Other Professional Awards Page**

Award On

Awarding/Examining Body

Comments

Completed Amount

Completed Units

Current Award On

Current Awarding/Examining Body

Current Comments

Current Completed Amount

Current Completed Units

Current Fee

Current Fee Currency

Current Grade

Current Group Ranking

Current Projected/Actual Completion Date

Current Reimbursement Condition

Current Status

Current Study Start Date

Current Title

Current Total Amount

Current Tution Method

Current Type

Fee

Fee Currency

Grade

Group Ranking

Projected/Actual Completion Date

Reimbursement Condition

Status

Study Start Date

Title

Total Amount

Tution Method

Type

**Personal Information Header Region**

Current Business Group

Current Contingent Worker Name

Current Employee Name

Current Employee Number

Current Organization Email Address

**Personal Information Page**

Current Date of Birth

Current Disability Code

Current Effective Date

Current Employee Number

Current First Name

Current Full Name

Current Honors

Current Last Name

Current Marital Status

Current Middle Name(s)

Current Organization Email Address

Current Preferred Name

Current Prefix

Current Previous Last Name

Current Social Security Number

Current Suffix

Current Title

Date of Birth

Disability Code

Effective Date

Employee Number

First Name

Full Name

Honors

Last Name

Marital Status

Middle Name(s)

Organization Email Address

Preferred Name

Prefix

Previous Last Name

Social Security Number

Suffix

Title

**Tenure Status Page**

Adjusted Tenure Date

Current Adjusted Tenure Date

Current Date Determined

Current Projected Tenure Date

Current Reason for Adjustment

Current Subject to Tenure Quota

Current Tenure Status

Date Determined

Projected Tenure Date

Reason for Adjustment

Subject to Tenure Quota

Tenure Status

**Termination Page**

Comments

Notification Date

Reason

Termination Date

**Work Schedule Page**

Current Employment Category

Current Frequency

Current Normal End Time

Current Normal Start Time

Current Work Hours

Current Work Schedule Key Flex

Employment Category

Frequency

Normal End Time

Normal Start Time

Work Hours

Work Schedule Key Flex

## FastFormula Options

You can do the following using FastFormula:

- Set a value into the document
- Override an existing value in the document

Your formula must be of the type Document Print.

The application provides three predefined input parameters for your use:

- P_SESSION_ID
- P_TRANS_ID
- P_EFFECTIVE_DATE(TEXT)

### Setting a Value into the Document

Say you want to set the manager name in the document, but the manager name is not a data field found within the workflow process.

Using an HRMS Localization Seed Data responsibility, create three functions, described below in order of invocation.

1. A FastFormula function that passes the Transaction ID to a database function, returning the manager name
2. A database function that returns the manager name for the specified transaction
3. A second FastFormula function that sets the manager name in the tag (form field)

| Function | FastFormula Function1 | Database Function | FastFormula Function2 |
|---|---|---|---|
| **Name** | My_FF_Get_Mgr_Name | MyPackage. My_DB_Mgr_Name_Function | My_FF_Put_Mgr_Name |
| **Definition** | MyPackage. My_DB_Mgr_Name_Function | | PQH_SS.PRINT. set_document_data |
| **Data Type** | VARCHAR2 | VARCHAR2 | Number |
| **Class** | External | | External |
| **Parameters** | Use predefined parameter: | Use predefined parameter: | Use predefined parameters: |

| Function | FastFormula Function1 | Database Function | FastFormula Function2 |
|---|---|---|---|
| | **Name**: P_TRAN_ID<br>**Type**: VARCHAR2<br>**Class**: Input Value | **Name**: P_TRAN_ID<br>**Type**: VARCHAR2<br>**Class**: Input Value | **Name**: P_TAG_NAME<br>**Type**: Text<br>**Class**: Input Value<br>**Name**: P_TAG_VALUE<br>**Type**: Text<br>**Class**: Input Value |
| **Return Value** | mgr_name | db_mgr_name | 0 = success |

The database function returns the manager name (db_mgr_name) to FastFormula Function1:

```
<local variable1> = My_FF_Get_Mgr_Name(P_TRAN_ID)
```

The second FastFormula function sets the manager name (mgr_name) in the form field:

```
<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME',<local
variable1>)
```

### Overriding an Existing Value in the Document

Say you want to override the manager's name with a specific manager's name. You can override the existing value with a literal:

```
<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME','Mark
Johnson')
```

> **Note:** Performing the tasks described in this section assumes knowledge of FastFormula, including the ability to use SQL queries to create Definitions, such as MyPackage.My_DB_Mgr_Name_Function.

See: *Oracle HRMS FastFormula User Guide*.

## Menu and Function Names

The following table lists user menu names and function names for this module.

| User Menu Name | Function Name |
|---|---|
| | SSHR Document Management |

## Workflow

Not applicable

## Configurable Tips and Instructions

The following tables list the configurable tips and instructions for each page.

***Define Document Page***

| Region | Tip Type | Message Name |
|---|---|---|
| Page | Instruction Text | PQH_SS_DEFINE_DOC_INT |
| Page | Instruction Text | ICX_POR_INDICATES_REQ_FIELD |
| Page | Instruction Text | PQH_SS_DEFINE_DOC_U_INT |
| Error | Error | PQH_SS_DUPLICATE_SHORT_NAME |
| Error | Error | PQH_PA_NO_TAGS_IN_FILE |
| Error | Error | PQH_SS_INVALID_FILE_ERR |

***Define Document: Attribute Mapping Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction Text | PQH_PA_ATTR_MAP_INT |

***Define Document: Attribute Mapping Delete Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction Text | PQH_SS_DOC_DELETE_MSG_INT |

***Define Document Properties Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Select Document Properties | Instruction Text | PQH_PA_DOC_PROP_INT |

***Document Mapping Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Warning | Error | PQH_PA_DOC_CREATED_INT |

***Document Delete Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction Text | PQH_PA_DOCUMENT_DELETE_INT |
| Page | Instruction Text | PQH_SS_DOC_DELETE_INT |

***Document Update Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction Text | PQH_PA_DOCUMENT_UPDATE_INT |

| Region | Tip Type | Region Name |
|---|---|---|
| Document Information | Instruction Text | PQH_SS_DOC_UPDATE_ALLOWED_TIP |

***Document Search Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction Text | PQH_PA_DOC_MGMT_GRP_INT |
| Results | Instruction Text | PQH_PA_DOC_MGMT_HGRID_INT |
| Search Group | Instruction Text | PQH_PA_GRP_SRCH_HRD_INT |
| Confirmation | Information | PQH_PA_RECORDS_SAVED |

***Document Remove Warning Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Description | Instruction Text | PQH_SS_DOC_REMOVE_DESC |
| Instruction | Instruction Text | PQH_SS_DOC_REMOVE_INT |

***Map Documents Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Results | Instruction text | PQH_PA_DOC_SRCH_RSLT_INT |

| Region | Tip Type | Region Name |
|---|---|---|
| Results | Instruction text | PQH_PA_DOC_SRCH_RSLT_U_INT |
| Search | Instruction text | PQH_PA_DOC_SRCH_INT |

***Define Group Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction text | PQH_PA_GRP_HDR_INT |
| Page | Instruction text | PQH_MANDATORY_MESSAGE_INT |

***Group Details Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Page | Instruction text | PQH_PA_GROUP_DETAILS_INT |

***Group Delete Warning Page***

| Region | Tip Type | Region Name |
|---|---|---|
| Description | Instruction text | PQH_SS_DOC_DELETE_GRP_DESC |
| Instruction | Instruction text | PQH_SS_DOC_DELETE_INSTRUCTION |

See .Adding Instructions to Web Pages, page 5-35

## Configurable FlexFields

Not applicable

### Configurable Profile Options

Not applicable

## Set Up Eligibility Processing

### Eligibility Processing Setup Example

The following is a best practice example of how to set up automatic calculation of a person's eligibility for a self-service action, using features available in HRMS Compensation and Benefits as a processing engine. When a user initiates an action, the application runs the Compensation and Benefits BENMNGLE engine, and displays whether or not the selected person is eligible.

To enable eligibility processing, turn on the system profile HR:Allow Use of Eligibility for Self Service Actions. If you want to allow users to process actions for which a selected person is not eligible, turn on HR:Allow Processing of Ineligible Self Service Actions.

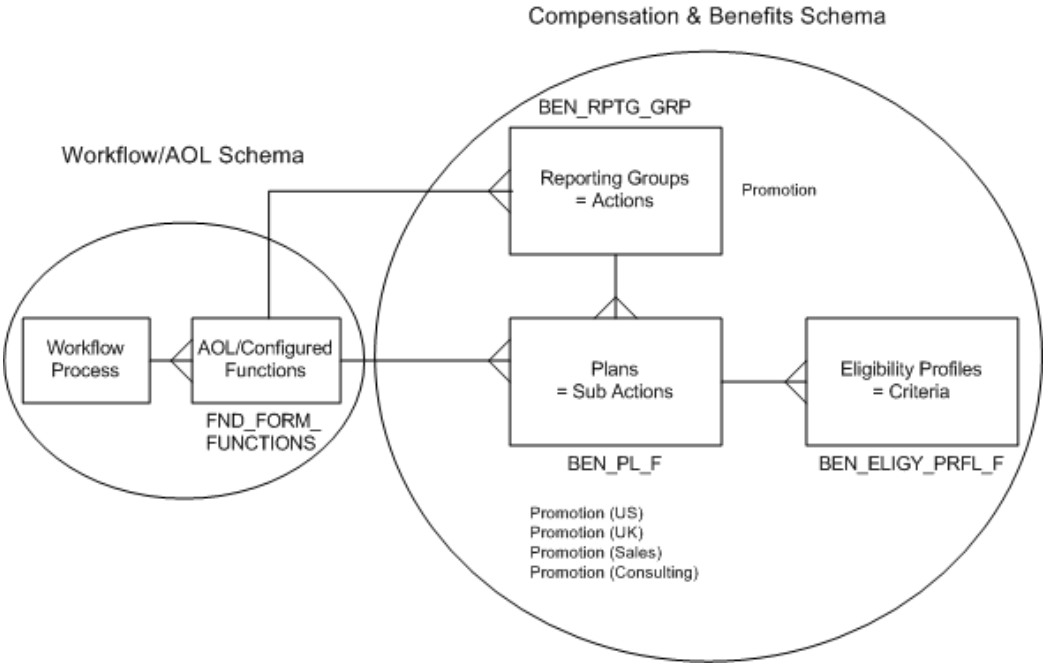
If you are confident that the BENMNGLE engine runs and updates the results tables on a regular basis, you can improve performance by disabling the profile HR:Run BENMNGLE when processing a Self Service action.

The system profiles described above are off by default.

### Eligibility for Self-Service Actions

The following figure describes how SSHR has mapped the Workflow and AOL schema onto the Compensation and Benefits schema to provide a generic eligibility processing engine. In a typical implementation, you link your copied and configured form functions to actions, such as Promotion. The actions take on a parent relationship with sub actions such as Promotion (US) or Promotion (Sales), which you define based on the requirements of, say, differing locales or departments.

***Mapping the Workflow/AOL Schema to the Compensation and Benefits Schema***




For a person to be eligible for a sub action that is legislation-specific, say, Promotion (US), you set up the sub action (plan) in a US business group. You refine the criteria that make a person eligible by defining eligibility profiles and linking them to the sub action. You can link each form function to multiple actions and sub actions, but you can determine eligibility only for sub actions.

> **Note:** The application considers a person who meets all *Required* profiles and at least one *Optional* profile eligible. If you link only one profile to a sub action, you define it as Required.

## Setting Up Eligibility Based on Length of Service

In this example, you have already decided to use the Benefits engine to process eligibility, and you have configured the form functions your enterprise wants to make available to users. User-friendly names help users recognize the workflow processes. Examples might include:

- Promotion (Australia)
- Promotion (Manufacturing)
- Transfer
- Award Bonus

This example assumes that you have copied and configured two form functions based on the predefined function Change Job:

- Change Assignment
- Change Assignment with Bonus

You have identified the applicable policies and eligibility rules in effect in your organization, and reviewed the available eligibility profile criteria. You have asked and answered appropriate business questions, including:

- What are the criteria that govern eligibility for each available form function? Examples include:
  - Legislation
  - Organization Unit (department)
  - Job
  - Length of Service
- Which life events can impact eligibility for actions?

In your organization, an employee is eligible for a bonus after one year of service. You set up eligibility processing so that if a person's length of service is less than one year, the person is eligible only for Change Assignment. If length of service is one year or more, the person is eligible for Change Assignment with Bonus.

#### Generic Steps to Set Up Eligibility

The steps below describe the generic process of setting up eligibility for sub actions.

1. Define eligibility criteria as required
2. In the Participant Eligibility Profiles window:
   - Create eligibility profiles
3. In the Plan Types window:
   - Define a plan type
4. In the Plans window:
   - Create plans (sub actions)
   - Link each plan to a form function (Miscellaneous tab)
   - Link eligibility profiles to each plan (Plan Eligibility tab)

5. In the Reporting Groups window:
    - Create reporting groups (actions)
    - Link each reporting group to a form function
    - Link each reporting group to plans (Components tab)

### Sample Steps for Length of Service

Using an HRMS Manager responsibility, follow the steps below to set up eligibility based on length of service.

**Derived Factors**

Specify how the application evaluates length of service criteria by defining two derived factors.

1. Define the first derived factor, in which length of service is less than one year. In the Derived Factors window (Length of Service tab):
    - Name = "LOS < 1 yr"
    - UOM = "Day"
    - Date to Use Code = "Date of Hire"
    - Values: Activate the No Min check box; Max = 364
    - Determination Code = "As of Event Date"

2. Define the second derived factor, in which length of service is one year or more. In the Derived Factors window (Length of Service tab):
    - Name = "LOS >= 1 yr"
    - UOM = "Year"
    - Values: Activate the No Max check box; Min = 1
    - Date to Use Code and Determination Code are the same values as the first derived factor

**Eligibility Profiles**

Set up two eligibility profiles. The first makes a person eligible with less than one year of service, the other makes a person eligible with a year or more of service. You can set up as many eligibility profiles as you need to qualify a person for an action. You specify if a profile is Required or Optional when you link the profile to a plan, below.

1. Define the first eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "Less Than 1 yr LOS"
   - Assignment Type = "Any Assignment" (Primary and Secondary)
   - Status = "Active"
   - Applies To = "Benefits Profile"
   - Select "Length of Service" from the LOV
   - Length of Service = "LOS < 1 yr"
2. Define the second eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "1 yr or More LOS"
   - Select the same values for Assignment Type, Status, and Applies To as the first profile
   - Length of Service = "LOS >= 1 yr"

     **Note:** If the Assignment Type is Any Assignment, eligibility processing can consider secondary assignments, enabling the application to find all actions for which the person is eligible. In a good implementation, a person is eligible for only one related sub action for each action. If BENMNGLE retrieves more than one eligible sub action, a Sub Actions page appears and displays the available choices.

**Sub Actions (Plans) and Actions (Reporting Groups)**

Create a plan type to relate your sub actions (plans) to self-service actions eligibility instead of benefits.

1. Define a new plan type to use for self-service actions. In the Plan Types window:
   - Name = "Business Process"
   - Option Type = "Personnel Action"
2. Define a sub action that includes only the assignment change. Link it to a form function and an eligibility profile. In the Plans window:
   - Name = "Change Assignment"

- Status = "Active"
- Plan Type = "Business Process"
- Plan Usage = "May not be in program"
- On the Eligibility Rates tab, activate the "Track ineligible persons" check box
- On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment" (or any form function name you have configured to change an assignment)
- Confirm that you have activated the Plan Years Not Applicable check box
- Save your work
- Press the Plan Eligibility button to open the Maintain Plan Eligibility window
- Press the Eligibility button to open the Eligibility window. Eligibility Profile Name = "Less Than 1 yr LOS"
- Activate the Required check box
- Save your work

3. Define a second sub action that additionally includes bonus. The steps are the same as in the first sub action, except for the following:
   - Name = "Change Assignment with Bonus"
   - On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment with Bonus" (or any form function name you have configured to change an assignment and award a bonus)
   - Eligibility Profile Name = "1 yr or More LOS"

4. Define an action and link it to your two sub actions to complete your setup. In the Reporting Groups window:
   - Name = "Change Assignment"
   - Purpose = "Personnel Action"
   - Function Name = "Change Assignment"
   - Save your work
   - Plan = "Change Assignment"; Plan = "Change Assignment with Bonus"

(Components tab)

See:

Plan Design, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Requirements for Total Compensation, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Profile Criteria, *Oracle HRMS Compensation and Benefits Management Guide*

Derived Factors, *Oracle HRMS Compensation and Benefits Management Guide*

Defining a Reporting Group, *Oracle HRMS Compensation and Benefits Management Guide*

## Allocated Checklists

The Allocated Checklists functionality automatically generates checklists based on HR actions and eligibility profiles and assigns them to a person or assignment. A typical checklist is a New Hire checklist.

The allocated checklists contain tasks associated with a particular life event. For example, for a new employee, the New Hire checklist would contain tasks associated with the New Hire life event.

If you use the Allocated Checklists function as a Manager, you can view checklists allocated to your direct reports. As an HR Professional user, you can view checklists allocated to the workers within your security profile.

For more information on Checklists in general, see: Checklists Overview, *Oracle HRMS Enterprise and Workforce Management Guide*.

You create and maintain checklists and tasks using an HRMS Manager responsibility.

See: Setting Up Checklists, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

When you display an allocated checklist for a worker, you can either perform the associated task actions yourself or reassign the task. When you have processed a task, you can change the task status as appropriate (for example, Completed, Rejected, Outstanding, Suspended).

> **Note:** If you reassign the task, the new performer receives a notification and can update the task status by updating the notification.

From the Allocated Checklists interface, you can delete a checklist for a worker or modify the checklist by adding and deleting tasks and changing task attributes.

> **Note:** You cannot delete a mandatory task from a checklist; however, if necessary, you can change the Mandatory attribute to No and then

delete the task. Checklists and tasks remain accessible from the Allocated Checklists interface until you explicitly delete them.

If required, you can also add checklists from the Allocated Checklists interface; however, by selecting a person or assignment and then creating a checklist, you have already implicitly allocated the checklist, and automatic allocation using a life event is not necessary.

## Delete Transactions Pending Approval

Oracle SSHR enables managers and workers to delete any transactions that they have initiated and are in the pending approval stage. You can enable this functionality using the HR: Enable Initiator to Delete a Pending-Approval Transaction profile option.

For more information about the HR: Enable Initiator to Delete a Pending-Approval Transaction user profile, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

When you set this profile option to Yes at any one of the levels: site, application, responsibility (Manager Self-Service and Employee Self-Service), or at the user level, the Delete icon is enabled on the following pages:

- All Actions Awaiting your Attention (Employee Self-Service responsibility)
- Personal Actions (Employee Self-Service responsibility)
- All Actions Awaiting your Attention (Manager Self-Service responsibility)
- Manager Actions (Manager Self-Service responsibility)

Initiators can view their transactions in the Pending Approval stage and delete those transactions prior to approval.

When an initiator deletes a transaction that is pending approval, Oracle SSHR performs the following actions:

- Closes all the notifications associated with the transaction from the worklist and All actions Awaiting Your Attention region.
- Removes the transactions with the Pending-Approval stage from the initiator's list of actions.
- Deletes the transaction from the HR_API_TRANSACTIONS table.

**Examples Illustrating the Delete Pending Transactions Functionality**

An initiator can delete a transaction pending approval at any point in the transaction flow till the transaction is approved.

The following examples describe the different scenarios in a transaction flow. In these examples, John Smith is an employee in the Human Resources department in Vision Corporation and he reports to Tracy Price. Tracy Price reports to James King who is the director of the Human Resources department.

John can delete a transaction in the following scenarios:

- John submits a transaction to Tracy and the transaction is in the Pending Approval stage.
- John submits a transaction that requires approval from Tracy and James. John can delete the transaction after Tracy's approval, pending approval from James.
- James returns a transaction submitted by John, for correction to Tracy. Now, John can delete this transaction as the transaction is in the pending approval.
- Tracy corrects the transaction submitted by John, and submits it for approval from James. As the transaction is in the pending approval stage, John can delete the transaction.
- James returns the transaction to John for correction. John can delete the transaction as the transaction is yet to be approved.

> **Note:** If you enable the HR: Defer Update After Approval profile option, then initiators can delete the deferred transactions till you run the Workflow Background Process. For more information about the HR: Defer Update After Approval user profile, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

# 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

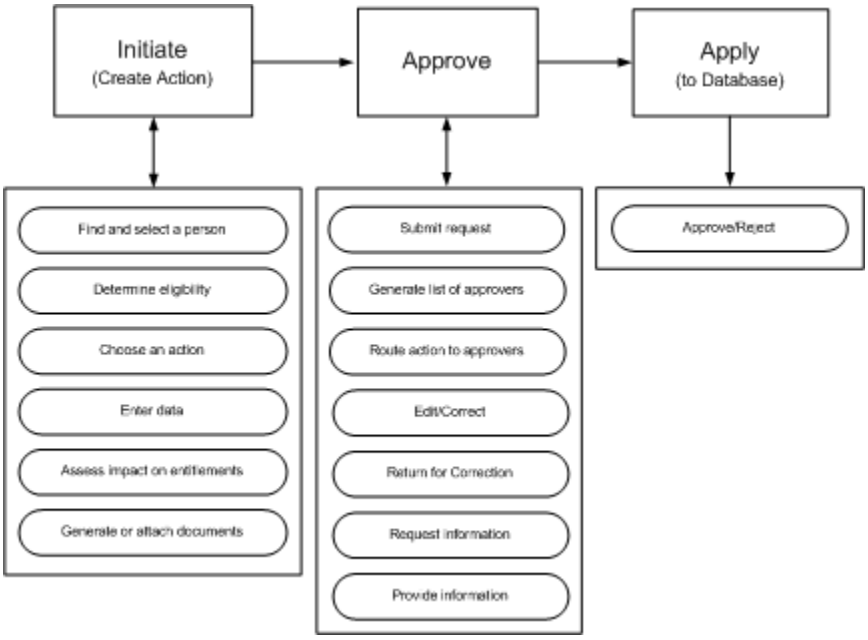
    - Applicant Hire
    - Termination
    - Termination with compensation
- Deployment or status changes
    - Employee Status Change (assignment, full/part time, grade, movement within pay scale)
    - Transfer
    - Leave of Absence (long term absence, sickness, sabbatical)
    - Special/Extra Information 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 10-46

See: Managing Conflicting Actions, page 10-49

See: Initiating a Self-Service Action, page 10-54

See: Approving a Self-Service Action, page 10-59

## 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), page 7-3

## 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, page 2-10

## 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, page 5-21

See: Self Service Workflows, page 4-3

## 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, page 3-10

## 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, page 10-34

## 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, page 10-16

## 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

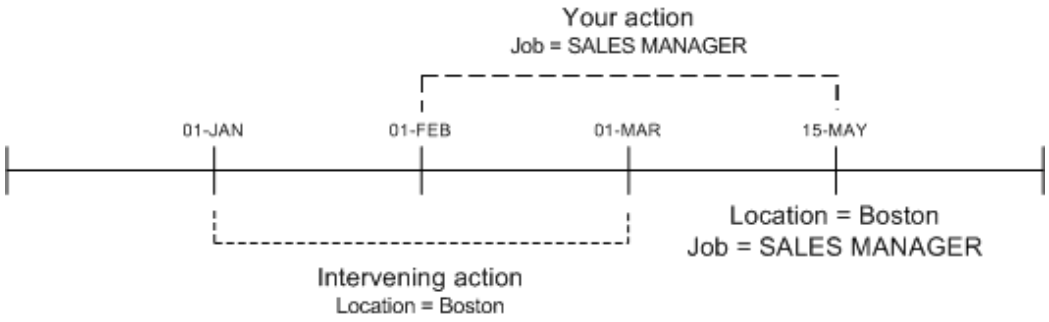
Intervening changes can occur for a variety of reasons, most often due to delays between request and approval. Another manager can approve a change to your selected person's record after your own action has entered the approval process. When the application encounters approved changes to your selected 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.

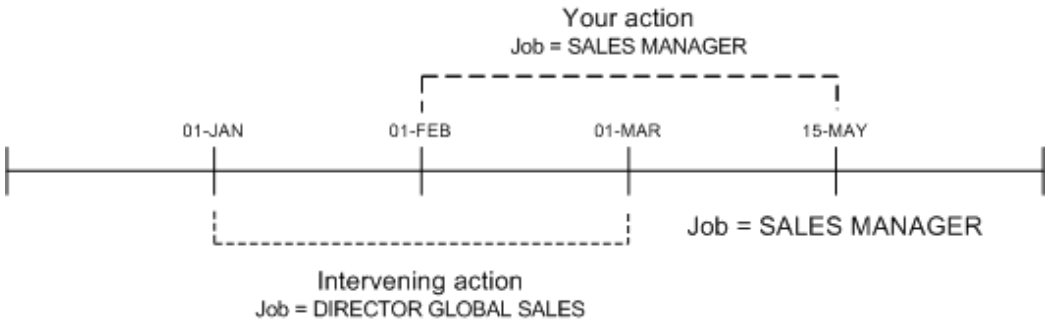
2. Your action's proposed job change conflicts with an intervening change from another manager that specifies a different job. Because both your action and the intervening action specify a job, your action's proposed job prevails, because your action has the later effective date. Nevertheless, you may 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

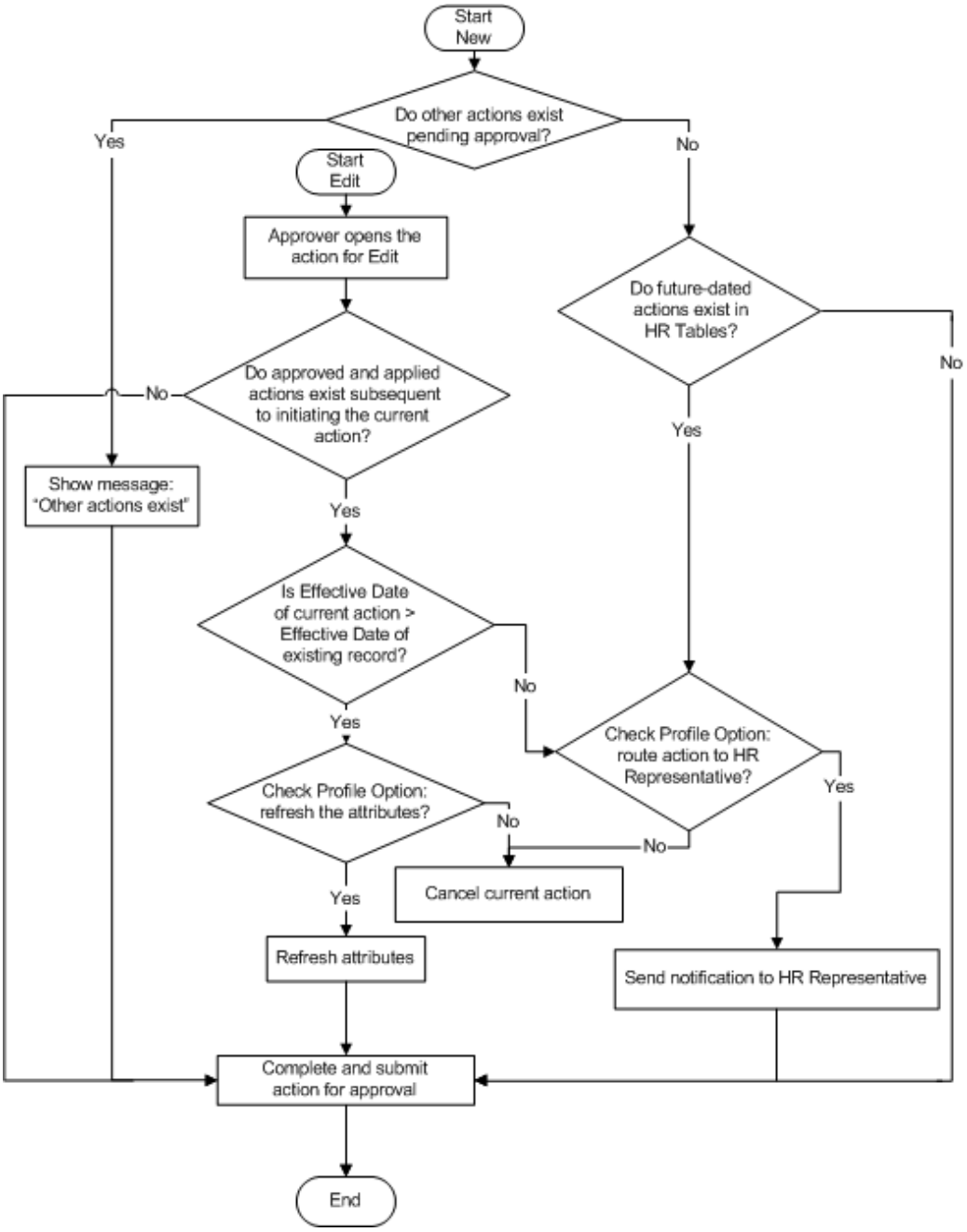
No automated system can resolve every scenario involving conflicting data. In some cases, an HR representative applies all appropriate changes manually. On the whole, managers prefer to get their actions in process and approve them. Your configuration accommodates most scenarios automatically by setting 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, page 10-34

## 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 10-43

## 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.

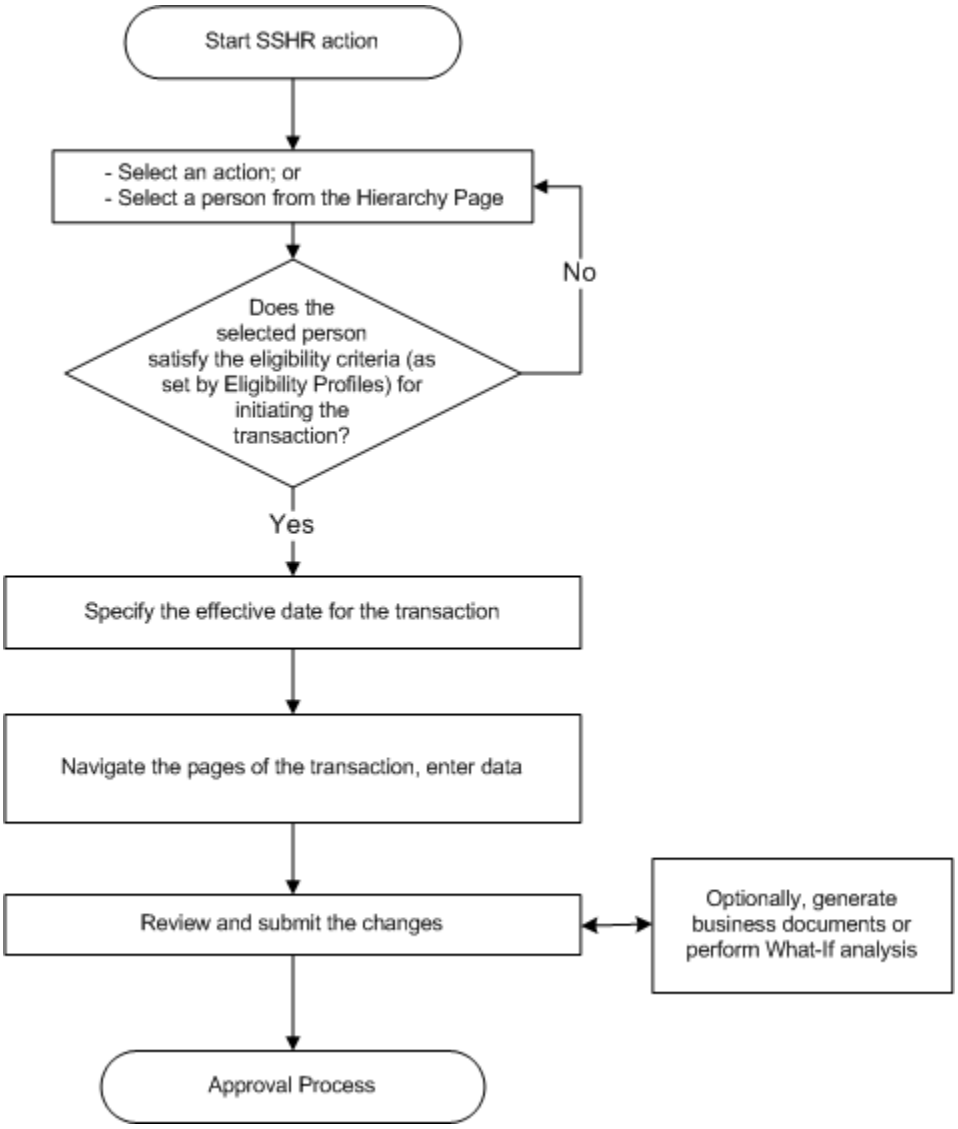
## Business Process

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 10-49

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 10-49

## 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.

The FYI notifications retrieve information from the transaction table and not from the base table. Therefore if transaction data is dependent on base table and base table data is deleted then relevant data is not displayed in FYI notifications.

See: Menu Function Parameter Descriptions, page 3-34

# Using Transaction Monitor

## Using Transaction Monitor

HR professionals, managers, and workers can use the Transaction Monitor page to track and view details of the self-service transactions. As the list of all self-service transactions is available on a single-page, users can efficiently track the status of their transactions.

Users can track transactions using the following status values and view their details.

- Pending Approval
- Complete
- Defer
- Error

> **Note:** In case, data is deleted from base tables, then the transaction details will not be available.

The Transaction Monitor feature helps users to view details of all pending or completed transactions. They can navigate to the details page of the transaction to view approval history, comments, and attachments.

Oracle SSHR displays only those transactions from the date when your enterprise started using the Transaction Monitor functionality.

### Using the Search Criteria to Search for Transactions

As, HR professionals, managers, and workers, you can use following search criteria to search for self-service transactions:

- Function Name: Select the function for which you want to view self-service transactions.
- Transaction Initiator: This field represents the person who initiated the transaction.
  - For workers, this field is read-only and displays the name of the person who logged in using the Employee Self-Service. By default, the Transaction Monitor functionality is not available from the Contingent Worker Self-Service responsibility.
  - For managers, this field is read-only and displays the name of the person who logged in as a manager using the Manager Self-Service responsibility.

- HR professionals, when they log in using the HR Professional responsibility, can search for workers or managers who initiated self-service transactions.

- Transaction Created for: This field represents the person for whom the self-service transaction is initiated.
  - For workers, this field is read-only and displays the name of the person who logged in using the Employee Self-Service or Contingent Worker Self-Service responsibility.
  - Managers, when they log in using the Manager Self-Service responsibility, can search for any of their subordinates for whom self-service transactions are initiated. Access to person records depends on the security profile.
  - HR Professionals, when they log in using the HR Professional responsibility, can search for managers or workers for whom self-service transactions are initiated. Access to person records depends on the security profile.

- Specify the period start date from when you would like to view the transactions. Specify the period end date until when you could like to view the transactions.
- Select any of the following statuses to view transactions:
  - Pending Approval
  - Complete
  - Defer
  - Error

  You can select only one status at a time. You cannot select multiple or all statuses. For transactions that are at the Error status, users are navigated to the Workflow Status Monitor pages.

## Viewing Transactions and their Details

Depending on the search criteria that you specify, you can view transactions and their details. To view details of a transaction, click the icon in the Transaction Details column.

**Note**: The following rules apply to the Transaction Monitor feature:

- Managers cannot view transactions initiated by their subordinates.
- Users cannot view draft transactions or save for later transactions.
- Approvers cannot search for transactions approved by them.

- The Action History Details are displayed only for those transactions, where AME is enabled.

# Configuring Transaction Monitor

This topic provides details about the Transaction Monitor function.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Transaction Monitor (HR_TRANSACTION_MGR_SS) |
| Employee Self Service | Transaction Monitor (HR_TRANSACTION_EMP_SS) |
| HR Professional | Transaction Monitor (HR_TRANSACTION_HR_SS) |

See: Defining Menus for SSHR, page 3-10

## Workflow

Not Applicable

## Configurable Flexfields

Not Applicable

## Configurable Profile Options

Not applicable

## Supported Functions

The Transaction Monitor feature supports the following list of SSHR functions:

| Function Name | User Function Name |
|---|---|
| HR_TERMINATION_SS | Termination |
| HR_COMPETENCE_PROFILE_SS | Competency Profile |
| HR_PERINFO_SS | Personal Information |
| HR_QUALIFICATION_SS | Qualification |
| HR_AWARD_SS | Award |
| HR_CAED_SS | Release Information |
| HR_SIT_SS | Special Information Types |
| HR_MANAGER_SS | Change Manager |
| HR_TERMINATION_COMP_SS | Termination with Compensation V4.0 |
| HR_CHANGE_JOB_SS | Change Job |
| HR_CHG_COST_LOC_SUP_SS | Change Cost Center, Location and Manager |
| PQH_TENURE_STATUS | Tenure Status |
| PQH_ACADEMIC_RANK | Academic Rank |
| HR_LOA_SS | Absence Management |
| HR_CHANGE_JOB_TERMS_SS | Change Job and Terms |
| HR_CHG_COST_TRM_LOC_SUP_SS | Change Cost Center, Terms and Manager |
| HR_EIT_SS | Extra Information Types |
| PQH_EMP_REVIEWS | Employee Reviews V4.0 |
| HR_EIT_A8A_SS | SG IRASLINE Person EIT |
| HR_CEI_SS | Contact Extra Information |

| Function Name | User Function Name |
|---|---|
| PQPVEHINFOPROCESS_SS | SS Vehicle Repository |
| HR_DOR_SS | Documents of Record |
| HR_EMP_STATUS_CHANGE_SS | Worker Status Change |
| HR_CHG_HOURS_SS | Change Hours |
| HR_PAY_RATE_CHANGE_SS | Change Pay |
| HR_EMP_TRANSFER_SS | Transfer |
| HR_EMP_TERMS_CHANGE_SS | Change Worker Status and Terms |
| HR_NEW_HIRE_SS | Hire |
| HR_APPL_HIRE_SS | Applicant Hire |
| BEN_SS_MGR_ADV_ICD | Self Service Individual Compensation Distributions-Internal |
| HR_REVERSE_TERMINATION_SS | Reverse Termination |
| HR_TERM_SS | Voluntary Termination |
| HR_CWKPLACE_SS | Contingent Worker Placement |
| HR_GOLD_CREATE_SS | Global Deployments Create Page |
| HR_GOLD_UPDATE_SS | Global Deployments Update Page |

# New User Registration

## New User Registration

Self-service registration for new users helps to reduce the workload and costs of HR administration. HR professionals can use this feature to add new employees to the Oracle HRMS database. The self-service approach reduces the rollout effort for large companies where the HR department is not centrally located. You can add or edit user-friendly tips and text messages in the user interface to reduce the need for end user training.

You can also use self-service registration to help shift the workload from the HR department onto the hiring line manager or even the individual employees by allowing them to register their own employee details.

Using the **New Employee Registration** function, employees log on with a generic company user name and supplied password or they access the function directly with a "guest login", which is invisible to users. They complete online registration, giving details such as name, address, employment details, and family members. They can create their own self-service user names and passwords (or you can choose to generate these automatically). Alternatively, HR administrators or line managers can create the employee records and self-service user names for their new hires.

Using the **Non-employee Registration** function, other people can log on to create non-employee records in Oracle HRMS. This is most commonly used by US third party benefits providers using Oracle Advanced Benefits. It enables benefits participants or their dependents who become COBRA qualified due to a life event (such as divorce or termination) to register so they can elect their COBRA coverage through self-service.

Using the **Create User Name** function, people who already have an HR record in the database can create their own self-service user names and passwords. This function provides an alternative to the existing methods of creating users, which are using the Users window or creating self-service users in a batch.

### Benefits Registration

If you have implemented Standard Benefits or Oracle Advanced Benefits, benefits participants can register directly with you through the World Wide Web or over a corporate intranet. If you are a third party benefits administrator or provider, this means that employees' HR departments are no longer responsible for transferring HR information to your database.

Once a person completes the registration, they can navigate directly to the Self-Service Benefits functions, which process detected life events that enable benefits elections or unrestricted program elections.

### Generic Users and Responsibilities

You give a generic user name and password to people, enabling them to access self-service initially to register. You can choose how many generic user names you create. For example, a third party benefits provider is likely to create one generic user name for each subscriber organization. Employers might create one user name for the entire business group, or different names based on the organization hierarchy structure.

### Default Organization

Each user name is associated with an organization using the profile option OAB:User to Organization Link. This defaults the organization for a new employee assignment, but the user can select another organization from the business group during registration. You can set this profile option at the responsibility level--to link each generic user name with a separate organization--or at the site, or application levels.

### Default Payroll

Similarly, for each generic user name you can select the default payroll to be assigned, by setting the profile option OAB:User to Payroll Link at the responsibility level. You can also set this profile option at the site, or application levels.

### Default Responsibility

By default, all newly registered users are assigned the seeded Self Registered Employee Default responsibility. This responsibility gives them access to a subset of self-service functions, such as Self-Service Benefits enrollment, person name, address, and contact information. You can create your own responsibilities and assign them to responsibilities, or the whole site by setting the OAB: Self Registered User Responsibility profile option at the appropriate level.

## New Employee Registration and Non-employee Registration

These modules are available under the predefined New User Registration Responsibility. They can be used as part of employee self-service or manager self-service. Using New Employee Registration, users log on with a generic user name to create their own employee records in Oracle HRMS, and their own self-service user name and password. Using Non-employee Registration, other people can log on to create non-employee records in your Oracle HRMS.

### Menu and Function Names

| User Menu Name | Function Name |
|---|---|
| New User Registration | New Employee Registration |
| New User Registration | Non-employee Registration |

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Names:

New Employee Registration Process and COBRA Registration Process

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

**Note:** Approval is not supported by these processes.

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| Ben Life Event Cobra | Message | BEN_COBRA_LIFE_EVENT_DATE |
| Ben Life Event Cobra | Message | BEN_LIFE_EVENT_COBRA |
| Ben Life Event Current | Message | BEN_LIFE_EVENT_DATE |
| Ben Life Event Current | Message | BEN_LIFE_EVENT_CURRENT |
| Registration user Main Content | Short Tip | HR_INCORRECT_PASSWORD_LENGTH |
| Verification Content | DATE_FORMAT | |

See: Adding Instructions to Web Pages, page 5-35

### Configurable Flexfields

| Region | Flex Name | Flex Code |
|---|---|---|
| Verification Content | Additional Personal Details Flex | PER_PEOPLE |
| Extra Information Type Update | Extra Person Information | Person Developer DDF |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| OAB: User to Organization Link | All | Organizations | Null |
| OAB User to Payroll Link | All | Payrolls | Null |
| OAB: Self Registered User Responsibility | All | Responsibilities | Self Registered Employee Default Responsibility |
| HR: Business Group | Set at Responsibility level | Business groups | |
| HR: Self Service HR Licensed | Site--set to Yes | Yes/No | No |

## Create User Name

This module is available under the predefined New User Registration Responsibility. It can be used as part of employee self-service. Using Create User Name, people who already have an HR record in Oracle HRMS can create their own self-service user names and passwords.

## Menu and Function Names

| User Menu Name | Function Name |
|---|---|
| New User Registration | Create User Name |

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Names:

Create User Name Process

**Note:** Approval is not supported by these processes.

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| New User Creation Verification Content | DATE_FORMAT | |
| Registration User Main Content | Short Tip | HR_INCORRECT_PASSWORD_LENGTH |

See: Adding Instructions to Web Pages, page 5-35

## Configurable Flexfields

| Region | Flex Name | Flex Code |
|---|---|---|
| New User Creation Verification Content | Additional Personal Details | PER_PEOPLE |

See: Configuring Flexfields, page 5-27

### Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| OAB: Self Registered User Responsibility | All | Responsibilities | Self Registered Employee Default Responsibility |
| HR: Business Group | Set at Responsibility level | Business groups | |
| HR: Self Service HR Licensed | Site--set to Yes | Yes/No | No |

## User Hooks To Generate User Names For New User Registration

As supplied, the New User Registration processes (Create New User, New Employee Registration, and Non-employee Registration) include a User ID page where users can enter a user name and password for logging on to self service. Alternatively, you can implement some additional code so that the user name and password are generated by the application when the user clicks a button on this page. You can implement this using user hooks.

There are two user hooks:

- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_B (which we will call the "Before user hook" because it runs before the user name is created)
- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_A (which we will call the "After user hook" because it runs after the user name is created)

They are called in the user api BEN_PROCESS_USER_SS_API. The user hooks communicate with this caller api through a set of globals. These globals are defined in the package BEN_PROCESS_USER_UTILITY. The usage notes within this package explain how to use the globals.

### Using the Before User Hook

Use the Before user hook to set globals with user and responsibility information. To set the globals with user information, use G_FND_USER_RECORD. To associate responsibility and security group/security profile information with the user, use G_FND_RESP_RECORD. If you do not set the responsibility and security information

using globals, the application uses the responsibility from the *OAB:Self Registered Employee Responsibility* profile option.

### Minimum Setup

The minimum you need to do to create a user with today's date as the start date is to put the following two lines in the Before user hook.

ben_process_user_utility.g_fnd_user_record.user_name := 'testuser';
ben_process_user_utility.g_fnd_user_record.password := 'testpassword';

You can also set up globals for start_date, end_date, last_logon_date, password_date, password_accesses_left, password_lifespan_accesses, password_lifespan_days, email_address, fax, description, customer_id, and supplier_id.

> **Important:** Never set the employee_id global within the New User Registration processes. If you do so, the global overwrites the employee id created during the process and so the user will not be associated with the correct employee id. If you want to use the user wrapper api outside of the page for creating user name and password, you can then pass in the global for employee id.

## Using the After User Hook

Use the After user hook to accomplish something that needs to be done after a user is created. For example, the Before user hook enables you to pass in information about a responsibility, but it does not handle multiple responsibilities. You could pass no information about responsibility in the Before user hook and instead call the appropriate "fnd" api(s) in the After hook to take care of the responsibility, menu, or any profile value that you want to associate with the user.

Another use for the After hook might be to write code to populate some tables--such as communication or extract tables--from where you can extract the information later.

# Setting Up a Generic User ID For New User Registration

Follow these steps to create the generic user name and password that will enable new employees, managers, and other users to access self-service to register themselves in your database. These steps are required if you are using any of the following processes:

- New Employee Registration
- Non-employee Registration
- Create User Name

If you are implementing new user registration in more than one business group, see: Setting Up Generic User IDs in Multiple Business Groups, page 10-76. If you are

implementing new user registration within a single business group, use the following procedure.

If you are *only* implementing the Create User Name process (that is, you are using self-service to create new users but not to create HRMS records), you can omit steps **7**, page 10-75and**8**, page 10-75.

### To set up self-service registration in a single business group:

1. If you are a third party benefits provider, create an organization to represent each subscriber organization or company in which you are providing benefits.

   If you are not a third party benefits provider, you create your HR organization hierarchy as required within your business group. Skip the next step since it applies to third parties who administer multiple companies within a single business group.

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

   See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

2. **Third party benefits providers using Oracle Advanced Benefits only:** Establish a link between your organizations and the relevant benefits program. For example, link each subscriber organization to the subscriber's benefit program. Use the Organizations tabbed region of the Programs window.

   This link enables the Participation process to select the appropriate benefit programs for a particular organization when processing people within that organization. This enhances system performance by limiting the retrieval of records to the person's organization. The process selects the programs pertaining to that organization and then examines the person's eligibility restrictions.

   > **Note:** Set the system profile *Limit By Persons Organization* to Yes to enable this feature for the Benefit Service Center window. Set the *Limit to Organization* parameter to limit the Participation batch process.

   See: Defining a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

   See: Associating an Organization with a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

3. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   If you only need one generic user name for the business group, you can use the predefined New User Registration responsibility.

Otherwise, create a copy of the New User Registration responsibility for each organization for which you will create a separate generic user name. You might want more than one responsibility for each organization. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

4. Create a generic user name and password for the business group or for each organization, so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 10-84.

   See: Users Window, *Oracle E-Business Suite System Administrator's Guide - Security*

5. Add the New User Registration responsibility (or the responsibilities you created in step *3*, page 10-74) to the generic user name for each organization.

6. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

7. Update the *OAB:User to Organization Link* system profile at the responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   **Important:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

   See:System Profile Values Window, *Oracle E-Business Suite System Administrator's Guide - Security*

8. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

   **Important:** Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

9. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations. If it is not, create any new self-service responsibilities you require.

   **Note:** The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self-service web pages after the initial registration.

10. If you created just one new responsibility in the previous step, change the profile *OAB: Self Registered User Responsibility* at the site level to point to your new responsibility. If you created a different responsibility for each organization, add it to the profile *OAB: Self Registered User Responsibility* at the responsibility level for the New User Registration responsibility (or your copies).

    **Note:** Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self-service menu for this seeded responsibility gives access to only a subset of employee self-service transactions.

11. Log into Self-Service with the user name and password you created.

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step *4*, page 10-75. After entering it, you must change the password to a generic password you want the new people to use when accessing self-service initially to register.

12. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB: Self Registered User Responsibility profile (step *10*, page 10-76) to the new user name.

#### Setting Up Generic User IDs in Multiple Business Groups

This procedure is appropriate for third party benefit providers who are creating a separate business group for each company or subscriber organization. It is also appropriate for employers or third party administrators who have multiple business groups on a single database.

### To set up self-service registration in multiple business groups:

1. Third party benefits providers: Create a business group to represent each subscriber organization or company in which you are providing benefits. In each business group, create an HR organization for the subscriber.

   Employers: Decide how many generic user names you want to create. You will

need at least one generic user name for each business group. You may want to create separate user names for the organizational hierarchies within each business group.

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

See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   Create a copy of the New User Registration responsibility for each business group. You might want more than one responsibility for each business group. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

3. Create a generic user name and password for each organization so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 10-84.

   See: Users Window, *Oracle E-Business Suite System Administrator's Guide - Security*

4. Add your copy of the New User Registration responsibility to the generic user name for each organization.

5. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

6. Update the *OAB:User to Organization Link* system profile at the user or responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   **Important:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

   See: System Profile Values Window, *Oracle E-Business Suite System Administrator's Guide - Security*

7. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

   **Important:** Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

8. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations.

   - If it is not, create any new self-service responsibilities you require.
   - If it is, create a copy for each organization.

   Update the system profile *HR:Business Group* at the responsibility level to point to the correct business group.

   **Note:** The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self-service web pages after the initial registration.

9. Update the system profile *OAB: Self Registered User Responsibility* at the responsibility level with the name of the responsibility to use for that organization (created in step ).

   **Note:** Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self-service menu for this seeded responsibility gives access to only a subset of employee self-service transactions.

10. Log into Self-Service with the user name and password you created.

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step *3*, page 10-77. After entering it, you must change the password to the generic password you want new people to use when accessing self-service initially to register.

11. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self

Registered User Responsibility profile (step **9**, page 10-78) to the new user name.

## Configuring the New Employee and Non-Employee Registration Processes

These processes are part of the Human Resources Self-Service item type. The New Employee Registration process displays the pages for new employees to create HR records and self-service user names for themselves. The Non-employee Registration process creates person records in the HRMS system for people who are not employees. This process is used by US benefit providers who have licensed Oracle Advanced Benefits to display pages for participants or dependents to register on the system to elect COBRA coverage.

These processes include, by default, the following pages:

| Page | Required? | Purpose |
|---|---|---|
| Introduction | No | This page includes a checklist of information that new users must have when entering their registration, and a legal agreement that users must agree to before proceeding. |
| Verification | No | This page has the user enter minimal information about themselves. This way the system can check for their existence on the database before they attempt to register their data. |
| Basic Details | Yes | Users enter marital status, and other personal data. |
| Main Address | Yes | Users can enter a primary address and two other addresses. |

| Page | Required? | Purpose |
|---|---|---|
| Phone Numbers | No | Users can enter the phone numbers they require. |
| Assignment | Yes, for New Employee process (not in non- employee process) | Employees can fill in information about their organization, job, position, grade, payroll, assignment status, people group, and additional employment information. |
| Family Member Coverage | No | This page simply asks users whether they wish to enter details of other family members. If they confirm that they do, the Add Family Members page appears. |
| Add Family Members | No | Users can enter names, addresses, phone numbers, and additional personal information for as many contacts as they require. |
| Life Events | No | **Relevant to US Third Party Benefits providers only.** Users can select the life event that has made them eligible for a benefits program. This creates a potential life event for the person. NOTE: Employers must remove this page from the process. |

| Page | Required? | Purpose |
|---|---|---|
| User Name | No | On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require. |
| Review | Yes | This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays. |
| Confirmation | No | If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page. |

**Note:** It is not currently possible to route the information entered by the user for approval by workflow. You can set up Alerts to notify the HR administrator that a new person record has been created.

To configure the Registration processes, you make some changes using Workflow Builder and others using the Personalization Framework.

#### Using Workflow Builder

### To configure the New Employee and Non-employee Registration workflows:

1. Decide which pages you want to use in the process. You *must* include Personal Details, Main Address, Review, Cancel, and--for the New Employee Registration process only--Employment Details (to identify the correct organization).

To delete pages, delete the corresponding activities from the workflow process.

Employers must delete the Life Event page from the registration process. Oracle Advanced Benefits customers can use life event triggers in the database to determine benefit enrollment opportunities. There are no life event restriction capabilities in Standard Benefits.

2. Decide in what sequence you want pages to appear. The Introduction page normally appears first, followed by Personal Details. The only pages that can come before Personal Details are Introduction and Verification. For the Non-employee Registration workflow, the life event page must be before the Personal Details page.

   To change the sequence of pages, edit the workflow process diagram.

   See: Configuring Workflow Objects, page 4-8

### Using the Personalization Framework

For each region, decide which region items you want to display. If you have implemented Standard Benefits or Oracle Advanced Benefits, ensure you are including all the fields that capture information required to assess benefits eligibility.

On the Personal Information page:

- You must display the Last Name, Gender and Hire Date fields.
- If you use rates, and therefore need a Payroll, you must require a birth date.
- In non-US countries, you should hide the field Covered Under Medicare.
- Make the Employee Number field enterable if you do not generate employee numbers in your business group.

On the Employment Information page (New Employee Registration only):

- You must display the Organization field.
- If you use rates or element entries, you must display the Payroll field.
- In localizations that use GRE, you should display the GRE field.

On the Verification page:

- You can add fields to assist the search, such as national identifier (for example, social security number), person descriptive flexfields, employee number, and email address.
- If the information entered on the Verification page matches more than one person, the application displays a tables of the duplicates so the user can choose one. Decide what information to include in this table. You can add birth date, Social Security Number, employee number, person descriptive flexfields, and FND

username.

For a list of configurable regions, see: New Employee Registration and Non-employee Registration, page 10-68.

See also: Configuring Web Pages, page 5-21

### Setting Up Life Events (Advanced Benefits only)

This section is relevant only to third party benefits providers who are including the Life Events page in the process flows. Employers who use Oracle Advanced Benefits should rely on life event triggers to determine the necessary processing instead of using this page.

You determine which life events appear on the Life Events page by the *Selectable for Self-Service* code you enter when you define the life event in the professional user interface. The code choices are:

- All--meaning that the life event can be selected in all self-service processes that use the Life Events page.
- Basic Registration--meaning that the life event can be selected in the New Employee Registration process
- COBRA Registration--meaning that the life event can be selected in the Non-employee Registration process
- Basic and COBRA Registration--meaning that the life event can be selected in both the New Employee and the Non-employee Registration processes

## Colliding Life Events:

When a person selects a life event from this page, the process will insert the event as a potential life event for the person. By completing the rest of the registration process, the person may have other life events detected due to life event triggers in the business group. Ensure that your life event collapsing and collision logic leaves a user with just one "winning" potential life event during the Participation Process. You could do this by one of the following approaches:

- Ensuring that all life events that can be selected in Registration have the Override check box selected (and other life events that might be triggered do not). Then, during setup of collapsing life events, you could choose which event should win if there is more than one overriding event.
- Turning off automatic triggering of life events
- Removing Life Event page from workflow and configuring life event triggers in the business group to be detected based on data entered by the person during the registration process. This is the approach that employers should use to determine data changes that may give the person an opportunity to make benefit election

changes.

## Configuring the Create User Name Process

The Create User Name Process workflow within the Human Resources Self-Service item type displays the pages for people who already have a record on the HR database to create their own self-service user names and passwords.

This process includes, by default, the following pages:

| Page | Required? | Purpose |
|---|---|---|
| Verification | Yes | This page has the user enter minimal information about themselves. This page must find one and only one person matching the information entered so that the User is connected to the correct HR record |
| User Name | Yes | On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require. |
| Review | Yes | This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays. |
| Confirmation | No | If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page. |

### To configure the Create User Name process:

1. Decide whether users should log on to use this process with a generic company ID

or with a guest ID (which would happen automatically and be invisible to the user).

2. If you decide to use a company ID for extra security:

   - Decide whether to create an ID specific to this process, or shared with the new employee registration process. This determines whether the user sees a menu of processes after logging on, or is taken straight to the Create User Name process.

   - Decide how to communicate the company IDs to your users. One approach--if you have licensed Oracle Advanced Benefits--is to create a new communication type and use the Determine Communications batch process. This approach will only work for people currently in the database.

3. If you decide to use a guest ID, there are three approaches you can use. Do ***one*** of the following:

   - In the Users window, create the guest user with the user name GUESTOAB and the password GUESTOAB. You can grant this user the predefined New User Registration responsibility or your copy of it. Log on using this user to change the password to WELCOME.

     Call the supplied pl/sql procedure ben_guest_user_api without passing a user name and password. The procedure uses user name GUESTOAB and the password WELCOME. It passes the user name and unencrypted password into the call to oraclehomepage.home().

     **Note:** Call ben_guest_user_api from a URL in this way:
     [APPS_WEB_AGENT]ben_guest_user_api.login?
     i_1=USERNAME&i_2=PASSWORD&rmode=2

   - In the Users window, create the guest user with any name and password. Log on using this user to change the password.

     Call the supplied pl/sql procedure ben_guest_user_api, passing a user name and unencrypted password. (For the format of the call, see the Note above) If the user name is passed in, the password must be too, or the procedure returns an error. The procedure passes the user name and unencrypted password into the call to oraclehomepage.home().

   - Call oraclehomepage.home directly passing a user name/password if desired. (For example, oraclehomepage.home?userid=<your user name>&password=<your password>).

4. On the Verification page:

   - Decide what information a user must enter on the Verification page of the system to identify the existing HR person record. By default this information is:

first name, last name, and birth date. You can add the following fields: national identifier (such as social security number), employee number, email address, supervisor, organization, location, address, and person flexfields.

- Decide what to display if the information entered on the Verification page matches more than one person. By default, the application displays an error.

For a list of configurable regions, see: Create User Name, page 10-70.

5. Decide what should happen if users try to create a user name when they do not have an existing HR record. By default the application issues an error directing the user to retry or Cancel to the menu and contact their administrator. You can configure the message text and the URL associated with the Cancel button. For example, the Cancel button could take them straight to the New Employee Registration process, rather than to the menu.

6. Determine which responsibility to assign to the new users. By default, all new users are granted the responsibility set in the OAB:Self Registered User Responsibility profile option. You may wish to configure this to vary the responsibility by the person type (especially employee versus non-employee).

   To do this, you can create different generic IDs (and responsibilities) for different groups of users and change the OAB:Self Registered User Responsibility profile option at responsibility level.

## Generating Self-Service User Names and Passwords

When a person has registered themselves in the HR database, you can choose to generate their self-service user name and password, rather than have them create their own. You can implement this using user hooks.

### To generate user names and passwords:

1. Write the PL/SQL to generate the user names and passwords as you require, using the user hooks.

   See: User Hooks To Generate User Names for New User Registration (appendix), page 10-72.

2. Optionally, edit the instruction text on the User ID page, hide the user name and password fields, and change the button label from Next to Generate.

3. Consider how you will inform users of their user name. One approach--for Oracle Advanced Benefits customers--is to use a user hook to call your own code that populates the communication tables, and use this information to alert your users. Another approach is to generate the user names in a standard and predictable way from users' names or national identifiers.

# 11

# Talent Management

## Talent Management Overview (SSHR)

The following topics describe the self-service functions available in the Talent Management area. They provide information about the functionality and configuration options for each function:

- Suitability Matching (Self-Service) , page 11-7
- Events and Bookings, page 11-4
- Employee Reviews, page 11-5
- Competency Profile, page 9-25
- Education and Qualifications, page 9-24
- Other Professional Qualifications, page 9-25
- Work Preferences, page 9-27
- Succession Planning, page 11-10

> **Note:** To grant your users access to the Training, External Training, and Training Plans functions, which were previously available from the Employee Self-Service menu, you must use the Learner Self-Service responsibility and the Learner Home and External Learning functions. For all other training functionality, see: Oracle Learning Management, *Oracle Learning Management User 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*

The following topics describe the functions available in Oracle Performance Management. They provide information about the functionality and configuration options for each function:

- Configuring the Appraisals Function, *Oracle Performance Management Implementation and User Guide*
- Questionnaire Administration, *Oracle Performance Management Implementation and User Guide*

# Using SSHR for Talent Management

## Which Talent Management functions can I access from SSHR?

You can access the Competency Profile, Event and Bookings, Employee Review, Suitability Matching, Work Preferences, Education and Qualifications, Succession Planning, and Other Professional Qualifications functions from SSHR.

> **Important:** The Appraisals and Questionnaire Administration functions are part of Oracle Performance Management. You require additional license to use these functions.
>
> See: Oracle Performance Management Overview, *Oracle Performance Management Implementation and User Guide*

## Are employee reviews the same as appraisals?

No. The Employee Review function enables you to set up a review meeting and invite reviewers to the meeting. The Appraisals functions enable you to perform an appraisal (for example, an annual performance review) during which you can evaluate a worker's competencies, set or assess objectives, and complete a questionnaire.

## What is the difference between the Education and Qualifications function and the Other Professional Qualifications function?

You use the Education and Qualifications function to identify the schools and colleges a person has attended and the qualifications they earned. For example, if an employee has a Bachelor of Arts degree, you use this function to record the qualification and the college or university the employee attended.

You use the Other Professional Qualifications function to record all other recognized

qualifications. Such qualifications are typically gained in the work environment.

## Can I create a competency profile using SSHR?

No. To create a competency profile, you use the forms-based interface. However, you can use SSHR to view and update a person's competency profile.

# Event and Attendance Administration

## Events and Bookings

The Events and Bookings function enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and workers, enabling managers to book their subordinates onto events. If a manager books a subordinate onto an event, the subordinate worker receives notification of the booking.

See also: Event and Attendance Administration, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Events and Bookings |
| Manager Self Service | Events and Bookings |

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

| Region Name | Tip Type | Message Name |
|---|---|---|
| Events Search Criteria | Instruction | PQH_EVENT_SEARCH |

| Region Name | Tip Type | Message Name |
|---|---|---|
| Events Create Button | Instruction | PQH_EVENT_ADDORCANCEL |
| Events Search And Result Header | Instruction | PQH_EVENT_BOOK |
| Manager Events Search And Result Header | Instruction | PQH_EVENT_MGR_SEARCH |
| Events Create Button | Instruction | PQH_EVENT_ADDORCANCEL |

See: Adding Instructions to Web Pages, page 5-35

### Configurable Flexfields

Not applicable

### Configurable Profile Options

Not applicable

## Employee Reviews

The Employee Review function enables employees and managers to create or update reviews. Employees can create their own reviews and managers can create reviews for their employees. Both managers and employees can invite reviewers to attend the review. They can also remove these reviewers if necessary. They can also attach supporting documents. If the Save Attachments check box is available in the Attachments region, then they can select this option to make these attachments available in the Oracle HRMS People window. When reviewers are invited to a review or removed from a review, they receive a notification.

See: Event and Attendance Administration, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Employee Review |
| Manager Self Service | Employee Review |

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Employee Review

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable Flexfields

Not applicable

## Configurable Profile Options

Not applicable

# Suitability Matching (Self-Service)

## Suitability Matching

The Suitability Matching function provides a range of competency-based methods for finding the right person for a work opportunity or finding the right work opportunity for a person. Managers and HR professionals can compare employees, applicants, and contingent workers by role, job, and position, and employees can find work opportunities that fit their competencies.

Depending on their responsibility, the default Suitability Matching page offers users multiple matching options.

### Suitability Matching Options Available to Managers

The Suitability Matching page for managers displays two regions:

**Note:** You must select the Include Core Competencies check box to use competency requirements defined at the business group level in the Suitability Matching feature. Otherwise, the application uses the competency requirements set below the business group level.

In the Find a Person for a Work Opportunity region, the Include Core Competencies check box appears for these actions:

- Find Suitable People by Role
- Find Suitable People by Competency

In the Find a Work Opportunity for a Person region, the Include Core Competencies check box appears for the Find Work Opportunities by Competency action.

When you compare current assignments, the application uses competency requirements defined for organization, job, and position of the assignment and does not consider competency requirements defined at the business group level.

- **Find a Person for a Work Opportunity**

  Using the options available in this region, managers can:

  - Find employees, contingent workers, and applicants who fit the competency profile for a job, position, department, vacancy, or some combination of these criteria.

- Find employees, contingent workers, and applicants who match a list of competencies that the managers specify.

- Compare the competencies of employees and contingent workers who currently occupy a specified job or position in a department or any department within the business group.

- Compare anyone who has applied for a vacant job or position in a department or any department within the business group.

In addition to these options, HR Professionals can use the Compare Named Successors for a Position option.

- **Find a Work Opportunity for a Person**

  Using the options available in this region, managers can:

  - Find work opportunities for an individual who fits the competency profile for one or more jobs, positions, departments, vacancies, or some combination of these criteria.

  - Find work opportunities for an individual employee or contingent worker who matches a list of competencies that the managers specify.

  - Compare an applicant's competency profile with the competency profiles of existing vacancies.

  - Compare, by competency, an employee's or contingent worker's current assignments.

In addition to these options, HR Professionals can use the Compare Succession option.

## Suitability Matching Options Available to Workers

Workers can use the Suitability Matching function to compare their competencies to those of current or potential future jobs, positions or vacancies and also search for suitable work opportunities.

Using the Suitability Matching page, workers can:

- Find work opportunities that suit their competency profile for one or more jobs, positions, departments, vacancies, or some combination of these criteria.

- Find work opportunities using person competencies.

- Compare their competency profiles with the competency profiles of existing vacancies.

- Compare, by competency, their succession options as defined for successors in the

succession plans.

- Compare the competency profiles of their assignments with those of the other employee assignments.

# Succession Planning

## Succession Planning

Succession planning and management is critical to the growth of an enterprise. Using the Succession Planning functionality, as an HR Professional or a manager, you can:

- Identify key positions in your organization to ensure that succession plans are in place.
- Identify employees who are likely to vacate their current positions because of promotion, retirement, or voluntary termination.
- Define additional information for succession plans to meet business needs.
- Create and update succession plans for jobs, positions, and employees.

On the Succession Planning page, you can:

- Search for plans for a job, position, or an employee.
- Create, update, and delete succession plans.

### Searching for Succession Plans

You can use search criteria such as job, position, and employee to search for plans. For example, you can search for plans for the Manager job or search for plans for employee John Smith. The application provides additional search criteria, such as key role and turnover rate to search for job and position plans. You can use search criteria such as employee name, employee number, or key person, to search for an employee's succession plans.

Some employees may have multiple succession plans. To search for multiple succession plans use the Successor search criteria. The successor for a job, position, or person is always an employee.

### Viewing Plan Details

You can view the following information for a succession plan:

- Name of the job, position, or employee.
- Whether the job or position is a key role and the employee is a key person.
- The time frame after which an employee is eligible to move to the new position.

- The turnover rate for the role and the risk of loss for an employee.
- Succession dates, such as the earliest date on which an employee can move to a new position.
- Additional successions plan details.

From the search results table, you can update or delete an existing succession plan.

See: Creating and Maintaining Succession Plans, page 11-11

# Creating and Maintaining Succession Plans

As an HR Professional or manager, you can create and maintain succession plans for workers.

For a general introduction to succession planning, see: Succession Planning, page 11-10

The following sections describe how to create and update succession plans.

## Creating a Succession Plan

Using the Create Succession Plan page, you can create a succession plan for a job, position, or an employee, and you can add successors. You can add multiple successors to a plan.

When creating a succession plan, you can use the following features to find suitable successors:

## Creating a Succession Plan

Complete these steps to create a succession plan:

- Select the type of succession plan that you want to create. You can create a succession plan for a job, position, or an employee.
- Select the worker's successor. The worker's number automatically appears.
- Specify the time period after which the worker is eligible to move to a new position, for example, immediately or in one month.
- Enter the succession dates, such as the earliest date on which an employee can move to a new position.
- Select whether the worker is eligible for a promotion.
- Provide additional plan details, if required.
- Add your comments on the succession plan.

If your enterprise has set up information for job, position, and worker, then the following information appears automatically on the page:

- Key role and turnover rate for a role (job or position)
- Key person, advancement potential, and risk of loss for a person

### Updating a Succession Plan

You update a succession plan to modify details such as succession dates or the readiness level. You can record your comments on the update.

## Setting up Information for Succession Planning

To enable managers and HR professionals use the Succession Planning functionality, you must complete the setup tasks.

#### To set up information for succession planning:

1. Link the following succession planning information types to the responsibilities that users access:
   - Employee Career Management Information
   - Job Career Management Information
   - Position Career Management Information

   Use the Information Type Security window to link EITs to a responsibility.

   See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   You can link the Employee Career Management Information EIT to the Manager Self-Service responsibility to enable managers to update this extra information for employees in their hierarchy.

2. Define the following lookup types required for succession planning:
   - PER_TIME_SCALES: Using this lookup, users can define values for the Readiness Level field.
   - PER_SUCC_PLAN_RISK_LEVEL: Using this lookup, users can identify whether an employee is at a high risk of vacating their current position. This lookup type populates the Risk of Loss field.
   - PER_SUCC_PLAN_RISK_LEVEL: Using this lookup, users can identify the turnover rate of a role (job or position).

The Turnover Rate and Risk of Loss fields use the same PER_SUCC_PLAN_RISK_LEVEL lookup.

- PER_SUCC_PLAN_POTENTIAL: Using this lookup, users can identify the advancement potential of an employee.

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

3. Complete the extra information required for succession planning for employees, jobs, and positions using the following windows:
   - For an employee, use the Extra Person Information window in Oracle HRMS.
   - For a position, use the Extra Position Information window in Oracle HRMS.
   - For a job, use the Extra Job Information window in Oracle HRMS.

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

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

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

   Managers can use the Extra Information page of the Manager Self-Service responsibility to update the extra information required for succession planning for employees. You must ensure that only one extra information record exists for an employee on a specific date, irrespective of whether the extra information is entered using Oracle HRMS or Oracle SSHR.

4. Add segments to the Add'l Succession Planning Det descriptive flexfield to capture additional information required for succession plans in your enterprise.

# 12

# Organization Chart in Oracle SSHR

# Using the Organization Chart

## Using the Organization Chart

An Organization Chart is a visual representation of relationships between workers in an organization. The organization chart that managers and workers view is based on supervisor hierarchy.

### How to Use the Organization Chart and Control Panel

The application uses the Hierarchy Viewer component of Oracle Application Development Framework (ADF) to render the Organization Chart. The hierarchy viewer Control Panel enables a user to manipulate the position and appearance of the organization chart at runtime. The organization chart includes a control panel, a number of nodes, and links that connect the nodes. The nodes are connected to panel cards that display worker information. You can expand or collapse a hierarchy.

The following section explains how to use the Control Panel:

- Click the Hide or Show Control Panel button to hide or expand the Control Panel.
- Use the Pan Control to reposition the organization chart component within the viewport.
- Use the Zoom to Fit control to zoom a organization component so that all nodes are visible within the viewport.
- Use the different Zoom Controls to zoom the organization chart components.
- Use the Panel Selector to view information. The panel information that you can view depends on your role. For example, managers can view Contact Information, Employment Details, and Salary of workers in their hierarchy. Workers can view Contact Information and Employment Details of other workers in their organization.
- Use the Layout Selector to change the layout of the organization chart. You can select layouts such as vertical top down, horizontal left-to-right, tree, radial or circle.

### Using Panel Cards

Panel cards display different sets of information depending on whether the user is a manager or worker. You can click the navigation buttons at the bottom of the panel card to navigate to the next set of information. You can isolate each of the cards and restore cards to the chart. Click the upward navigation arrow to view the hierarchy above any

specific worker.

For information on Organization Chart:

- For managers in Oracle SSHR, see: Using the Organization Chart as Managers in Oracle SSHR, page 12-3
- For workers in Oracle SSHR, see: Using the Organization Chart as Workers in Oracle SSHR, page 12-5
- In Oracle Succession Planning, see: Using the Organization Chart in Oracle Succession Planning, *Oracle Succession Planning Implementation and User Guide*

## Using the Organization Chart as Managers in Oracle SSHR

Managers can navigate to the Organization Chart using their Manager Self-Service responsibility, Talent Profile function. As a manager, when you click the Organization Chart tab, the chart displays the hierarchy of the manager who logs in. By default, the chart displays ten direct reports. If there are more than ten direct reports, then you can navigate to the next set of direct reports using the side navigator icon. For each selected node, you can view the hierarchy and then drill further down the hierarchy. If there are workers on secondary assignment reporting to a manager, then the organization chart represents this reporting structure in a dotted line format.

See: How to Use the Organization Chart and Control Panel, page 12-2

### Searching for Workers

You can perform a simple or an advanced search to search for workers in your organization. Search results of a simple search display person name and job.

Advanced search criteria includes first name, last name, manager name, job and organization. Click Add Fields to add additional search criteria. You can save your searches to use them in future.

Following your search, click the person name to view the person's details and hierarchy in the organization chart format.

### Viewing Worker Information

Managers can view the following information in different panels for a worker:

- Contact Information: View email, work phone, and address of the worker. Email is a link that helps you to send mail from the organization chart. When you click the Email link, the email client on your local machine opens and the worker's email ID automatically appears in the To field.
- Employment Details: View the employee number, work location, organization, job,

position, and grade.

- Salary: View the worker's salary, salary currency, grade, and grade range. You can view salary details of workers in your hierarchy only. You cannot view salary details of workers above your hierarchy or workers outside of your security profile although you can view their contact and employment information.

  **Note:** You can view information in panel fields only if data is available. For employees, you can view their Contact Information, Employment Details, and Salary. For contingent workers, you can view their Contact Information and Employment Details.

## Viewing and Performing Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. If there are workers on secondary assignment reporting to a manager, then the organization chart represents this reporting structure in a dotted line format. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

## Performing Self-Service Actions

You can perform actions for workers only if your administrator has enabled functions from the Actions list. Click the Actions link on the person details panel to perform self-service action for a worker, such as change the job, pay, or manager, and update education qualifications. When you click the Actions link and select an action, the action is launched in a page in the Manager Actions tab. The links of all manager actions appear in the side navigation container on the left side of the page. You can complete the transaction and move on to other transactions without leaving the page. You can process multiple transactions for a worker from this page. The manager actions that you can perform depend on the configuration choices that your enterprise makes. Manager self-service actions can be performed only for primary assignments and not secondary assignments.

You cannot launch actions related to performance management plan or appraisal functions from the Actions list for a worker. If your enterprise has licensed Oracle Succession Planning and your administrator has assigned you the Succession Planning functions, then you can launch actions to create or update succession plans for workers.

## Identifying Key High Potential Workers

You can identify key high potential workers for whom succession plans exist and workers who do not have at least one succession plan. Icons below the Actions link help you to identify such workers.

**Note:** You can view these icons if your enterprise has licensed Oracle Succession Planning and your administrator has assigned you the Succession Planning functions.

## Using the Organization Chart as Workers in Oracle SSHR

Workers can navigate to the Organization Chart using the Employee Self-Service responsibility, Talent Profile function, My Hierarch tab. If a worker is a manager, then the Organization Chart displays that manager's hierarchy. For each selected node, you can view the hierarchy and then drill further down the hierarchy. If there are workers on secondary assignment reporting to a manager, then the organization chart represents this reporting structure in a dotted line format.

See: How to Use the Organization Chart and Control Panel, page 12-2

The Organization Chart enables workers to:

- Search for other workers in their enterprise using the Simple or Advanced Search.
- View the following information of worker:
  - Contact Information: View email, work phone and address of the worker. Email is a link that helps you to send mail from the organization chart. When you click the Email link, your email client opens and the worker's email ID automatically appears in the To field.
  - Employment Details: View the worker number, work location, organization, job, position, and grade.

    You can view contact and employment details only. You cannot view salary details of other workers.
  - Perform self-service personal actions: Click the Actions link in the person details panel to perform personal self-service actions. When you select an action, the action is launched in a page with a side navigation container in the Personal Actions tab. All the personal actions links appear in the side navigation container on the left side of this page. You can complete the transaction launched, and move on to other transactions without leaving the page. You can process multiple transactions for yourself. You can launch actions for your primary assignment only.

## Implementing the Organization Chart

The Organization Chart is built on Applications Development Framework (ADF) and the component used is hierarchyViewer, which is one of the ADF Data Visualization components. This topic provides information on how to implement and configure the

Organization Chart. Oracle SSHR and Oracle Succession Planning provide the Organization Chart feature.

## Implementing the Organization Chart

To implement and use the Organization chart, complete the following steps:

1. **Create AppsDataSource and deploy the .ear file**

   - Create AppsDataSource on an Oracle WebLogic Server (WLS) instance.
   - Deploy your web application .ear file, which is OrgChartApplication.ear.

   For information on how to create AppsDataSource and deploy the .ear file, refer to the My Oracle Support note: 1408355.1

2. **Define the External ADF Application URL profile option**

   Set the External ADF Application URL profile option at the Site level to integrate the application with Applications Development Framework (ADF) and display the organization chart. Enter the location of the Oracle WebLogic Server instance as the profile option value.

   For example:

   System Profile : External ADF Application URL (code: FND_EXTERNAL_ADF_URL)

   Sample value : http://domain:port/OrgChart-ViewController-context-root

## Configuring the Organization Chart Components

To change the organization chart components, you must modify values in the ResourceBundle.properties present in the OrgChartApplication.ear file and then redeploy the file on the Oracle WebLogic Server instance. For more information, refer to the My Oracle Support note: 1408355.1

## Configuring the Organization Chart Module

To configure the Organization Chart module in:

- Oracle SSHR, see: Configuring the Organization Chart Module in Oracle SSHR, page 12-7
- Oracle Succession Planning, see: Configuring the Organization Chart Module in Oracle Succession Planning, *Oracle Succession Planning Implementation and User Guide*

# Configuring the Organization Chart Module in Oracle SSHR

## Configuring the Organization Chart Module

This topic provides information to configure the Organization Chart module.

### Organization Chart JSP Page Name

TMOrgChartPG

### Functions

You can access this module from the following functions:

| User Name | Function Name | Responsibility and Prompt | Description |
|---|---|---|---|
| Talent Profile Home Function – Manager | HR_TALENT_HOME_FUNC_MGR | Manager Self-Service<br>Talent Profile | Provides the Organization Chart, Talent Profile tabs and Manager Actions tabs. |
| Talent Profile Home Function – Employee | HR_TALENT_HOME_FUNC_EMP | Employee Self-Service<br>Talent Profile | Provides the My Hierarchy, Talent Profile, and Personal Actions tabs. |

### Submenus

Following is a list of submenus for the Organization Chart module:

| User Name | Submenu | Responsibility | Description |
|---|---|---|---|
| Talent Profile Main Home Menu - Manager | HR_TALENT_HOME_MENU_MGR | Manager Self-Service | Talent Profile Main Home Menu - Manager |
| Talent Profile Main Home Menu – Employee | HR_TALENT_HOME_MENU_EMP | Employee Self-Service | Talent Profile Main Home Menu |

### Workflow

Not Applicable

### Configurable Tips and Instructions

Not Applicable

### Configurable FlexFields

Not Applicable

### Security Profile

Set the security profiles according to your business requirements to ensure that managers cannot view salary panel of workers who are not in their reporting hierarchy.

### Profile Options

Using the Organization Chart, managers can perform manager transactions. The application applies the following profiles when actions are launched from the Organization Chart:

- HR: Position Default Options for SSHR
- HR: Self Service Hire and Placement Default Values
- HR: Allow Concurrent Self Service Actions
- HR: Defer Update After Approval
- HR: Manage Self Service Actions When Future-Dated Changes Exist
- HR: Refresh Self Service actions with data from intervening actions
- HR: Allow processing of ineligible Self Service actions
- HR: Allow use of eligibility for Self Service actions
- HR: Enable Multiple Assignments in SSHR: If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR:Enable Multiple Assignments in SSHR system profile to allow this. See the Multiple Assignments section in theUser Access and Security in Oracle SSHR, page 2-3 topic.

## Configuring the Actions List

The Actions list that managers and workers view is role based.

- Functions in the Available in the Predefined Personal Actions Menu

  The following table provides a list of functions available in the predefined Personal Actions Menu:

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Personal Information | | | Personal Information | Y | |
| Payslip | | | Payslip | Y | |
| W4 Information | | | Employees W4 Information | Y | |
| Manage Payroll Payments | | | Manage Payroll Payments V4.0 | N | |
| Release Information | | | Release Information | Y | |
| | | | Employee Appraisals | N | Obsolete - replaced with Employee: My Appraisals Page |
| Appraisals | | | Employee: My Appraisals Page | Y | |
| Suitability Matching | | | Suitability Matching | Y | |
| Tenure Status | | | Tenure Status Overview | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Academic Rank | | | Academic Rank | Y | |
| Education and Qualifications | | | Qualification | Y | |
| Other Professional Qualifications | | | Award | Y | |
| Competency Profile | | | Competency Profile | Y | |
| Work Preferences | | | Work Preferences | Y | |
| Resume | | | Resume | Y | |
| Apply for Job | | | Search and Apply for a Job Page | Y | |
| | | | Enroll and Cancel Training | N | |
| | | | External Training | N | |
| Employee W2 | | | Employee W2 | Y | |
| Extra Information | | | Extra Information Types | Y | |
| Special Information | | | Special Information Types | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Event And Bookings | | | Event And Bookings | Y | |
| Employee Review | | | Employee Reviews V4.0 | Y | |
| Absence Management | | | Absence Management | Y | |
| | | | Training Plan Views | N | |
| Contact Extra Information | | | Contact Extra Information | Y | |
| Private Vehicle Entry | | | SS Vehicle Repository | Y | |
| Vehicle Mileage Expenses | | | SS Mileage Claim | Y | |
| Commutation Information | | | JP Commutation Information Self Service | Y | |
| Documents of Record | | | Documents of Record | Y | |
| Employment Verification | | | Employment Verification | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Voluntary Termination | | | Voluntary Termination | Y | |
| Charitable Contributions | | | Charitable Contributions | Y | |
| Manage Payroll Payments | | | Manage Payroll Payments V4.0 | Y | |
| Employee Directory | | | Proxy Page | N | |
| Organization Manager V4.0 | | | Organization Manager | Y | |
| | OTA Learner Application Menu | HOME PAGE | | Y | |
| Defined Contribution Plan Enrollment | | | Defined Contribution Plan Enrollment | Y | |

- Functions in the Available in the Predefined Manager Actions Menu

  The Organization chart uses the person-based supervisor hierarchy type to display direct reports of a manager. The employee panel card in the Organization Chart displays the Actions link. Managers can click the Actions link and select a self-service transaction in the Actions list. This Actions list is driven by the predefined Manager Actions Menu (HR_LINE_MANAGER_FUNCTIONS).

  The following table provides a list of functions available with the predefined Manager Actions Menu (HR_LINE_MANAGER_FUNCTIONS):

| Prompt | Function | Grant | Description |
|---|---|---|---|
| | Worker Status Change V5.2 | Y | |
| Worker Status Change | Worker Status Change | Y | |
| | Change Hours V5.2 | Y | |
| Change Hours | Change Hours | Y | |
| Termination | Termination | Y | |
| | Change Pay V5.2 | Y | |
| Change Pay | Change Pay | Y | |
| Change Job | Change Job | Y | |
| | Transfer V5.2 | Y | |
| Change Cost Center, Location and Manager | Change Cost Center, Location and Manager | Y | |
| Personal Information | Personal Information | Y | |
| Tenure Status | Tenure Status | Y | |
| Transfer | Transfer | Y | |
| Education and Qualifications | Qualification | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Other Professional Qualifications | Award | Y | |
| Competency Profile | Competency Profile | Y | |
| Work Preferences | Work Preferences | Y | |
| Resume | Resume | Y | |
| Training | Enroll and Cancel Training | N | |
| External Training | External Training | N | |
| Change Job and Terms | Change Job and Terms | Y | |
| Change Cost Center, Terms and Manager | Change Cost Center, Terms and Manager | Y | |
| Extra Information | Extra Information Types | Y | |
| | Change Worker Status and Terms V5.2 | Y | |
| Change Worker Status and Terms | Change Worker Status and Terms | Y | |
| Employee Review | Employee Reviews V4.0 | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Individual Compensation Distribution (Original) | Self Service Individual Distributions (Original)-Internal Use | Y | |
| Individual Compensation Distributions | Self Service Individual Compensation Distributions-Internal | Y | |
| | Organization Manager | N | Obsolete |
| | Hire V5.2 | N | Obsolete |
| | Applicant Hire V5.2 | N | Obsolete |
| | French Hire | N | Obsolete |
| | French Applicant Hire | N | Obsolete |
| Vehicle Mileage Expenses | SS Mileage Claim | Y | |
| Commutation Information | JP Commutation Information Self Service | Y | |
| Assign Schedules and Manage Exceptions | Assign Schedule | Y | |
| Documents of Record | Documents of Record | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Contact Extra Information | Contact Extra Information | Y | |
| | Hire | Y | |
| | Applicant Hire | Y | |
| | Special Information Types V4.0- OSHA | Y | |
| | Special Information Types V4.0- Stock Options | Y | |
| Competence Profile | ADS Competence Profile V4.0 | Y | |
| Applicant Hire iRecruitment | Applicant Hire iRecruitment | Y | |
| Transfer with Compensation Distribution V4.0 | Transfer with Comp V4.0 | Y | |
| IRASLINE Person Extra Information Types | SG IRASLINE Person EIT | Y | |
| Private Vehicle Entry | SS Vehicle Repository | Y | |
| Assignment Costing | Assignment Costing | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| | Assignment Costing Workflow Notify | Y | |
| | Reverse Termination | Y | |
| P11D | P11D Manager Action | Y | |
| Change Manager | Change Manager | Y | |
| Termination with Compensation | Termination with Compensation V4.0 | Y | |
| Release Information | Release Information | Y | |
| Academic Rank | Academic Rank | Y | |
| Special Information | Special Information Types | Y | |
| Event And Bookings | Event And Bookings | Y | |
| Absence Management | Absence Management | Y | |

If you want to configure the Actions list according to your business requirements, then you must create custom menus using the predefined menus.

## Configuring the Action Links in the Side Navigation Container

Managers and workers can process multiple self-service transactions effectively and with minimum navigation using the action links in a side navigator.

The manager or personal actions that appear in the side navigation container are driven by the following menus:

- SSHR Emp Side Bar Menu (HR_SS_EMP_SIDEBAR) for worker personal actions.

  The following table provides a list of worker personal actions that are supported and not supported in the side navigation container:

| Worker Action | Supported: Y/N |
|---|---|
| Personal Information | Y |
| Payslip | Y |
| W4 Information | Y |
| Release Information | Y |
| Suitability Matching | N |
| Tenure Status | Y |
| Academic Rank | Y |
| Education and Qualifications | Y |
| Other Professional Qualifications | Y |
| Competency Profile | N |
| Work Preferences | Y |
| Resume | N |
| Employee W2 | N |
| Extra Information | Y |
| Special Information | Y |
| Event & Bookings | Y |
| Employee Review | Y |
| Absence Management | Y |

| Worker Action | Supported: Y/N |
|---|---|
| Contact Extra Information | Y |
| Private Vehicle Entry | Y |
| Documents of Record | Y |
| Voluntary Termination | Y |
| Manage Payroll Payments | Y |
| Organization Manager | Y |
| Vehicle Mileage Expenses | Y |
| Employment Verficiation | Y |
| P60 | Y |
| P11D | Y |

- SSHR Side Bar Menu (HR_SS_SIDEBAR) for manager actions.

  The following table provides a list of manager actions that are supported and not supported in the side navigation container:

| Manager Action | Supported: Y/N |
|---|---|
| Work Preferences | Y |
| Individual Compensation Distribution | Y |
| Private Vehicle Entry | Y |
| P11D | Y |
| Allocated Checklist | Y |

| Manager Action | Supported: Y/N |
|---|---|
| P60 | Y |
| Documents of Record | Y |
| Academic Rank | Y |
| Release Information | Y |
| Tenure Status | Y |
| Change Cost Centre, Location and Manager | Y |
| Termination with Compensation | Y |
| Change Cost Center, Terms and Manager | Y |
| Change Manager | Y |
| Contact Extra Information | Y |
| Other Professional Qualifications | Y |
| Education and Qualifications | Y |
| Events and Bookings | Y |
| Extra Information | Y |
| IRASLINE Information Types | Y |
| Training Plans Manager | N |
| Transfer | Y |

| Manager Action | Supported: Y/N |
|---|---|
| Worker Status Change | Y |
| Absence Management | Y |
| Enroll and Cancel Training | N |
| External Training | N |
| Resume | N |
| Assign Schedules and Manage Exceptions | Y |
| Assignment Costing | Y |
| Commutation Information | Y |
| Competency Profile | N |
| Special Information | Y |
| Termination | Y |
| Change Job | Y |
| Change Pay | Y |
| Personal Information | Y |
| Employee Review | Y |
| Vehicle Mileage Expenses | Y |
| Manage Payroll Payments | Y |

| Manager Action | Supported: Y/N |
|---|---|
| Change Worker Status and Terms | Y |

**Important:** The manager and personal actions whether launched from Self-Service Manager Actions, Personal Actions, Organization Chart or Talent Profile are the same. As some of the self-service functions are not supported in the side navigation container, there would be a mismatch between functions in the side navigation container and the drop-down list available in Organization Chart.

### Configuration Guidelines for the Side Navigator

The SSHR Side Bar Menu (HR_SS_SIDEBAR) and SSHR Emp Side Bar Menu (HR_SS_EMP_SIDEBAR) contain a list of predefined supported functions including global and localization specific. During implementation, you can remove those functions that are not applicable to your legislation using the "function exclusion" feature available in the Responsibility window of the System Administrator responsibility.

## Organization Chart for Contingent Workers

By default, the Contingent Worker Self-Service responsibility does not have the function to launch the Organization Chart. If you want to enable contingent workers to use the Organization Chart feature, then you must create custom contingent worker menu and add the Organization Chart functions.

# 13

# Talent Profile in Oracle SSHR

# Talent Profile Functionality in Oracle SSHR

## Talent Profile in Oracle SSHR

The Talent Profile feature of Oracle SSHR helps enterprises to obtain a complete picture of the talent profile of their workforce to manage and execute their talent processes. Talent Profile captures and displays complete worker talent details on a single-interface enabling enterprises to attract, develop, and retain the best talent.

> **Note:** Oracle Self-Service HR provides you with a minimal Talent Profile function to only view the talent profiles of your workforce. The Performance Matrix (9-box) that is available on the Oracle SSHR Talent Profile page of a worker enables manager to view the performance profile of the selected worker only.
>
> Enterprises require Oracle Succession Planning license to:
>
> - Compare Talent Profiles of workers. Compare Profile is a list of value in the Select an Action list, Talent Profile page of a worker in Oracle Succession Planning.
> - Use performance matrices (9-box): Performance Matrix (Potential) and Performance Matrix (Retention) to assess the performance and retention potential of workers in a manager's hierarchy. Performance Matrix (Potential) and Performance Matrix (Retention) are list of values in the Select an Action list, Talent Profile page of a worker in Oracle Succession Planning.
> - Use Suitability Analyzer

## Talent Profile Features

Enterprises can use the following Talent Profile features to develop and manage succession plans for their workforce:

### View Complete Talent Information

Talent Profile displays worker information such as personal information, photograph, contact information, and employment details. Talent Profile obtains relevant data from talent management products and presents the information in the following regions:

- Competencies
- Qualifications

- Other Professional Qualifications
- Previous Employment
- Learning Certifications
- Training Details
- Appraisals
- Performance Objectives
- Succession Plans
- Job History
- Career Path
- Work Preferences
- Salary
- Benefits
- Monetary Compensation
- Compensation Statement
- Other Information
- Performance Ratings

### View Details and Process Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

### View 9-Box Matrixes

Managers can view the performance profile of a worker in the Performance Matrix (9 - Box) that indicates performance and growth potential.

You can compare a worker's:

- Potential vs. Performance: This matrix provides information on performance and leadership potential.

- Retention vs. Performance: This matrix provides information on performance and risk of loss.

Enterprises can define the performance, potential, and retention rating scales according to their business requirements.

> **Note:** Oracle Applications Development Framework (ADF)-based default templates are used to display nine box matrixes. Implementation steps must be completed to view the nine box matrixes.

### Print Talent Profiles

Managers can print talent profiles of workers. The application provides a default print option with all the configured regions. Managers have the flexibility to select required talent profile regions and print a custom view of the talent profile.

### Maintain Notes

Workers and managers can create and update notes to record important information about their talent profile such as notes about appraisals or learning plans.

### Create and Use Tags

Workers and managers can create tags that are similar to keywords. Tags help categorize and group talent. Workers can create tags that match their individual profiles. Managers can create tags that match with the talent profiles of their workers.

### Perform Self-Service Actions

Managers and workers can perform self-service actions. For example, when a manager views the talent profile of a worker, the manager can change the pay of the worker by selecting the Change Pay self-service action directly from the Talent Profile page.

Managers can use Talent Profile to launch personal actions or manager actions. These personal actions or manager actions are launched in a new page in the Personal Actions tab or the Manager Actions tab respectively. The page that is launched when a manager initiates a personal action or manager action has a side navigator that helps managers to process and complete multiple self-service transactions for themselves or for workers in their hierarchy without leaving the page. Workers can use Talent Profile to launch personal actions. The personal action selected, is launched in the Personal Actions tab. The side navigator available on this page helps workers to complete multiple self-service personal actions without leaving the page.

### Use Talent Profile Based on Role Requirements

As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plan

and Performance Matrix (9-box).

### Use Flexible Search Options to Search for Talent Profiles

Managers can directly search for the worker whose talent profile they want to view with out having to navigate through the entire hierarchy. The search displays the talent profile of the selected worker. Horizontal links display the complete hierarchical relationship of the worker and the manager. A saved view of recently viewed profiles helps managers to return to recent records without having to perform the search again. The application saves the recently viewed profiles only for that specific session.

## Key Concepts

The following topics provide conceptual and procedural information about using Talent Profile:

- Using Talent Profile as Managers in Oracle SSHR, page 13-5
- Using Talent Profile as Workers in Oracle SSHR, page 13-14
- Generating Printable Profiles in SSHR, page 13-20

# Using Talent Profile as Managers in Oracle SSHR

When managers navigate to the Talent Profile page, the page displays their own talent information. The Talent Profile page of a worker provides managers with information required for succession planning. To view talent profiles of workers in their hierarchy, managers can select a worker either from the hierarchy list or quick search region.

> **Note:** Currently, Talent Profile supports only supervisor hierarchy.

As a manager, when you navigate to the Talent Profile page of a worker, you can:

- View worker details
- View talent information presented in different regions
- Print talent profiles
- Perform self-service actions

> **Note:** Managers who are contingent workers can access Talent Profiles of employees and contingent workers reporting to them using the Manager Self-Service responsibility provided the profile option HR: Expand Role of Contingent Worker is set to Yes. For contingent

workers, certain regions such as Salary, Benefits, Monetary Compensation, and Compensation Statement may not be available to view.

## View Worker Details

You can view employment details such as the organization, job, position, supervisor, and the hire date. The contact details include address, phone numbers, and e-mail address. You can also view a photograph of the worker, if available. If the worker has added tags to the profile, then you can view the tags.

## View Details and Process Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. In the Assignment field, select the assignment of a worker to view details and perform the appropriate manager actions. Employment details and the talent profile information presented in the talent regions vary depending on the assignment that you select. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

## View Talent Information Presented in Different Regions

This section lists the talent regions that managers can view for their workers.

**Note:** Your enterprise may display all the regions or hide some of the regions according to the business needs and processes.

- Competencies
- Appraisals
- Performance Objectives
- Qualifications
- Learning Certifications
- Training
- Other Professional Qualifications
- Job History
- Career Path

- Benefits
- Work Preferences
- Previous Employment
- Monetary Compensation
- Succession Plans
- Other Information
- Salary
- Compensation Statement
- Performance Ratings

### Competencies

The Competencies region displays the current competencies of the selected worker. You can view the level and status of the competencies.

Click the More link to navigate to the Competency Profile page of the worker to view or update the existing competency profile. When you update or add competencies for a worker, the updated information is visible on the Talent Profile page.

For information on competencies, see: Competency Profile, page 9-25

### Appraisals

The Appraisals region displays the appraisal information using a bar graph. The bar graph is a column chart where the x-axis shows the appraisal period end date and the y-axis shows the appraisal rating of the worker and the total rating value. You can easily distinguish the rating of the worker and the total rating value as the bar graph uses different color codes. Talent Profile displays information only from appraisals that are given an overall rating, regardless of whether the appraisals are created using the Appraisals function or appraisals are created as part of performance management plans. The bar graph displays information for five appraisals.

**Note:** Talent Profile does not display information from self appraisals.

Click the More link to navigate to the View Appraisals page for more information on the worker's appraisals. On the View Appraisals page, you can view completed and in progress appraisals.

For more information on appraisals, see: The Appraisal Process, *Oracle Performance Management Implementation and User Guide*

### Performance Objectives

You can view worker objectives for a specific performance management plan. By default, the Plan Name field displays the latest published performance management plan. The Performance Objectives region displays the plan name, plan period, objectives, and objective start and end date. The Complete % field helps you to track the progress of the worker's objectives.

Click the More link to navigate to the Performance Management page of the worker. For each performance management plan, you can view a list of tasks. The application enables these tasks at appropriate times during the performance-management period.

**View Performance Objectives of an Indirect Report**

When you view the Talent Profile page of an indirect report (a worker reporting to your direct report), and click the More link, the application enables you to view and carry out the performance management tasks as the indirect report's manager. For example, Dan Bird is Sales Manager, Vision Corporation and Alice Taylor, the manager of Store A reports to Dan. When Dan views the Talent Profile of Alex Smith who reports to Alice, Dan can perform Alice's performance-management tasks.

For more information on manager performance management tasks, see: Manager Performance-Management Tasks, *Oracle Performance Management Implementation and User Guide*

### Qualifications

The Qualifications region displays the education qualifications information such as qualification type, title, and status.

Click the More link to navigate to the Education and Qualifications page of the worker to create or update qualifications. The Talent Profile page displays the updated qualifications information.

For more information, see: Education and Qualifications, page 9-24

### Learning Certifications

You can view the learning certification details such as the certification name, status, progress, and renew date.

Click the More link to navigate to the Learner Home page of the worker. On the Learner Home page of the worker, you can view details such as additional certification details, classes that the worker has currently enrolled in, and learning paths that the worker has subscribed to.

For more information, see: The Learner Home, *Oracle Learning Management User Guide*

### Training

This region displays the training information of the selected worker. Details include the

course name, course delivery method, enrollment status, and enrollment dates. You can use the Filter values to view all, completed, or upcoming training.

Click the More link to navigate to the Learner Home page of the worker to view additional training details. You can also enroll the worker in required training. The Talent Profile displays the updated enrollment information.

For more information, see: The Learner Home, *Oracle Learning Management User Guide*

### Other Professional Qualifications

You can view other professional qualifications of the worker such as an award. This region does not display academic qualifications, which are displayed in the Qualifications region.

Click the More link to navigate to the Other Professional Qualifications page to add new professional qualifications or update existing professional qualifications. The Talent Profile displays the updated professional qualifications information.

For more information, see: Other Professional Qualifications, page 9-25

### Job History

The Job History region displays the details of previous jobs of the selected worker in the same enterprise. You can use this information to analyze what the worker has gained from each role in terms of experience, skills, and professional development. When creating succession plans you can use the job history details to evaluate the work experience summary of the worker.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Career Path

You can view the proposed career path of the selected worker from the current job level. Managers can learn where the worker is in their career. They can analyze the worker's career path and plan for suitable training to meet the future role requirements.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Benefits

You can view the benefits enrollments of the worker such as programs, plans, and options. You can also view with the benefits' coverage start date and coverage amounts.

Click the More link to launch the Self-Service Benefits Enrollments function. The subsequent Benefits Enrollments pages that you view depend on the configuration choices that your enterprise makes.

For more information, see:Self-Service Benefits Enrollments, *Oracle HRMS Compensation and Benefits Management Guide*

### Work Preferences

You can view the work preferences specified by the worker in two regions: Domestic Options and International Relocation Options. You can gather information such as whether the worker is willing to accept international travel or relocate domestically. You can also view preferred work hours and work schedule.

Click the More link to navigate to the Work Preferences page of the worker to add or update information. The Talent Profile page displays the updated work preferences details.

For information see: Work Preferences, page 9-27

### Previous Employment

This region displays the work history in previous organizations. You can view previous employment details such as the previous employer, previous employment period, and employer location. The previous employment details provide valuable inputs such as the employers that the worker has worked with. You also get an idea of the worker's experience in each industry if the worker was employed in various industries. You can evaluate how the previous roles are useful for career management and succession plans for the worker.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Monetary Compensation

You can view a graphical representation of the monetary compensation details of the worker. Monetary compensation can include components such as allowances, bonus, and salary. You can view a list of all compensation related sections (defined with a chart or graph) from the latest Total Compensation Statement (TCS). You can select any one of the values to view a graphical representation of the selected monetary compensation section.

Talent Profiles uses the Total Compensation Statement information to display the monetary compensation graph. If there is no Total Compensation statement available for the worker and a graph for cash compensation has not been included in the statement, then the application does not display any information in the Monetary Compensation region.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Succession Plan

The succession plan information that you view for a worker depends on the release level of Oracle Succession Planning that your enterprise uses:

If your enterprise uses R12.1 HRMS RUP5 Oracle Succession Planning, then you can

view the following information:

- Successors Identified for

  This table lists the potential successors of the worker. You can view information such as workers' performance level, succession and retention potential, and readiness percent.

- Succession Plans

  This table lists the succession plans identified for the worker. Information that you can view includes whether the succession plan is for a worker or role, plan status, and the workers' performance level, succession and retention potential, and readiness percent.

  **Note:** If your enterprise uses pre R12.1 HRMS RUP5 Oracle Succession Planning then you can view the following information:

  - Successor For:

    This table lists the workers for whom the selected worker is identified as a successor. Information includes readiness level and the earliest succession date.

  - As Successor:

    This table lists the workers identified as the successors of the selected worker. Information includes readiness level and the earliest succession date.

    This is a view only region and you cannot perform any transactions as the More link is not available.

### Other Information

For your workers, you can make notes about their achievements and contributions. Click the More link to navigate to the Attachments page where you can add attachments. You can create attachments in different ways. You can attach a file, provide the location of the directory in which you saved the document, or provide a text description.

You can add tags for your workers. The tags that you add for a worker appear on that worker's Talent Profile page. Tags help group and categorize talent.

### Salary

You can view details of the current salary. Details include salary rate and annualized salary.

This is a view only region and you cannot perform any transactions as the More link is

not available.

### Compensation Statement

This region displays the worker's total compensation information including compensation awards and benefits. Compensation information can include monetary awards such as salary and bonus awards as well as non-monetary awards such as stock options. Benefits information can include medical and dental benefits (optionally showing the cost to your organization).

Talent Profile uses Total Compensation Statement to display information in this region. If there is no Total Compensation statement available for the worker, then the application does not display any information in this region.

This is a view only region and you cannot perform any transactions as the More link is not available.

### Performance Ratings

The application hides this region by default. Your enterprise can display this region, if you use Oracle HRMS to rate performance. HR Managers can enter performance of their workers using the Performance window in Oracle HRMS. The Performance Ratings region displays the information that HR managers enter in Oracle HRMS. You can view details such as the main appraiser and rating.

> **Note:** If your enterprise uses Oracle Performance Management to evaluate workforce performance, then your enterprise can hide the Performance Ratings region . In this case, use Appraisals region to view performance ratings.

## View Performance Matrix (9 - Box)

On the Talent Profile page of the selected worker, you can view the performance profile using Performance Matrix (9 - Box).

You can compare a worker's:

- Potential vs. Performance: This matrix provides information on performance and leadership potential.
- Retention vs. Performance: This matrix provides information on performance and risk of loss.

> **Note:** Oracle Applications Development Framework (ADF)-based default templates are used to display nine box matrixes. Implementation steps must be completed to view the nine box matrixes.

Talent Profile uses information from the following products to plot the rating scales on the Performance Matrix ( 9 - Box).

**Performance**: If your enterprises uses Oracle Performance Management, then the application derives the Performance value from the Overrall Rating field on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Performance value is derived from the Performance window in Oracle HRMS.

**Potential**: If your enterprise uses Oracle Performance Management, then the application derives the Potential value from the Readiness Level field in the Advancement Potential region on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Potential value is derived from the Succession Potential field of the SSHR succession planning feature.

**Retention**: If your enterprise uses Oracle Performance Management, then the application derives the Retention value from the Retention Level field in the Advancement Potential region on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Retention value is derived from the Risk of Loss field of the SSHR succession planning feature.

> **Important:** The values that you view on the Performance Matrix are the values that your enterprise defines for performance, potential, and retention rating scales.

## Print Talent Profile

Managers can print the worker's talent profile. Select Printable Profile in the Select an Action list and click Go. Then, click Generate Report to generate the talent report. The printable profile is a PDF document. You can view the profile of the selected worker for multiple criteria such as competency profile, appraisal ratings, and compensation. The profile report displays the workers's performance and potential matrix that helps evaluate talent. The performance and retention matrix helps to understand correlation between performance and possibility of the worker's separation from the enterprise. Managers have the flexibility to print required talent profile regions.

See: Generating Talent Profiles, page 13-20

## Perform Self-Service Actions

The Select an Action list displays the list of actions that you can perform as a manager for the selected worker. For example, you can perform self-service actions such as transfers, change manager or change worker status.

When you select an Action and click Go, the action is launched in a page with a side navigation container in the Manager Actions tab. All the manager action links appear in the side navigation container on the left side of the page. You can select any one of the action links from the side navigation container, complete a transaction, and move on to other transactions without leaving the page. You can process multiple manager actions

for a worker from this page.

> **Note:** Your enterprise configures the self-service actions that a manager can perform.

## Using Talent Profile as Workers in Oracle SSHR

As a worker, when you navigate to the Talent Profile page, the page displays your talent information. On this page, you can:

- View employment details
- View talent information presented in different regions
- Perform self-service actions
- Print your talent profile

> **Note:** If the Talent Profile feature is enabled for contingent workers, then contingent workers can use this feature. However, certain regions such as Salary, Benefits, Monetary Compensation, and Compensation Statement may not be available to view. Employees or contingent workers can view talent profile of their primary assignment only.

### View Employment Details

You can view employment details such as the organization, job, position, supervisor, and the hire date. The contact details include address, phone numbers, and e-mail address. You can also view your photograph, if available. You can also view tags that you have added to your profile.

### View Talent Information Presented in Different Regions

This section lists the talent regions that you can view on your Talent Profile page:

> **Note:** Your enterprise may display all the regions or hide some of the regions according to the business needs and processes.

- Competencies
- Appraisals
- Performance Objectives

- Qualifications
- Learning Certifications
- Training
- Other Professional Qualifications
- Job History
- Career Path
- Benefits
- Work Preferences
- Previous Employment
- Monetary Compensation
- Other Information
- Salary
- Compensation Statement
- Performance Ratings

### Competencies

The Competencies region displays your current competencies. You can view the level and status of the competencies.

Click the More link to navigate to the Competency Profile page to view or update the existing competency profile. When you update or add competencies, the updated information is visible on the Talent Profile page.

For more information, see: Competency Profile, page 9-25

### Appraisals

The Appraisals region displays the appraisal information using a bar graph. The bar graph is a column chart where the x-axis shows the appraisal period end date and the y-axis shows your appraisal rating and the total rating value. You can easily distinguish your appraisal and the total rating value as the bar graph uses different color codes. Talent Profile displays information only from appraisals that are given an overall rating, regardless of whether the appraisals are created using the Appraisals function or appraisals are created as part of performance management plans. The bar graph displays information for five appraisals.

**Note:** Talent Profile does not display information from self appraisals.

Click the More link to navigate to the My Appraisals page to view or update your appraisals. The Appraisal Process, *Oracle Performance Management Implementation and User Guide*

### Performance Objectives

You can view objectives for a specific performance management plan. By default, the Plan Name field displays the latest published performance management plan. The Performance Objectives region displays the plan name, plan period, objectives, and objective start and end date. The Complete % field helps you to track the progress of your performance objectives.

Click the More link to navigate to the Performance Management page to view your Performance Management Task List. The tasks are those appropriate to the performance management plan (PMP) and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

For more information, see: Worker Performance-Management Tasks, *Oracle Performance Management Implementation and User Guide*

### Qualifications

The Qualifications region displays your education qualification information such as qualification type, title and status.

Click the More link to navigate to the Education and Qualifications page to create or update qualifications. The Talent Profile page displays the updated qualifications information.

For more information, see: Education and Qualifications, page 9-24

### Learning Certifications

You can view the learning certification details such as the certification name, status, progress, and renew date.

Click the More link to navigate to the Learner Home page to view additional certification details. On the Learner Home page, you can view classes that you are currently enrolled in, view learning certifications and learning paths that you have subscribed to, track the status of pending enrollments, and communicate with instructors and other learners using forums and chats.

For more information, see: The Learner Home, *Oracle Learning Management User Guide*

### Training

This region displays your training information. Details include course name, course delivery method, enrollment status and enrollment status, and enrollment dates. You can use the Filter values to see all, completed, or upcoming training.

Click the More link to navigate to the Learner Home page to view additional training details. Use the Catalog page to browse categories, search for and enroll in courses, or request enrollment from an approver.

After you enroll in training, the Talent Profile page displays the updated information.

For more information, see: The Learner Home, *Oracle Learning Management User Guide*

### Other Professional Qualifications

You can view other professional qualifications such as an award. This region does not display academic qualifications, which are displayed in the Qualifications region.

Click the More link to navigate to the Other Professional Qualifications page to add new professional qualifications or update existing professional qualifications. The Talent Profile page displays the updated information.

For more information, see: Other Professional Qualifications, page 9-25

### Job History

The Job History region displays the details of your previous jobs in the same enterprise. You can use this information to review each role in terms of experience, skills, and professional development.

This is a view only region and you cannot perform any transactions as the More link is not available.

### Career Path

You can view your proposed career path from the current job level. You can use this information to assess your skills and experience and create an action plan on updating your skills to meet your career goals.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Benefits

You can view the benefits programs, plans, and options in which you are enrolled in along with the coverage start date and coverage amounts.

Click the More link to launch the Self-Service Benefits Enrollments function. The subsequent Benefits Enrollments pages that you view depend on the configuration choices that your enterprise makes.

For more information, see: Self-Service Benefits Enrollments, *Oracle HRMS Compensation and Benefits Management Guide*

### Work Preferences

You can view your work preferences in two regions: Domestic Options and International Relocation Options.

Click the More link to navigate to the Work Preferences page of to add or update your work preferences information. The Talent Profile page displays the updated work preferences details.

For more information, see: Work Preferences, page 9-27

### Previous Employment

This region displays previous employment details such as the previous employer, previous employment period, and employer location.

This is a view only region and you cannot perform any transaction as the More link is not available.

### Monetary Compensation

You can view a graphical representation of your monetary compensation details. Monetary compensation can include components such as allowances, bonus, and salary. You can view a list of all compensation related sections (defined with a chart or graph) from the latest Total Compensation Statement (TCS). You can select any one of the values to view a graphical representation of the selected monetary compensation section.

Click the More link to navigate to the Total Compensation Statement page and view details.

Talent Profiles uses the Total Compensation Statement information to display the monetary compensation graph. If there is no Total Compensation statement available or a graph for cash compensation has not been included in the statement, then the application does not display any information in the Monetary Compensation region.

Click the More link to navigate to the Total Compensation Statement page to view more details.

### Other Information

Use the Notes feature to add any information about your talent profile, for example, your achievements and contributions. Click the More link to navigate to the Attachments page where you can add attachments. You can attach a file, provide the location of the directory in which you saved the document, or provide a text description.

### Salary

You can view details of your current salary. Details include salary rate and annualized salary.

### Compensation Statement

This region displays your total compensation information including compensation awards and benefits. Compensation information can include monetary awards such as salary and bonus awards as well as non-monetary awards such as stock options. Benefits information can include medical and dental benefits (optionally showing the cost to your organization).

Talent Profile uses Total Compensation Statement to display information in this region. If there is no Total Compensation statement available, then the application does not display any information in this region.

Click the More link to navigate to the Total Compensation Statement page to more details.

### Performance Ratings

By default, this region is hidden on the Talent Profile page. If your enterprise uses Oracle HRMS to record performance ratings, then your enterprise can display this region.

Using the Performance window in Oracle HRMS, HR managers can enter the performance ratings of their workers. The Talent Profile's Performance Ratings region displays the information that HR managers enter in Oracle HRMS. You can view details such as the main appraiser and rating.

> **Note:** If your enterprise uses Oracle Performance Management to evaluate workforce performance, then your enterprise can hide the Performance Ratings region. In this case, use Appraisals region to view performance ratings.

## Perform Self-Service Actions

The Select an Action list displays the list of actions that you can perform. For example, perform self-service actions such as manage payroll payments.

When you select an Action and click Go, the action is launched in a page with a side navigation container in the Personal Actions tab. All the personal action links appear in the side navigation container on the left side of the page. You can complete the transaction launched, and move on to other transactions without leaving the page. You can process multiple transactions for yourself.

**Note:** Your enterprise configures the self-service actions that you can perform. Note that workers can launch actions for their primary assignment only.

### Print Talent Profile

You can print your talent profile, if the Printable Profile option is available in the Select an Action list. Select the option and click Go. On the Talent Profile page, the Include in Report check box is selected by default in all the talent regions. You can choose to print selected talent regions. When you click Generate Report, the application displays a printable profile in the Adobe Acrobat PDF format.

See: Generating Printable Profiles in SSHR, page 13-20

## Generating Printable Talent Profiles in Oracle SSHR

Managers can print the talent profile of workers when they view the profile of workers in their hierarchy. Individual workers can also print their own talent profiles. When you select the Printable Profile option as a worker or manager, and click Go, the printable version page appears. On this page, the Include in Report check box is automatically selected for all the talent information regions. You can select only the required regions and click Generate Report. The application generates a printable profile in the Adobe Acrobat PDF format.

### Contents of the Printable Profile

The talent profile information that managers and workers view differs. Only managers can view the following information for their workers:

- Succession Plan
- Performance Matrix (Potential)
- Performance Matrix (Retention)

The talent profile PDF displays information for multiple criteria such as competency profile, work preferences, and compensation. You can view a graphical representation of the appraisal ratings and the cash compensation. The report includes certification details, job history and salary information of your employees. You can also view the compensation statement and training details.

**Note:** The Printable Profile report displays only those regions that have data. For example, if no data is available for Appraisals, then this region does not appear in the report.

### Viewing Performance Matrix (Potential) and Performance Matrix (Retention)

Managers can view the performance profile of workers using the following matrices:

- Performance Matrix (Potential): Provides information on performance and leadership potential of a worker on a rating scale of 1 to 3.
- Performance Matrix (Retention): Provides information on a worker's performance and risk of loss on a rating scale of 1 to 3.

Talent Profile uses information from the Succession Planning feature, Oracle Performance Management or Oracle HRMS Performance window (depending on the product to assess workforce performance) to plot the rating scales on the Performance Matrix ( 9 - Box).

**Important:** The values that you view on the Performance Matrix are the values that your enterprise defines for performance, potential, and retention rating scales.

For example, your enterprise can define the following rating scales for performance, potential, and retention:

Performance

- 1: Needs

  Indicates that the performance is significantly below the required level.

- 2: Meets

  Indicates that the performance is good and in-line with job requirements.

- 3: Exceeds

  Indicates that the worker has exceeded the required level of performance.

Potential

- 1: Limited

  Indicates that the worker shows little or no potential to move to the next work level.

- 2: Growth

  Indicates that the worker shows potential to advance to the next or higher work level.

- 3: High

  Indicates that the worker has requisite skills and expertise and exhibits leadership qualities.

Retention

- 1: Low

  Indicates that the risk of losing the worker is high.

- 2: Medium

  Indicates that the risk of losing the worker is moderate.

- 3: High

  Indicates that the risk of losing the worker is minimal.

# Enabling Talent Profile in Oracle SSHR

## Enabling Talent Profile in Oracle SSHR

Talent Profile is a comprehensive and integrated talent management feature that helps enterprises to obtain a complete picture of the talent profile of their workforce. Talent Profile captures and displays complete worker talent details on a single-interface.

Oracle Self-Service HR provides you with a minimal Talent Profile function to only view the talent profiles of your workforce. You require Oracle Succession Planning license to:

- Compare Talent Profiles
- Use performance matrices (9-box): Performance Matrix (Potential) and Performance Matrix (Retention)
- Use Suitability Analyzer

**Talent Profile Based on Role Requirements**

As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plan region.

### Talent Profile Menus

To meet the different talent requirements, Oracle SSHR supplies the following Talent Profile Menus:

| Menu | Description |
|---|---|
| SSHR Talent Profile Manager Access Menu (HR_SSHR_TP_MGR_MENU) | Enables managers to view talent profiles of workers in their supervisor hierarchy. |
| Talent Profile Employee Access Menu (HR_TP_EMP_MENU) | Enables workers to view their talent profiles. |
| SSHR Menu For All Seeded Report Template Functions (HR_SSHR_TP_TEMPLATE_MENU) | Enables managers to print the talent profiles of workers. Workers can print their own talent profiles. |
| Talent Profile Launch Menu (HR_TP_LAUNCH_MENU) | Launches the Talent Profile page. |

## Enabling Talent Profile in Oracle SSHR

To enable managers, workers, and HR Professionals to use the Talent Profile feature, complete the following steps:

1. **Add the Talent Profile function**

   Add the function Talent Profile HR_TALENTPROFILE_SS to the appropriate menus of the self-service responsibilities. For example, you can add the function to the supplied or the configured Manager Self Service menu. Use the Menus window of the System Administrator responsibility to complete this task.

2. **Assign the Talent Menus to the self-service responsibility menus**

   To enable managers and HR professionals to use Talent Profile, add the following menus to the manager and HR professional self-service responsibility menus:

   - SSHR Talent Profile Manager Access Menu (HR_SSHR_TP_MGR_MENU)
   - Talent Profile Employee Access Menu (HR_TP_EMP_MENU)
   - SSHR Menu For All Seeded Report Template Functions (HR_SSHR_TP_TEMPLATE_MENU)

   To enable workers to use Talent Profile, add the following menus to the appropriate workers' responsibility menus:

   - Talent Profile Employee Access Menu (HR_TP_EMP_MENU)
   - SSHR Menu For All Seeded Report Template Functions (HR_SSHR_TP_TEMPLATE_MENU)

3. **Complete implementation steps to view Oracle Applications Development Framework (ADF) based nine box matrixes**

   Oracle SSHR uses the following default templates to display talent matrixes in the nine box format:

   - Default Retention vs. Impact of Loss
   - Default Retention vs. Impact of Loss
   - Default Performance vs. Retention

   These default templates are of 3*3 matrix type and are built on Oracle Applications Development Framework (ADF).

      - To view the ADF-based nine box matrixes, you must complete

deployment steps in an Oracle WebLogic Server (WLS) instance. For more information, refer to the *Oracle Succession Planning Implementation and User Guide*.

- To edit the default templates, you require Oracle Succession Planning license and must have enabled the Talent Matrix tool in Oracle Succession Planning.

- If you do not deploy WLS and complete the necessary implementation steps, then the application provides an option to download or save PDF reports of nine box matrixes instead of displaying them.

### Display the Relevant Succession Plan Region on the Talent Profile Page of a Worker

Managers can view succession plan details of their workers when they navigate to the Talent Profile of workers. By default, the Talent Profile page of a worker displays the Succession Plan region (SuccessionPlanNewOverviewRN) that is part of the R12.1 HRMS RUP5 Oracle Succession Planning model. If you are not using the Oracle Succession Planning model of R12.1 HRMS RUP5, then you must hide this version of the Succession Plan region and display the pre R12.1 HRMS RUP5 Succession Plan region (SuccessionPlanOverviewRN) on the Talent Profile page. See: Personalizing the Talent Profile Page, page 13-45

## Setting up a Custom Version of the Talent Profile Feature

If you do not want to use the supplied Talent Profile menus, you can create menus based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your business processes. You can base your configuration on the sample menus provided although you should not change the predefined menus directly.

For information on setting up a custom version of the Talent Profile feature, see: Setup Steps to Implement a Custom Version of the Talent Profile Feature in SSHR, page 13-26

## Configuring Talent Profile for Contingent Workers

The Talent Profile function is not supported in the predefined Contingent Worker Self Service menu, by default. If required, you can add the Talent Profile function to the predefined Contingent Worker Self Service menu (HR_CWK_DIRECT_ACCESS) or the custom Contingent Worker Self Service menu that you use.

Before, you perform the following steps, you must ensure that the HTML call for the Talent Profile Employee Home Function does not have any reference to the Organization Chart functionality.

To enable contingent workers in your enterprise to use the Talent Profile functionality, complete the following steps:

1. Navigate to the Functional Administrator responsibility.
2. Click the Core Services tab.
3. Click the Menus sub tab. The Navigation Menus page appears.
4. Search for the predefined or custom Contingent Worker Self Service menu.
5. Click Update.
6. Click Add Another Row.
7. Enter Talent Profile in the Prompt field.
8. Select Talent Profile Employee Home Function in the Function field.
9. Select the following functions:

   Talent Profile Employee Access Menu

   SSHR Menu For All Seeded Report Template Functions
10. Click Apply.
11. Click the Profiles tab. The Profiles page appears.
12. Search for the Contingent Worker Personal Actions Menu profile option. Verify that the profile value is set to Contingent Worker Personal Actions Menu. After completing these steps, clear the cache.

#### Hide Certain Regions on the Talent Profile Page for Contingent Workers

Regions such as Salary, Benefits, Monetary Compensation, and Compensation Statement that are not applicable to contingent workers must be hidden using the Personalization feature.

## Setup Steps to Implement a Custom Version of the Talent Profile Feature in SSHR

This topic describes the implementation steps to set up a custom version of the Talent Profile feature:

### 1. Create Copies of Supplied Menus

Using the Functional Administrator responsibility, create copies of the following

supplied menus for Talent Profile.

- SSHR Talent Profile Manager Access Menu (HR_SSHR_TP_MGR_MENU)
- Talent Profile Employee Access Menu (HR_TP_EMP_MENU)
- SSHR Menu For All Seeded Report Template Functions (HR_SSHR_TP_TEMPLATE_MENU)

You can base your configuration on the sample menus provided although you should not change the predefined menus directly. You must create your own menus using the predefined menus as examples. Otherwise, your changes may be lost during an upgrade.

## 2. Set up the Talent Profile Regions

Talent Profile displays talent information in individual regions. As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plans region.

By default, Talent Profile displays a set of regions for workers and managers, called Employee View and Manager View. Each of the regions is assigned a region code and a sub-function with the same name as the region code. The sub-functions for each of the regions control the security of the region. These sub-functions determine whether the application can display that region in the particular profile view or not.

When a user logs in to Talent Profile, the application determines whether the user is a worker or manager. Then, the application checks whether the corresponding worker or manager sub-function for the view is granted. If the function is granted, then the application will display the region for the worker or manager.

***Supplied SSHR Talent Profile Manager Access Menu (HR_SSHR_TP_MGR_MENU)***

| Name | Function | Type | Functionality |
|---|---|---|---|
| Talent Profile Career Path Manager | HR_TP_MGR_CAREER_PATH_SS | SUBFUNCTION | Region |
| Talent Profile Cash Compensation Manager | HR_TP_MGR_CASH_COMP_SS | SUBFUNCTION | Region |
| Talent Profile Certifications Manager | HR_TP_MGR_CERTIFI_SS | SUBFUNCTION | Region |

| Name | Function | Type | Functionality |
|---|---|---|---|
| Talent Profile Competency Manager | HR_TP_MGR_COMPETENCY_SS | SUBFUNCTION | Region |
| Talent Profile Compensation Statement Manager | HR_TP_MGR_COMP_STAT_SS | SUBFUNCTION | Region |
| Printable Profile | HR_TP_MGR_EXPORT_CUSTOM_ACTN | SUBFUNCTION | Action |
| Talent Profile Job History Manager | HR_TP_MGR_JOB_HIST_SS | SUBFUNCTION | Region |
| Talent Profile Performance Matrix Manager | HR_TP_MGR_PERF_MATRIX_SS | SUBFUNCTION | Action |
| Talent Profile Performance Objectives Manager | HR_TP_MGR_PERF_OBJ_SS | SUBFUNCTION | Region |
| Talent Profile Previous Employment Manager | HR_TP_MGR_PREV_EMP_SS | SUBFUNCTION | Region |
| Talent Profile Qualifications Manager | HR_TP_MGR_QUALIFI_SS | SUBFUNCTION | Region |
| Talent Profile Salary Overview Manager | HR_TP_MGR_SALARY_SS | SUBFUNCTION | Region |
| Talent Profile Succession Plan Manager | HR_TP_MGR_SUCCESSION_SS | SUBFUNCTION | Region |
| Talent Profile Additional Information Manager | HR_TP_MGR_ADDITIONALINFO_SS | SUBFUNCTION | Region |
| Talent Profile Appraisal Manager | HR_TP_MGR_APPR_SS | SUBFUNCTION | Region |

| Name | Function | Type | Functionality |
|---|---|---|---|
| Talent Profile Awards Manager | HR_TP_MGR_AWARDS_SS | SUBFUNCTION | Region |
| Talent Profile Work Preferences Manager | HR_TP_MGR_WORK_PREF_SS | SUBFUNCTION | Region |
| Talent Profile Training Manager | HR_TP_MGR_TRAINING_SS | SUBFUNCTION | Region |
| Talent Profile Global Search Enabled | HR_TP_VIEW_GBL_SEARCH_SS | SUBFUNCTION | Region |
| Talent Profile Show Person Hierarchy Enabled | HR_TP_VIEW_PER_HIERARCHY_SS | SUBFUNCTION | Region |
| Download Export XML Button Security Renderer | HR_TP_DOWNLOAD_EXPORT_XML | SUBFUNCTION | Reporting Action |
| Talent Profile More Link Manager | HR_TP_MGR_MORE_LINK | SUBFUNCTION | More link configuration option for Manager |
| Printable Profile ( Full ) | HR_TP_MGR_EXPORT_FULL_ACTN | SUBFUNCTION | Action |
| Talent Profile Benefits Manager | HR_TP_MGR_BENFTS_SS | SUBFUNCTION | Region |
| Talent Profile Performance Ratings Managers | HR_TP_MGR_PERFRATING_SS | SUBFUNCTION | Region |

***Supplied Talent Profile Employee Access Menu - HR_TP_EMP_MENU***

| Name | Function | Type | Functionality |
|---|---|---|---|
| Talent Profile Additional Information Employee | HR_TP_EMP_ADDITIONALINFO_SS | SUBFUNCTION | Region |
| Talent Profile Appraisal Employee | HR_TP_EMP_APPR_SS | SUBFUNCTION | Region |
| Talent Profile Awards Employee | HR_TP_EMP_AWARDS_SS | SUBFUNCTION | Region |
| Talent Profile Career Path Employee | HR_TP_EMP_CAREER_PATH_SS | SUBFUNCTION | Region |
| Talent Profile Certifications Employee | HR_TP_EMP_CERTIFI_SS | SUBFUNCTION | Region |
| Talent Profile Competency Employee | HR_TP_EMP_COMPETENCY_SS | SUBFUNCTION | Region |
| Talent Profile Job History Employee | HR_TP_EMP_JOB_HIST_SS | SUBFUNCTION | Region |
| Talent Profile Performance Objectives Employee | HR_TP_EMP_PERF_OBJ_SS | SUBFUNCTION | Region |
| Talent Profile Previous Employment Employee | HR_TP_EMP_PREV_EMP_SS | SUBFUNCTION | Region |
| Talent Profile Qualifications Employee | HR_TP_EMP_QUALIFI_SS | SUBFUNCTION | Region |
| Talent Profile Training Employee | HR_TP_EMP_TRAINING_SS | SUBFUNCTION | Region |

| Name | Function | Type | Functionality |
|---|---|---|---|
| Talent Profile Work Preferences Employee | HR_TP_EMP_WORK_PREF_SS | SUBFUNCTION | Region |
| Talent Profile More Link Employee | HR_TP_EMP_MORE_LINK | SUBFUNCTION | Region |
| Talent Profile Cash Compensation Employee | HR_TP_EMP_CASH_COMP_SS | SUBFUNCTION | Region |
| Talent Profile Salary Overview Employee | HR_TP_EMP_SALARY_SS | SUBFUNCTION | Region |
| Talent Profile Compensation Statement Employee | R_TP_EMP_COMP_STAT_SS | SUBFUNCTION | Region |
| Printable Profile | HR_TP_MGR_EXPORT_CUSTOM_ACTN | SUBFUNCTION | Action |
| Compare Profile | HR_TP_EMP_COMPARE_WITH_ACTN | SUBFUNCTION | Action |
| Printable Profile ( Full ) | HR_TP_MGR_EXPORT_FULL_ACTN | SUBFUNCTION | Action |
| Talent Profile Benefits Employee | HR_TP_EMP_BENFTS_SS | SUBFUNCTION | Region |
| Talent Profile Performance Ratings Employee | HR_TP_EMP_PERFRATING_SS | SUBFUNCTION | Region |

## 3. Configuring the More Links in the Talent Profile Regions

The Talent Profile page regions provide a More link using which managers can navigate to the relevant self-service pages of workers. For example, when a manager clicks the More in the Qualifications region, the application displays the worker's Qualifications page. Similarly, when workers view their own Talent Profile page, they can navigate to the self-service pages using the More link. Talent Profile delivers predefined More links for manager and employee views using the following sub-functions:

- **Manager View**

  Talent Profile More Link Manager (HR_TP_MGR_MORE_LINK). This sub-funciton is included in the SSHR Talent Profile Manager Access Menu (HR_SSHR_TP_MGR_MENU)

- **Employee View**

  Talent Profile More Link Employee (HR_TP_EMP_MORE_LINK). This sub-function is included in the Talent Profile Employee Access Menu (HR_TP_EMP_MENU).

You can configure the More links to display different application pages instead of the default configured pages. Each region has a predefined unique code defined for More links. This code is different from the region codes. The region codes are used for security of the regions. The More link code is used to specify the destination page when the More link is clicked. **Note**: If you do not want users to navigate to any application page from the More link, then you must leave the parameter value blank.

To map the More link code to the destination function, navigate to the Form Functions window. Query the Talent Profile form function that you have set up. Click the Form Tab region and configure the Parameter as follows:

MoreLinkMapMgr=<user defined sub-function name>&MoreLinkMapEmp=<userdefined sub-function name>, for example: MoreLinkMapMgr=HR_TP_MGR_MORE_LINK&MoreLinkMapEmp=HR_TP_EMP_MORE_LINK

The two parameters: MoreLinkMapMgr and MoreLinkMapEmp derive the destination for the More links. The value for both these parameters is a user defined sub-function. These sub-functions contain the mapping of region More link code to the destination function.

The following sections provide information about the predefined parameters supplied with the HR_TP_EMP_MORE_LINK and HR_TP_MGR_MORE_LINK sub-functions.

### Talent Profile More Link Manager (HR_TP_MGR_MORE_LINK)

**Predefined Form Parameters**

pTPMADDINFO=&pTPMBENFTS=BEN_SS_MGR_ENRT&pTPMCARERPATH=&pTPMCMPETNCY=HR_COMPETENCE_PROFILE_SS&pTPMPERFMATRIX=&pTPMJOBHIST=&pTPMSALARY=&pTPMCOMPSTMNT=&pTPMCASHCOMP=&pTPMCERT=OTA_LEARNER_HOME_SS&pTPMPERFOBJ=HR_MGR_TALMGMT_SS&pTPMAPPRAISAL=HR_VIEW_APPRAISALS_PAGE_SS&pTPMPREVEMP=&pTPMAWARDS=HR_AWARD_SS&pTPMQUALIFI=HR_QUALIFICATION_SS&pTPMSUCCPLAN=&pTPMTRAINING=OTA_LEARNER_HOME_SS&pTPMWORKPREF=HR_WORK_PREFERENCES_SS&pTPMPERFRATE=HR_MGR_VIEWS_HIST_SS

***More Links on the Talent Profile Manager View***

| Region Display Name | Region Code (Manager) | Parameter in the More Link Code | Default Parameter Value | Page that the More Link Displays |
|---|---|---|---|---|
| Other Information | HR_TP_MGR_ADDITIONALINFO_SS | pTPMADDINFO | Blank | Add Attachment page. |
| Appraisal | HR_TP_MGR_APPR_SS | pTPMAPPRAISAL | HR_VIEW_APPRAISALS_PAGE_SS | View Appraisals page |
| Other Professional Qualifications | HR_TP_MGR_AWARDS_SS | pTPMAWARDS | HR_AWARD_SS | Other Professional Qualifications |
| Benefits | HR_TP_MGR_BENFTS_SS | pTPMBENFTS | BEN_SS_MGR_ENRT | Self-Service Benefits Enrollment |
| Career Path | HR_TP_MGR_CARER_PTH_SS | pTPMCARERPATH | Blank | More link is not available in this region |
| Cash Compensation | HR_TP_MGR_CASH_COMP_SS | pTPMCASHCOMP | Blank | More link is not available in this region |
| Learning Certifications | HR_TP_MGR_CERTIFI_SS | pTPMCERT | OTA_LEARNER_HOME_SS | Learner Home |
| Competencies | HR_TP_MGR_COMPETENCY_SS | pTPMCMPETNCY | HR_COMPETENCE_PROFILE_SS | Competency Profile |

| Region Display Name | Region Code (Manager) | Parameter in the More Link Code | Default Parameter Value | Page that the More Link Displays |
|---|---|---|---|---|
| Compensation Statement | HR_TP_MGR_COMP_STAT_SS | pTPMCOMPSTMNT | Blank | More link is not available in this region |
| Job History | HR_TP_MGR_JOB_HIST_SS | pTPMJOBHIST | Blank | More link is not available in this region |
| Performance Objectives | HR_TP_MGR_PERF_OBJ_SS | pTPMPERFOBJ | HR_MGR_TALMGMT_SS | Performance Management page of the worker. |
| Previous Employment | HR_TP_MGR_PREV_EMP_SS | pTPMPREVEMP | Blank | More link is not available in this region |
| Qualifications | HR_TP_MGR_QUALIFI_SS | pTPMQUALIFI | HR_QUALIFICATION_SS | Education and Qualifications |
| Training | HR_TP_MGR_TRAINING_SS | pTPMTRAINING | OTA_LEARNER_HOME_SS | Learner Home |
| Work Preferences | HR_TP_MGR_WORK_PREF_SS | pTPMWORKPREF | HR_WORK_PREFERENCES_SS | Work Preferences |
| Performance Ratings | HR_TP_MGR_PERFRATING_SS | &pTPMPERFRATE | HR_MGR_VIEWS_HIST_SS | My Employee Information |

## Talent Profile More Link Employee (HR_TP_EMP_MORE_LINK)

**Predefined Form Parameters**

pTPMADDINFO=&pTPMBENFTS=BEN_SS_BNFT_ENRT&pTPMCARERPATH=&pTP

MCMPETNCY=HR_COMPETENCE_PROFILE_SS&pTPMPERFMATRIX=&pTPMJOBHIST=&pTPMSALARY=&pTPMCOMPSTMNT=BEN_TCS_EMPSS_WELCOME_PG&pTPMCASHCOMP=BEN_TCS_EMPSS_WELCOME_PG&pTPMCERT=OTA_LEARNER_HOME_SS&pTPMPERFOBJ=HR_EMP_TALMGMT_SS&pTPMAPPRAISAL=HR_EMP_MY_APPR_SS&pTPMPREVEMP=&pTPMAWARDS=HR_AWARD_SS&pTPMQUALIFI=HR_QUALIFICATION_SS&pTPMSUCCPLAN=&pTPMTRAINING=OTA_LEARNER_HOME_SS&pTPMWORKPREF=HR_WORK_PREFERENCES_SS&pTPMPERFRATE=HR_EMP_VIEWS_SS

***More Links on the Talent Profile Worker View***

| Region Display Name | Region Code (Employee) | Parameter in the More Link Code | Default Parameter Value | Page that the More Link Displays |
|---|---|---|---|---|
| Other Information | HR_TP_EMP_ADDITIONALINFO_SS | pTPMADDINFO | Blank | Add Attachments |
| Appraisal | HR_TP_EMP_APPR_SS | pTPMAPPRAISAL | HR_EMP_MY_APPR_SS | My Appraisals |
| Other Professional Qualifications | HR_TP_EMP_AWARDS_SS | pTPMAWARDS | HR_AWARD_SS | Other Professional Qualifications |
| Benefits | HR_TP_EMP_BENFTS_SS | pTPMBENFTS | BEN_SS_BNFT_ENRT | Self Service Benefits Enrollments |
| Career Path | HR_TP_EMP_CARER_PTH_SS | pTPMCARERPATH | Blank | More link is not available in this region |
| Cash Compensation | HR_TP_EMP_CASH_COMP_SS | pTPMCASHCOMP | BEN_TCS_EMPSS_WELCOME_PG | Total Compensation Statement |
| Certification | HR_TP_EMP_CERTIFI_SS | pTPMCERT | OTA_LEARNER_HOME_SS | Learner Home |

| Region Display Name | Region Code (Employee) | Parameter in the More Link Code | Default Parameter Value | Page that the More Link Displays |
|---|---|---|---|---|
| Competencies | HR_TP_EMP_COMPETENCY_SS | pTPMCMPETNCY | HR_COMPETENCE_PROFILE_SS | Competency Profile |
| Compensation Statement | HR_TP_EMP_COMP_STAT_SS | pTPMCOMPSTMNT | BEN_TCS_EMPSS_WELCOME_PG | Total Compensation Statement |
| Job History | HR_TP_EMP_JOB_HIST_SS | pTPMJOBHIST | Blank | More link is not available in this region |
| Performance Objectives | HR_TP_EMP_PERF_OBJ_SS | pTPMPERFOBJ | HR_EMP_TALMGMT_SS | Performance Management |
| Previous Employment | HR_TP_EMP_PREV_EMP_SS | pTPMPREVEMP | Blank | More link is not available in this region |
| Qualifications | HR_TP_EMP_QUALIFI_SS | pTPMQUALIFI | HR_QUALIFICATION_SS | Education and Qualifications |
| Salary | HR_TP_EMP_SALARY_SS | pTPMSALARY | Blank | More link is not available in this region |
| Succession Plan | HR_TP_EMP_SUCCESSION_SS | pTPMSUCCPLAN | Blank | This region is not available in the Employee view |
| Training | HR_TP_EMP_TRAINING_SS | pTPMTRAINING | OTA_LEARNER_HOME_SS | Learner Home |

| Region Display Name | Region Code (Employee) | Parameter in the More Link Code | Default Parameter Value | Page that the More Link Displays |
|---|---|---|---|---|
| Work Preferences | HR_TP_EMP_WORK_PREF_SS | pTPMWORKPREF | HR_WORK_PREFERENCES_SS | Work Preferences |
| Performance Matrix (Header is not shown) | HR_TP_EMP_PERF_METRICES_SS | pTPMPERFMATRIX | Blank | More link is not applicable |
| Performance Ratings | HR_TP_EMP_PERFRATING_SS | &pTPMPERFRATE | HR_EMP_VIEWS_SS | My Information |

You can display EIT, SIT, and custom content on the Talent Profile page, see:

- Person Extra Information Types (EITs)

  See: Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions, page 13-64

- Person Special Information Types

  See: Displaying Person Special Information Types (SITs) as Talent Profile Page Regions, page 13-68

- Custom content

  See: Displaying Custom Content as Talent Profile Page Regions, page 13-70

  **Note:** The EIT, SIT, and custom content regions do not support More links.

## 4. Grant the Custom Menus or Add the Custom Menus to the Responsibility

To enable managers and workers to use the Talent Profile features, you must grant the custom Talent Profile menus to the Oracle SSHR responsibilities assigned to the users.

You can grant the custom menus using the Functional Administrator responsibility. Grants enable managers and workers to access the Talent Profile functions. For information on creating grants and using permission sets, see: Grants and Permissions Sets (*Oracle E-Business Suite System Administrator's Guide - Security*)

You can also add the custom menus to the Oracle SSHR responsibilities assigned to the users using the System Administrator responsibility

## Completing the Configuration Steps for Talent Profile in SSHR

After you set up Talent Profile, you carry out the following configuration steps:

- Define Lookups for 9-Box Matrixes, page 13-38
- Configure the Quick Search and Hierarchy Regions, page 13-43
- Configure the Region Icon in the Talent Profile Regions, page 13-44
- Personalize the Talent Profile Page, page 13-45

### Define Lookups for 9-Box Matrixes

Using Talent Profile, managers can assess workers' potential, performance, and retention.

The Performance Matrix displays performance profile of the worker using the following matrices:

- Performance vs. Potential: Provides information on the performance and leadership potential of a worker. The application plots the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Potential rating on the vertical y-axis on a scale of 1 to 3.
- Performance vs. Retention: Provides information on a worker's performance and risk of loss. The application plots the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Retention rating on the vertical y-axis on a scale of 1 to 3.

To assess workers' performance, potential, and retention using the 9-box matrixes, you must complete the following steps:

- Define lookup types required for Talent Profile, page 13-38
- Define lookup types for 9-box matrixes, page 13-39
- Define mapping between Talent Profile and 9-box lookups , page 13-41

1. Define Lookup Types Required for Talent Profile

   Define the following lookup types to assess performance, potential, and retention:

- PERFORMANCE_RATING: Indicates the performance rating of a worker, such as, Excellent, Average, and Poor.

- PER_SUCC_PLAN_POTENTIAL: Indicates the succession potential of a worker and promotion to the next higher role, such as Emergency Stand-In and Promotion in 1 Year. The Succession Potential segment of the Employee Career Management Information person EIT uses values defined in this lookup.

- PER_SUCC_PLAN_RISK_LEVEL: Indicates the retention potential of a worker, such as High, Medium, and Low. This lookup stores the values for the Turnover Rate segment of the Job Career Management Information and Position Career Management Information EITs. The Risk of Loss segment of the Employee Career Management Information person EIT also uses this lookup values.

If these lookups have already been defined, then you must verify that the information meets your business requirements.

For information how to add lookup values, see: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Define Lookup Types for 9-box Matrixes

To display values in 9-box matrixes, you must add values to the following lookup types. When adding the lookup values, you must specify the code so that the application can display the relevant rating for a worker in the 9-box. If you do not enter the code, then the 9-box does not display the rating. Define a maximum of three codes on a scale of 1 to 3.

- PER_9_BOX_LEVEL

  This lookup type is used to display the performance rating for a worker. The following table provides an example of how you can define lookup values for PER_9_BOX_LEVEL.

| Code | Meaning | Description |
|---|---|---|
| 1 | Needs | Performance is significantly below the required level. |
| 2 | Meets | Performance is good and in-line with job requirements. |

| Code | Meaning | Description |
|---|---|---|
| 3 | Exceeds | Worker has exceeded the required level of performance. |

- PER_POTENTIAL_9_BOX_LEVEL

  Indicates the potential level of workers such as limited, growth, and high. The following table provides an example of how you can define lookup values for PER_POTENTIAL_9_BOX_LEVEL:

| Code | Meaning | Description |
|---|---|---|
| 1 | Limited | Worker shows little or no potential to move to the next work level. |
| 2 | Meets | Worker shows potential to advance to the next or higher work level. |
| 3 | Exceeds | Worker has requisite skills and expertise and exhibits leadership qualities. |

- PER_RETENTION_9_BOX_LEVEL

  Indicates the retention prospects of workers such as low, medium, and high. The following table provides an example of how you can define lookup values for PER_RETENTION_9_BOX_LEVEL:

| Code | Meaning | Description |
|---|---|---|
| 1 | Low | Risk of losing the worker is high. |
| 2 | Medium | Risk of losing the worker is moderate. |

| Code | Meaning | Description |
|---|---|---|
| 3 | High | Risk of losing the worker is minimal. |

3. Define mapping between Talent Profile and 9-box lookups

   The various matrixes do not directly use the lookup codes that you define in Step 1. The matrixes display ratings on a scale of 1-3 only using the 9-box lookup codes. To correctly represent workers' performance, potential, and retention dimensions, you must map the talent profile lookup codes to the 9-box look up codes.

   Use the following table to identify the 9-box lookup type that is associated with a talent profile lookup type:

| Talent Profile Lookup Type | 9-Box Lookup Type |
|---|---|
| PERFORMANCE_RATING | PER_9_BOX_LEVEL |
| PER_SUCC_PLAN_POTENTIAL | PER_POTENTIAL_9_BOX_LEVEL |
| PER_SUCC_PLAN_RISK_LEVEL | PER_RETENTION_9_BOX_LEVEL |

   The following example looks at why you must map a talent profile lookup type to a 9-box lookup type:

   In your enterprise, you have defined the following values for the PERFORMANCE_RATING lookup type to assess performance of workers:

   1. Below Average
   2. Average
   3. Sastisfactory
   4. Good
   5. Excellent
   6. Outstanding

   You have defined the following values for the PER_9_BOX_LEVEL lookup to represent performance in the 9-box matrix:

| Code | Meaning | Description |
|---|---|---|
| 1 | Needs | Performance is significantly below the required level. |
| 2 | Meets | Performance is good and in-line with job requirements. |
| 3 | Exceeds | Worker has exceeded the required level of performance. |

As the application uses only three levels in a 9-box, you must map the six PERFORMANCE_RATING lookup values to the three PER_9_BOX_LEVEL codes using the User Types and Statuses window.

You can define the following mapping:

| PERFORMANCE_RATING values | Mapped to PER_9_BOX_LEVEL |
|---|---|
| Below Average<br>Average | 1: Needs |
| Satisfactory<br>Good | 2: Meets |
| Excellent<br>Outstanding | 3: Exceeds |

Follow these steps to define mapping between talent profile and 9-box lookups:

1. Navigate to the User Types and Statuses window.
2. Select a lookup type, for example, PERFORMANCE_RATING.
3. In the System Type field, select the lookup value that you want to extend. For example, select the Satisfactory system type.
4. Enter a description of the new user type or status. For example, enter Meets as a description.
5. Enter a code for the new user type or status. For example, enter 2.

6. Click the Further Info field. The Share Type Information window appears.

7. Select the 9 Box level that the user status applies to.

8. Repeat the steps to map the PERFORMANCE_RATING 'Good' value with the PER_9_BOX_LEVEL value 'Meets'.

9. Save your work.

See: Creating User Types and Statuses, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Configure the Quick Search and Hierarchy Regions

By default, the Talent Profile page displays two regions: Quick Search and Hierarchy that managers can use to navigate between talent profiles of workers. These regions are configurable and can be removed from the Talent Profile page.

The following sections explain the regions and how you can configure them.

### Configuring the Quick Search Region

The Quick Search region displays two search options:

- Search Profile

  Displays profiles that logged in user can access. Users can select one of the profiles and click the Show Profile button to view the talent profile details.

- Recently Visited Profile

  This option displays recently viewed profiles. Currently, the visited profiles information is stored only in the transaction and this information is lost once the transaction ends.

To display the region, you must grant the HR_TP_VIEW_GBL_SEARCH_SS function to the user.

Details of the Function

- User Function Name: Talent Profile Global Search Enabled

- Type: SUBFUNCTION

### Configuring the Hierarchy Bean

The hierarchy bean appears at the top of the profile below the Quick Search region. The hierarchy bean lists the workers in the supervisor hierarchy of the logged in user.

To display the hierarchy bean, you must the grant the HR_TP_VIEW_PER_HIERARCHY_SS function to the user.

Details of the Function

- User Function Name: Talent Profile Show Person Hierarchy Enabled
- Type: SUBFUNCTION

## Configure the Region Icon in the Talent Profile Regions

All the Talent Profile regions display icons that indicate the regions content in a graphical representation. You can add the required icons using the Personalization function. Each region is shared region and a separate XML document. Place the icons that are going to be used in the Talent Profile Regions in the OA_Media folder.

Locate the region icon item and navigate to the PhotoCellRN page element. The Photo item of PhotoCellRN is an image type item. This item has an Image URI property, which is set to a blank image, by default. To display another image, personalize this property to point to the required image to be used on the region by starting with '/OA_Media/' followed by the icon file name of the icon being used for this region.

## Display Regions on the Talent Profile page

Display regions on the Talent Profile page to view additional person specific details:

- Person Extra Information Types (EITs)

  See: Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions, page 13-64

- Person Special Information Types

  See: Displaying Person Special Information Types (SITs) as Talent Profile Page Regions, page 13-68

- Custom content

  See: Displaying Custom Content as Talent Profile Page Regions, page 13-70

  **Note:** The EIT, SIT, and custom content regions do not support More links.

## Configure the Print Profile Default XML Template, if Required

Oracle Succession Planning delivers the Single Person Profile Template (PEREMPTP) to print the talent profile of a worker.

The predefined Single Person Profile Template (PEREMPTP) is available to print the talent profile of a worker.

You can create custom print profile templates based on your business requirements.

Your custom print profile template must be based on the predefined Single Person Profile Template (PEREMPTP). Whenever you create a custom template to generate the Printable Profile (Full) report, you must set the custom template code as the value of the 'FullProfileTemplateCode' parameter value in the relevant Talent Profile launch function so that the application uses the custom print profile template.

To create and use a custom template of the Printable Profile (Full) report, follow these steps:

1. Log in to the XML Publisher Administrator responsibility.
2. Create a XML template based on the predefined PEREMPTP template. For example, name the custom template as Custom template for Talent Profile and code as PEREMPTPCUST.
3. Navigate to the Form Functions window using the System Administrator responsibility.
4. Query the relevant Talent Profile launch function to which you want to add the custom print profile template. For example, query the Talent Profile (HR_TALENTPROFILE_SS) function.
5. Click the Form tab. You view the existing parameter definitions.
6. Add the following parameter:

   FullProfileTemplateCode=PEREMPTPCUST

   **Important:** The parameter value must be same as the code of the custom template that you created in the earlier step.

7. Save your work.

# Personalizing the Talent Profile Page

This topic provides information on personalizing Talent Profile regions and region columns.

See: *Oracle Application Framework Personalization Guide* for more information on personalizing OA Framework pages.

## Talent Profile Regions

Use the information in the following table to create or rearrange regions on the Talent Profile page (/oracle/apps/per/talentprofile/webui/TMProfileRN):

**Note:** TMProfileRN represents the entire page. Therefore, you cannot add this region, for example, in the Appraisals region of the Talent Profile page.

| Region Display Name | Region Path |
|---|---|
| Other Information | /oracle/apps/per/talentprofile/additionalinfo/webui/AdditionalInformationRN |
| Appraisal | /oracle/apps/per/talentprofile/performance/webui/AppraisalChartRN |
| Other Professional Qualifications | /oracle/apps/per/talentprofile/qualifications/webui/AwardsOverviewRN |
| Benefits | /oracle/apps/per/talentprofile/benefit/webui/BenefitsOverviewRN |
| Career Path | /oracle/apps/per/talentprofile/careerpath/webui/CareerPathRN |
| Cash Compensation | /oracle/apps/per/talentprofile/empsalary/webui/SalaryCashCompGraphRN |
| Certification | /oracle/apps/per/talentprofile/learning/webui/CertificationsSummaryRN |
| Competencies | /oracle/apps/per/talentprofile/competency/webui/CompetencyOverviewRN |
| Compensation Statement | /oracle/apps/per/talentprofile/empsalary/webui/SalaryComponentsRN |
| Job History | /oracle/apps/per/talentprofile/employment/webui/CareerHistoryRN |

| Region Display Name | Region Path |
|---|---|
| Performance Objectives | /oracle/apps/per/talentprofile/perfmanagement/webui/PerformanceManagementRN<br><br>**Note:** Talent Profile retrieves information about objectives from Oracle Performance Management. The plan administrator must select the Include Objective Setting in Process check box for a plan to display details of objectives in the Performance Objectives region for both direct and indirect reports of a manager. For more information, refer to the *Oracle Performance Management Implementation and User Guide* |
| Previous Employment | /oracle/apps/per/talentprofile/prevemp/webui/PrevEmploymentOverviewRN |
| Qualifications | /oracle/apps/per/talentprofile/qualifications/webui/QualificationsOverviewRN |
| Salary | /oracle/apps/per/talentprofile/empsalary/webui/SalaryOverviewRN |
| Succession Plan | R12.1 HRMS RUP5:<br>/oracle/apps/per/talentprofile/successionplannew/webui/SuccessionPlanNewOverviewRN<br><br>Pre R12.1 HRMS RUP5:<br>/oracle/apps/per/talentprofile/successionplan/webui/SuccessionPlanOverviewRN<br><br>See this, page 13-48 section for more information. |
| Training | /oracle/apps/per/talentprofile/training/webui/TrainingOverviewRN |
| Work Preferences | /oracle/apps/per/talentprofile/workpreference/webui/WorkPreferenceOverviewRN |
| Performance Matrix (Header is not shown) | /oracle/apps/per/talentprofile/performancematrix/webui/NineBoxSwitcherRN |
| Performance Ratings | /oracle/apps/per/talentprofile/performance/webui/PerformanceRatingRN |

## Talent Profile Region Columns

You can personalize the supplied Talent Profile region columns to suit your business requirements. For example, by default, the Competencies region displays the following columns:

- Competency Name
- Current Proficiency Level
- Status
- Start Date
- End Date

If required, you can add columns to display different information. Using personalization, you can change labels, hints, tips, and messages.

See: *Oracle Application Framework Personalization Guide*, Extensibility chapter.

## Display the Relevant Succession Plan Region on the Talent Profile Page of a Worker

Managers can view succession plan details of their workers when they navigate to the Talent Profile of workers. By default, the Talent Profile page of a worker displays the Succession Plan region (SuccessionPlanNewOverviewRN) that is part of the R12.1 HRMS RUP5 Succession Planning model.

The SuccessionPlanNewOverviewRN region contains the following columns:

- Successors Identified for
  - Name
  - Succession Status
  - Performance
  - Succession Potential
  - Retention Potential
  - Impact of Loss
  - Readiness Percent
- Succession Plans for
  - Worker/Role Name

- Plan Status
- Succession Status
- Performance
- Succession Potential
- Retention Potential
- Impact of Loss
- Readiness Percent

If you are not using the Succession Planning model of R12.1 HRMS RUP5, then you must hide this version of the Succession Plan region and display the pre R12.1 HRMS RUP5 Succession Plan region (SuccessionPlanOverviewRN) on the Talent Profile page.

The SuccessionPlanOverviewRN region contains the following columns:

- Successor For
  - Successor
  - Potential Level
  - Earliest Succession Date
- As Successor
  - Succession Plan For
  - Name
  - Potential Level
  - Earliest Succession Date

Complete the following steps to display the pre R12.1 HRMS RUP5 Succession Plan region:

1. Navigate to the Talent Profile page of a worker.
2. Click the Personalize link.
3. Choose the appropriate context.
4. Click Complete View and Expand All options.

5. Navigate to the Flexible Layout row of the SuccessionPlanNewFlexRN region.

6. Click Remove Content and then select Yes. This action hides the R12.1 HRMS RUP5 Succession Plan region.

7. Navigate to the Flexible Layout row that does not have content.

8. Click Add Content (green plus icon). The Add Content page appears.

9. Click Next until you view the Succession Plans option.

10. Select this option and click Apply.

11. Click Return to Application. The worker's Talent Profile page now displays the pre R12.1 HRMS RUP5 Succession Plan region.

# Configuring Manager and Personal Actions in Talent Profile

This topic provides information on how to configure the manager and personal actions available from the following sections in the Talent Profile page.

- Actions list in the Talent Profile page
- Side Navigator in the Talent Profile page

## Configuring the Actions List

In Talent Profile, the standard Personal Actions or Manager Actions list is role based. The Actions list contains Personal Actions or Manager Actions depending on the profile the person is viewing.

- If the person viewing the Talent Profile page is an employee, then the actions that are available are defined by the value set for the HR: Personal Actions Menu profile option. These are the same actions that are available from the following navigation: Employee Self Service > Personal Actions.

- If the person viewing the Talent Profile page is an employee and is a manager, then the actions that are available are defined by the value set for the HR:Manager Actions Menu profile option. These are the same actions that are available from the following navigation: Manager Self Service > Manager Actions

- If the person viewing the Talent Profile page is a contingent worker, then the actions that are available are defined by the value set for the HR:Contingent Worker Personal Actions Menu profile option. These are the same actions that are available from the following navigation: Contingent Worker Self Service > Personal Actions.

- If the person viewing the Talent Profile page is a contingent worker and is a manager, then the actions that are available are driven by the value set for the HR: Contingent Worker Manager Actions Menu profile option. These are the same functions that are available from the following navigation: Manager Self Service > Manager Actions.

If you want to configure the Actions list according to your business requirements, then you must create custom menus using the predefined menus.

### Functions in the Available in the Predefined Personal Actions Menu

The following table provides a list of functions available in the predefined Personal Actions Menu:

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Personal Information | | | Personal Information | Y | |
| Payslip | | | Payslip | Y | |
| W4 Information | | | Employees W4 Information | Y | |
| Manage Payroll Payments | | | Manage Payroll Payments V4.0 | N | |
| Release Information | | | Release Information | Y | |
| | | | Employee Appraisals | N | Obsolete - replaced with Employee: My Appraisals Page |
| Appraisals | | | Employee: My Appraisals Page | Y | |
| Suitability Matching | | | Suitability Matching | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Tenure Status | | | Tenure Status Overview | Y | |
| Academic Rank | | | Academic Rank | Y | |
| Education and Qualifications | | | Qualification | Y | |
| Other Professional Qualifications | | | Award | Y | |
| Competency Profile | | | Competency Profile | Y | |
| Work Preferences | | | Work Preferences | Y | |
| Resume | | | Resume | Y | |
| Apply for Job | | | Search and Apply for a Job Page | Y | |
| | | | Enroll and Cancel Training | N | |
| | | | External Training | N | |
| Employee W2 | | | Employee W2 | Y | |
| Extra Information | | | Extra Information Types | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Special Information | | | Special Information Types | Y | |
| Event And Bookings | | | Event And Bookings | Y | |
| Employee Review | | | Employee Reviews V4.0 | Y | |
| Absence Management | | | Absence Management | Y | |
| | | | Training Plan Views | N | |
| Contact Extra Information | | | Contact Extra Information | Y | |
| Private Vehicle Entry | | | SS Vehicle Repository | Y | |
| Vehicle Mileage Expenses | | | SS Mileage Claim | Y | |
| Commutation Information | | | JP Commutation Information Self Service | Y | |
| Documents of Record | | | Documents of Record | Y | |
| Employment Verification | | | Employment Verification | Y | |

| Prompt | Sub Menu | Sub Menu Type | Function | Grant | Description |
|---|---|---|---|---|---|
| Voluntary Termination | | | Voluntary Termination | Y | |
| Charitable Contributions | | | Charitable Contributions | Y | |
| Manage Payroll Payments | | | Manage Payroll Payments V4.0 | Y | |
| Employee Directory | | | Proxy Page | N | |
| Organization Manager V4.0 | | | Organization Manager | Y | |
| | OTA Learner Application Menu | HOMEPAGE | | Y | |
| Defined Contribution Plan Enrollment | | | Defined Contribution Plan Enrollment | Y | |

### Functions in the Available in the Predefined Manager Actions Menu

The following table provides a list of functions available in the predefined Manger Actions menu.

| Prompt | Function | Grant | Description |
|---|---|---|---|
| | Worker Status Change V5.2 | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Worker Status Change | Worker Status Change | Y | |
| | Change Hours V5.2 | Y | |
| Change Hours | Change Hours | Y | |
| Termination | Termination | Y | |
| | Change Pay V5.2 | Y | |
| Change Pay | Change Pay | Y | |
| Change Job | Change Job | Y | |
| | Transfer V5.2 | Y | |
| Change Cost Center, Location and Manager | Change Cost Center, Location and Manager | Y | |
| Personal Information | Personal Information | Y | |
| Tenure Status | Tenure Status | Y | |
| Transfer | Transfer | Y | |
| Education and Qualifications | Qualification | Y | |
| Other Professional Qualifications | Award | Y | |
| Competency Profile | Competency Profile | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Work Preferences | Work Preferences | Y | |
| Resume | Resume | Y | |
| Training | Enroll and Cancel Training | N | |
| External Training | External Training | N | |
| Change Job and Terms | Change Job and Terms | Y | |
| Change Cost Center, Terms and Manager | Change Cost Center, Terms and Manager | Y | |
| Extra Information | Extra Information Types | Y | |
| | Change Worker Status and Terms V5.2 | Y | |
| Change Worker Status and Terms | Change Worker Status and Terms | Y | |
| Employee Review | Employee Reviews V4.0 | Y | |
| Individual Compensation Distribution (Original) | Self Service Individual Distributions (Original)-Internal Use | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Individual Compensation Distributions | Self Service Individual Compensation Distributions-Internal | Y | |
| | Organization Manager | N | Obsolete |
| | Hire V5.2 | N | Obsolete |
| | Applicant Hire V5.2 | N | Obsolete |
| | French Hire | N | Obsolete |
| | French Applicant Hire | N | Obsolete |
| IRASLINE Information Types | SG IRASLINE Person EIT | Y | |
| Private Vehicle Entry | SS Manager Vehicle Repository | Y | |
| Vehicle Mileage Expenses | SS Mileage Claim | Y | |
| Commutation Information | JP Commutation Information Self Service | Y | |
| Assign Schedules and Manage Exceptions | Assign Schedule | Y | |
| Documents of Record | Documents of Record | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| Contact Extra Information | Contact Extra Information | Y | |
| | Hire | Y | |
| | Applicant Hire | Y | |
| | Special Information Types V4.0- OSHA | Y | |
| | Special Information Types V4.0- Stock Options | Y | |
| Competence Profile | ADS Competence Profile V4.0 | Y | |
| Applicant Hire iRecruitment | Applicant Hire iRecruitment | Y | |
| Transfer with Compensation Distribution V4.0 | Transfer with Comp V4.0 | Y | |
| IRASLINE Person Extra Information Types | SG IRASLINE Person EIT | Y | |
| Private Vehicle Entry | SS Vehicle Repository | Y | |
| Assignment Costing | Assignment Costing | Y | |
| | Assignment Costing Workflow Notify | Y | |

| Prompt | Function | Grant | Description |
|---|---|---|---|
| | Reverse Termination | Y | |
| P11D | P11D Manager Action | Y | |
| Change Manager | Change Manager | Y | |
| Termination with Compensation | Termination with Compensation V4.0 | Y | |
| Release Information | Release Information | Y | |
| Academic Rank | Academic Rank | Y | |
| Special Information | Special Information Types | Y | |
| Event And Bookings | Event And Bookings | Y | |
| Absence Management | Absence Management | Y | |

## Configuring the Action Links in the Side Navigation Container

Managers and workers can process multiple self-service transactions effectively and with minimum navigation using the action links in a side navigator. The side navigator appears in a separate page when they select an Action in the Talent Profile page.

The manager or personal actions that appear in the side navigation container are driven by the following menus:

- SSHR Emp Side Bar Menu (HR_SS_EMP_SIDEBAR) for worker personal actions.

  The following table provides a list of worker personal actions that are supported and not supported in the side navigation container:

| Worker Action | Supported: Y/N |
|---|---|
| Personal Information | Y |
| Payslip | Y |
| W4 Information | Y |
| Release Information | Y |
| Suitability Matching | N |
| Tenure Status | Y |
| Academic Rank | Y |
| Education and Qualifications | Y |
| Other Professional Qualifications | Y |
| Competency Profile | N |
| Work Preferences | Y |
| Resume | N |
| Employee W2 | N |
| Extra Information | Y |
| Special Information | Y |
| Event & Bookings | Y |
| Employee Review | Y |
| Absence Management | Y |
| Contact Extra Information | Y |
| Private Vehicle Entry | Y |

| Worker Action | Supported: Y/N |
|---|---|
| Documents of Record | Y |
| Voluntary Termination | Y |
| Manage Payroll Payments | Y |
| Organization Manager | Y |
| Vehicle Mileage Expenses | Y |
| Employment Verficiation | Y |
| P60 | Y |
| P11D | Y |

- SSHR Side Bar Menu (HR_SS_SIDEBAR) for manager actions.

  The following table provides a list of manager actions that are supported and not supported in the side navigation container:

| Manager Action | Supported: Y/N |
|---|---|
| Work Preferences | Y |
| Individual Compensation Distribution | Y |
| Private Vehicle Entry | Y |
| P11D | Y |
| Allocated Checklist | Y |
| P60 | Y |
| Documents of Record | Y |

| Manager Action | Supported: Y/N |
|---|---|
| Academic Rank | Y |
| Release Information | Y |
| Tenure Status | Y |
| Change Cost Centre, Location and Manager | Y |
| Termination with Compensation | Y |
| Change Cost Center, Terms and Manager | Y |
| Change Manager | Y |
| Contact Extra Information | Y |
| Other Professional Qualifications | Y |
| Education and Qualifications | Y |
| Events and Bookings | Y |
| Extra Information | Y |
| IRASLINE Information Types | Y |
| Training Plans Manager | N |
| Transfer | Y |
| Worker Status Change | Y |
| Absence Management | Y |

| Manager Action | Supported: Y/N |
|---|---|
| Enroll and Cancel Training | N |
| External Training | N |
| Resume | N |
| Assign Schedules and Manage Exceptions | Y |
| Assignment Costing | Y |
| Commutation Information | Y |
| Competency Profile | N |
| Special Information | Y |
| Termination | Y |
| Change Job | Y |
| Change Pay | Y |
| Personal Information | Y |
| Employee Review | Y |
| Vehicle Mileage Expenses | Y |
| Manage Payroll Payments | Y |
| Change Worker Status and Terms | Y |

**Important:** The manager and personal actions whether launched from Self-Service Manager Actions, Personal Actions, Organization Chart or

Talent Profile are the same. As some of the self-service functions are not supported in the side navigation container, there would be a mismatch between functions in the side navigation container and the drop-down list available in Talent Profile.

**Configuration Guidelines for the Side Navigator**

The SSHR Side Bar Menu (HR_SS_SIDEBAR) and SSHR Emp Side Bar Menu (HR_SS_EMP_SIDEBAR) contain a list of predefined supported functions including global and localization specific. During implementation, you can remove those functions that are not applicable to your legislation using the "function exclusion" feature available in the Responsibility window of the System Administrator responsibility.

### Enabling Managers to View and Perform Manager Actions for Multiple Assignments

Using Talent Profile, managers can view and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR: Enable Multiple Assignments in SSHR system profile to allow this. See the Multiple Assignments section in the User Access and Security in Oracle SSHR, page 2-3 topic.

## Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions

To view additional details of workers, you can display the Person Extra Information Types (EITs) as regions on the Talent Profile page. You can display a maximum of 10 EIT regions. Use the Oracle Application Framework Personalization feature to display EITs as regions.

On the Talent Profile page, you can add the EIT region and then configure the *Flex: Descriptive Flex (HrEitDescFlex)* item in this region to display contexts and segments of your choice.

**Note:** The EIT region does not support More link.

To display EITs as regions, complete the steps explained in this topic.

### Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:
   - Personalize Self-service Defn

- FND: Personalization Region Link Enabled
- Self Service Accessibility Features

For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Set up descriptive flexfield segments to record EIT data. EITs are defined using descriptive flexfields.

   See: *Extra Information Types* in the *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Displaying EITs as Regions

**Example 1**

In this example, you display the Passport Details region on the Talent Profile page. To display this region, you must have defined the required flexfield segments such as Country, Passport Number, Issue Date, and Expiry Date before carrying out these steps:

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the EIT region.
5. Click the Add Content icon to add the new region.

   The Add Content page appears.
6. Select any one of the available Extra Information Types regions. 10 EIT predefined regions are available for Talent Profile. Oracle recommends that you select only one EIT region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.

   As a next step, configure the EIT region to enter the title.
8. Click the Personalize icon for that region.
9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Passport Details and click Apply.

You specify the required flexfield context to see the EIT data for that context.

11. Click the Personalize icon of the Flex:Descriptive Flex item.

12. Enter the EIT context and the flexfield segments that you want to display. Use the following format when specifying the context and segments:

    For example:

    ```
    ContextName|SegmentName1|SegmentName2
    ```

    ```
    Passport Details|Country|Status|Passport Number|Date of Issue|Expiry Date
    ```

13. Click Apply to save your changes.

**Example 2**

In this example, you display multiple EITs: Employee Succession Planning Information and Tenure Status Details. Note that you must have defined the required segments for these flexfields before carrying out these steps:

1. Navigate to the Talent Profile page.

2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.

3. Select the required Personalization level and click Go.

4. Click the Content tab and select a layout where you want to add the EIT region

5. Click the Add Content icon to add the new region.

   The Add Content page appears.

6. Select any one of the available Extra Information Types regions. 10 EIT predefined regions are available for Talent Profile. Oracle recommends that you select only one EIT region for each flexible layout.

7. Click Apply. You can view this region on the Talent Profile page.

   As a next step, configure the EIT region to enter the title.

8. Click the Personalize icon for that region.

9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.

10. Change the Prompt field with the desired title such as Passport Details and click Apply.

    You specify the required flexfield context to see the EIT data for that context.

11. Click the Personalize icon for the Flex:Descriptive Flex item.

12. Enter the multiple EIT contexts and the flexfield segments that you want to display. Use double pipe || to enter two different contexts while the segments can be separated by single pipe |

    For example:

    ```
    ContextName|SegmentName1|SegmentName2||ContextName2|SegmentName1|Seg
    mentName2
    ```

    ```
    Employee Succession Planning Information|Succession
    Potential|Retention Potential||Tenure Status| Tenure Status|Date
    Determined
    ```

13. Click Apply to save your changes.

## Restricting Access to Sensitive EIT Information

When you display EIT regions, there may be some information that is sensitive, which requires to be hidden from users who log in to the application. For example, if you configure an EIT to display additional succession planning information, managers can view such additional succession planning information when they navigate to their Talent Profile page as workers. To restrict the display of such sensitive information, use the 'ShowLoggedInDtls' formvalue available with every EIT on the Talent Profile page. To control the display of EIT information for the logged in manager, you must specify the value using the OAF Personalization feature. If the value of this formvalue is set to 'Y', then the EIT information is visible to the logged in manager. If the value of this Form Value is set to 'N', then the EIT information is not displayed to the logged in manager.

Complete the following steps to restrict access to sensitive EIT information:

1. On the Talent Profile page, click the Personalize page link.

2. Select the 'Content' tab.

3. In the EIT region, click the Personalize properties (pencil) icon.

4. Select the Complete View radio button.

5. Click the Expand All link.

6. Click the Personalize icon for the Form Value personalization item.

7. Set the value to "Y' or 'N' as required.

8. Click Apply to save your work.

# Displaying Person Special Information Types (SITs) as Talent Profile Page Regions

To view additional details of workers, you can display the person Special Information Types (SITs) as regions on the Talent Profile page. You can display a maximum of 10 SIT regions. Use the Oracle Application Framework Personalization feature to display SITs as regions.

On the Talent Profile page, you can add the SIT region and then configure the *Flex: Key flex for Sit (HrSitKeyFlex)* item to display contexts and segments of your choice.

**Note:** The SIT region does not support More link.

To display SITs as regions, complete the steps explained in this topic.

## Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:
   - Personalize Self-service Defn
   - FND: Personalization Region Link Enabled
   - Self Service Accessibility Features

   For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Set up key flexfield segments to record SIT data. SITs are stored in a key flexfield combination table where the combination of segments must be unique.

   See: *User Definable Key Flexfields* in the *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Displaying SITs as Regions

**Example 1**

In this example, you display the Visa Details region on the Talent Profile page. To display this region, you must have defined the required flexfield segments such as Visa Type and Purpose of Visa.

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.

3. Select the required Personalization level and click Go.

4. Click the Content tab and select a layout where you want to add the SIT region.

5. Click the Add Content icon to add the new region.

   The Add Content page appears.

6. Select any one of the available Special Information Type regions. 10 SIT predefined regions are available. Oracle recommends that you select only one SIT region for each flexible layout.

7. Click Apply. You can view this region on the Talent Profile page.

   As a next step, configure the SIT region to enter the title.

8. Click the Personalize icon for that region.

9. Scroll to the SitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.

10. Change the Prompt field with the desired title such as Visa Details and click Apply.

    You specify the required flexfield context to see the EIT data for that context.

11. Click the Personalize icon of the Flex:Descriptive Flex item.

12. Enter the SIT context and the flexfield segments that you want to display. Use the following format when specifying the context and segments:

    For example:

    ```
    ContextName|SegmentName1|SegmentName2
    Visa Details|Visa Type|Purpose of Visa
    ```

13. Click Apply to save your work.

**Example 2**

In this example, you display multiple SITs: Vehicle Profile and Work Environment. Note that you must have defined the required segments for these flexfields.

1. Navigate to the Talent Profile page.

2. Click the global Personalize Page link. The Page Layout Personalization page appears.

3. Select the required Personalization level and click Go.

4. Click the Content tab and select a layout where you want to add the SIT region

5. Click the Add Content icon to add the new region.

   The Add Content page appears.

6. Select any one of the available Extra Information Types regions. 10 SIT predefined regions are available for Talent Profile. Oracle recommends that you select only one SIT region for each flexible layout.

7. Click Apply. You can view this region on the Talent Profile page.

   As a next step, configure the SIT region to enter the title.

8. Click the Personalize pencil icon for that region.

9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.

10. Change the Prompt field with the desired title such as Passport Details and click Apply.

    You specify the required flexfield context to see the EIT data for that context.

11. Click the Personalize icon for the *Flex: Key Flex for Sit* item.

12. Specify the multiple SIT contexts and the flexfield segments that you want to display. Use double pipe `||` to enter two different contexts while the segments can be separated by single pipe `|`

    For example:

    ```
    ContextName|SegmentName1|SegmentName2||ContextName2|SegmentName1|Seg
    mentName2
    ```

    ```
    Vehicle Profile|Vehicle Type|Issue Date|Plate Number|State
    Issued||Work Environment|Location|Plant|Field|Home
    ```

13. Click Apply to save your work.

## Displaying Custom Content as Talent Profile Page Regions

On the Talent Profile page, you can use custom regions to display business specific details. You can configure custom regions if you need to use information structures other than EITs or SITs. Use a SQL Statement to retrieve the business specific information from the database and then configure the custom regions to display the content. You can configure a maximum of 10 custom regions on the Talent Profile page.

> **Note:** The custom region does not support More link.

To display custom content as regions, complete the steps explained in this topic.

## Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:

   - Personalize Self-service Defn
   - FND: Personalization Region Link Enabled
   - Self Service Accessibility Features

   For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Create a database view based on one or more tables in the database. Consider security and information requirements before creating a database view.

   You can use the Additional WHERE clause to display the data of the worker whose profile is being viewed, if the database view returns data for all workers. This clause uses specific parameters that are passed dynamically. Following are the parameters:

   - ##PERSON_ID## - Person ID of the currently viewed worker's profile
   - ##PRIMARY_ASSIGNMENT_ID## - Assignment ID of the currently viewed worker's profile
   - ##LOGIN_PERSON_ID## - Person ID of the logged in worker who is a manager
   - ##BUSINESS_GROUP_ID## - Business group ID of the currently viewed worker
   - ##EFFECTIVE_DATE## - Effective date in the format "YYYY-MM-DD HH24:MI:SS"

   Following rules apply when you create a database view:

   1. Views can be based on any database table.
   2. Create an alias starting with 'D_' or 'd_' for the view columns that you want to display on the Talent Profile page.
   3. Use the HR_TP_NAME_TRANSLATIONS lookup type to create a lookup for each column that is created as an alias in the previous step. The lookup code must be the same as the column alias. Provide a user friendly value in the Meaning column as this value appears as the column header in the custom region of the Talent Profile page.

      Example of Lookup Codes

| Code | Meaning |
|---|---|
| D_FULL_NAME | Full Name |
| D_PARTY_ID | Party Identifier |

3. Write a SQL statement to retrieve data from the database view.

## Displaying Custom Content as Talent Profile Regions

**Example 1**

In this example, you display the Worker Information region that has two columns: Name and Party Number. The Additional Where clause in this example has a person_id IN clause where the login_person_id and the person_id of the worker whose profile is being viewed are passed.

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the custom region
5. Click the Add Content icon to add the new region.

   The Add Content page appears.
6. Select any one of the available Dynamic View regions. 10 Dynamic View predefined regions are available. Oracle recommends that you select only one dynamic region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.

   As a next step, configure the dynamic region to enter the title.
8. Click the Personalize icon for that region.
9. Scroll to the DyncVwFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Worker Information and click Apply.

The Dynamic View has three parameters that you must configure to display data in the region:

- Layout Style: Valid values are: TABLE - Table Layout and FORM - Message Component (Form) Style Layout
- DyViewName: The database view name that you created to show the required data in the custom region.
- DyWhereClause: Any additional where clause that is required to further filter the data retrieved from the view.

11. Click the personalize icon of the DyViewName item to specify the database view name.
12. Change the Prompt field with the desired database view name for the region and click Apply.
13. Click the personalize icon for the DyWhereClause item to specify the additional where clause.
14. Change the Prompt field with the desired additional Where Clause for the region and click Apply.

# 14

# Absence Management

# Absence Management

## Absence Management in SSHR

The Absences module enables employees or managers to enter absence-related information in SSHR. You can request multiple absences and view them in a summary format. You can also view a history of absences you have taken and display current leave entitlement balances. You can submit a planned absence request (before the absence is taken) or a confirmed request (either after the absence is completed or when dates have been finalized before the absence begins).

You can download absence details such as absence date to the calendar application that you use, if the Export feature is enabled. Your system administrator configures the Export feature.

You can update absence requests as a manager or employee, for example, to change the absence dates or confirm the absence. Planned, confirmed, and updated requests can be submitted for approval. You cannot update requests when they are pending approval.

> **Note:** If your administrator has configured it, you can view and apply for only those absence types for which you are eligible.

You can view your accrual balances as an employee, or those of other employees as their manager.

See: Viewing Accrual Balances using SSHR, page 14-4.

For more information on Absence Management, see: Absence Management and PTO Accruals, *Oracle HRMS Compensation and Benefits Management Guide*

**UK Users Only:**

Entering a Sickness Absence, *Oracle HRMS Compensation and Benefits Management Guide*

Entering Sickness Evidence, *Oracle HRMS Compensation and Benefits Management Guide*

### Info Online

Access the web site of third-party information providers, if your enterprise enables the Info Online content container. If the Handbook link is available, you can click it for information on company's absence policies.

## Accrual Balances Maintained by SSHR : Overview

Managers and employees can view accrued leave details based on an effective date using Oracle SSHR.

Managers

Using the Manager Self-Service responsibility, you can view accrued leave details for employees in your team and allocate or plan deliverable accordingly.

You can:

- View Accrual balances in the View Entitlement Balances pop-up window from approval notifications

  **Note:** This does not apply to email notifications.

- The notification for approval displays the accrual balance as of the system date, by default. You can enter an effective date and query for accrual balance as of that date in the View Entitlement Balances pop-up window. Additionally, you can personalize the effective date to display the accrual balance only as of the system date, or personalize to hide the View Entitlement Balance pop-up window.

- When you create, update, confirm, or submit an absence on behalf on an employee, you can view the employee's entitlement balances in the View Entitlement Balances pop-up window. You can also view the accrual balances for all assignments of an employee when you navigate to the notification from the worklist or workflow responsibilities.

  **Note:** If a terminated employee queries for leave accrual on a future date beyond the termination date, instead of the accrual information, the application will display the following message: Contact your HR Representative for information on your accrual balance.

Employees

Using Employee Self-Service, you can view your accrued leave, allowing you with the flexibility of planning vacations well in advance.

You can:

- View accrual balance in the View Entitlement Balances pop-up window when creating, updating and submitting an absence

- View accrual balance in the View Entitlement Balances pop-up window when confirming a planned absence

- By default, you can view the accrual balances as of the system date. You can enter an effective date and query for accrual balance as of that date in the View Entitlement Balances pop-up window. Additionally, you can personalize the effective date to display the accrual balance only as of the system date, or personalize to hide the View Entitlement Balance pop-up window.

Managers and employees must use the Effective Date field on the tab Entitlement Balances, of the Absence Management Summary table, to query for accrued leave.

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

See: How do we track and analyze absences and net accrual entitlement:Leave and Absence Management, *Oracle HRMS Compensation and Benefits Management Guide*

See: Leave and Absence Management:Self-Service Functionality, page 1-6

## Viewing Accrual Balances in SSHR

Using SSHR, employees can view their accrual balances and managers can view the accrual balances of employees in their business group and also employees belonging to other business groups. The Show Accrual Balances region in the Self-Service HR Leave of Absence page displays the accrual balances for a person as of the effective date.

Follow the steps below to enable SSHR to display the appropriate accrual balances in the Leave of Absence page.

1. Set up the accrual plans that suit the requirements of your organization.

   Determine the accrual balances and their corresponding accrual plans that you would like to display in the Leave of Absences page.

   See: Setting Up PTO Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide*.

2. Define an element set of type run set and include elements that correspond to these accrual plans.

   See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*.

3. You can now view the appropriate employee accrual balances using the SSHR Leave of Absence page.

   See: Absences, page 14-2.

# 15

# Vehicle and Mileage Processing

# Vehicle and Mileage Processing

## Vehicle Repository

In the vehicle repository, you can store details of company vehicles and private vehicles used for business purposes. This information is datetracked so that you can record changes to the vehicle - such as its status (active or inactive) - over time. Storing this data in a repository removes the need for repetitive and error-prone data entry.

Use Oracle SSHR to record vehicle repository information in the Vehicle Repository Page. The vehicle repository information includes:

- Registration number
- Make and model
- Registration date
- Engine capacity
- List price and value of optional accessories fitted initially and added later
- Fiscal rating
- Status, and reason for Inactive status
- Whether the vehicle can be allocated to multiple users
- **For Russian users only:**Vehicle Category, mileage/fuel limits, usage schedule, and lease details.
- **For Russian users only:**Extra information about vehicle insurance details

  **Note:** You can enter multiple insurance details for the same vehicle.

- **For Polish users only:** Vehicle-card identification number, engine number, inspection dates, and additional, user-defined technical information about the vehicle

You can import company vehicle information from a car fleet management system, storing a fleet identifier and date transferred on each vehicle record.

### Vehicle Allocation

Use Oracle SSHR to allocate vehicles to your employees so they can be used in

employee mileage claims (UK and Poland) or Benefit in Kind processing (Ireland). You can allocate two types of vehicles : company and private.

- You can allocate one primary company vehicle to each employee, and as many additional company vehicles as your business rules allow.
- You can allocate as many private vehicles as your business rules allow. You mark one vehicle as the default.

Business rules are held in the PQP_CONFIGURATION_VALUES table. See: Configuration Settings for Vehicle Repository and Mileage Claims, page 15-4

When you allocate a vehicle, you can override some of the configuration settings for your business group.

You can record a vehicle against a single assignment, or against all of an employee's assignments.

You can allocate vehicles from the Vehicle Repository page.

When you move the mouse over the Users icon, you can view the user details in a pop-up window.

## Vehicle Repository Menu and Function Names

The Vehicle and Mileage Processing module enables managers to add vehicles to the repository in Oracle SSHR. You can add details of company and private cars, and allocate vehicles to employees.

UK users can use this module to enter their mileage claims in Oracle SSHR.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Vehicle Repository | Vehicle Repository |
| Vehicle Mileage Claims | Vehicle Mileage Claims |

### Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Private Vehicle Allocation

**Configurable Workflow Attributes:**

Not applicable

**Workflow Process Display Name:**

Vehicle Mileage Expense

**Configurable Workflow Attributes:**

Not applicable

# Configuration Settings for Vehicle Repository and Mileage Claims

Global and localized configuration settings provide the appropriate defaults for your business groups. You can add this information using the Configuration Values Page. Select the Vehicle Mileage module and the Configuration Type Vehicle Mileage Generic Information to view, update or delete data for your business group.

## Global and Localization Settings

This table displays the localization settings available.

| Column | Segment | Meaning | Global | UK | Ireland |
|---|---|---|---|---|---|
| LEGISLATION_CODE | Legislation Code | - | -- | GB | IE |
| PCV_INFORMATION_CATEGORY | Vehicle and Mileage Settings | - | PQP_VEHICLE_MILEAGE | PQP_VEHICLE_MILEAGE | PQP_VEHICLE_MILEAGE |
| PCV_INFORMATION1 | Calculation Method | Proration or Exhaustive--determines how you apply mileage band limits across payroll periods. You can override this default when you allocate vehicles or enter claims. | -- | Exhaustive | Null |

| Column | Segment | Meaning | Global | UK | Ireland |
|---|---|---|---|---|---|
| PCV_INFORMATION2 | Maximum Company Vehicles Allowed | Limit on the number of company vehicles that can be allocated to an assignment | -- | 2 | Null |
| PCV_INFORMATION3 | Maximum Private Vehicles Allowed | Limit on the number of private vehicles that can be allocated to an assignment | -- | -- | Null |
| PCV_INFORMATION4 | Share Company Vehicle | Yes means that the vehicle can be shared by several employees. No means the vehicle cannot be shared. | Y | N | Y |
| PCV_INFORMATION5 | Share Private Vehicle | Yes means that the vehicle can be shared by several employees. No means the vehicle cannot be shared. | Y | Y | Y |

| Column | Segment | Meaning | Global | UK | Ireland |
|---|---|---|---|---|---|
| PCV_INFORMATION6 | Previous Tax Year Claim Valid Until | All claims for previous tax year must be submitted before the date entered. The year in the date is ignored. | -- | 5 July | Null |
| PCV_INFORMATION7 | Allow Both Company and Private Vehicles Claims | No means that you cannot allocate both company and private vehicles to an employee at the same time, nor submit mixed claims. | Y | N | N |
| PCV_INFORMATION8 | Search Criteria for Rates Table | The default (%) means that the Rates Table list of values displays all user defined tables. To restrict the list, use a naming convention for mileage rate tables. For example, include the word "car" in all names and enter %car% in this field. | % | % | % |

| Column | Segment | Meaning | Global | UK | Ireland |
|---|---|---|---|---|---|
| PCV_INFORMATION9 | Validate Private Vehicle Claims in Repository | Yes means that you can only enter claims against a vehicle already assigned to the employee in the repository. No means that you can enter a claim against a vehicle that is not in the repository. | Y | N | N |
| PCV_INFORMATION10 | Vehicle Claims Correction Period in Days | An input of 30 would mean that only those claims that have a claim date within the last 30 days could be corrected. | -- | -- | Null |
| PCV_INFORMATION11 | Use Sliding Rates | Yes means you use the sliding rates table for additional passengers. No means you use the rates table instead of the sliding rates table. | -- | PQP_VEHICLE_MILEAGE | -- |

| Column | Segment | Meaning | Global | UK | Ireland |
|---|---|---|---|---|---|
| PCV_INFORMATION12 | Combine Taxable and NonTaxable Claims | Yes means you combine taxable and non-taxable balances to calculate rates. No means you do not combine taxable and non-taxable balances to calculate rates. | -- | PQP_VEHICLE_MILEAGE | -- |

# 16

# Payroll Process Management

## Payroll Overview

SSHR provides self-service functions within the following areas of Payroll Process Management:

- Payroll Payment and Distributions
  - Online Payslips
- Payroll Statutory Deductions and Reporting
  - Tax reports

This chapter looks in detail at the self-service functions available within these areas and provides information on the functionality and configuration options for each function:

## Using SSHR with Payroll Functions

### Can SSHR users access payroll information online?

Yes. The self-service Online Payslip function enables users to display their own payslip using the self-service interface.

### Are these payslips configurable?

Yes. Administrators can use the Personalization Framework functionality to configure the payslip to suit their requirements. Payslips are also available for some localizations.

### Can users use the self-service functionality to specify how their salary should be paid?

Yes. You can use the Payment Methods function to specify whether your salary is paid

using a check, or a direct deposit, for example.

## Can managers see the payslips for their employees?

Sometimes. The Online Payslip function is intended to be an employee-only function and is available from the Employee Self Service menu, however, the Online Payslip function is also available from the Payroll Professional menu which enables a third-party to access the payslip.

## Can users view any other payroll information using SSHR?

This depends on your localization. Some users, for example, users in the US, can view tax withholdings information using SSHR. This tax information can be updated and maintained as required and then submitted to the tax authority. Alternatively, the tax information form enables users to display tax statements for information purposes.

# Payroll - Global

## Online Payslip

### Generic and Localised Versions of Online Payslip

The Payslip module enables self-service users to view their electronic payslip for a pay period. For information on the generic payslip, see:Online Payslip, page 16-11

The generic payslip has been localized and designed to meet local requirements. For information on some localized versions, see:

- Online Payslip (UK), page 16-126
- Online Payslip (South Africa), page 16-126
- Online Payslip (US), page 16-59
- Online Payslip (Australia), page 16-129
- Online Payslip (New Zealand, page 16-129)
- Online Payslip (Hong Kong), page 16-129
- Online Payslip (India), page 16-129
- Online Payslip (Korea), page 16-129
- Online Payslip (Kuwait), page 16-129
- Online Payslip (Singapore), page 16-129
- Online Payslip (International Payroll), page 16-14

## Payment Methods

The Payroll Payments module enables self-service users to specify how they wish their salary to be paid by dividing their net pay into one or more payments. Each payment is of a particular type (cash, check, deposit) and has an associated amount and a priority. The payments are made in order of priority. SSHR always uses the lowest priority payment to pay any net pay remaining after all the other payments have been made. It is also possible that low priority payments may not receive all (or any) or their allotted funds because of the amounts used to process higher priority payments.

A typical use of this function occurs if a user wants to split their net pay so that $100 is

paid into a savings account and the rest is paid into a current account. The user can subsequently change the amount paid into the savings account if required.

You can apply configuration options to determine:

- whether users can use the module for multiple payments
- whether payment information is for viewing only
- which types of payments the user can select (cash, check, deposit, or a combination)
- how the payment amounts are defined (percentage of net pay or a monetary amount)
- the maximum number of payments a user can set up
- which organization payment methods are used
- the bank details a user can set up for countries other than the default country
- whether users can validate their bank account number

If you configure Payment Methods so that users can edit their payments, they can carry out the following steps:

- create new payments
- update existing payments
- delete payments
- change the priorities for payments

> **Note:** You must ensure that the required payment methods are available for the employee assignment. For information on enabling payment methods, see: Entering Payment Methods for an Employee Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

> **Important:** You cannot delete bank details that have been used in the current month's payroll (note that the icon is grayed out). If you require deleting your additional bank details, you will be able to do so from the 1st of the following month.

To ensure correctness of your bank account number, you must enter the account number twice. The application validates the entered account information. If you have entered an incorrect account number, then the application prompts to re-enter the bank

account number.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Manage Payroll Payments |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Process Payroll Payments

> **Note:** The Process Payroll Payments module does not support approvals.

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Process Payroll Payments | Manage Payroll Payments | View Only |
| Process Payroll Payments | Manage Payroll Payments | Permitted Payment Types |
| Process Payroll Payments | Manage Payroll Payments | Maximum Payment Methods |
| Process Payroll Payments | Manage Payroll Payments | Permitted Amount Types |
| Process Payroll Payments | Manage Payroll Payments | Deposit Payments List |
| Process Payroll Payments | Manage Payroll Payments | Cash Payments List |
| Process Payroll Payments | Manage Payroll Payments | Cash Payments List |

**View Only**

Specifies whether the user can edit the payments information. The default value enables editing.

**Permitted Payment Types**

Specifies which types of payment methods a user can create. The available payment types are cash, check, and deposit. The default value allows the user to create any of the three payment types.

**Maximum Payment Methods**

Specifies the maximum number of payments that a user can create (up to 10). The default value is 5.

**Permitted Amount Types**

Specifies the amount types for payments. The payment amount can be a monetary amount or a percentage of net pay. The default value enables both amount types.

**Deposit Payments List**

This attribute is only used if you have enabled deposit payments. This attribute stores a list of Organizational Payment Method (OPM) names that can be used to create a deposit payment. The OPM names are separated by a vertical bar (|). The module uses the first match to a deposit OPM name (for the worker's payroll) when new deposit payments are created. For example, East_Coast_NACHA|West_Coast_NACHA.

**Cash Payments List**

This is used in the same way as the Deposit Payments Checklist but for cash payments.

**Check Payments List**

This is used in the same way as the Deposit Payments Checklist but for check payments.

> **Note:** The administrator must set at least one of Deposit Payments List, Cash Payments List, or Check Payments List.

See: Configuring Workflow Attribute Values, page 4-10

## Configurable Definitions for the Personalization Framework:

The following definitions can be configured in the Personalization Framework:

### Regions

#### Summary and Edit Pages

| Region Code | Region Name |
|---|---|
| PAY_PAYMENTS_TOP_SS | Payroll Payments Top |
| PAY_PAYMENTS_EDIT_SS | Payroll Payments Edit |
| PAY_PAYMENTS_SUMMARY_SS | Payroll Payments Summary |
| PAY_PAYMENTS_LABELS_SS | Payroll Payments Labels |

#### Review Page

| Region Code | Region Name |
|---|---|
| PAY_PAYMENTS_REVIEW_SS | Payroll Payments Review |

### Tips and Instructions

| Region ID | Region Name | Attribute Name | Tip Type | Message Name |
|---|---|---|---|---|
| PAY_PAYMENTS_EDIT_INS1_SS | Payroll Payments Edit Create Mode Instructions | Pay Instruction 1 | | PAY_PSSV4_ADD_CASH_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS1_SS | Payroll Payments Edit Create Mode Instructions | Pay Instruction 2 | | PAY_PSSV4_ADD_CHECK_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS1_SS | Payroll Payments Edit Create Mode Instructions | Pay Instruction 3 | | PAY_PSSV4_ADD_CHEQUE_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS1_SS | Payroll Payments Edit Create Mode Instructions | Pay Instruction 4 | | PAY_PSSV4_ADD_DEPOSIT_OVERVIEW |

| Region ID | Region Name | Attribute Name | Tip Type | Message Name |
|---|---|---|---|---|
| PAY_PAYMENTS_EDIT_INS1_SS | Payroll Payments Edit Create Mode Instructions | Pay Instruction 5 | | PAY_PSSV4_ADD_REMAINING_PAY |
| PAY_PAYMENTS_EDIT_INS2_SS | Payroll Payments Edit Update Mode Instructions | Pay Instruction 1 | | PAY_PSSV4_UPDATE_CASH_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS2_SS | Payroll Payments Edit Update Mode Instructions | Pay Instruction 2 | | PAY_PSSV4_UPDATE_CHECK_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS2_SS | Payroll Payments Edit Update Mode Instructions | Pay Instruction 3 | | PAY_PSSV4_UPDATE_CHEQUE_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS2_SS | Payroll Payments Edit Update Mode Instructions | Pay Instruction 4 | | PAY_PSSV4_UPDATE_DEPOSIT_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS2_SS | Payroll Payments Edit Update Mode Instructions | Pay Instruction 5 | | PAY_PSS_REMAINING_PAY |
| PAY_PAYMENTS_EDIT_INS3_SS | Payroll Payments Edit View-only Mode Instructions | Pay Instruction 1 | | PAY_PSSV4_DETAILS_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS3_SS | Payroll Payments Edit View-only Mode Instructions | Pay Instruction 2 | | PAY_PSSV4_DETAILS_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS3_SS | Payroll Payments Edit View-only Mode Instructions | Pay Instruction 3 | | PAY_PSSV4_DETAILS_OVERVIEW |

| Region ID | Region Name | Attribute Name | Tip Type | Message Name |
|---|---|---|---|---|
| PAY_PAYMENTS_EDIT_INS3_SS | Payroll Payments Edit View-only Mode Instructions | Pay Instruction 4 | | PAY_PSSV4_DETAILS_OVERVIEW |
| PAY_PAYMENTS_EDIT_INS3_SS | Payroll Payments Edit View-only Mode Instructions | Pay Instruction 5 | | PAY_PSS_REMAINING_PAY |
| PAY_PAYMENTS_SUMMARY_INS1_SS | Payroll Payments Summary Edit Mode Instructions | Pay Instruction 1 | | PAY_PSSV4_SUMMARY_EDIT_OVERVIEW |
| PAY_PAYMENTS_SUMMARY_INS1_SS | Payroll Payments Summary Edit Mode Instructions | Pay Instruction 2 | | PAY_PSS_EDIT_DFLT_MANDATORY_ PAY |
| PAY_PAYMENTS_SUMMARY_INS1_SS | Payroll Payments Summary Edit Mode Instructions | Pay Instruction 3 | | PAY_PSS_EDIT_DFLT_CASH |
| PAY_PAYMENTS_SUMMARY_INS1_SS | Payroll Payments Summary Edit Mode Instructions | Pay Instruction 4 | | PAY_PSS_EDIT_DFLT_CHECK |
| PAY_PAYMENTS_SUMMARY_INS1_SS | Payroll Payments Summary Edit Mode Instructions | Pay Instruction 5 | | PAY_PSS_EDIT_DFLT_CHEQUE |

| Region ID | Region Name | Attribute Name | Tip Type | Message Name |
|---|---|---|---|---|
| PAY_PAYMENTS_SUMMARY_INS2_SS | Payroll Payments Summary View-only Mode Instructions | Pay Instruction 1 | | PAY_PSSV4_SUMMARY_VIEW_OVERVIEW |
| PAY_PAYMENTS_SUMMARY_INS2_SS | Payroll Payments Summary View-only Mode Instructions | Pay Instruction 2 | | PAY_PSS_MANDATORY_PAY |
| PAY_PAYMENTS_SUMMARY_INS2_SS | Payroll Payments Summary View-only Mode Instructions | Pay Instruction 3 | | PAY_PSS_CASH_SALARY |
| PAY_PAYMENTS_SUMMARY_INS2_SS | Payroll Payments Summary View-only Mode Instructions | Pay Instruction 4 | | PAY_PSS_CHECK_SALARY |
| PAY_PAYMENTS_SUMMARY_INS2_SS | Payroll Payments Summary View-only Mode Instructions | Pay Instruction 5 | | PAY_PSS_CHEQUE_SALARY |

See: Adding Instructions to Web Pages, page 5-35

### FlexFields:

| Region ID | Region Name | Attribute Name | FlexField Name |
|---|---|---|---|
| PAY_PAYMENTS_EMPLOYEE_TABLE_SS | Payroll Payments Employee Table | PAY_BANK_KEY_FLEX | BANK Bank Details Key Flexfield |
| PAY_PAYMENTS_EDIT_DETAILS_SS | Payroll Payments Edit Details | PAY_BANK_KEY_FLEX | BANK Bank Details Key Flexfield |

| Region ID | Region Name | Attribute Name | FlexField Name |
|---|---|---|---|
| PAY_PAYMENTS_REVIEW_SS | Payroll Payments Review | PAY_BANK_KEY_FLEX | BANK Bank Details Key Flexfield |

See: Configuring Flexfields, page 5-27

## Configurable Profile Options

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Payroll Payments Self-Service Enable Multiple Assignments | Site | Yes/No | No |
| HR: Payroll Payments Self-Service Payment Function | Site | Not NULL/ALL/NULL | NULL |

**HR:Payroll Payments Self-Service Enable Multiple Assignments**

Specifies whether the user can use the function to define payments for multiple assignments. The default value only permits payments for the primary assignment.

**HR:Payroll Payments Self-Service Payment Function**

Specifies which organization payment method is the default.

- If the profile is NULL, then the application defaults to the first valid payment method for that payment category.
- If the profile is NOT NULL, then the application displays the payment category specified at the organization level.
- If the profile is ALL, then the application displays all the valid payment methods available to the payment category. You can select a payment method from the list of values and create your personal payment method.

# Online Payslip

The Payslip module enables self-service users to view their electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

**Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user sees an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

## Viewing Online Payslips as a Payroll Professional

Using the Payroll Professional responsibility you can select the Payslip Details link and search for a person. When you select a person from the list, their payslip will be displayed. You can also save a person in My List for future access, so you do not need to search for that person again.

In addition to displaying payslips for current employees, you can also display online payslips for ex-employees. To search for ex-employees, you use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

For more information on the function parameter used to enable the Ex-Employee Search, see: Menu Function Parameter Descriptions, page 3-34.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service V5.1 | Payslip V5.1 |
| Payroll Professional | Employee Search (with Ex-Employee Search enabled) |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Not applicable

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

**HR: Mask Characters - South Africa only**

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

## Configuration Options

To set up a payslip for your employees to view online.

See: Setting Up Payslip Information and Generating Payslips, *Oracle HRMS Payroll Processing Management Guide*

To view an employee's statement of earnings.

See:Viewing Statement of Earnings, *Oracle HRMS Payroll Processing Management Guide*

# Online Payslip (International Payroll)

The Online Payslip for the International Payroll is a localized version of the generic payslip and has been designed to meet the requirements for International Payroll users.

The International HR/Payroll Online Payslip includes regions that display information stored in the pay action information table in Action Information Categories. The Payroll Archive archives data for the Action Information Categories, and the application then displays the information in the payslip region. For example, the Payroll Archive archives data for Employee Payments and the application displays the data in a payslip region Employee Net Pay Distribution.

You can also use an RTF template to produce the online payslip using BI Publisher. You can use the default template or create your own.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Payslip |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

## Additional Configuration Options

You can further configure the Online Payslip by setting up various options:

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Information Additional Organization information. You can display elements, messages, and balances.

2. If you are providing Online Payslips in PDF output, you can add custom data to the generated XML by defining a custom package and procedure and entering it in the XML Code field in Self Service Preference at the business group, HR organization or location level.

   This procedure should have the following three input parameters: p_document type, p_action_context_id and p_action_information_category and will be called once for each archived action_information_category (e.g. IP_DEDUCTIONS, EMPLOYEE_DETAILS, etc as is shown in the sample below). You can add custom XML tags which will appear under that action_information_category in addition to the ones already archived (see example below).

   Another call to the above procedure is invoked after all archived information has been parsed into the corresponding XML with the purpose of allowing the addition of a custom information category along with its segments (e.g. CUSTOM_CATEGORY1 and CUSTOM CATEGORY 2 in the below example). This call will pass NULL to the action_information_category parameter so as to differentiate it from the previous call(s). The value for p_document_type will always be 'PAYSLIP' and the assignment action id of the payroll archiver run will be passed for the p_action_context_id.

   A sample XML generated as a combination of the generic package and the custom procedure is shown below.

**Note:** The segments and categories designated as "CUSTOM" in this sample correspond to the portion generated by the custom procedure.

```
<PAYSLIP>
<EMPLOYEE_DETAILS>
<FULL_NAME>JOHN SMITH</FULL_NAME>
<ORGANIZATION_ID>967</ORGANIZATION_ID>
<NATIONAL_IDENTIFIER>865-34-9023</NATIONAL_IDENTIFIER>
<PAY_BASIS>Monthly US Corp</PAY_BASIS>
<FREQUENCY>Week</FREQUENCY>
<CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT>
<EMPLOYEE_DETAILS></EMPLOYEE_DETAILS>
<IP_DEDUCTIONS>
<ELEMENT_CLASSIFICATION>Earnings</ELEMENT_CLASSIFICATION>
<ELEMENT_TYPE_ID>105182</ELEMENT_TYPE_ID>
<PRIMARY_BALANCE>10519710</PRIMARY_BALANCE>
<PROCESSING_PRIORITY>3750</PROCESSING_PRIORITY>
<CURRENT_AMOUNT>30051.47</CURRENT_AMOUNT>
<YTD_AMOUNT>178493.82</YTD_AMOUNT>
<REPORTING_NAME>FIT Withheld</REPORTING_NAME>
<ATTRIBUTE_NAME>Employee Taxes</<ATTRIBUTE_NAME>
<CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT>
<IP_DEDUCTIONS>
<CUSTOM_CATEGORY1>
<CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT>
</CUSTOM_CATEGORY1>
<CUSTOM_CATEGORY2>
<CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT>
<CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT>
</CUSTOM_CATEGORY2>
</PAYSLIP>
```

For further information, see: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide

3. Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

   You can override the PDF Payslip parameters at organization and location levels. The precedence is Location, Organization, and Business Group. You can also specify a payslip template at the Location EIT while specifying XML Code at the Business Group EIT. However, you must specify the template in at least one of the EITs. If you do not specify the template, the application generates an OAF payslip ends in error.

4. Run the Prepayments process.

5. Run the payment processes

6. Run the Payroll Archive process to enable SSHR users to view their payslip.

7. View Online Payslip Using SSHR.

After completing the above configuration, you can view payslips through the Self-Service HR application using the Employee Self-Service responsibility. Click Payslip to view the most recent pay period's payslip. You can choose other pay periods from the drop-down list available under the Choose a Payslip region. Up to ten payslips can be selected in the drop-down list of values. To see other payslips, click on 'next 10' or 'previous 10'.

## Voluntary Deductions

Using the Total Compensation data model, a compensation or benefits administrator can enable voluntary deductions for employees by setting up Individual Compensation Distribution plans, such as charitable contributions or savings bond plans.

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

See: Individual Compensation Distributions (ICD), *Oracle HRMS Compensation and Benefits Management Guide*

## Element Entries Using Self-Service

This function enables administrators and managers the ability to enter element entries for multiple employees at a time using a self-service interface. Users can enter, validate, and approve payroll elements prior to processing payroll. If approvals are set up, then when the user creates or updates a batch, the workflow submits the transaction for approval.

The Search/Create Batch page shows the list of submitted batches or saved batches that are yet to be submitted. The Monitor Process Status – Region displays the current status of the selected batches. If a batch status is already displayed, users can refresh for latest status.

If the HR: Auto Batch Naming in Self Service profile option has been set, then the application automatically populates the name when a user creates a batch. If the Profile HR: Auto Batch Naming in Self Service value is set to No, then users must enter a unique name for the batch.

Users can select employee assignment and enter payroll element input values. They can review the assignment information to confirm the correct assignment has been chosen where multiple assignments exist. If the security profile has been set, users will be able

to view the assignments of employees for whom they have access.

Users can enter element entry values for elements that are in the element set associated to them and for employees for whom they have access through their security profile.

The Element Entry page enables administrators to enter, validate, and approve payroll elements prior to processing payroll.

This feature enables managers and administrators to:

- Create batch header for employees.
- Search for employees for whom they have access based on the security profile - HR Security profile.
- Create batch lines to select employee, applicable elements, input values, and effective date.
- Save the batch header and batch lines, validate and submit the batch later.
- If approvals are setup, then managers can submit the batches for approval. Approvers can review the batches, approve them, or return for correction.

Users can create a new batch using the Create Batch field. While creating a batch, users must specify a date for the batch. The Default is system date. The Batch by Element option is selected by default. Users can create new entries, reject entries, or change existing entries.

By default, the Reject entry option is displayed in the Action if Entry Exist field. If users select the Change Existing Entry option, then the Effective Date Change field gets enabled and users can override, correct, and update the entries.

By default, the Reject if Future Changes check box is selected. The application checks whether the batch lines match the entries that start in future or if a future change is scheduled and rejects the batch. If users select the Purge After Transfer check box, then the application purges the batch from the temporary table after successful batch transfer.

When user click Next , the application ensures that the batch name is unique and the effective date is not blank. Users can navigate to Batch Lines by Assignment Page or to Batch by Element using the appropriate options.

Using the Batch By Assignment page, users can query and modify those assignments that exist for a particular batch. The Batch Details entered in Batch Creation page can be viewed on the Batch By Element/Assignment pages.

Users can update a batch only when the status is Valid, Transfer Incomplete, Unprocessed, Error, and Status Mismatch. Users can use the Update icon to navigate to the Update page.

When users click the Validate button, the application internally runs the Validate concurrent process. Users can query the batch name they have validated and view the

output/errors in the error log. The validation process tests each batch line against certain predefined rules about element entries, and also against custom rules if users have created additional validation procedures.

If approvals are set up, then when the user submits a batch, the workflow submits the transaction for approval. If the transaction is awaiting approval, then the user cannot edit the batch until it has been approved or rejected by the approver. If rejected, the application purges the information.

Users can search according to the batch criteria provided in the Batch Name field. Users can view the status of the submitted batches. Some the supported statuses include:

- Valid: displays this status when all the batch lines and header are valid.
- Transferred: displays this status when all of the batch lines, and header have been transferred.
- Transfer Incomplete: displays this status when header has been transferred along with some of the batch lines.
- Unprocessed: displays this status when at least one batch is unprocessed.
- Error: displays this status when the batch has not been transferred and at least one line, control total, or the header is in error.
- Status Mismatch: displays this when the combination of statuses in the header, batch lines, and batch is not consistent.
- Approved: If you have set up approvals, then this status is displayed if the approver approves the submitted batch.
- Return for Correction: If you have set up approvals, then this status is displayed if the approver returns the submitted batch for correction.

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR: Applicable Elements for Self Service BEE | This profile is applicable at the site, responsibility and user level. | Users need to select applicable element set from the profile LOV | |

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR: Auto Batch Naming in Self Service | This profile is applicable at the site, responsibility and user level. | Yes/No | No |

**HR: Applicable Elements for Self Service BEE**

This profile is applicable at the site, responsibility and user level. The profile restricts the elements to the Self Service user. The elements are assigned to particular profile, such that only if the profile is enabled, then users can view the elements or otherwise they will not be able to view the elements from the profile LOV.

**HR: Auto Batch Naming in Self Service**

This profile enables generating the name automatically for a batch. The profile value is Yes or No and is set at site level. The default is No.

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Self-Service Batch Element Entry Process - This process governs approvals in Oracle Payroll. This process is available in the HRSSA item type (HRSSA.wft) and routes batch element entries for approval and generates notifications.

### Configurable Workflow Attributes:

| Process Display Name | Function Activity Display Name | Function Activity Attribute Display Name |
|---|---|---|
| Self-Service Batch Element Entry Process | PAY_BATCH_JSP_PRC | PAY_BATCH_SEARCH_PAGE<br>PAY_BATCH_CREATE_PAGE<br>PAY_BATCH_ASSIGNMENT_PAGE<br>PAY_BATCH_ELEMENT_PAGE |

## View Employee Balances

Using SSHR, payroll professionals can view employee balances in their business group on any given effective date. The View Employee Balances page enables you to view the Employee Balances based on certain criteria.

You can choose to display the balances either by date, classification, assignment level, person level balances or by dimension level. You can provide the following criteria in the section Employee Balance Search Criteria.

1. **Date** - to view the Employee Balances on a particular date. By default, the system date is selected.

2. **Classification Name** - to view the balances based on the Element Classification. By default Earnings is selected.

3. **Balance Level** - to view both Assignment and Person level balances. By default Assignment Level is selected.

4. **Dimension Level** - to choose the desired dimension levels for which they want to see the balance values. The following dimensions are supported:

   - Period to Date (PTD)
   - Month to Date (MTD)
   - Quarter to Date (QTD)
   - Year to Date (YTD)

   **Note:** You can view Arrears and Accrual balances for Deduction type elements only.

You can access the View Employee Balance self-service page by navigating as follows:

Payroll Professional > Employee View Balance Search > Action icon > View Employee Balances SS Page

Use the Payroll Professional responsibility to access the View Employee Balance SS Page. When you click on Employee View Balance Search option in Payroll Professional responsibility, the Employee View Balance Search page is displayed where you can query for the employee for whom you want to retrieve the balances.

Once you identify the required employee, then click on the Action icon against the employee name to go the View Employee Balance SS Page.

You can specify the required criteria in the View Employee Balance SS Page to retrieve and view the balances.

You can also access the View Employee Balance self-service page using Oracle Forms by navigating as follows:

Person > Assignments > Quick Pay > View Results > Balances > View Employee Balances

Assignment Process Results > Balances > View Employee Balances

Payroll Process Results > Assignment Process > Balances > View Employee Balances

If you select the View Employee Balances option, the View Employee Balances SS page appears that displays the balances which are effective on the Quick Pay payment date.

You can search and view the employee balances as on the effective date of the Quick Pay run when you access the View Employee Balance SS Page from the Quick Pay window. You cannot view the balances on any date as the Effective Date is disabled.

**View Employee Balance Page (PAY_IP_VIEW_EMPBAL_SS)**

The View Employee Balance page displays the Employee Information Region providing an employee's basic information such as Employee Name, Organization Name, Employee Number, and Assignment Number.

You can choose the following criteria to display the Balances: date, classification name, balance level, dimension level.

You can view the GRE information of the employee and the balances for the employee in a tabular format based on the criteria selected in the Query Region.

To enable SSHR to display the appropriate employee balances in the View Employee Balance page, ensure that the following set up is available:

1. Set up elements with the associated Primary Balance in Element Further Information flexfield.

   See: Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide* .

2. If you need to display the balances for element of Deduction type, then you should define primary balances for Arrears and Accruals in the Element Further Information flexfield.

3. If you are using the Element Design Wizard to create your elements, then the wizard will automatically creates the Primary balances (Arrears and Accruals Balance in case of Deduction element) and populate them in the Element Further Information flexfield.

4. For the Primary balances created, the wizard also creates Defined balances for the following balance dimensions:

   - Assignment Within Tax Unit Processing Period To Date(_ASG_TU_PTD)

   - Assignment Within Tax Unit Processing Calendar Month To Date

(_ASG_TU_MONTH)

- Assignment Within Tax Unit Tax Quarter To Date(_ASG_TU_TQTD)
- Assignment Within Tax Unit Tax Year To Date(_ASG_TU_TYTD)
- Person Within Tax Unit Calendar Month To Date(_PER_TU_MONTH)
- Person Within Tax Unit Tax Quarter To Date(_PER_TU_TQTD)
- Person Within Tax Unit Tax Year To Date(_PER_TU_TYTD)
- Assignment Inception To Date(_ASG_ITD)
- Assignment Processing Period To Date(_ASG_PTD)
- Assignment Calendar Month To Date(_ASG_MONTH)
- Assignment Tax Quarter To Date(_ASG_TQTD)
- Assignment Tax Year To Date(_ASG_TYTD)
- Person Calendar Month To Date(_PER_MONTH)
- Person Tax Quarter To Date(_PER_TQTD)
- Person Tax Year To Date(_PER_TYTD)

When you create Deduction type elements. the primary balances for Arrears and Accruals are populated.

5. If the tax unit has been enabled for your localization, then the application uses the Tax Unit level balance dimensions to display the balances. If there are more than one tax units for an employee, the View Employee Balance page displays the balances for the tax unit effective on the selected date.

# Using Payslip Modeler

## Using Payslip Modeling

The payslip modeler enables employees and payroll administrators to model a paycheck/payslip by running a mock payroll run. Employees can use this feature to make decisions regarding various benefit options and savings using the estimates. They can check their estimated take-home pay based on an upcoming bonus or tax refunds.

Payroll administrators can use this feature to answer employee queries or to perform what-if analysis.

**Note:** The terms Payslip Modeler or Paycheck Modeler refer to the same functionality. The application displays these terms depending on your legislation.

If the profile option HR: Enable Multiple Assignments for Payroll Simulation has been set to Yes, the list of assignments is displayed from which the employee can choose the assignments to run the payroll simulation process. If this profile option has not been set, then the employee is taken to the Payslip Modeling Entry page for running the payroll simulation process.

Therefore based on the profile option set, either the page to select an assignment or the Payslip Modeling Entry page gets displayed.

**Important:** Ensure to select the Agree to Terms check box to proceed.

You can use the Payslip Modeler within the specified period as defined for your business group. If you try to run this process outside the dates specified, the application errors.

Depending on your legislation, the page displays the information appropriately.

- Header region - View personal, assignment, and payroll related information. This includes details such as name, job, grade, position, and payroll.
- Display region - View the details based on the configuration specified within the Extra Assignment Information types for your localization.
- Element Entries region - The Element Entries section typically contains the earnings and deductions details. The display of various details in this section varies depending on how it has been configured for your localization.

Employees and payroll administrators can select the values of the elements that are available for modeling the payslips/paychecks at the Extra Assignment Information.

Employees or payroll administrators can make the changes to the earnings or deduction details to model the payslip by mapping the values and generating a sample payslip.

**Note:** You cannot run payslip modeling process, if you have run a prepayment or costing process for the current pay period.

You can generate the model payslip using the template specified within the Self-Service Preferences window at the organization level or at business group level.

See: Entering Self Service Preference Information, *Entering Self-Service Preference Information*

### Viewing Previous Payslips

Employees can view their previous payslips and compare the differences in pay while modeling their payslips. This enables them to plan their savings based on their take-home pay.

### Localized Versions of Payslip Modeler

For Americas, see:

- Paycheck Modeling (US), page 16-66
- Payslip Modeling (Canada), page 16-83
- Payslip Modeling (Mexico), page 16-111

For the United Kingdom, see Payslip Modeling (UK), page 16-122

For APAC, see:

- Payslip Modeling (Australia), page 16-133
- Payslip Modeling (India), page 16-146

## Configuring Payslip Modeler

This topic provides configuration information for the Payslip Modeler function.

For an overview of Payslip Modeler, see: Payslip Modeler, *Oracle Payroll Processing Management Guide*

For information on the how to set up the details for using the Payslip Modeler, see: Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

### Menu and Functions

This Module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Payslip Modeling |
| Professional Payroll User | Payslip Modeling |

## Configurable Profile Options

The following table lists the configurable profile options:

| Profile | Configurable Levels | Values | Default |
|---|---|---|---|
| HR:Enable Payroll Simulation | Site, Responsibility | Yes/No | |
| HR: Enable Multiple Assignments for Payroll Simulation | Site, Application, Responsibility, User | Yes/No | |

## Configurable Flexfields

| Region | Flex Name | Flex Code |
|---|---|---|
| Element Entries | Extra Assignment Information | AEI _INFORMATION_CATEGORY |

# Using Payroll Dashboard

Payroll Dashboard enables administrators to monitor different payroll-related processes in a dashboard. Payroll Dashboard uses the existing payroll functionality to collate the different process-related data. With this feature, a new capability of Payroll Readiness is incorporated. Payroll Readiness checks the prerequisite conditions required for processing payroll as configured by the administrator. From the dashboard, administrators can also run payroll, retry, or rollback processes.

Payroll Dashboard provides easy to read statistics for quick reference and to view the status of payrolls running and calculation-related information during a pay cycle. With this dashboard, the need to run and review numerous processes is eliminated. Users can focus on the key areas to ensure appropriate action and highlight the exceptions during payroll processing.

Payroll Dashboard displays the different components of a payroll application within a single page to ensure that a payroll manager or administrator can monitor the progress. The dashboard enables reconciling the payroll easily, efficiently, and more importantly, to the appropriate people.

Payroll Dashboard is enabled for Payroll Professional or Payroll Administrator. Payroll

Professional user can :

- Access using the Payroll Dashboard and Configuration functions
- Configure the processes for Payroll Dashboard.

When a payroll profession user accesses the payroll dashboard, the Payroll Readiness and Process Monitor tabs are available.

## Using the Payroll Readiness

**Viewing Current Assignment Activity**

In the Payroll Readiness tab, you can view the assignment activity for all the payrolls in the current payroll period for the current business group. You can search by filter criteria such as payroll, primary assignments and then selecting the appropriate check box.

By default, the Current Assignment Activity displays the assignment information for all the payrolls in that business group.

When you enter the search criteria and queries, the assignment activity information is displayed. The table displays all the payrolls and the count of each assignment. You can click on each hyperlink to view the employee details such as name, date of hire, position, organization, and email. You can also view this information as a graph for a quick reference.

You can view the list of assignments without payment methods for the current period. This includes the list of new hires that do not have a valid payment method in the current period. You can also export this list to a spreadsheet for further analysis.

**Viewing the Payroll Readiness**

You can view the readiness status for the current payroll period by selecting a specific payroll or leaving blank for all payrolls in the current business group. The application displays the readiness information for the selected payroll with the details as indicated below:

- Payroll name – the payroll to check the readiness.
- Last Performed - displays the date on which the last readiness check has been performed in the current payroll period.
- Check Readiness - select this checkbox if you want to perform readiness check.
- Process Payroll – select if you want to process payroll for the current period.

Clicking on Check Readiness icon displays the readiness details for the selected payroll. You can view the process name, payroll period, status whether complete or incomplete. You can also view the message depending on the type of processes selected. Oracle supports the following processes for their readiness: - Batch Element Entry, OTL Time

Entries, and Retropay. You can configure these processes against any payroll according to their business need in the Readiness Configuration page.

**Running a Payroll Run**

Besides running a payroll process using the forms interface, you can also process a payroll run by entering the payroll details and submitting it.

## Using Process Monitor

When you click the Process Monitor tab, the Payroll Snapshot region provides a quick snapshot of the payroll processes. They can view the count of the processes have been run for the period specified in the Readiness Configuration page.

You can select the payroll and any of the following processes such as quickpay, quickpay pre-payments, payroll run, prepayments, cheque writer, magnetic transfer and view their process count.

For the selected process that has been run, you can view period for which it has been run, and its status. The Process Info link for the selected payroll enables you to view the time taken for this process to complete such as start time, estimated completion time and percentage of completion. You can view this information in a graphical format too.

You can also perform the retry, rollback or export actions for a selected payroll.

> **Note:** You can retry and rollback only if there are no future processes run for that payroll.

If any errors were encountered while running the processes, then you can view the errored assignment information using the Assignment Process icon. The Messages option provides the messages generated by the run results while processing the assignment.

If any process has been configured for your localization in the extensible lookup PAY_DB_MONITOR_PROCESSES, then you can view this list of processes in the Other Process Details section.

**Australia users only**: You can monitor the details of the payment summary and end of year reconciliation reports for the period specified.

**UK users only**: You can monitor the details of the predefined RTI processes from Other Payroll Related Processes section for the period specified.

**Mexico users only**: You can monitor the details of the Social Security Archiver, Social Security Affiliation Report, and SUA Interface Extract processes from the Other Process Details region for the period specified.

**Payment Distribution**

You can view Payment Distribution information, including Prepayment, Payment Method and Third Party Payment Method details for the selected payroll and period.

**Viewing the Payroll Analysis**

The Payroll Analysis tabbed region is enabled by default for the Australia, US, Canada and International Payroll localizations only.

**US, Canadian, and Mexico Users:** In the Payroll Analysis tabbed region, users can view details of earnings and deductions, such as the current amount, previous amount, and the variance in amounts by comparing the values between a selected Current Payroll Period and a selected Previous Payroll Period. In the Analysis by field, Mexico users can select from any one of the following values: Employee State Tax, ISR, and Social Security Quota to view the balance amounts processed towards each individual employer state tax, ISR or social security quota balance in the selected payroll periods.

**US and Mexico Users:** In addition, users can view variances in amounts for each selected earnings or deductions category (similar to secondary classification) under a classification level. Payroll administrators can drill down into the category to view the variance in amounts at each element level in that category for the selected classification.

**International Payroll Users**: In the Payroll Analysis tabbed region, users can view details of earnings and deductions, such as the current amount, previous amount, and the variance in amounts by comparing the values between a selected Current Payroll Period and a selected Previous Payroll Period

**Australia Users:** In the Payroll Analysis tabbed region, users can view details of earnings and deductions, such as the current amount, previous amount, and the variance in amounts by comparing the values between a selected Current Payroll Period and a selected Previous Payroll Period.

User can view the variances in amounts for each selected earnings or deductions under the primary element classification and select any one of the following values:Direct Payments, Earnings, Employer Charges, Foreign Tax Deductions, Foreign Total Adjustment, Information, Involuntary Deductions, Pre Tax Deductions, Tax Deductions, Termination Deductions, Termination Information, Termination Payments, and Voluntary Deductions.

Users can select the balance and then select from any of the following values: Gross Earnings, Non Taxable Earnings, Pre Tax Deductions, Taxable Gross, Tax Deductions, Post Tax Deductions, Direct Payments, Net Payment, Employer Chargers to view the balance amounts processed in the selected payroll periods.

## Using the Readiness Configuration

This page enables you to configure the processes for Payroll Readiness. You can access the Readiness Configuration page using the Readiness Configuration function attached to the payroll professional responsibility.

The configuration settings specified in the Readiness Configuration page are used to display data in the Payroll Readiness and Process Monitor tabs.

**Configuring Payroll Readiness Setup**

You can search for the processes which are associated with a payroll and check for their readiness. You can associate the processes to a Payroll using Create available on this page. You can delete the process which is already associated to a payroll.

You can associate the selected process to All the Payrolls in the Business Group or to the selected Payrolls.

Oracle defaults the processes such as BEE, OTL Time Entry and RetroPay.

**Create Readiness Configuration**

When you click the Create button in the Payroll Readiness Setup region takes you to the Create Readiness Configuration page. You can create readiness configuration by associating readiness check with specific or with all payrolls.

The following types of readiness checks are currently available for you:

- Predefined Checks - seeded by Oracle. Batch Element Entry, OTL Time Entries and Retropay are the available seeded readiness checks.

  India users : Users can check the total number of employees who have made or not made Tax Declaration.

- Concurrent Program - valid concurrent programs attached to the responsibility.

  Australia users - Users can perform a readiness check for TFN to check list of the employees who do not have TFN. This checks for the assignments that have a default tax filing number of 111 111 111 for more than 28 days from the date of hire. The 28 days period is checked from the payroll payment date.

  India users: Users can run the readiness check for the employees who do not have PAN

- Validation Check - defined by the user using Create Custom validation page.

## Creating Custom Validation

If you want to create your own validations to meet your business requirements, you can create these checks for Payroll Readiness using the Create Custom Validation page.

You can access this page using the function Create Custom Validation attached to the payroll professional user responsibility.

You can search for a custom validation check to update, or create a new custom validation check. When a custom validation is created here, it will be available in the Readiness Configuration page to be associated with a specific payroll or all payrolls.

# Configuring Payroll Dashboard

## Configuring Payroll Dashboard

This topic provides configuration information for payroll dashboard.

## Menu and Functions

This Module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Professional Payroll User | Payslip Dashboard |
| | Readiness Configuration |
| | Create Custom Validation |

# Making Employee Claims

This topic describes how to use the Employee Claims functionality using the self-service interface.

## Creating Employee Claims as an Employee

Use the employee self service Employee Claims page to create, update or search for claims that are paid through payroll. Claims can be monetary or time worked. Monetary claims can include medical allowances, overtime allowance, airport allowance. You can attach supporting documents while making claims.

Navigate to the Employee Claims page to create a new claim or to search for an existing claim to update.

You can view the employee details and if there are multiple assignments, then these are listed in the Assignment field drop down. You can select the assignment to make a transaction.

You can search for claims in the Search region using the parameters like Start Date, End Date, Elements, or Approval Status. Click Go to display the results. For each transaction, you can see the Approval status and if supporting documents are attached, then you can also view those documents.

You can delete any transaction that is in Pending Approval status. If the status Error, then you can use the Update icon to make any correction and submissions. You can

view status details by clicking the Details icon.

To create a new transaction click Create. This will navigate to the Create page.

On the Create Claims page, you can select the element or elements in the Element Name column. When you select an element, the corresponding details get enabled in the page for further selection.

You can open the element Search popup window or provide first 3 characters to list look ahead values. In the Search pop up window, you can provide the search criteria. Click Quick Select in the results table to fill the Element Name column. For example, you can make a claim by using the element, Travel Allowance.

Enter an effective date to determine to which payroll period element entry needs to be made. Click the Input values icon to open the Element input window. These are the same input values that were configured when you defined the element.

You can also record any additional information in the additional information flex fields while defining the elements.

Click the Supporting document icon to open the Add Attachment pop up window. You can select the Attachment type, provide a title and description. Click File to browse your local machine to attach the document. When the document is successfully attached, click Next to navigate to the Review page.

You can review all details before submitting the claim. To attach a document only for the approver, you can use the Attachment icon on the Review page. When the details are confirmed accurate, you can submit the page to initiate the approval cycle. The claim is then submitted for approval.

When the claim is approved, an FYI notification is sent to the employee. Navigate to the Employee Assignment window to see the element entries. You can see the element entries with input values ready for payroll processing. You can also see the supporting attachments.

## Viewing and Approving Employee Claims as a Payroll Professional/Supervisor

As this function is seamlessly integrated with approvals management, the claims can be routed through the approval cycle. These claims can be sent to the manager/supervisor for approval.

Using the Payroll Professional/Manager responsibility, a payroll user can click the Employee Claims link to search for an employee.

Select an employee from the list to display the details. A payroll professional can approve or reject the claims depending on the employee meeting the criteria and verification of the corresponding documents submitted as claims.

A supervisor or manager can view or approve the claim. Click Notification icon to open the details page. As a supervisor or approver, you can review the attached documents before approving the claims. If you approve the request, then element entries are created for the employee. If a further approval hierarchy exists, then notification is sent

to the next level. You can view the Approval chain and action status in the Action History region of this page.

For information about how to access Employee Claims, see: Configuring Employee Claims, page 16-33

# Configuring Employee Claims

This topic provides configuration information for the Employee Claims function.

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Employee Claims |
| Payroll Professional | Employee Claims |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

| Workflow Name | Function Name |
|---|---|
| Employee Claims | PAY_EMP_CLAIMS_JSP_PRC |

### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable FlexFields

Not applicable

### Configurable Profile Options

Not applicable

### Additional Configuration Options

To use the Employee Claims functionality,

1. You can define elements and then link those element sets to suit your business need. Create an element set and associate element set to the HR Organization.

   See: Entering Claims Element Set Information, *Oracle HRMS Enterprise and Workforce Management Guide*

2. You must configure AME as per your business needs. You must ensure that the approval workflow is set up to one level up.

   For information about setting up approvals, See: *Oracle Approvals Management Implementation Guide*

# Payroll Management - Americas

## Tax Form (W-4) (US)

The **Tax Form** page accessed through the Employee Self-Service responsibility, Tax Form function, enables employees to update their Federal W-4 and State W-4 withholding information using self-service. When a user makes changes to the Federal information, all the states that follow the Federal information are also updated, unless the filing status or exempt status are different. After you make an update to the Federal information, you see the data in PDF format when you review the changes. Use the Tax Form pages to generate the Federal W-4: Employee's Withholding Certificate in accordance with IRS statutory requirements. For more information about the Federal W-4: Employee's Withholding Certificate, refer to the IRS website: https://www.irs.gov/pub/irs-pdf/fw4.pdf.

The notification mechanism delivers confirmation to employees about the changes that they make. HR or payroll administrators receive notifications based on the configuration made to the W-4 notifications function. For example, if a user claims a federal tax exemption, then the HR/Payroll representative receives a notification and can review the data and update if necessary.

Payroll administrators can run the following reports to track the changes made by employees in self-service to determine the tax records using:

- Tax Form Audit Report
- Tax Form Exception Report

### Using the Tax Form Page

The Tax Form page enables employees to:

- Review the existing Federal W-4 and State W-4 withholding details
- Update the Federal W-4 and State W-4 withholding details
- Review the updated Federal W-4 and State W-4 withholding details

### Reviewing the existing Federal W-4 and State W-4 Withholding Details

As an employee, when you click the Tax Form link, the **Tax Form Overview** page appears displaying Federal W-4 details, by default.

Tax Form Type region: In the Tax Form Type region, select the type of data that you want to view: Federal or State. The **Filing Status** field displays all the possible values, with the selected current value. You can view the State and Local links information

when you select State as the Tax Form Type.

## Viewing the State W-4 Information

When you select a State as the Tax Form Type, the application displays the following details:

- If an employee's record is associated with only one state, then that state's W-4 withholding details are displayed. You can view that state's W-4 withholding details along with the relevant state and local withholding form links.

- If an employee's record is associated with multiple states, then the employee can select a specific state from the State List to view that particular state's W-4 details along with the relevant state and local withholding form links. For example, if you select New York, then the application displays the New York state tax withholding details along with the New York Withholding Form (PDF) and New York Local Form links.

### Criteria for States to Appear in the State List

The application uses the following rules for states to appear in the State List:

- The State List displays only the states that are effective for an employee in the current taxation year. A state is considered effective for an employee only if it is associated with the Primary Resident Address, Work Location, a non-zero Time Percentage or a Tagged Earning.

- Even if a state is effective for an employee in the taxation year, then the state will not appear in the State List if the state does not withhold tax.

Use the state withholding links to review instructions related to the State W-4 details. For states that support the Federal W-4 form, the Tip icon provides the required instructions. The Details section displays fields that are applicable to that state only. For example, fields such as SIT Exempt and Optional Calculation are supported only in certain states.

An **Update** button is available to make changes to Federal W-4 and State W-4. For states that follow the Federal W-4 and do not have their own State W-4 form, the **Update** button is not displayed and instead instructions indicate that only Federal W-4 changes are applicable to those states.

> **Important:** An employee self-service user cannot update their online Tax Form page, if any one of the following values is set by the payroll administrator in the following windows in Oracle US Payroll.
>
> - Federal Tax Rules, FIT Override region:

- Regular Rate
- Regular Amount
- Supplemental Rate

- State Tax Rules, SIT Override region:
  - Regular Rate
  - Regular Amount
  - Supplemental Rate

## Updating the Federal W-4 and State W-4 Withholding Details

Click the **Update** button in the **Overview** page to navigate to the **Update Tax Form** page. The details that appear in this page are based on the W-4 details (federal or state) selected in the Overview page. When you navigate to the Update Tax Form page, the Tax Form Type and Select State fields become read-only in the Update Tax Form page.

- Updating the Federal W-4 withholding details: When you select **Update** on the Tax Form page, the fields and sections corresponding to the steps on the 2020 Federal W-4 form: Employee's Withholding Certificate appear. Update the federal details if applicable. These details are optional. See the tips for the fields for further information.

  **Important:** If you select the "Exempt" check box and submit the federal tax form, then the following rules apply:

  - Values that were entered in the "Claim Dependents", "Other Income (not from jobs)", "Deductions", and "Extra Withholding" fields are set to 0 (zero).
  - If the "Multiple Jobs or Spouse Works" check box was checked, then it is set to unchecked, that is, set to No.

  You must select the "**I Agree**" check box to submit your changes.

- Updating the State W-4 withholding details: When you select Update for State W-4 details, the Update Tax Form page that displays is based on the details applicable to that state.

To update other state or federal W-4 details, click Cancel to navigate backto the Overview page.

Click **Continue** after making necessary updates. The Tax Form: Review page appears.

## Reviewing the Updated Federal W-4 and State W-4 Withholding Details

The **Tax Form: Review** page displays information based on the type of details that you update: federal or state.

When you modify the Federal W-4 details and click Continue, you can view the Federal W-4 PDF with the latest information. Click **Submit** to save changes to the federal tax record of the employee. The federal changes are also saved to the employee's assignment in the Federal Tax Rules window in Oracle US Payroll.

For State W-4 changes, the Review page displays the Current and Proposed withholding values. Click Submit to save changes to the state tax record of the employee.

## Functional Behavior of the States List in the Tax Form Page

The following sections provide information about the State List in the Tax Form page:

- States with no State Withholding: Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington, and Wyoming do not have State Withholding, so these states will not appear in the State List even if an employee record is associated with any one of the states.

- For the following states, if the employee submits a Federal W-4 in 2020 or later, then they need to also fill out the state form: Arkansas, California, Delaware, Georgia, Massachusetts, Minnesota, Nebraska, New York, South Carolina, Vermont, and Wisconsin.

- States supporting only the Federal W-4 form: Colorado, New Mexico, North Dakota, and Utah support only the Federal form. For these states, updating the State W-4 details is not applicable so the **Update** button is not available.

- The SIT Exempt field is enabled only for the states that allow exemption from withholding: For these states the SIT Exempt field is displayed in the Overview, Update, and Review pages as necessary. The SIT Exempt field is disabled for the following states that do not permit exemption from SIT withholding: Alabama, Hawaii, Massachusetts, Indiana, California, Connecticut, Pennsylvania, Vermont, West Virginia, Mississippi, Ohio, and Puerto Rico.

- Additional filing requirement for claiming SIT Exempt: Arkansas, Louisiana, New York, North Carolina require additional filing to claim exemption from State Withholding. For these states, the details about any additional required forms appear as a tip below the Exempt check box in the Update Page.

- Optional Calculation field: The Optional Calculation field is enabled in the Overview, Update, and Review pages for Arizona, Arkansas, and New Jersey.

- Exemption Reason field: This field is applicable to Kentucky, Missouri, Montana, and Oregon states. To comply with the respective state's W-4 form requirements, employees must select an exemption reason if they are claiming exemption from state tax withholding.

- Exemption Amount field: Puerto Rico supports Exemption Amount. This field is enabled in the Overview, Update, and Review pages.

- Arizona Voluntary SIT Form (AZA4V) field: Arizona Voluntary SIT Form (AZA4V) field is enabled only for Arizona in the Overview, Update and Review pages.

- Pennsylvania: Pennsylvania does not have any W-4 form. The message "No Withholding form for Pennsylvania" is displayed for this state as Pennsylvania does not have any W-4 form.

# Configuring the Tax Form (W-4) (US)

This topic provides configuration information for the Tax Form pages.

For a functional overview of the Tax Form page, see: Tax Form (W-4) (US), page 16-35

## Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name | Prompt |
|---|---|---|
| Employee Self Service | Online Tax Forms | Tax Form |

See: Defining Menus for SSHR, page 3-10

## Workflow

The following workflow processes are delivered in the HRSSA Item Type (hrssa.wft):

### Workflow Process Display Name:

- Change W4 Information JSP PRC (PAY_CHANGE_W4_INFO_JSP_PRC): The Tax Form self-service function uses this workflow.

- Federal W4 Notification (PAY_FED_W4_NOTIFICATION_PRC): This workflow process sends notifications when Federal W-4 and State W-4 details are updated online.

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions in the Tax Form Pages

| Message | Field | Page |
|---|---|---|
| PAY_US_OTF_W4_MULJOB_OVW | Multiple Jobs or Spouse Works | Overview |
| PAY_US_OTF_W4_CLAIMDEP_OVW | Claim Dependents | Overview |
| PAY_US_OTF_W4_OTHERINC_OVW | Other Income (not from jobs) | Overview |
| PAY_US_OTF_W4_DEDUCTIONS_OVW | Deductions | Overview |
| AY_US_OTF_W4_EXTRAWITH_OVW | Extra Withholding | Overview |
| PAY_US_OTF_W4_CLAIMDEP_UPD | Claim Dependents | Update |
| PAY_US_OTF_W4_OTHERINC_UPD | Other Income (not from jobs) | Update |
| PAY_US_OTF_W4_DEDUCTIONS_UPD | Deductions | Update |
| PAY_US_OTF_W4_EXTRAWITH_UPD | Extra Withholding | Update |

### Tips and Instructions in the Page Regions

| Region | Tip Type | Message Name |
|---|---|---|
| W4 Update Filing Detail | Instruction | PAYSSW4_UPDATE_HEADER_INFO |

| Region | Tip Type | Message Name |
|---|---|---|
| W4 Update Exempt | Instruction | PAY_US_OTF_W4_EXEMPTSTAT_TXT |
| W4 Update Agreement | Instruction | PAYSSW4_UPDATE_AGREEMENT_INFO |
| W4 Update Filing Detail | Long Message | PAY_US_OTF_W4_ALLOWANCES_TXT |
| W4 Update Filing Detail | Long Message | PAY_US_OTF_W4_ADDLAMOUNT_TXT |

See: Adding Instructions to a Web Page, page 5-35

#### Configurable Tips and Instructions for State W-4 Forms

As there are there are individual State W-4 forms, it may be necessary to display additional details to employees in the State W-4 page. Generic text is displayed on the State W-4 pages using the Messages OAF page property. These messages can be configured as per state specific requirements. Create a new message with the message name as <GENERIC_MESSAGE_NAME>_<STATE_ABBREV> to display additional or different details for a specific state. The Self-Service page will utilize the state specific message if found. If the state specific message is not found, then the generic message is displayed. For example, the local form name is displayed for New York as "New York Local Form" using the Generic message PAY_US_OSTF_LOCAL_FORM_NAME. If it is necessary to display the Local form name as, New York City Tax Form, then create a message PAY_US_OSTF_LOCAL_FORM_NAME_NY (Generic message name appended with the State abbreviation) with text as New York City Tax Form. After this message is saved, the application will start using the state specific form name instead of the generic name.

Following is a list of messages that can be configured for states by specifying state specific messages:

| Message Name | Description about the message usage |
|---|---|
| PAY_US_OSTF_DEF_TO_FED_MSG | Instruction to use the default Federal W-4 values |
| PAY_US_OSTF_EXEMPTADDLFORM | Tip message for the additional filing requirement to claim SIT Exemption |

| Message Name | Description about the message usage |
|---|---|
| PAY_US_OSTF_EXEMPTSTAT_TXT | Statutory text to claim SIT Exemption |
| PAY_US_OSTF_LOCAL_FORM_NAME | Local Form Name |
| PAY_US_OSTF_STATE_FORM_NAME | State Form Name |
| PAY_US_OSTF_STATE_LINK_MSG | Message for the State Withholding form |
| PAY_US_OSTF_USE_FEDERAL_TIP | Instructions about using Federal W-4 |
| PAY_US_OSTF_W4_ADDLAMOUNT | Tip message for the Additional Amount field |
| PAY_US_OSTF_W4_ALLOWANCES | Tip message for the Allowances field |
| PAY_US_OSTF_W4_EXEMPTAMT | Tip message for the Exemption Amount field |
| PAY_US_OSTF_W4_OPTCALC | Tip message for the Optional Calculation field |
| PAY_US_OSTF_W4_SITEXEMPT | Tip message for the SIT Exempt field |
| PAY_US_OSTF_W4_STINFO3 | Tip message for the STA_INFORMATION3 field |

#### Configurable Messages

The following is a list of configurable messages with their description:

| Message Name | Description |
|---|---|
| PAY_US_OSTF_ADD_TAX_NUMBER | Validation message for Additional Amount |
| PAY_US_OSTF_AGREE_ERROR | Error message to indicate that Agree check box must be selected |
| PAY_US_OSTF_EXEMPTADDLFORM_AR | State specific message |
| PAY_US_OTF_STATE_WA_GA | State Specific - GA state allowance restrictions |
| PAY_US_OSTF_EXEMPTADDLFORM_LA | State specific message |

| Message Name | Description |
|---|---|
| PAY_US_OSTF_EXEMPTADDLFORM_NC | State specific message |
| PAY_US_OSTF_EXEMPTADDLFORM_NY | State specific message |
| PAY_US_OSTF_EXEMPTWARN | Warning that SIT Exemption has been claimed |
| PAY_US_OSTF_NO_W4FORM | Message for states without W-4 form |
| PAY_US_OSTF_NO_WHSTATES | Message for employee with no tax withholding States |
| PAY_US_OSTF_USE_FEDERAL_MSG | Message about using Federal W-4, directing to Tip |
| PAY_US_OSTF_USE_FEDERAL_TIP_AR | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_CA | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_GA | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_MA | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_MN | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_NY | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_VT | State specific message |
| PAY_US_OSTF_USE_FEDERAL_TIP_WI | State specific message |
| PAY_US_OSTF_USE_ONLY_FED | Message that only Federal W-4 is supported |
| PAY_US_OSTF_W4_OVERALLOW | Message that allowances are above the threshold |
| PAY_US_OSTF_W4_STINFO3_AZ | Arizona specific details for the AZ4AV field |
| PAY_US_OTF_W4_FITEXEMPT | Tip message for the FIT Exempt field |

| Message Name | Description |
|---|---|
| PAYSS_STATEW4_EXEMPT_STATUS | Message that Exempt selection clears Allowances and Additional Amount |
| PAYSS_W4_NO_CHANGES | Message to indicate no changes were made for State W-4 details |
| PAYSSW4_STATE_EXEMPT_MSG | Message that Exempt selection will be forwarded to the Tax department |

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR: Online Tax Forms Update Method | Site | All, None, Primary | Primary |
| HR: HR/Payroll Representative Source | Site | Custom PL/SQL, GRE Contact Information, Further Payroll Information | Further Payroll Information |

**HR: Online Tax Forms Update Method**

This profile option determines which assignments can be updated.

The possible values are as follows:

- **Primary**: Only the tax information for the primary assignment is updated when a user changes tax information using the Online Tax Form.
- **All** (default value): The tax information for all assignments is updated when a user changes tax information.

  Note that for an employee with multiple assignments, by default, only primary assignment related tax records are updated when changes are submitted from Online Tax form. If tax records of all the assignments are to be updated, then it is necessary to set the value to All.

- **None**: If the profile value is set as "None" or "Primary" or left as blank, then only the federal tax record corresponding to the primary assignment of employee is updated with the latest changes.

**HR: HR/Payroll Representative Source**

If a user makes a change to their tax information using the online tax form, a notification is sent to a designated contact person informing them of the change. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.

- GRE Contact Information: You must enter a payroll representative in the Contact Information additional organization information window.

- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

## Configuration Steps for the Tax Form (W-4) (US)

Review the following configuration steps and complete them, if required:

1. Enabling exception notifications: If the necessary configuration is made, then when employees update Federal W-4 and State W-4 details, the designated HR/Payroll Representative receives exception notifications. To enable the exception notifications, set the W4 Notifications field to Yes. W4 Notifications is available under **Reporting Preferences**, Additional Organization Information at the Business Group and HR Organization levels. The application uses the organization level preference if found. Otherwise the business group level preference will be used. If W4 Notifications is set to Yes, then exception notifications are sent. A few examples of exception scenarios are: selection of exemption or the number of allowances is greater than the threshold limit. See Business Groups and HR Organizations: Entering Reporting Preferences, *Oracle HRMS Enterprise and Workforce Management Guide (US)* for more information.

2. Set the HR: HR/Payroll Representative Source profile option to determine the designated contact person to whom notifications of Federal W-4 or State W-4 changes must be sent.

3. Set the HR: Online Tax Forms Update Method profile option to the required value. For employees with multiple assignments, W-4 details of only the primary assignment are shown in the Online Tax Form. When changes are submitted from the Online Tax Form, by default changes are made to the tax records corresponding to the primary assignment.

4. Only State Withholding form links are Oracle delivered. You can override the

Oracle-delivered State Withholding form links and/or configure Local Withholding form links, if required.

## Setting Document Delivery Preferences

As an employee, use the **Document Delivery Preferences** page to choose online or paper delivery or both for the following documents.

- In the United States:
  - Employee W-2
  - Payslip
- In Canada
  - Employee T4
  - Employee T4A
  - Employee RL1
  - Employee RL2

Access the **Document Delivery Preferences** page by clicking the **Document Delivery Preferences** link in the Employee Self-Service responsibility. This page has following regions:

### Document Delivery Preferences Header

The header region displays the employee name, the organization email address, the employee number, and the employee's business group.

### Electronic Delivery Consent

Use this section to enter your preferences for the document delivery. Click **Update** to opt for a delivery method and the address to which you want to receive the Employee W-2 form.

The following tables list the documents and the preferences that you can set for these documents.

***US Legislation***

| Document Type | Delivery Method | Delivery Address Preference |
|---|---|---|
| Employee W-2 | Yes | Yes |
| Payslip | Yes | Not Applicable |

***Canadian Legislation***

| Document Type | Delivery Method | Delivery Address Preference |
|---|---|---|
| T4 Slip | Yes | Not Applicable |
| T4A Slip | Yes | Not Applicable |
| RL1 Slip | Yes | Not Applicable |
| RL2 Slip | Yes | Not Applicable |

## Specifying Delivery Method and Delivery Address Preferences

The **Date** field displays the system date. Click **Update** to opt for a delivery method and the address to which you want to receive the document. Note that the delivery address preference is applicable to the W-2 form only.

1. In the **Delivery Method** field, select either the **Online** or the **Paper** check box.
   - If you select the **Online** check box and leave the **Paper** check box blank, then you will only receive your document online.
   - If you select the **Paper** check box and leave the **Online** check box blank, then you will only receive a paper copy.
   - If you select both options, then you will receive both an online and a paper copy. At any time, you can withdraw your consent by deselecting the **Online** check box and selecting **Paper** as your delivery preference.
2. In the **Delivery Address Preference** field, select a delivery address if you want the paper W-2 form sent to you. This field lists the following options:

- Work Address
- Mailing Address
- Resident Address

3. Select a delivery address preference to receive a paper copy of the W-2 form. If you do not select a delivery address preference or leave the field blank, then by default, the document is sent to your resident address.
   - If you prefer to have your document mailed to an alternate address, such as a mailing address, then select the mailing address as your delivery address preference.
   - If no address (associated with your selection preference) is defined in the **Other Address** region of the **Personal Information** page, then your resident address is used to send the W-2 form.

After you specify your delivery preferences, select the consent check box to save the record.

# Configuring the Document Delivery Preferences Page

## Configuration Details for the Document Delivery Preferences Page

This topic provides configuration information for the Document Delivery Preferences page.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Document Delivery Preferences |

### Workflow

Not applicable

### Configurable Tips and Instructions

See: Configuring Web Pages, page 5-21

| Region Name | Tip Type | Message Name |
|---|---|---|
| Electronic Delivery Consent | Instruction | dpHeaderOtherInformation<br><br>This field is hidden by default in the PayDocPreferencesPG XML page. To add a custom message, you must first display this field using Personalization. |

See: Adding Instructions to a Web Page, page 5-35

### Configurable FlexFields

Not applicable

### Configurable Profile Options

Not applicable

## Viewing 1099-R Information Return

The **Form 1099-R Information Return** page enables:

- An employee or retiree to view their 1099-R form and corrected 1099-R form online using the 1099-R Information Return function of the Employee Self-Service responsibility. They can also download 1099-R and corrected 1099-R forms in Adobe Acrobat PDF format from the **Form 1099-R Information Return** page.

- A payroll professional to search, view, and print 1099-R information returns for a specific employee or a retiree using the 1099-R Information Return Search function of the Payroll Professional responsibility. Payroll professionals can perform a simple search based on employee name or advanced search based on First Name, Last Name, Assignment Number or Job. Once the employee retiree is selected, then the payroll professional can click "**Further Action**" to view or download and print their online 1099-R information return.

**Prerequisite Step** : To enable employees or retirees to view their 1099-R and corrected 1099-R forms online, a payroll administrator must run the following concurrent programs respectively:

- 1099R Information Return – PDF

- Corrected 1099R Information Return - PDF

The **Form 1099-R Information Return** page presents the following regions:

### Employee Details

This region displays the name of the employee or retiree who has logged into the self-service page, the employee's number, the organization email address, and the business group.

### 1099-R Information

If there is more than one 1099-R form, then select the organization and year for which you want to view details. A bar graph is provided that displays federal gross distributions amounts (Box 1) and federal income tax withheld amounts (Box 4) for the current and previous reporting years

### View or Download 1099-R

Use this region to view and download the 1099-R form and the corrected 1099-R form as PDF files inline in a browser window.

> **Note:** The application displays the 1099-R form in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

## Configuring the Form 1099-R Information Return Page

### Configuration Details for the Form 1099-R Information Return Page

The following sections provide configuration details:

#### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | 1099-R Information Return |
| Payroll Professional | 1099-R Information Return Search |

#### Workflow

Not applicable

### Configurable Tips and Instructions

See: Configuring Web Pages, page 5-21

You can configure tips and instructions in the 1099RPG.xml page.

See: Adding Instructions to a Web Page, page 5-35

### Configurable FlexFields

Not applicable

### Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR: Original 1099-R on or before (MM/DD) | Site, Application, Responsibility, User | | |
| HR: View Online 1099-R From Date (MM/DD/YYYY) | Site, Application, Responsibility, User | | |

#### HR: Original 1099-R on or before (MM/DD)

Applies to the 1099-R Information Return-PDF. The 1099-R Information Return-PDF must be marked as Corrected if the data is changed after it was originally archived and the 1099-R form was already issued to the person. When set to a month and day, this profile option date value is used to compare to the date the data is archived. The Year End Pre-Process (YEPP) archives the date for an assignment action as A_ARCHIVE_DATE. If the A_ARCHIVE_DATE is found to be greater than the profile option date when the 1099-R PDF is run, then the 1099-R is printed with the "CORRECTED" check box checked.

The following section is an example of how to issue 1099-R's with the Corrected check box checked:

1. Set the HR: Original 1099-R on or before (MM/DD) profile option to a day and month, for example, 02/01. The application will dynamically add the year as one year after the year for which the 1099-R's are being generated. In this case, the 1099-Rs are being issued for 2010, so the profile date is 02/01/2011. This is the date after which any 1099-R's will be re-issued and therefore require "Corrected" check box to be selected.

2. On Dec 31, 2010 or any date in January 2011, you run the Year End Preprocessor as normal. This will archive the assignment action dates (A_ARCHIVE_DATE) and

will also archive the profile option date.

3. Prior to January 31st, 2011, you run the 1099-R PDF report. This will generate all 1099-R's with the Corrected box deselected.

4. On February 15th, 2011 a retiree reports an incorrect value on their 1099-R. Balance adjustments are made for 2010 to correct their data. 5. The retiree's data is rearchived. Then the 1099-R PDF process is rerun for this person (A_ARCHIVE_DATE gets set to 02/15/2011 which is later than the profile option date of 02/01/2011), and now their 1099-R is printed with the Corrected check box selected as required.

#### HR: View Online 1099-R From Date (MM/DD/YYYY)

Set the HR: View Online 1099-R From Date (MM/DD/YYYY) profile option to control the display of prior years' 1099-R information returns that employees and payroll professionals can view and download using the Employee Self-Service and Payroll Professional responsibilities. Only those 1099-R information returns that are generated on and after the date set in this profile option are available for viewing online. This profile option can be set at the site, application, responsibility, and user level.

### Additional Configuration Steps:

Set the document viewing and printing preferences using Self Service Preferences. You can define this information at the HR organization or the business group level using additional organization information, or alternatively, at the person or the location level using an extra information type.

Enter the following information:

1. **Document Type**: This specifies the type of document for which the following fields will be configured. Select 1099R or Corrected 1099R depending on the document type.

   - **Online**: This is a Yes or No field that determines whether or not to display 1099-R or corrected 1099-R PDF forms online to employees working in the current business group. If you select No, then the PDF will not be displayed.

   - **Paper**: This is a Yes or No field that determines whether or not to print the employee's 1099-R or corrected 1099-R form. Setting this option to Yes or No will have no effect on the "Online" preference setting.

2. **Template**: Select the template to be used for displaying the 1099-R or corrected 1099-R form online. All of these templates are maintained under the XDO template manager and are available through the XML Publisher responsibility. If this field is left blank, then the seeded template is used for displaying the 1099-R or corrected 1099-R forms online.

3. **XML Code**: Leave this field blank as it does not apply.

4. Effective Date: Leave this field blank or enter a date prior to or equal to the system date. If you enter a date which is later than the system date, then no online 1099-R or Corrected 1099-R will be shown.

5. **Payslip Employer Address**: Leave this field blank as it does not apply.

6. **Display Payslip GRE Addr From**: Leave this field blank as it does not apply.

7. **Offset Criteria**: Leave this field blank as it does not apply.

8. **Display Rate Detail Section**: Leave this field blank as it does not apply.

9. The online 1099-R or Corrected 1099-R self-service preferences can be overridden at organization and location levels. The order of precedence goes to Location, Organization, and then Business Group. Location level templates override any templates set at any other level. Templates specified at the HR Organization level override templates specified at the Business Group level.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide* (for HR organization or business group level)

See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Management Guide* (*Managing Your Workforce Using Oracle HRMS*) (for person level)

See: Location Extra Information Types , *Oracle HRMS Enterprise and Workforce Management Guide* (for location level)

## Tax Information Form W-2 and W-2c (US)

The **Form W-2 Wage and Tax Statement** page:

- Enables an employee to view and download their annual Wage and Tax Statement of earnings and tax withholding (W-2). To access your own W-2, log in to Employee Self Service- and click **Employee W-2**.

- Enables a payroll professional to view and download an employee's annual W-2. To view an employee's W-2, log in to the Payroll Professional responsibility, select the Employee W-2 link, and search for a person. When you select a person from the list, their tax information appears. You can also save a person in **My List** for future access.

  **Note:** Your system administrator can set the HR:Mask National Identifier in Year End Forms (Yes/No) profile option to mask all but the last 4 digits of the recipient's SSN on the W-2 and W2c forms.

## Setting Document Delivery Preferences

Use the **Document Delivery Preferences** page for selecting online or paper delivery, or both of your Employee W-2 and Employee W-2c. You can specify your address preference if you want to receive paper copies. See Setting Document Delivery Preferences , page 16-46 for more information.

## Using the Form W-2 Wage and Tax Statement Page

The **Form W-2 Wage and Tax Statement** page presents the following regions:

## Form W-2 Wage and Tax Statement Header

This region displays the name of the employee who has logged into the self-service page, the employee's number, the organization email address, and the business group.

## W2 Information

View annual earnings and tax withholding in a graphical format. A bar graph displays amounts for Box 1 (annual federal wages) and Box 2 (annual federal income tax withheld) for the current and previous reporting years for comparison purposes.

## View or Download W2

This region displays the following documents as a PDF file. You can view the PDF file inline in a browser window.

- The latest form W-2. If there is no W-2 information or if your payroll administrator has not configured the self-service preferences to enable online access, then a message appears. You can view the Form W-2 only after the Year End Pre-Process runs successfully. If the Year End Pre-Process ended with an error status, then no online Form W-2 is available for any assignment in the GRE. If the Year End Pre-Process completes successfully but some assignments are in error, only the successfully archived assignments are available for online viewing and printing. Employees and Payroll Professionals can view employee W-2s from prior years by selecting the applicable employee W-2 from the list of values.

- The latest form W-2c. The self-service page displays the latest employee W-2c only if the W-2c Pre-Process and either the Employee W-2c Report request set or the Employee W-2c PDF report has been run for the employee. If multiple W-2c Pre-Processes and either the corresponding Employee W-2c report request sets or Employee W-2c PDF reports have been run, then the employee W-2cs are displayed in reverse chronological order. Employees and Payroll Professionals can view employee W-2cs from prior years by selecting the applicable employee W-2c from the list of values.

**Note:** The application displays the W-2 and W2c forms in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

# Configuring the Tax Information Form W-2 and W-2c (US)

## Configuration Details for Tax Information Form W- 2 and W-2c (US)

The following sections provide configuration details:

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self Service | Employee W-2 |
| Payroll Professional | Employee W-2 |
| Payroll Professional | Employee Search for W-2 |

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Pay Employee W2 Process

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

See: Configuring Web Pages, page 5-21

| Region Name | Tip Type | Message Name |
|---|---|---|
| Pay W2 Details | Instruction | PAY_W2_PRINT_WARNING_MESG |
| | Instruction | PAY_NO_W2_TO_VIEW_WEB |
| | Instruction | PAY_NO_SS_PREF_W2_WEB |
| | Instruction | PAY_NO_SS_PREF_W2C_WEB |

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR: HR/Payroll Representative Source | Site, Payroll | Further Payroll Information, GRE Contact Information, Custom PL/SQL | Further Payroll Information |
| HR:Allow online W-2 viewing as of (MM/DD) | Site, Application, Responsibility, User | MM/DD | |
| HR: View Online W-2 From Date (MM/DD/YYYY) | Site, Application, Responsibility, User | MM/DD/YYYY | |

### HR: HR/Payroll Representative Source

If a user requests a reprint of the paper Form W-2, a notification is sent to a designated contact person informing them of the request. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.
- GRE Contact Information: You must enter a payroll representative in the Contact

Information additional organization information window.

- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

**HR:Allow online W-2 viewing as of (MM/DD)**

Enable the profile option to allow your employees to view and download their W-2 or W-2c forms as PDF files. You can specify the month and day that the current year's W-2 or W-2c are viewable and grant these rights at the application, responsibility, user, server, organization, or site level. If employees attempt to view their W-2 or W-2c form before the specified date, they only see the previous years' W-2 or W-2c forms.

> **Note:** Customers who have set up multiple application servers must bounce these servers after setting the profile option in order for users to be able to view online W2s. Customers may have different configuration on the middle tier, for example, more than one application server, multiple JVMs, and load balancing. Such setup can contribute to the caching of the profile values and may not reflect the profile option setting on bouncing of Apache only, it may require bouncing of the application or middle tier to make sure the cache value is cleared.

**HR: View Online W-2 From Date (MM/DD/YYYY)**

Set the HR: View Online W-2 From Date (MM/DD/YYYY) profile option to control the display of W-2s that employees can view and download using the Employee Self-Service responsibility. Only those W-2s that are generated after the date set in this profile option are available for viewing online. This profile option can be set at the site, application, responsibility, and user level.

## Additional Configuration Steps:

Set the document viewing and printing preferences using Self Service Preferences. You can define this information at the HR organization or business group level using additional organization information, or alternatively, at the person or location level using an extra information type.

Enter the following information:

1. **Document Type**: This specifies the type of document for which following segments will be configured. Select W-2 or W-2c depending on the document type.
   - **Online**: This is a Yes/No field signifying whether to display online W-2or W2-c PDF to employees working in the current business group. If you select No, then the PDF will not be displayed.
   - **Paper**: This is a Yes/No field signifying whether to print this generated W-2 or

W-2c PDF or not. There is no effect on online employee's W-2 or W-2c by setting this option to YES or NO.

2. **Template**: Select the template to be used for displaying online W-2 or W-2c PDF. All these templates are maintained under XDO template manager and are available through the XML Publisher Responsibility. If this field is left blank, then the seeded template is used for W-2 or W-2c PDF.

   **Important:** In the **Template** field:

   - Ensure that you set the latest template to report all the information in the Box 14 fields in the online Employee W-2 PDFs.

   - Ensure that you set the appropriate template to enable employees to view or download their W-2 PDFs using the mobile app for Oracle Self-Service Human Resources. For example, to generate W-2 PDFs for 2020, the **Template** field must be set to "Form W-2 2020." Refer to My Oracle Support Knowledge (Document 2105189.1), *Oracle Mobile Self-Service Human Resources for Oracle E-Business Suite Release Notes* for information about the mobile app.

3. **XML Code**: Leave this field blank as it does not apply.

4. **Effective Date**: Leave this field blank or enter a date prior to or equal to the system date. Note: If you enter a date which is later than the system date, then no Online W-2or W-2c PDF will be shown.

5. **Payslip Employer Address**: Leave this field blank as it does not apply.

6. **Display Payslip GRE Addr From**: This feature is not available so the field can be left blank.

7. **Offset Criteria**: This field is only applicable to the PDF Payslip so it should be left blank.

8. **Display Rate Detail Section**: This field is not available so it can be left blank. If any value entered there will be no effect on the W-2c PDF.

9. The Online W-2 or W-2c PDF self-service preferences can be overridden at organization and location levels. The order of precedence goes to Location, Organization and then Business Group. Location level templates override any templates set at any other level. Templates specified at the HR Organization level override templates specified at the Business Group level.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide* (for HR organization or business group level)

See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Management Guide* (*Managing Your Workforce Using Oracle HRMS*) (for person level)

See: Location Extra Information Types , *Oracle HRMS Enterprise and Workforce Management Guide* (for location level)

#### Configuring the Predefined XML Templates

To generate W2 or W-2C PDFs, you can use either the predefined templates or create your custom templates by copying the delivered rtf templates and modifying them. See: Setting Up Custom BI Publisher Templates for Payroll in the *Oracle HRMS Payroll Processing Management Guide (US)*.

### Displaying Tax Information for Ex-Employees

In addition to displaying tax information for current employees, you can also display tax information for ex-employees. To search for ex-employees, use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

The Ex-Employee Search is enabled for the following function:

PAY_MGR_W2_EMP_SEARCH (Employee Search for W-2)

If you choose to use this functionality, then you should add this function to your responsibility.

## Online Payslip (US)

The **Online Payslip** for the US is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 16-11.

For a list of the information that appears on the payslip region, see Payslip Region Information, *Oracle HRMS Payroll Processing Management Guide (US)*

The **Payslip** page appears when you click the **Payslip** function in the Employee Self-Service responsibility. View your payslip details and download a PDF version.

### Setting Document Delivery Preferences

Use the **Document Delivery Preferences** page for selecting online or paper delivery, or both of your payslip. See Setting Document Delivery Preferences , page 16-46 for more information.

## Payslip Regions

The **Payslip** page presents the following information.

## Payslip Header

This region displays the name of the employee who has logged into the self-service page, the employee's number, the organization email address, and the business group.

## Pay Information

**Pay Information** region:

This region presents two pie-charts that display components of the current pay amount and the year-to-date pay amount in a graphical format. You can view gross earnings for the current pay amount and the year-to-date amount. The components of the current amount and the year-to-date amount include the following. Each component value is expressed as a percentage.

- Pre-Tax
- Taxes
- After-Tax
- Net Pay

## Select a Payslip

Select a date range if you want to view payslip for a specific period or if you leave the date range fields blank, then the **Choose a Payslip** field displays a list of all the available payslips.

## HTML Payslip

Select a pay period in the **Choose a Payslip** field to view the applicable payslip details.

## PDF Payslip

Select a pay period in the **Choose a Payslip** field and click the PDF icon next to the field to view the applicable payslip details payslip inline in a browser window. Alternatively, use the **Quick Select Payslip** region to quickly view a payslip report.

> **Note:** The application displays the payslip in the browser window by default. Do not download the forms to your local machine for security

reasons, for example, if you are using a shared computer.

#### Quick Select Payslip

Based on the date range, all the available payslips are displayed in this region in the reverse chronological order. Select a report to view inline in a browser window. The document can be downloaded if required using the applicable option in the PDF pane.

## Configuring Online Payslip (US)

The Online Payslip for the US is a localized version of the generic payslip and has been designed to meet local requirements. This topic provides configuration information.

You can also use an RTF template to produce the online payslip using BI Publisher. You can use the default template or create your own.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. Set this profile option to a date on or after which payslips will be available for viewing by employees in Self-Service. If this profile option is not set then the user will receive a message that there are no payslips available for viewing.

## Additional Configuration Options

1. Define Additional Information

   Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Information additional organization information. You can display elements, messages, and balances.

   See: Entering Payslip Information, *Oracle HRMS Payroll Processing Management Guide*

2. Add Custom Code to Existing XML

   If you are providing Online Payslips in PDF output, you can add custom data to the generated XML by defining a custom package and procedure and entering it in the XML Code field in Self Service Preference at the business group, HR organization or location level.

   This procedure should have the following three input parameters: p_document type, p_action_context_id and p_action_information_category and will be called once for each archived action_information_category (e.g. AC_DEDUCTIONS, EMPLOYEE_DETAILS, etc as is shown in the sample below). You can add custom XML tags which will appear under that action_information_category in addition to the ones already archived (see example below).

   Another call to the above procedure is invoked after all archived information has been parsed into the corresponding XML with the purpose of allowing the addition of a custom information category along with its segments (e.g.

CUSTOM_CATEGORY1 and CUSTOM CATEGORY 2 in the below example). This call will pass NULL to the action_information_category parameter so as to differentiate it from the previous call(s). The value for p_document_type will always be 'PAYSLIP' and the assignment action id of the payroll archiver run will be passed for the p_action_context_id.

A sample XML generated as a combination of the generic package and the custom procedure is shown below.

> **Note:** The segments and categories designated as "CUSTOM" in this sample correspond to the portion generated by the custom procedure.

```
<PAYSLIP>
<EMPLOYEE_DETAILS>
 <FULL_NAME>Jawid Shaik</FULL_NAME>
 <ORGANIZATION_ID>9675</ORGANIZATION_ID>
 <NATIONAL_IDENTIFIER>865-34-9023</NATIONAL_IDENTIFIER>
 <PAY_BASIS>Monthly US Corp</PAY_BASIS>
 <FREQUENCY>Week</FREQUENCY>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</EMPLOYEE_DETAILS>
<AC_DEDUCTIONS>
 <ELEMENT_CLASSIFICATION>Earnings</ELEMENT_CLASSIFICATION>
 <ELEMENT_TYPE_ID>105182</ELEMENT_TYPE_ID>
 <PRIMARY_BALANCE>10519710</PRIMARY_BALANCE>
 <PROCESSING_PRIORITY> 3750</PROCESSING_PRIORITY>
 <CURRENT_AMOUNT>30051.47</CURRENT_AMOUNT>
 <YTD_AMOUNT>178493.82</YTD_AMOUNT>
 <REPORTING_NAME>FIT Withheld</REPORTING_NAME>
 <ATTRIBUTE_NAME>Employee Taxes</ATTRIBUTE_NAME>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</AC_DEDUCTIONS>
<CUSTOM_CATEGORY1>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</CUSTOM_CATEGORY1>
<CUSTOM_CATEGORY2>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</CUSTOM_CATEGORY2>
</PAYSLIP>
```

For further information, see: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide

3. Configure the XML Payslip Using Self Service Preference EIT

   Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

You can override the PDF Payslip parameters at organization and location levels. The precedence is Location, Organization, and Business Group. You can also specify a payslip template at the Location EIT while specifying XML Code at the Business Group EIT. However, you must specify both the template and the effective date in at least one of the EITs. If you do not specify the template and the effective date, the application generates an OAF payslip.

The fields **Template**, **XML Code**, and **Effective Date** are specific to the PDF payslip and the remaining fields are common for both OAF and PDF payslips. The **Number of Payslips to Display** field controls the number of payslips displayed in the **Choose a Payslip** drop-down list in the self-service page. In this field, you can enter a number between 1 and 50 to indicate the number of payslips that can be displayed in the **Choose a Payslip** list. The default value for the field is 10.

> **Important:** In the **Template** field, ensure that you set the appropriate template to enable employees to view or to download their payslips in the PDF format using the mobile app for Oracle Self-Service Human Resources. Refer to My Oracle Support Knowledge (Document 2105189.1), *Oracle Mobile Self-Service Human Resources for Oracle E-Business Suite Release Notes* for information about the mobile app.

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

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

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

4. Display Federal W-4 Form Fields on the Online Payslip, if Required

   You can optionally display the following Federal W-4 form fields on the self-service Payslip page for employees. By default, the predefined XML template for the online payslip does not report these fields.

   - Multiple Jobs or Spouse Works
   - Claim Dependents
   - Other Income (not from jobs)
   - Deductions

   To report the Federal W-4 form fields on the online payslip, complete the following steps:

   1. Add the fields to the applicable location in your custom payslip template. Use

the following sample XML output as an example. This sample shows the US_WITHHOLDINGS tag with the Federal W-4 form fields. Note that while modifying the template, update the field labels according to your own business requirements.

```
        <US_WITHHOLDINGS>
         <TAX_TYPE>Federal</TAX_TYPE>
         <STATUS>Married filing jointly (or  Qualifying widow
(er))</STATUS>
         <EXEMPTIONS>0</EXEMPTIONS>
          <ADDITIONAL_AMOUNT>5</ADDITIONAL_AMOUNT>
          <OVERRIDE_AMOUNT>0</OVERRIDE_AMOUNT>
          <OVERRIDE_PERCENTAGE>0</OVERRIDE_PERCENTAGE>

<FIT_WAGE_ACCUMULATION_FLAG>N</FIT_WAGE_ACCUMULATION_FLAG>
          <SECONDARY_EXEMPTIONS></SECONDARY_EXEMPTIONS>

<MULTIPLE_JOBS_OR_SPOUSE_WORKS>Y</MULTIPLE_JOBS_OR_SPOUSE_WORKS>
          <CLAIM_DEPENDENTS>5</CLAIM_DEPENDENTS>
         <OTHER_INCOME>1</OTHER_INCOME>
         <DEDUCTIONS>2</DEDUCTIONS>
         </US_WITHHOLDINGS>
```

2. Use Personalization to display the fields on the online Payslip page in self-service. By default these fields are hidden, that is, the **Rendered** property is set to False. To report these fields on the payslip, complete the following steps to personalize the payslip page to set the **Rendered** property to **True** for these four fields.

    1. Navigate to Work Structures > Organization > Description and query the business group.

    2. Click Others > Self Service Preferences > Select "Payslip" and remove any template value and save.

    3. Using the applicable responsibility, navigate to self-service and access the Payslip function.

    4. Click the Personalize Page link on the Payslip page. By default the Federal Form W-4 fields are not visible.

    5. On the Personalize Page: Payslip page, search for one of the fields, for example, Claim Dependents.

        1. Ensure that all the four fields are available.

        2. For each one of the fields, click the icon in the **Personalize** column.

        3. In the next page, find the **Rendered** field under the first column.

        4. Change the value from Inherit to **True** in the available list of values under the Employee Self-Service responsibility column .

5. Click **Apply**.

6. Repeat the same steps for the remaining three fields.

6. Click the Return to Application link at the bottom of the page.

5. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

6. Run the payment processes (for example, the Check Writer process).

7. Run the Payroll Archive process to enable SSHR users to view their payslip.

   See: Managing the Payroll Archive Process, *Oracle HRMS Payroll Processing Management Guide*

8. View Online Payslip Using SSHR

   After completing the above configuration, you can view payslips through the Self-Service HR application using the Employee Self-Service responsibility.

   Click **Payslip** to view the most recent pay period's payslip. You can choose other pay periods from the drop-down list available under the Choose a Payslip region. Up to ten payslips can be selected in the drop-down list of values. To see other payslips, click on 'next 10' or 'previous 10'.

## Paycheck Modeling (US)

The Paycheck Modeling feature for the US is a localized version of the generic Payslip Modeling functionality and is designed to meet local requirements.

For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23

Employees can model their paycheck using the Paycheck Modeler available online. This a Paycheck calculator that can be used by individuals to quickly and accurately answer paycheck related questions and address "what-if" scenarios such as how their net pay would be impacted by an increase to their 401K deduction or by a change to their federal or state filing status from single to married. Employees can elect to print a PDF copy of their model paycheck results. This feature is available to both employees and payroll professionals (administrators) via Self Service HR. Payroll administrators can use this feature to answer queries or perform what-if analysis for employees.

> **Note:** Users cannot run paycheck modeling process, if there is a prepayment or costing process already executed for the current pay

period. The modeling process does not impact the data present in the application. The employee data remains absolutely unaffected by the simulation process. Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their paycheck. Employees can elect to print a PDF copy of their model paycheck results. The PDF output displays a watermark indicating it is a sample payslip only, plus the model result values are designated as "Estimated.

For the United States Localization, the Payroll Modeling functionality enables employees or payroll administrators to model the following information to determine the impact on payroll calculations:

- Resident Address Details
- Work Location Details
- Tax Withholding Information
- Earnings and Deductions

## Using Paycheck Modeling

The Paycheck Modeling feature enables employees and payroll administrators to perform the following tasks:

- View information provided in the Welcome Page and agree to the Usage Terms and Conditions.
- View certain personal and pay information such as Employee Name, Job title, Payroll, Pay Basis and Annual Salary.
- Perform paycheck modeling altering address region details such as:
  - Resident State
  - Resident County
  - Resident City
  - Work Location
  - Work At Home

  For example, users can change resident address details to verify corresponding tax calculation changes. If taxation is present for the selected address location, you can view the change in the Simulation Output in the Tax Deductions section. For

example, if users are planning on moving to a different city and/or state, they can model a resident address and/or a work location change to assess the impact on tax and other deductions in order to determine changes to net (or take-home) pay. Note that if the user changes their resident state, they will also need to select a new resident county and city as well as state filing and exemption status. Likewise, if they change their work location, they will also need to select a new work state filing and exemption status.

- Model tax withholding information changes at Federal and State level. For example, an employee who is getting married may want to model changing their Federal Filing Status from "Single" to "Married". Likewise, they may also want to model changes to their Resident and/Work State Tax Withholding details such as changing the state filing status or changing the number or both of state exemptions plus they can also set up Additional Withholding amounts.

  When modeling a payslip for 2020 and later, you can use the following Federal W-4 form fields:

  - Multiple Jobs or Spouse Works
  - Claim Dependents
  - Other Income (not from jobs)
  - Deductions

    **Note:** The Federal Allowances field is no longer available when modeling a payslip for 2020 and later.

- Model changes to net or take home pay by selecting different earnings and deductions that have been made available for modeling. For example, an employee may be eligible for an upcoming bonus or overtime pay, and would like to see what their net or take home pay will be. Likewise, an employee may want to model a change to their 401k deferred compensation deduction to see the effect on their net or take home pay.

- View and print model paycheck results. View side by side pie charts that compare the employee's Current Pay to their Estimated (model) Pay.
  - The Current Pay pie chart displays data from the employee's most recent payslip.
  - The Estimated Pay pie chart displays data from the model paycheck.
  - The Current Pay and Estimated Pay pie charts provide a breakdown of current and estimated pay by pretax deductions, taxes, other deductions and net pay.

# Configuration Information for Paycheck Modeling (US)

This topic provides configuration information for the Paycheck Modeling (US) function.

For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Payslip Modeling |
| Payroll Professional | Payslip Modeling |

**Note:** The Oracle Payroll generic menu is Payslip Modeling. To meet the industry requirements, you can rename the menu for the United State legislation as Paycheck Modeling.

## Workflow

Not Applicable

## Personalization of Paycheck Modeling Pages

The Paycheck Modeling Self-Service Pages are based on Oracle Application Framework technology and you can personalize the pages to display the content as per your requirements to indicate the necessary details or instructions to employees. Following are the details which you can personalize:

**Welcome Page**

Welcome Message, Usage Instructions and Terms, and Conditions displayed on this page can be personalized.

**Generate Model Paycheck Page**

Following information can be personalized:

- Details in the "Personal Information" section.
- Details in the "Pay Information" section.

- Fields in the "Address Related Details", Tax Withholding Details", Earnings and Hours" and "Deductions" regions. Also the Information Tips for each of these Regions.

- Placeholders in the "Instructions" section.

The fields displayed in the "Pay Information", "Address Related Details", "Tax Withholding Details", "Earnings and Hours" and "Deductions" regions are configured based on Descriptive Flexfield Contexts. If any of the fields in these regions are to be hidden or made read-only, then it can be done by specifying the list of segments to be displayed and those to be displayed as Read-Only. The instructions about setting up the "Descriptive Flexfield Segment List" are specified in "Oracle Applications Framework Developer Guide". For specifying the Segment List, it is necessary to know the Flexfield Context and segment names corresponding to each region. Note that the names displayed on the page for each field correspond to the Prompt information. The actual segment name will be different. The segment name should be used in the Segment List. For example, for the field "Resident State Withholding Override Rate" under "Tax Withholding Details" Region, the Segment name is "RS Override Rate".

Below are the context names for each of the regions. These flexfield contexts are available with the 'Extra Assignment Information' EIT.

| Region | Context Code |
|---|---|
| Pay Information | US_SIMULATION_DISPLAY |
| Address Details | US_SIMULATION_REGION1 |
| Tax Withholding Details | US_SIMULATION_REGION2 |
| Earnings | US_SIMULATION_REGION3 |
| Deductions | US_SIMULATION_REGION4 |

Below is the list of segment names for each of the fields in various regions.

**Pay Information Region**:

| Field Name | Segment Name |
|---|---|
| Pay Basis | Pay Basis |
| Rate | Rate |

| Field Name | Segment Name |
|---|---|
| Annual Salary | Annual Salary |
| Gross Pay YTD | Gross Pay YTD |

**Address Details Region:**

| Field Name | Segment Name |
|---|---|
| Resident State | Resident State |
| Resident County | Resident County |
| Resident City | Resident City |
| Work Location | Work Location |
| Work At Home | Work At Home |

T**Tax Withholding Details Region:**

| Field Name | Segment Name |
|---|---|
| Federal Filing Status | Federal Filing Status |
| Federal Tax Exempt | Federal Tax Exempt |
| Federal Withholding Allowances | Federal Withholding Allowances |
| Additional Federal Withholding | Addl. Federal Withholding Amt |
| Federal Withholding Override Rate | Federal Override Rate |
| Federal Withholding Override Amount | Federal Override Amount |
| Federal Supplemental WithholdingOverride Rate | Federal Override Suppl. Rate |
| Resident State Filing Status | Resident State Filing Status |

| Field Name | Segment Name |
|---|---|
| Resident State Tax Exempt | Resident State Tax Exempt |
| Resident State Withholding Allowances | Resident State Allowances |
| Additional Resident State Withholding Amount | Addl. RS Withholding Amount |
| Resident State Withholding Override Rate | RS Override Rate |
| Resident State Withholding Override Amount | RS Override Amount |
| Resident State Supplemental Withholding Override Rate | RS Override Suppl. Rate |
| Work State Filing Status | Work State Filing Status |
| Work State Tax Exempt | Work State Tax Exempt |
| Work State Withholding Allowances | Work State Allowances |
| Additional Work State Withholding Amount | Addl. WK Withholding Amount |
| Work State Withholding Override Rate | WK Override Rate |
| Work State Withholding Override Amount | WK Override Amount |
| Work State Supplemental Withholding Override Rate | WK Override Suppl. Rate |

In the **Tax Withholding Details** region, the following fields can be used when modeling a payslip for 2020 and later:

- Multiple Jobs or Spouse Works
- Claim Dependents
- Other Income (not from jobs)
- Deductions

See Configuring Online Payslip (US), page 16-61 for information about these fields.

**Earnings Region**:

| Field Name | Segment Name |
|---|---|
| Select Earnings/Hours Type | Input |
| Value | Value |
| Default Value | Default Value |

**Deductions Region**:

| Field Name | Segment Name |
|---|---|
| Select Deductions Type | Input |
| Value | Value |
| Default Value | Default Value |

## Configurable Profile Options

- HR: Enable Payroll Simulation - Users can use the Paycheck Modeling module only if the profile option HR:Enable Payroll Simulation is set to Yes.

- HR: Enable Multiple Assignments for Payroll Simulation - If an employee has multiple active assignments, then users can choose whether they can perform paycheck modeling on just their primary assignment or select from a list of all their active assignments. Setting profile option "HR: Enable Multiple Assignments for Payroll Simulation" to Yes will allow employees to select any of their active assignments on which they wish to perform paycheck modeling. If the profile option is set to No, then paycheck modeling can only be performed on their primary assignment.

## Setup Steps

The following sections provide setting up information.

### Set Up the Modeling Availability Rule

Further (optional) control of when Paycheck Modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition.

1. Navigate to the Payroll window (Payroll > Description).
2. Query the required payroll definition.
3. Click Further Information.
4. Set the following fields:

   Modeling Availability Rule to either Available or Unavailable.

   Set the Days After Period Start and Days Before Period End as appropriate.

For more information, see: *Defining a Payroll, Oracle HRMS Oracle HRMS Payroll Processing Management Guide*

### Add the Simulation Details Extra Information to the Required Responsibility

1. Navigate to the Information Types Security window.
2. Select the Information Type of SIMULATION_ELEMENTS (Simulation Details) and attach the type to the required Responsibility.
3. Save your work and close the Information Types Security window.

### Configure Earnings and Deductions to be Available for Modeling

This is a mandatory setup step in order to make earning and deduction elements available to the end user when modeling their paycheck. For each earning or deduction element, the administrator needs to configure the Element Extra Information Type (EIT) 'Simulation Details'. Navigate: Total Compensation > Basic > Element Description > Query the applicable element > Extra Information > Simulation Details.

Both existing elements can be configured in order to be available for paycheck modeling as well as new elements created. The following fields are available for configuration in the Element EIT 'Simulation Details':

- Enable Simulation: Set this to Yes to allow this element to be selected by the end user when performing Paycheck Modeling.
- Simulation Input 1 to Simulation Input 15: Up to 15 input values can be configured for usage with Paycheck Modeling. For example, if an hourly, non-exempt employee can model overtime earnings, then Simulation Input Values 1, 2, and 3 could be defined to enable the employee to enter a rate, number of hours as well as the applicable factor.
- Simulation Name: Enter the element name that the end user will see in the Paycheck Modeler when selecting that element, if it is to be different from the current element name.

For more information, see *Defining an Element, Oracle HRMS Compensation and Benefits*

*Management Guide*

### Define Element Exclusion Set

By default, an employee's existing element entries will be processed as part of the model paycheck, even if the element has not been configured to be available for Paycheck Modeling. To exclude elements from even being processed, payroll administrators can optionally define an exclusion element set to exclude these elements from being included in the model paycheck process. An example of when this feature might be useful is when a bonus is being paid out in the pay cycle that is being processed and administrators do not want the element to be seen by the employee in their model paycheck results. By defining an element exclusion set to specifically exclude that bonus element, it will neither be available for modeling by the end user nor will it be processed when the model paycheck is submitted.

For more information on how to exclude elements, see *Defining an Element or Distribution Set, Oracle HRMS Compensation and Benefits Management Guide* After defining an element exclusion set, you must select this set in the Modeling Exclusion Element Set field of the Self Service Preference window for your business group. For more information, see: *Entering Self-Service Preference Information, Oracle HRMS Enterprise and Workforce Management Guide*.

### Select the Oracle BI Publisher XML Template to Print Payslip Modeling PDF

Oracle Payroll for US provides a predefined XML template to print payslip modeling PDF report.

Details of the XML Template:

Name: US Payroll Simulator Template

Code: PAYUSPSSM

Application: Payroll

Data Definition: US Payroll Simulator Data Definition

Type: RTF

Default Output Type: PDF

You must select the XML template in the Payroll Simulation Template field of the Self Service Preference window for your business group.

If customers do not want to use the default template, then they can create an XML Publisher template and specify the template in the Self Service Preference window. The template must be associated with the Data Definition PAY<LEG_CODE>SIMPAYSLIP

## Rules that Apply to the Paycheck Modeling (US) Function

Single Output for all types of Elements processed in Paycheck Modeling:

Separate Check or Process Separately options are not applicable to Paycheck Modeling.

Even if the element is defined with one or both of these options selected, only one model paycheck is produced which will include all of the earnings and deductions that have been processed.

Processing of Involuntary Deductions in Paycheck Modeling:

Modeling involuntary deductions such as Garnishments is not permitted. However, any existing involuntary deductions that are associated with an employee's assignment will be processed during paycheck modeling unless specifically excluded by the payroll administrator." For information on how to set up an exclusion element set, refer to the Setting Run Type Exclusions and Triggers topic

# Configuration Steps to Display Dates on Online Payslip (US)

This topic describes the configuration steps that must be completed to display dates when employees generate the Online Payslip for US localization. Note that the configuration steps are applicable to displaying Start and End Dates for Premium and Overtime elements only.

## Define Descriptive Flexfield Segments

Complete this step if the following setup does not exist in your instance:

- Log in to the System Administrator responsibility.
- Navigate to the Descriptive Flexfield Segments window (Application > Flexfield > Descriptive > Segments).
- Query using the following values:

  Application : Payroll

  Title: "Additional Element Entry Information" (or) "Add'l Element Entry Info."
- Add the following in Context Field Values, if the value does not exist:

  Code: US EARNINGS

  Name: US EARNINGS

  Description: Additional Element Entry Info for US

  Click on Segments and enter the following values:

  Click on Segments and enter the following values:

  Number: 10

  Name: Originating Pay Period

  Window Prompt: Originating Pay Period

  Column: ATTRIBUTE10

Value Set: HR_US_DATE_11

Click Open and deselect the Required check box.

- Close the Window and Save your work.
- Complete the following steps to feed the Descriptive flex field with date values. The Descriptive Flex field defined above is linked to each of the elements that form the payroll.
- Click Additional Element Entry Information and then select the Context Value : US EARNINGS.
- Enter the Originating Pay Period, which is any date based on employee hire and element entry date.
- Freeze and compile the flexfield definition.

## Complete the Configuration Steps to Display Dates on Online Payslip

1. Log in to the Oracle HRMS responsibility.
2. Go to Other Definitions.
3. Navigate to the Table Values window.
4. Query the table: ONLINE_PAYSLIP_DATE_CONTROL_TBL. By default, for the Column Name: 05, for Overtime and Premium 'Y" value is displayed.

### Defining the new Column Values

1. Navigate to the Table Structure window.
2. Query the table: ONLINE_PAYSLIP_DATE_CONTROL_TBL
3. Click the Columns button.
4. In the User Column Key, add the new record for the required in the form of 'State Code', for example: 35.
5. Save the changes and close the Columns window.
6. Click the Rows button.
7. Add a new record for the required element type, for example: Supplemental and save your changes.

### Defining the Table Values

1. Navigate to the Table Values window.
2. Query the ONLINE_PAYSLIP_DATE_CONTROL_TBL table, which handles dates. In the name field in the Column section, query the state code that you had added in the earlier step, for example 35.
3. Add record for element type in the Exact field, in this example, it is Supplemental.
4. Define value 'Y' in the corresponding value field.
5. In the values section add records for the element types and configure accordingly. For example, if you enter Overtime in the Exact field and if the corresponding Value field is left blank it assumes the default value which is 'N'.

   **Note:** Instead of defining an element explicitly to N not configuring will assume a default 'N'.

6. Save your work.

## Online Payslip (Canada)

The **Online Payslip** for Canada is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 16-11.

For a list of the information that appears on the payslip region, see Payslip Region Information, *Oracle HRMS Payroll Processing Management Guide (US)*

The **Payslip** page appears when you click the **Payslip** function in the Employee Self-Service responsibility. View your payslip details and download a PDF version.

### Payslip Regions

The **Payslip** page presents the following information.

### Payslip Header

This region displays the name of the employee who has logged into the self-service page, the employee's number, the organization email address, and the business group.

### Pay Information

**Pay Information** region:

This region presents two pie-charts that display components of the current pay amount and the year-to-date pay amount in a graphical format. You can view gross earnings for the current pay amount and the year-to-date amount. The components of the current amount and the year-to-date amount include the following. Each component value is expressed as a percentage.

- Taxes
- After-Tax
- Net Pay

### HTML Payslip

Select a pay period in the **Choose a Payslip** field to view the applicable payslip details.

### Quick Select Payslip

All the available payslips are displayed in this region in the reverse chronological order. Select a report to view or download the payslip in PDF format.

## Configuring the Online Payslip (Canada) Page

This topic provides configuration information for the Online Payslip (Canada) page.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. Set this profile option to a date on or after which payslips will be available for viewing by employees in Self-Service. If this profile option is not set then the user will receive a message that there are no payslips available for viewing.

## Additional Configuration Options

1. Define Additional Information

   Optionally define additional information to be displayed in the Other Information section of the payslip using the Balances, Elements, and Message types in the Payslip Information additional organization information. If you are entering a message, you can either specify the message text or the message name. If you specify the message name, the Canadian Payroll Archiver subsequently retrieves the message from fnd_new_messages and archives it. If you enter the message text, the Canadian Payroll Archiver archives the message text entered at the organization or business group level.

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

2. Append Custom Code to Existing XML

   If you are providing online PDF payslips, you can append custom data to the

generated XML by defining a custom procedure and entering it in the XML Code field in Self-Service Preferences at the Business Group, HR organization or Location level.

This procedure should have the following three input parameters: p_document type, p_action_context_id and p_action_information_category and will be called once for each archived action_information_category (e.g. AC_DEDUCTIONS, EMPLOYEE_DETAILS, etc as is shown in the sample below). You can add custom XML tags which will appear under that action_information_category in addition to the ones already archived (see example below).

Another call to the above procedure is invoked after all archived information has been parsed into the corresponding XML with the purpose of allowing the addition of a custom information category along with its segments (e.g. CUSTOM_CATEGORY1 and CUSTOM CATEGORY 2 in the below example). This call will pass NULL to the action_information_category parameter so as to differentiate it from the previous call(s). The value for p_document_type will always be 'PAYSLIP' and the assignment action id of the payroll archiver run will be passed for the p_action_context_id.

A sample XML generated as a combination of the generic package and the custom procedure is shown below.

> **Note:** The segments and categories designated as "CUSTOM" in this sample correspond to the portion generated by the custom procedure.

```
<PAYSLIP>
<EMPLOYEE_DETAILS>
 <FULL_NAME> Payslip_XML_Test, First name </FULL_NAME>
 <ORGANIZATION_ID>3011</ORGANIZATION_ID>
 <NATIONAL_IDENTIFIER>046 454 286</NATIONAL_IDENTIFIER>
 <PAY_BASIS>Salaried</PAY_BASIS>
 <FREQUENCY>Week</FREQUENCY>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
</EMPLOYEE_DETAILS>
<AC_DEDUCTIONS>
   <PAY_BASIS>Salaried</PAY_BASIS>
   <FREQUENCY>Week</FREQUENCY>
   <PROCESSING_PRIORITY>2</PROCESSING_PRIORITY>
   <CURRENT_AMOUNT>319.48</CURRENT_AMOUNT>
   <YTD_AMOUNT>844.59</YTD_AMOUNT>
   <REPORTING_NAME>QPP</REPORTING_NAME>
 </ATTRIBUTE_NAME>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</AC_DEDUCTIONS>
<AC_EARNINGS>
 <ELEMENT_CLASSIFICATION>Earnings</ELEMENT_CLASSIFICATION>
   <ELEMENT_TYPE_ID>105182</ELEMENT_TYPE_ID>
   <PRIMARY_BALANCE>10551965</PRIMARY_BALANCE>
   <PROCESSING_PRIORITY>1775</PROCESSING_PRIORITY>
   <CURRENT_AMOUNT>1200</CURRENT_AMOUNT>
   <YTD_AMOUNT>1200</YTD_AMOUNT>
   <REPORTING_NAME>Rate Salary</REPORTING_NAME>
   <CURRENT_HOURS>40</CURRENT_HOURS>
   <YTD_HOURS>40</YTD_HOURS>
   <RATE>30</RATE>
   <CURRENT_DAYS />
   <YTD_DAYS />
   <ATTRIBUTE_NAME />
</AC_EARNINGS>
<CUSTOM_CATEGORY1>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</CUSTOM_CATEGORY1>
<CUSTOM_CATEGORY2>
 <CUSTOM_SEGMENT1>Data1</CUSTOM_SEGMENT1>
 <CUSTOM_SEGMENT2>Data2</CUSTOM_SEGMENT2>
 <CUSTOM_SEGMENT3>Data3</CUSTOM_SEGMENT3>
</CUSTOM_CATEGORY2>
</PAYSLIP>
```

3. Configure the XML Payslip Using Self Service Preference EIT

   Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

   You can override the PDF Payslip parameters at Organization and Location levels. The precedence is Location, Organization, and Business Group. You can also specify a payslip template at the Location EIT while specifying XML Code at the Business Group EIT. However, you must specify both a template and effective date in one of the EITs. If you do not specify the template and the effective date, the

application generates an OAF payslip.

The fields **Template**, **XML Code**, and **Effective Date** are specific to the PDF payslip and the remaining fields are common for both OAF and PDF payslips. The **Number of Payslips to Display** field controls the number of payslips displayed in the **Choose a Payslip** drop-down list in the self-service page. In this field, you can enter a number between 1 and 50 to indicate the number of payslips that can be displayed in the **Choose a Payslip** list. The default value for the field is 10.

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

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*

4. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

5. Run the payment processes (for example, the Chequewriter process).

6. Run the Canadian Payroll Archiver process to enable SSHR users to view their payslip.

   See: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide*

7. View Online Payslip Using SSHR

   After completing the above configuration, you can view payslips through the self-service application using the Employee Self-Service responsibility.

   Click Payslip to view the most recent pay period's payslip. You can choose other pay periods from the drop-down list available under the Choose Payslip region.

## Payslip Modeling (Canada)

The Payslip Modeling feature for Canada is a localized version of the generic Payslip Modeling functionality and is designed to meet local requirements.

For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23

Employees can model their payslip using the Payslip Modeler available online. This is a payslip calculator that can be used by individuals to quickly and accurately answer payslip related questions and address "what-if" scenarios. The calculation results of the 'what-if' scenarios are based on the employee's current pay or the most recent payslip.

This feature is available to both employees and payroll professionals (administrators) via Self Service HR. Payroll administrators can use this feature to answer queries or perform what-if analysis for employees.

> **Note:** The Payslip Modeling feature is not available from Manager Self-Service and Contingent Worker Self-Service responsibilities.

The Payslip Modeling feature consists of the following processes:

- A Welcome page greeting the employee by name and where the employee must agree to certain terms and conditions.
- A Payslip Modeler page where employees can select from earnings and deductions to model as well as change tax information (if desired). Once the selections are complete, the employee can submit their model payslip to be calculated.
- Results are displayed, which the employee can optionally print out as a PDF document.

> **Note:** Users cannot run the payslip modeling process, if there is a prepayment or costing process already executed for the current pay period. The employee data remains absolutely unaffected by the simulation process. Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their payslip. Employees can elect to print a PDF copy of their model payslip results. The PDF output displays a watermark indicating it is a sample payslip only, plus the model result values are designated as Estimated.

For the Canada Localization, the Payslip Modeling functionality enables employees or payroll administrators to model the following information to determine the impact on payroll calculations:

- Address Details
- Tax Information Details
- Earnings and Hours
- Deductions

## Using Payslip Modeling

The Payslip Modeling feature enables employees and payroll administrators to perform the following tasks:

### Agree to Terms and Conditions:

Employees can view information provided in the Welcome Page and agree to the Usage Terms and Conditions.

### Model Payslip:

After employees agree to the usage terms and conditions, the Generate Model Payslip page appears. On this page, employees can:

- View certain personal and pay information such as Employee Name, Job Title, Payroll, Pay Basis, Annual Salary, and Gross Pay.

- Perform payslip modeling altering address related details. The work location field displays the employee's assignment work location, by default. The Employment Province and Override Province fields are read-only. If there is a change in the work location, then the read-only Employment Province field gets updated according to the new province. The Override Province, if present, is the province in which the employee is currently taxed. Employees can select a work location available to the assignment based on the business group. The federal and provincial fields that subsequently appear are related to the work location. The initial value that appears in each of the federal and provincial fields, by default, is the value set in the employee's record.

- Employees can select a work location available to the assignment based on the business group. The federal and provincial fields that subsequently appear are related to the work location. The initial value that appears in each of the federal and provincial fields, by default, is the value set in the employee's record.

  **Federal Fields**

  Federal Tax Exempt

  Federal Total Claim Amount

  Additional Federal Tax

  Federal Prescribed Zone Deduction

  Federal Commission Remuneration

  Federal Commission Expenses

  Federal Annual Deduction Amount

  Federal Labour Sponsored Fund Contribution

  **Provincial Fields**

  Provincial Tax Exempt: Applicable to Quebec only

  Provincial Total Claim Amount: Applicable to all provinces

  Additional Provincial Tax: Applicable to Quebec, Newfoundland and Labrador

only.

Provincial Commission Remuneration: Applicable to Quebec only.

Provincial Commission Expenses: Applicable to Quebec only.

Provincial Annual Deduction Amount: Applicable to Quebec only.

Provincial Labour Sponsored Funds Contribution: Applicable to all provinces that allow this tax credit.

Number of Dependents (Ontario only)

Number of Infirm Dependents (Ontario only)

Change the work location, federal, or provincial tax details to view the impact on payroll and tax calculations. A work location change will only impact tax calculations if there is a province change. You can view the change in the Simulation Output in the Tax Deductions section. If users are planning on moving to a different province, they can model a work location change to assess the impact on tax and other deductions to determine changes to net or take-home pay.

- Model changes to net or take home pay by selecting different earnings and deductions that have been made available for modeling. For example, an employee may be eligible for an upcoming bonus or overtime pay, and would like to see what their net or take home pay will be. The list of Element-Input Values that appear can change, based on the work location selected.

  See: Examples: Payslip Modeling Scenarios, page 16-86

### View and Print Model Payslip

Employees can view and print model payslip results. They can view side by side pie charts that compare the employee's Current Pay to their Estimated (model) Pay. The Current Pay pie chart displays data from the employee's most recent payslip. The Estimated Pay pie chart displays data from the model payslip. The Current Pay and Estimated Pay pie charts provide a breakdown of current and estimated pay by pretax deductions, taxes, other deductions and net pay.

## Examples of Payslip Modeling Scenarios (Canada)

This topic provides examples on payslip modeling scenarios.

See: Payslip Modeling (Canada), page 16-83

### Example 1

Employee, who is working some overtime this week wants to estimate what their next check will be.

The employee selects the applicable earnings from the list of earnings that have been

made available for payslip modeling. This selection displays their current [hourly] rate of pay and current number of hours. The employee then enters in their Estimated Hourly Rate and Estimated Number of Hours. In this case, they also select to add Overtime to the list of earnings, and are then prompted to enter the Estimated Overtime Rate as well as the Estimated Number of hours. Note that what the employee is able to enter or select from would be based on the element definition, namely the input values. The employee will also see a list of their current deductions (again, based on their latest actual payslip) and they can also select or de-select from the available deductions. In this case, these will be left as they are with no changes. The employee can also override their existing Federal and Provincial tax credits, etc. In this case, these values will also be left as is.

## Example 2

Employee, who is due a Bonus, wants to estimate their net take home pay.

The employee selects the applicable earnings from the available list of earnings. They would select the "Bonus" earning. The employee can then enter a flat dollar amount. Note that what the employee is able to enter or select from would be based on the element definition, namely the input values. The employee will also see a list of their current deductions (again, based on their latest actual payslip) and they can also select or de-select from the available deductions. In this case, these will be left as is with no changes. Employee can also override their existing Federal and Provincial tax credits, etc. In this case, these values will also be left as is.

## Example 3

Employee would like to increase or decrease their RRSP deduction to determine the tax effect and take home pay.

The employee selects the applicable earnings from the available list of earnings. The selection would include just their Regular earnings. This displays their current [hourly] rate of pay and current number of hours if applicable. The employee then enters in their Estimated/Projected Hourly Rate and Estimated/Projected Number of Hours, or Estimated/Projected Amount. Note that what the employee is able to enter or select from would be based on the element definition, namely the input values.

The employee will also see a list of their current deductions (again, based on their latest actual payslip) and they can also select or de-select from the available deductions. In this case, the employee had a RRSP deduction in their most recent payslip so the last amount deducted is displayed as Current. In the Estimated/Projected Amount column, they can enter a new amount or percent, depending on how the deduction element is defined. The employee can also override their existing Federal and Provincial tax credits, etc. In this case, these values will be left as is.

## Example 4

Employee, who is getting married, wants to see their take home pay will be once their

tax credit amount is changed.

The employee selects the applicable earnings from the available list of earnings. This would include just their Regular earnings. This selection displays their current [hourly] rate of pay and current number of hours if applicable. The employee, then enters in their Estimated/Projected Hourly Rate and Estimated/Projected Number of Hours, or Estimated/Projected Amount. Note that what the employee is able to enter or select from would be based on the element definition, namely the input values. The employee can also see a list of their current deductions (again, based on their latest actual payslip) and they can also select or de-select from the available deductions. In this case, they are left intact with no changes. The employee can then change their existing Federal and Provincial tax credits.

# Configuration Information for Payslip Modeling (Canada)

This topic provides configuration information for the Payslip Modeling (Canada) function.

For information about the generic Payslip Modeler:

See: Using Payslip Modeler, page 16-23

Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Payslip Modeling |
| Payroll Professional | Payslip Modeling |

## Workflow

Not Applicable

## Personalization of Paycheck Modeling Pages

The Payslip Modeling Self-Service Pages are based on Oracle Application Framework technology and you can personalize the pages to display the content as per your requirements to indicate the necessary details or instructions to employees. Following are the details which you can personalize:

**Welcome Page**

Welcome Message, Usage Instructions and Terms, and Conditions displayed on this page can be personalized.

**Generate Model Payslip Page**

You can personalize the following information:

- Fields in these regions:

  Simulation Display Region for CA

  Address Related Details

  Tax Information Details

  Earnings and Hours

  Deductions

- Information Tips for each of these Regions.

- Placeholders in the 'Instructions' section.

The fields displayed in the Generate Model Paylsip page regions are configured based on Descriptive Flexfield Contexts. If any of the fields in these regions are to be hidden or made read-only, then it can be done by specifying the list of segments to be displayed and those to be displayed as Read-Only. The instructions about setting up the "Descriptive Flexfield Segment List" are specified in the "*Oracle Applications Framework Developer Guide*". For specifying the Segment List, it is necessary to know the Flexfield Context and segment names corresponding to each region. Note that the names displayed on the page for each field correspond to the Prompt information. The actual segment name will be different. The segment name should be used in the Segment List.

Below are the context names for each of the regions in the Generate Model Payslip page.

These flexfield contexts are available with the 'Extra Assignment Information' EIT.

| Region | Context Code |
|---|---|
| Simulation Display Region for CA | CA_SIMULATION_DISPLAY |
| Address Related Details | CA_SIMULATION_REGION1 |
| Tax Information Details | CA_SIMULATION_REGION2 |
| Earnings and Hours | CA_SIMULATION_REGION3 |
| Deductions | CA_SIMULATION_REGION4 |

Below is the list of segment names for each of the fields in various regions.

**Simulation Display Region for CA Region**:

| Field Name | Segment Name |
|---|---|
| Pay Basis | Pay Basis |
| Rate | Rate |
| Annual Salary | Annual Salary |
| Gross Pay YTD | Gross Pay YTD |

**Address Related Details Region:**

| Field Name | Segment Name |
|---|---|
| Work Location | Work Location |
| Employment Province | Employment Province |
| Override Province | Override Province |

**Tax Information Region:**

| Field Name | Segment Name |
|---|---|
| Federal Tax Exempt | Federal Tax Exempt |
| Federal Total Claim Amount | Federal Total Claim Amount |
| Additional Federal Tax | Additional Federal Tax |
| Feeral Prescribed Zone Deduction | Federal Prescribed Zone Dedn. |
| Federal Commission Remuneration | Federal Comm. Remuneration |
| Federal Annual Deduction Amount | Fed. Annual Deduction Amount |
| Federal Labour Sponsored Fund Contribution | Fed. Lbr Spnsrd Funds Contri |

| Field Name | Segment Name |
|---|---|
| Provincial Tax Exempt | Provincial Tax Exempt |
| Provincial Total Claim Amount | Provincial Total Claim Amount |
| Additional Provincial Tax | Additional Provincial Tax |
| Provincial Commission Remuneration | Prov. Comm. Remuneration |
| Provincial Commission Expenses | Prov. Comm. Expenses |
| Provincial Annual Deduction Amount | Prov. Annual Deduction Amount |
| Provincial Labour Sponsored Funds Contribution | Prov. Lbr Spnsrd Funds Contri |
| Number of Dependents | Number of Dependents |
| Number of Disabled Dependents | Number of Disabled Dependents |

**Earnings Region**:

| Field Name | Segment Name |
|---|---|
| Select Earnings/Hours Type | Input |
| Value | Value |
| Default Value | Default Value |

**Deductions Region**:

| Field Name | Segment Name |
|---|---|
| Select Earnings/Hours Type | Input |

| Field Name | Segment Name |
|---|---|
| Value | Value |
| Default Value | Default Value |

## Configurable Profile Options

- HR: Enable Payroll Simulation - Users can use the Payslip Modeling module only if the profile option HR:Enable Payroll Simulation is set to Yes.
- HR: Enable Multiple Assignments for Payroll Simulation - If an employee has multiple active assignments, then users can choose whether they can perform payslip modeling on just their primary assignment or select from a list of all their active assignments. Setting profile option "HR: Enable Multiple Assignments for Payroll Simulation" to Yes will allow employees to select any of their active assignments on which they wish to perform payslip modeling. If the profile option is set to No, then payslip modeling can only be performed on their primary assignment.

## Setup Steps

The following sections provide information to set up the Payslip Modeling functionality:

### Set Up the Modeling Availability Rule

Further (optional) control of when Payslip Modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition.

1. Navigate to the Payroll window (Payroll > Description).
2. Query the required payroll definition.
3. Click Further Information.
4. Set the following fields:

   Modeling Availability Rule to either Available or Unavailable.

   Set the Days After Period Start and Days Before Period End as appropriate.

For more information, see: *Defining a Payroll, Oracle HRMS Oracle HRMS Payroll Processing Management Guide*

### Add the Simulation Details Extra Information to the Required Responsibility

1. Navigate to the Information Types Security window.
2. Select the Information Type of SIMULATION_ELEMENTS (Simulation Details) and attach the type to the required Responsibility.
3. Save your work and close the Information Types Security window.

### Configure Earnings and Deductions to be Available for Modeling

This is a mandatory setup step in order to make earning and deduction elements available to the end user when modeling their payslip. For each earning or deduction element, the administrator needs to configure the Element Extra Information Type (EIT) 'Simulation Details'. Navigate: Total Compensation > Basic > Element Description > Query the applicable element > Extra Information > Simulation Details.

**Note**: Only those elements that are enabled and Inputs that are configured at the Element Extra Information Level will be displayed in the Generate Modeling page, Earnings and Deductions section related "Input" field.

The following fields are available for configuration in the Element EIT 'Simulation Details':

- Enable Simulation: Set this to Yes to allow this element to be selected by the end user when performing Payslip Modeling.
- Simulation Input 1 to Simulation Input 15: Up to 15 input values can be configured for usage with Payslip Modeling. For example, if an hourly, non-exempt employee can model overtime earnings, then Simulation Input Values 1, 2, and 3 could be defined to enable the employee to enter a rate, number of hours as well as the applicable factor.
- Simulation Name: Enter the element name that the end user will see in the Payslip Modeler when selecting that element, if it is to be different from the current element name.

For more information, see *Defining an Element, Oracle HRMS Compensation and Benefits Management Guide*

### Define Element Exclusion Set

By default, an employee's existing element entries will be processed as part of the model payslip, even if the element has not been configured to be available for Payslip Modeling. To exclude elements from even being processed, payroll administrators can optionally define an exclusion element set to exclude these elements from being included in the model payslip process. An example of when this feature might be useful is when a bonus is being paid out in the pay cycle that is being processed and

administrators do not want the element to be seen by the employee in their model payslip results. By defining an element exclusion set to specifically exclude that bonus element, it will neither be available for modeling by the end user nor will it be processed when the model payslip is submitted.

For more information on how to exclude elements, see *Defining an Element or Distribution Set, Oracle HRMS Compensation and Benefits Management Guide*

After defining an element exclusion set, you must select this set in the Modeling Exclusion Element Set field of the Self Service Preference window for your business group. For more information, see: *Entering Self-Service Preference Information, Oracle HRMS Enterprise and Workforce Management Guide.*

### Select the Oracle BI Publisher XML Template to Print Payslip Modeling PDF

Oracle Payroll for Canada provides a predefined XML template to print the payslip modeling PDF report.

Details of the XML Template:

Name: CA Payroll Simulator Template

Code: PAYCAPSSM

Application: Payroll

Data Definition: CA Payroll Simulator Data Definition (PAYCASIMPAYSLIP)

Type: RTF

Default File: PAYCAPSSM_en.rtf

Default Output Type: PDF

You must select the XML template in the Payroll Simulation Template field of the Self Service Preference window for your business group.

If customers do not want to use the default template, then they can create an XML Publisher template and specify the template in the Self Service Preference window. The template must be associated with the Data Definition PAY<LEG_CODE>SIMPAYSLIP

## Changes to Self-Service Menus for Canada

Information in this topic is applicable to new customers who have implemented Oracle HRMS R12.1 HRMS RUP8.

If you are an existing Canadian customer, by default, the following Canadian functions are available with the Employee Self Service (HR_EMPLOYEE_DIRECT_ACCESS_V4.0) and Payroll Professional Menu (PAY_PROF_SELF_SERVICE_V4.0):

- Employee T4
- Employee T4A

- Employee RL1
- Employee RL2
- Employee Search for T4
- Employee Search for T4A
- Employee Search for RL1
- Employee Search for RL2

If you are a new Canadian customer who has implemented Oracle HRMS R12.1 HRMS RUP8, then these functions are not available with the predefined responsibilities. To make these self-service functions available to your employees and payroll professionals, complete the following setup steps:

1. Add Canadian functions to Canadian specific menus.
    - Navigate to the Menus window.
    - Create custom Self-Service and Payroll Professional menus using the following example:
        - Employee Self-Service Menu

          Name: CA_EMPLOYEE_SELF_SERVICE

          User Menu Name: CA Employee Self Service

          Add the following functions:

| Seq | Prompt | Function |
|---|---|---|
| 1 | My T4 | Employee T4 |
| 2 | My T4A | Employee T4A |
| 3 | My RL1 | Employee RL1 |
| 4 | My RL2 | Employee RL2 |

        - Payroll Professional Menu

          Name: CA_PAYROLL_PROFESSIONAL

          User Menu Name: CA Payroll Professional

Add the following functions:

| Seq | Prompt | Submenu | Function |
|---|---|---|---|
| 1 | Employee Search for T4 | | Employee Search for T4 |
| 2 | | | Employee T4 |
| 3 | Employee Search for T4A | | Employee Search for T4A |
| 4 | | | Employee T4A |
| 5 | Employee Search for RL1 | | Employee Search for RL1 |
| 6 | | | Employee RL1 |
| 7 | Employee Search for RL2 | | Employee Search for RL2 |
| 8 | | | Employee RL2 |
| 9 | | Employees Menu | |
| 10 | | Manager Enter Process Menu | |
| | | SSHR hierarchy and search functions | |

2. Create two new responsibilities for the menus.

   Navigate to the Responsibilities window. Create the following responsibilities and attach the menus created in step1 to the custom responsibilities:

| Responsibility Name | Responsibility Key | Menu |
|---|---|---|
| CA Employee Self Service | CA_EMP_SS | CA Employee Self Service |
| CA Payroll Professional | CA_PAYROLL_PROF | CA Payroll Professional |

3. Attach the responsibilities to users.

   Navigate to the Users window. Add the responsibilities created in step 2 to required users.

## Employee T4

The Employee T4 module enables employees to view and print the following PDFs using their self-service responsibility:

- T4 PDF
- T4 Amendment PDF
- T4 Cancellation PDF

Based on the options selected in the **Document Delivery Preferences** page, employees can elect to receive their T4 slip online, printed, or both. See Setting Document Delivery Preferences, page 16-46 for more information.

When an employee logs in and clicks the **Employee T4** link in their self-service responsibility, the application displays the latest T4 PDF inline in a browser window if the Federal Year End Preprocess or Federal Year End Amendment process is run for that employee. The latest T4 PDF is displayed provided the system date must be later than the online viewing date specified in the HR: Allow Online T4/T4A viewing as of (MM/DD) profile option. Otherwise, the application displays a note that the T4 statement is not available for that specific year. If for the employee, the Payroll Archive process is run for multiple years, then the application initially displays the latest archived T4 PDF. A bar graph displays income and deduction amounts for the current and previous reporting years for comparison purposes.

To view previous years PDFs, select the appropriate value from the list of all available PDFs. When you select a particular record in the list of values and click the Go button, the PDF page will display T4 PDF in the PDF display region. If an employee's province has changed or GRE has changed within the year, then separate entries are available in the list of values for each province or GRE.

**Note:** The application displays the T4 document in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

### Viewing T4 as a Payroll Professional

Using the Payroll Professional responsibility, you can select the **Employee T4** link and search for a person. When you select a person from the list, their T4 information appears. You can also save a person in My List for future access, so you do not need to search for that person again. In addition to displaying T4 information for current employees, you can also display information for ex-employees. To search for ex-employees, use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

## Employee T4A

The Employee T4A module enables employees to view and print the following PDFs using their self-service responsibility:

- T4A PDF
- T4A Amendment PDF
- T4A Cancellation PDF

Based on the options selected in the **Document Delivery Preferences** page, employees can elect to receive their T4A slip online, printed, or both. See Setting Document Delivery Preferences, page 16-46 for more information.

When an employee logs in and clicks the **Employee T4A** link in their self-service responsibility, the application displays the latest T4A PDF Federal Year End Preprocess or Federal Year End Amendment process is run for that employee. The latest T4A PDF is displayed inline in a browser window provided the system date must be later than the online viewing date specified in the HR: Allow Online T4/T4A viewing as of (MM/DD) profile option. Otherwise, the application displays a note that the T4A PDF is not available for that specific year. If for the employee, Payroll Archive process is run for multiple years, then the application initially displays the latest archived T4A PDF. A bar graph displays income and tax amounts for the current and previous reporting years for comparison purposes.

To view previous years PDFs, select the appropriate value from the list of all available PDFs. When you select a particular record in the list of values and click the Go button, the PDF page will display T4A PDF in PDF display region. If an employee's province has changed or GRE has changed within the year, then separate entries are available in the list of values for each province or GRE.

**Note:** The application displays the T4A document in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

### Viewing T4A as a Payroll Professional

Using the Payroll Professional responsibility you can select the **Employee T4A** link and search for a person. When you select a person from the list, their T4A information appears. You can also save a person in **My List** for future access, so you do not need to search for that person again. In addition to displaying T4A information for current employees, you can also display information for ex-employees. To search for ex-employees, use the Person Type field in the **Advanced Search** page and select the person type Ex-Employee.

## Configuring Employee T4 and T4A Modules

This topic provides configuration information for Employee T4 and T4A modules.

**Important:** If you are an existing Canadian customer, by default, the following Canadian functions are available with the Employee Self Service (HR_EMPLOYEE_DIRECT_ACCESS_V4.0) and Payroll Professional Menu (PAY_PROF_SELF_SERVICE_V4.0):

- Employee T4
- Employee T4A
- Employee Search for T4
- Employee Search for T4A

If you are a new Canadian customer who has implemented Oracle HRMS R12.2.5, then these functions are not available with the predefined responsibilities. To make these self-service functions available to your employees and payroll professionals, complete the setup steps listed in the topic: Changes to Self-Service Menus for Canada, page 16-94

### Menu and Function Names

The Employee T4 module can be accessed from the following menus and functions:

| User Menu Name | Prompt ( Function) |
|---|---|
| Employee Self-Service | Employee T4 (PAY_T4_SS) |
| Payroll Professional | Employee T4 Search (PAY_MGR_T4_EMP_SEARCH) |

The Employee T4A module can be accessed from the following menus and functions:

| User Menu Name | Prompt (New Function) |
|---|---|
| Employee Self-Service | Employee T4A (PAY_T4A_SS) |
| Payroll Professional | Employee T4A Search (PAY_MGR_T4A_EMP_SEARCH) |

See: Defining Menus for SSHR, page 3-10

## Workflow

Not applicable

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

**Employee T4**

| Tip Type | Message Name |
|---|---|
| Error | PAY_74166_NO_T4_TO_VIEW_WEB |
| Error | PAY_74165_NO_SS_PREF_T4_WEB |
| Error | PAY_74167_T4_INVALID_SETUP |

**Employee T4A**

| Tip Type | Message Name |
|---|---|
| Error | PAY_74169_NO_SS_PREF_T4A_WEB |
| Error | PAY_74170_NO_T4A_TO_VIEW_WEB |
| Error | PAY_74167_T4_INVALID_SETUP |

## Configurable FlexFields

Not applicable

## Configurable Profile Options

**HR: Allow Online T4/T4A viewing as of (MM/DD):**

Enable the HR: Allow Online T4/T4A viewing as of (MM/DD) profile option to allow your employees to view and download their T4s and T4As as PDF files. You can specify the month and day that the current year T4s and T4As are viewable and grant these rights at the application, responsibility, user, server, organization, or site level. If employees attempt to view their T4 before the specified date, then they will have access to the previous years T4s and T4As only. If no value is provided here, then employees can view all available T4s and T4As from the prior year as soon as the Federal Year End Preprocess is run.

## Additional Configuration Steps

1. Set the document viewing and printing preferences using Self Service Preferences at one of the following levels:

   Business Group

   HR Organization

   Location

   Person

   The precedence goes to Person, Location, Organization and then Business Group.

2. Define the following self-service preferences fields for online T4 and T4A:

   - **Document Type**: This specifies the type of document for which following segments will be configured. T4 or T4A should be chosen from the list of values attached to this segment.

- **Online**: This is a Yes/No segment signifying whether to display the online T4/T4A PDF to employees. Select Yes to enable self- service T4/T4A PDF functionality. If you select No, then the T4/T4A will not be displayed through self-service. The default value is Yes. If Yes is chosen for a particular group, for example, location and organization, and there are employees in that group who have not provided consent to receive their T4 or T4A online, then you must enter an override for that employee to set this option to No.

- **Template**: The list of seeded templates available are as follows:

  1. If the T4 is selected under Document Type, then the following predefined templates are available:

     - T4 Slip
     - T4 Instructions
     - T4 Amendment PDF
     - T4 Amendment Instructions
     - T4 Cancellation PDF
     - T4 Cancellation Instructions

  2. If the T4A is selected under Document Type, then the following predefined templates are available:

     - T4A PDF Template
     - T4A PDF Error Report
     - T4A Amendment PDF
     - T4A Amendment PDF Error Report
     - T4A Cancellation PDF

     Select the template to be used for formatting the online T4/ T4A PDF. All of these templates are maintained under XDO template manager, which is available through the XML Publisher responsibility. For information on how to create custom T4 and T4A templates, see: *Setting Up Custom BI Publisher Templates for Canada Payroll, Oracle HRMS Payroll Processing Management Guide (Canada)*

  The following self-service preferences fields are not applicable to view T4 or T4A online using self-service:

- Paper
- XML Code
- Effective Date
- Payslip Employer Address
- Display Payslip GRE Addr
- From Offset Criteria
- Display Rate Detail Section
- Offset Criteria

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

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*

3. Complete the following steps to ensure that the statutory reporting name is printed on the T4 and T4A self-service PDFs.
    1. Enter or query the GRE in the **Organization** window.
    2. In the **Organization Classifications** region, select GRE/Legal Entity.
    3. Click **Others**, and select **Employer Identification**.
    4. Click in the **Additional Organization Information** field to open the Employer Identification window.
    5. Enter the statutory reporting name. Note that if the **Statutory Reporting Name** field is left blank, then the GRE name is printed on the T4 and T4A self-service PDFs.
4. Define the **User Table** columns to control the viewing of T4 and T4A PDFs online through self-service:

    The CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL controls the viewing of each slip (original, amended, and cancelled) for every year. For example, if you want to restrict online viewing to only original year end slips, then enter a value of N in this table for amended and cancelled slips for each year. Rows for this table have been seeded (T4 PDF, T4 Amendment PDF, T4 Cancellation PDF, T4A PDF,

T4A Amendment PDF, and T4A Cancellation PDF). Under Table Structure, you have to create columns by entering the year (YYYY) you want to control the slips. As Table Values, you can provide N or Y for a specific year (column value) and for specific report type (row value). The default is Y.

Following are the setup steps to control the viewing of the T4 and T4A statements online through self-service:

1. Navigate to the **Table Structure** window (Other Definitions > Table Structure).
2. Query the CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL table.
3. Define columns and provide year (YYYY) under Name.
4. Navigate to the **Table Values** window (Other Definitions > Table Values).
5. Query the form with table value as CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL.
6. Date track to 31-Dec of the year provided in the earlier step.
7. Select report (T4 PDF, T4 Amendment PDF, T4 Cancellation PDF, T4A PDF, T4A Amendment PDF, and T4A Cancellation PDF) in the Exact column and provide either Y or N in the Value field.

## Employee RL1

The Employee RL1 module enables employees to view and print the following PDFs using their self-service responsibility:

- RL1 PDF
- RL1 Amendment PDF
- RL1 Cancellation PDF

Based on the options selected in the **Document Delivery Preferences** page, employees can elect to receive their RL1 slip online, printed, or both. See Setting Document Delivery Preferences, page 16-46 for more information.

The PDFs are available if the employee's payroll data is archived in either the Provincial Year End Preprocess or amendment year end preprocess or has cancelled PDFs.

When an employee logs in and clicks the **Employee RL1** link in their self-service responsibility, the latest RL1 PDF will be shown inline in a browser window if the Provincial Year End Preprocess is run for that user. Otherwise, the application displays a note that the RL1 is not available for that specific year. If for the user Payroll Archive process is run for multiple years, then initially the application displays the latest archive RL1 PDF. A bar graph displays income and tax amounts for the current and previous

reporting years for comparison purposes.

To view previous years PDFs, select the appropriate value from the list of all available PDFs.

When you select a particular record in the list of values and click the Go button, the PDF page will display RL1 PDF in the PDF display region. If an employee's PRE has changed within the year, then separate entries are available in the list of values for each PRE.

> **Note:** The application displays the RL1 document in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

### Viewing RL1 as a Payroll Professional

Using the Payroll Professional responsibility you can select the **Employee RL1** link and search for a person. When you select a person from the list, their RL1 information appears. You can also save a person in My List for future access, so you do not need to search for that person again. In addition to displaying RL1 information for current employees, you can also display information for ex-employees. To search for ex-employees, use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

## Employee RL2

The Employee RL2 module enables employees to view and print the following PDFs using their self-service responsibility:

- RL2 PDF
- RL2 Amendment PDF
- RL2 Cancellation PDF

Based on the options selected in the **Document Delivery Preferences** page, employees can elect to receive their RL2 slip online, printed, or both. See Setting Document Delivery Preferences, page 16-46 for more information.

The PDFs are available if the employee's payroll data is archived in either the Provincial Year End Preprocess or amendment year end preprocess or has cancelled PDFs.

When an employee logs in and clicks the **Employee RL2** link in their self-service responsibility, the latest RL2 PDF will be shown inline in a browser window if the Provincial Year End Preprocess is run for that user. Otherwise, the application displays a note that the RL2 is not available for that specific year. If for the user Provincial Year End Preprocess is run for multiple years, then initially the application displays the latest archive RL2 PDF. A bar graph displays income and tax amounts for the current and

previous reporting years for comparison purposes.

To view previous years PDFs, select the appropriate value from the list of all available PDFs. When you select a particular record in the list of values and click the Go button, the PDF page will display RL2 PDF in the PDF display region. If an employee's PRE has changed within the year, then separate entries are available in the list of values for each PRE

> **Note:** The application displays the RL2 document in the browser window by default. Do not download the forms to your local machine for security reasons, for example, if you are using a shared computer.

### Viewing RL2 as a Payroll Professional

Using the Payroll Professional responsibility you can select the **Employee RL2** link and search for a person. When you select a person from the list, their RL2 information appears. You can also save a person in My List for future access, so you do not need to search for that person again. In addition to displaying RL2 information for current employees, you can also display information for ex-employees. To search for ex-employees, use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

## Configuring Employee RL1 and RL2 Modules

This topic provides configuration information for Employee RL1 and RL2 modules.

> **Important:** If you are an existing Canadian customer, by default, the following Canadian functions are available with the Employee Self Service (HR_EMPLOYEE_DIRECT_ACCESS_V4.0) and Payroll Professional Menu (PAY_PROF_SELF_SERVICE_V4.0):
>
> - Employee RL1
> - Employee RL2
> - Employee Search for RL1
> - Employee Search for RL2
>
> If you are a new Canadian customer who has implemented Oracle HRMS R12.2.5, then these functions are not available with the predefined responsibilities. To make these self-service functions available to your employees and payroll professionals, complete the setup steps listed in the topic: Changes to Self-Service Menus for Canada, page 16-94

## Menu and Function Names

The Employee RL1 module can be accessed from the following menus and functions:

| User Menu Name | Prompt ( Function) |
|---|---|
| Employee Self-Service | Employee RL1 (PAY_RL1_SS) |
| Payroll Professional | Employee RL1 Search (PAY_MGR_RL1_EMP_SEARCH) |

The Employee RL2 module can be accessed from the following menus and functions:

| User Menu Name | Prompt ( Function) |
|---|---|
| Employee Self-Service | Employee RL2 (PAY_RL2_SS) |
| Payroll Professional | Employee RL2 Search (PAY_MGR_RL2_EMP_SEARCH) |

See: Defining Menus for SSHR, page 3-10

## Workflow

Not applicable

### Workflow Process Display Name:

Not applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

**Employee RL1**

| Tip Type | Message Name |
|---|---|
| Error | PAY_74173_NO_RL1_TO_VIEW_WEB |

| Tip Type | Message Name |
|---|---|
| Error | PAY_74172_NO_SS_PREF_RL1_WEB |
| Error | PAY_74174_RL1_INVALID_SETUP |

**Employee RL2**

| Tip Type | Message Name |
|---|---|
| Error | PAY_74169_NO_SS_PREF_T4A_WEB |
| Error | PAY_74170_NO_T4A_TO_VIEW_WEB |
| Error | PAY_74167_T4_INVALID_SETUP |

## Configurable FlexFields

Not applicable

## Configurable Profile Options

**HR:Allow Online RL1/RL2 viewing as of (MM/DD)**

Enable the HR:Allow Online RL1/RL2 viewing as of (MM/DD) profile option to allow your employees to view and download their RL1s or RL2s as PDF files. You can specify the month and day that the current year's RL1s or RL2s are viewable and grant these rights at the application, responsibility, user, server, organization, or site level. If employees attempt to view their RL1 or RL2 before the specified date, they only see the previous years RL1s or RL2s.

## Additional Configuration Steps

- Set the document viewing and printing preferences using Self Service Preferences at one of the following levels:

  Business Group

  HR Organization

  Location

  Person

The precedence goes to Person, Location, Organization and then Business Group.

Define the following self-service preferences fields for online T4 and T4A:

- Document Type: This specifies the type of document for which following segments will be configured. RL1 or RL2 should be chosen from the list of values attached to this segment.

- Online: This is a Yes/No segment signifying whether to display the online RL1 or RL2 PDF to employees. Select Yes to enable self -service RL1 or RL2 PDF functionality. If you select No, then RL1 or RL2 will not be displayed through self service.

- Template: The list of seeded templates available are as follows:

  If the RL1 is selected under Document Type, then the following predefined templates are available:

  RL1 Paper PDF

  RL1 Amendment PDF

  RL1 Cancelled PDF

  RL1 PDF Error Report

  RL1 Amendment Error Report

  If the RL2 is selected under Document Type, then the following predefined templates are available:

  RL2 Paper PDF

  RL2 Amendment PDF

  RL2 Cancel PDF

  RL2 PDF Error Report

  RL2 Amendment Error Report

  Select the template to be used for formatting the online RL1/ RL2 PDF. All of these templates are maintained under XDO template manager, which is available through the XML Publisher responsibility. For information on how to create custom T4 and T4A templates, see: *Setting Up Custom BI Publisher Templates for Canada Payroll, Oracle HRMS Payroll Processing Management Guide (Canada)*

- The following self-service preferences fields are not applicable to RL1 or RL2.

  Paper

  XML Code

  Effective Date

Payslip Employer Address

Display Payslip GRE Addr

From Offset Criteria

Display Rate Detail Section

Offset Criteria

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

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*

- Define the User Table columns to control the viewing of RL1 and RL2 Statements.

  The CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL controls the viewing of each slip (original, amended and cancelled) for every year. For example, if you want to restrict online viewing to only original year end slips, then enter a value of N in this table for amended and cancelled slips for each year. Rows for this table have been seeded (RL1 PDF, RL1 Amendment PDF, RL1 Cancellation PDF, RL2 PDF, RL2 Amendment PDF, and RL2 Cancellation PDF). Under Table Structure, you have to create columns by entering the year (YYYY) you want to control the slips. As Table Values, you can provide N or Y for a specific year (column value) and for specific report type (row value). The default is Y.

  Following are the setup steps to control the viewing of T4 and T4A statements through self-service:

  1. Navigate to the Table Structure window (Other Definitions > Table Structure).

  2. Query the CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL table.

  3. Define columns and provide year (YYYY) under Name.

  4. Navigate to the Table Values window (Other Definitions > Table Values).

  5. Query the form with table value as CAYE_ONLINE_SLIPS_DISPLAY_CONTROL_TBL.

  6. Date track to 31-Dec of the year provided in the earlier step.

  7. Select the report (RL1 PDF, RL1 Amendment PDF, RL1 Cancellation PDF, RL2 PDF, RL2 Amendment PDF, and RL2 Cancellation PDF) in the Exact

column and provide either Y or N in the Value field.

## Payslip Modeling (Mexico)

The Payslip Modeling feature for Mexico is a localized version of the generic Payslip Modeling functionality and is designed to meet local requirements.

For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23

Payroll professionals (administrators) can model payslips using the Payslip Modeler available online. This is a payslip calculator that can be used to quickly and accurately answer payslip related questions and address "what-if" scenarios. The calculation results of the 'what-if' scenarios are based on the employee's current pay or the most recent payslip. The simulation output displays some additional components like Employer Taxes, IDW components, and ISR Run results in addition to the employee components which are displayed in the Employee Online Payslip. These additional components are useful for Payroll Managers to simulate employee payroll calculations.

The Payslip Modeling feature is available to payroll professionals (administrators) via Self Service HR. Payroll administrators can use this feature to answer queries or perform what-if analysis for employees.

> **Note:** The Payslip Modeling feature is not available from Employee Self-Service, Manager Self-Service and Contingent Worker Self-Service responsibilities.

The Payslip Modeling feature consists of the following processes:

- A Welcome page greeting the user by name and where the user must agree to certain terms and conditions.
- A Payslip Modeler page where users can select from earnings and deductions to model as well as change tax information, if desired. Once the selections are complete, the user can submit the model payslip to be calculated.
- Results are displayed, which the user can optionally print out as a PDF document.

> **Note:** Users cannot run the payslip modeling process, if there is a prepayment or costing process already executed for the current pay period. The employee data remains absolutely unaffected by the simulation process. Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their payslip.

For the Mexico localization, the Payslip Modeling functionality enables payroll

administrators to model the following information to determine the impact on payroll calculations:

- Location Details
- Mexico Tax Witholding Details
- Earnings and Hours
- Deductions

## Using Payslip Modeling

The Payslip Modeling feature enables payroll administrators to perform the following tasks:

### Agree to Terms and Conditions:

Payroll administrators can view information provided in the Welcome Page and agree to the Usage Terms and Conditions.

### Model Payslip:

After payroll administrators agree to the usage terms and conditions, the Generate Model Payslip page appears.

This page enables payroll administrators to alter work location, GRE and ISR Tax Rates user tables in addition to the earnings and deductions values to determine their impact on payroll calculations.

- View certain personal and pay information such as Employee Name, Job Title, Payroll, Pay Basis, Annual Salary, and Gross Pay.
- Perform payslip modeling altering location details. The work location field displays the employee's assignment work location, by default. The government reporting entity field displays the assignment's GRE, by default. The list of GREs available to the assignment are based on the business group.
- Payroll administrators can select a work location available to the assignment based on the business group. The tax withholding details fields that subsequently appear are related to the work location. The following is a list of fields that appear in the Mexico Tax Witholding Details region:
  - Pay Run Type: Employees can select the required run type to submit the simulation payroll run. The default run type is Regular.
  - ISR Tax Rate

- ISR Monthly Tax Rate
- ISR Tax Annual Rate
- ISR Subsidy for Empl

The initial values that appear in the Mexico Tax Witholding Details region are the default values set for the assignment's payroll.

Payroll administrators can change the work location and tax witholding details to view the impact on payroll and tax calculations. For example, users can change the work location to verify corresponding tax calculation changes. If taxation is present for the selected work location, then you can view the change in the Simulation Output under Estimated Taxes and Estimated Employer Taxes section.

- Model changes to net or take home pay by selecting different earnings and deductions that have been made available for modeling. The list of Element-Input Values that appear can change, based on the work location selected.

### View and Print Model Payslip

Payroll administrators can view and print model payslip results. They can view side by side pie charts that compare the employee's Current Pay to their Estimated (model) Pay. The Current Pay pie chart displays data from the employee's most recent payslip. The Estimated Pay pie chart displays data from the model payslip. The Current Pay and Estimated Pay pie charts provide a breakdown of current and estimated pay by pretax deductions, taxes, other deductions and net pay.

## Configuration Information for Payslip Modeling (Mexico)

This topic provides configuration information for the Payslip Modeling (Mexico) function.

For information about the generic Payslip Modeler:

See: Using Payslip Modeler, page 16-23

See: Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Payroll Professional | Payslip Modeling |

## Workflow

Not Applicable

## Personalization of Paycheck Modeling Pages

The Payslip Modeling Self-Service Pages are based on Oracle Application Framework technology and you can personalize the pages to display the content as per your requirements to indicate the necessary details or instructions to employees. Following are the details which you can personalize:

**Welcome Page**

Welcome Message, Usage Instructions and Terms, and Conditions displayed on this page can be personalized.

**Generate Model Payslip Page**

You can personalize the following information:

- Fields in these regions:

  Simulation Display Region for MX

  Location Details

  Mexico Tax Withholding Details

  Earnings and Hours

  Deductions

- Information Tips for each of these Regions.

- Placeholders in the 'Instructions' section.

The fields displayed in the Generate Model Paylsip page regions are configured based on Descriptive Flexfield Contexts. If any of the fields in these regions are to be hidden or made read-only, then it can be done by specifying the list of segments to be displayed and those to be displayed as Read-Only. The instructions about setting up the "Descriptive Flexfield Segment List" are specified in the "*Oracle Applications Framework Developer Guide*". For specifying the Segment List, it is necessary to know the Flexfield Context and segment names corresponding to each region. Note that the names displayed on the page for each field correspond to the Prompt information. The actual segment name will be different. The segment name should be used in the Segment List.

Below are the context names for each of the regions in the Generate Model Payslip page.

These flexfield contexts are available with the 'Extra Assignment Information' EIT.

| Region | Context Code |
|---|---|
| Simulation Display Region for MX | MX_SIMULATION_DISPLAY |
| Location Details | MX_SIMULATION_REGION1 |
| Mexico Tax Withholding Details | MX_SIMULATION_REGION2 |
| Earnings and Hours | MX_SIMULATION_REGION3 |
| Deductions | MX_SIMULATION_REGION4 |

Below is the list of segment names for each of the fields in various regions.

**Simulation Display Region for MX**:

| Field Name | Segment Name |
|---|---|
| Pay Basis | Pay Basis |
| Rate | Rate |
| Annual Salary | Annual Salary |
| Gross Pay YTD | Gross Pay YTD |

**Location Details Region:**

| Field Name | Segment Name |
|---|---|
| Work Location | Work Location |
| Government Reporting Entity | Government Reporting Entity |

**Mexico Tax Withholding Details:**

| Field Name | Segment Name |
|---|---|
| Pay Run Type | Pay Run Type |

| Field Name | Segment Name |
|---|---|
| ISR Tax Rate | ISR Tax Rate |
| ISR Monthly Tax Rate | ISR Monthly Tax Rate |
| ISR Tax Annual Rate | ISR Tax Annual Rate |
| ISR Tax Annual Rate | ISR Tax Annual Rate |
| ISR Subsidy for Empl | ISR Subsidy for Empl |

**Earnings Region**:

| Field Name | Segment Name |
|---|---|
| Select Earnings/Hours Type | Input |
| Value | Value |
| Default Value | Default Value |

**Deductions Region**:

| Field Name | Segment Name |
|---|---|
| Select Earnings/Hours Type | Input |
| Value | Value |
| Default Value | Default Value |

## Configurable Profile Options

- HR: Enable Payroll Simulation - Users can use the Payslip Modeling module only if the profile option HR:Enable Payroll Simulation is set to Yes.
- HR: Enable Multiple Assignments for Payroll Simulation - If an employee has multiple active assignments, then users can choose whether they can perform

payslip modeling on just their primary assignment or select from a list of all their active assignments. Setting profile option "HR: Enable Multiple Assignments for Payroll Simulation" to Yes will allow employees to select any of their active assignments on which they wish to perform payslip modeling. If the profile option is set to No, then payslip modeling can only be performed on their primary assignment.

## Setup Steps

The following sections provide information to set up the Payslip Modeling functionality:

### Set Up the Modeling Availability Rule

Further (optional) control of when Payslip Modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition.

1. Navigate to the Payroll window (Payroll > Description).
2. Query the required payroll definition.
3. Click Further Information.
4. Set the following fields:

   Modeling Availability Rule to either Available or Unavailable.

   Set the Days After Period Start and Days Before Period End as appropriate.

For more information, see: *Defining a Payroll, Oracle HRMS Oracle HRMS Payroll Processing Management Guide*

### Add the Simulation Details Extra Information to the Required Responsibility

1. Navigate to the Information Types Security window.
2. Select the Information Type of SIMULATION_ELEMENTS (Simulation Details) and attach the type to the required Responsibility.
3. Save your work and close the Information Types Security window.

### Configure Earnings and Deductions to be Available for Modeling

This is a mandatory setup step in order to make earning and deduction elements available to the end user when modeling their payslip. For each earning or deduction element, the administrator needs to configure the Element Extra Information Type (EIT) 'Simulation Details'. Navigate: Total Compensation > Basic > Element Description > Query the applicable element > Extra Information > Simulation Details.

**Note**: Only those elements that are enabled and Inputs that are configured at the Element Extra Information Level will be displayed in the Generate Modeling page, Earnings and Deductions section related "Input" field.

The following fields are available for configuration in the Element EIT 'Simulation Details':

- Enable Simulation: Set this to Yes to allow this element to be selected by the end user when performing Payslip Modeling.
- Simulation Input 1 to Simulation Input 15: Up to 15 input values can be configured for usage with Payslip Modeling. For example, if an hourly, non-exempt employee can model overtime earnings, then Simulation Input Values 1, 2, and 3 could be defined to enable the employee to enter a rate, number of hours as well as the applicable factor.
- Simulation Name: Enter the element name that the end user will see in the Payslip Modeler when selecting that element, if it is to be different from the current element name.

For more information, see *Defining an Element, Oracle HRMS Compensation and Benefits Management Guide*

### Define Element Exclusion Set

By default, an employee's existing element entries will be processed as part of the model payslip, even if the element has not been configured to be available for Payslip Modeling. To exclude elements from even being processed, payroll administrators can optionally define an exclusion element set to exclude these elements from being included in the model payslip process. An example of when this feature might be useful is when a bonus is being paid out in the pay cycle that is being processed and administrators do not want the element to be seen by the employee in their model payslip results. By defining an element exclusion set to specifically exclude that bonus element, it will neither be available for modeling by the end user nor will it be processed when the model payslip is submitted.

For more information on how to exclude elements, see *Defining an Element or Distribution Set, Oracle HRMS Compensation and Benefits Management Guide*

After defining an element exclusion set, you must select this set in the Modeling Exclusion Element Set field of the Self Service Preference window for your business group. For more information, see: *Entering Self-Service Preference Information, Oracle HRMS Enterprise and Workforce Management Guide.*

### Select the Oracle BI Publisher XML Template to Print Payslip Modeling PDF

Oracle Payroll for Mexico provides a predefined XML template to print the payslip modeling PDF report.

Details of the XML Template:

Name: MX Payroll Simulator Template

Code: PAYMXPSSM

Application: Payroll

Data Definition: MX Payroll Simulator Data Definition

Type: RTF

Default Output Type: PDF

You must select the XML template in the Payroll Simulation Template field of the Self Service Preference window for your business group.

If customers do not want to use the default template, then they can create an XML Publisher template and specify the template in the Self Service Preference window. The template must be associated with the Data Definition PAY<LEG_CODE>SIMPAYSLIP

## Recommended Step for the Government Reporting Field in the Location Details Region

The Government Reporting Entity field in the Location Details region, by default, displays the assignment's GRE recorded in the Statutory Info tab of the Assignment window.

If the GRE is not entered, then the application determines the GRE of an assignment based on the hierarchy the location is associated with. Therefore, it is recommended that all locations be associated with the appropriate GREs using the Mexico HRMS Statutory Reporting Hierarchy.

# Payroll Management - EMEA

## Online Payslip (South Africa)

The Payslip module enables self-service users to view an electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user will see an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

**HR:Mask Characters**

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

## Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the ZA Payslip Balances and ZA Payslip Elements additional organization information types.

   - ZA Payslip Balances

     See: Business Groups: Entering ZA Payslip Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

   - ZA Payslip Elements

     See: Business Groups: Entering ZA Payslip Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

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

*Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Pay Advice Generation - Self Service (South Africa) process to enable SSHR users to view their payslip.

   See: Running the Pay Advice Generation - Self Service (South Africa), *Oracle HRMS Payroll Processing Management Guide*

# Payslip Modeling (UK)

The payslip modeling feature for the United Kingdom (UK) is a localized version of the generic payslip modeling functionality and is designed to meet local requirements.

> **Note:** For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23.

Employees can model their payslip using the payslip modeler available online. You can use the payslip calculator to quickly and accurately answer payslip related questions and address "what-if" scenarios such as how their net pay would be impacted. Employees can print a PDF copy of their model payslip results. This feature is available to both employees and payroll professionals (administrators) from the Self Service HR.

> **Additional Information:** You cannot run the payslip modeling process if a prepayment or costing process has already been run for the current pay period. The modeling process does not impact the data present in the application. Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their payslip. Employees can elect to print a PDF copy of their sample payslip.

For UK, the payslip modeling feature enables employees or payroll administrators to model the following information to determine the impact on payroll calculations: all types of elements like Tax Related Details, Earnings Details and Deduction details can be simulated.

## Using Payslip Modeling

Payslip modeling allows you to simulate the results of a payroll run and display those results as a payslip. You can view certain personal and pay information such as

employee name, job title, payroll, pay basis, and annual salary. Use the upper part of the Payslip Modeler window to change tax details and enter termination information. You can add extra Earnings, Pre Tax deductions, and Termination Payment elements if required in the lower part of the Payslip Modeler window.

As this is a simulation, the actual data is changed data within the application when running the simulation and rolled back at the end of simulation. Users can simulate custom Earnings, Pre Tax Deductions elements with Multiple Entries Allowed Flag as No. You can only simulate in current open period in which the system date falls and cannot simulate in any other past periods or future payroll periods. Click Download on the Results page to save the model payslip in PDF format.

> **Caution:** Do not download the model payslip to your local machine for security reasons, for example, if you are using a shared computer.

# Configuration Information for Payslip Modeling (UK)

This topic provides configuration information for the Paycheck Modeling (UK) function.

For information about the generic Payslip Modeler, see: Using Payslip Modeler, page 16-23 and Setting up Payslip Modeler., *Oracle Payroll Processing Management Guide*

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Manager Self Service | Payslip Modeling |
| Payroll Professional | Payslip Modeling |

> **Note:** The Oracle Payroll generic menu is Payslip Modeling. To meet the industry requirements, you can rename the menu for the United State legislation as Paycheck Modeling.

## Set Up the REGISTER EIT PROGRAM

Complete the following post-installation steps:

1. Navigate to the UK Super HRMS Manager > Processes and Reports > Submit Processes and Reports.

2. Click Single Request.

3. Select Register Extra Information Types (EITs) with the following parameters:
   - Table Name = PER_ASSIGNMENT_INFO_TYPES
   - Information Type = DEFAULT_GB_SIMULATION_REGION1
   - Multiple Rows = No
   - Legislation Code = United Kingdom

4. Submit the concurrent program.

5. Submit the program for the information type DEFAULT_GB_SIMULATION_REGION2.

## View and Print Model Payslip

Payroll administrators can view and print sample payslip results. You can access this module from the following menus and functions:

(N) Self Service for UK Employees > Payslip Modeling > Configurable Profile Options HR: Enable Payroll Simulation

To use the payslip modeling module, the profile option HR: Enable Payroll Simulation must be set to to Yes.

For more information, see: *Defining a Payroll, Oracle HRMS Oracle HRMS Payroll Processing Management Guide*

### Setup Steps

The following steps describe how to set up the payslip modeling feature.

> **Note:** Additional (optional) control of when payslip modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition

1. Navigate to the Payroll window (Payroll > Description).

2. Query the required payroll definition.

3. Click Further Information.

4. Set the following fields: Modeling Availability Rule to either Available or Unavailable.

5. Set the Days After Period Start and Days Before Period End as appropriate.

### Payslip Modeling Scenario

1. Create an employee.
2. Attach payroll and earnings for which simulation is enabled with some value.
3. On the Tax Information tab, enter the Tax Code, Tax Basis, and NI Category.
4. Run quick pay for any previous month
5. Navigate to the Self Service responsibility.
6. Navigate to Payslip Modeling.
7. Select *Yes, I have read and I agree to the above Usage Terms and Conditions.* in the Welcome to Payslip Modelling window and click Next.
8. On the Generate Model Payslip page, enter all details and click Next.
9. In Sample Payslip, the payslip is generated successfully with complete details.

## P11D Reports (UK)

The P11D report for the UK provides information on expenses and benefits paid by an employer to an employee or worker. UK employers must submit P11D information for employees on paper, or using Electronic Data Interchange (EDI) or magnetic tape.

See: P11D: Flat File Contents and Required Input Values, *Oracle HRMS Payroll Processing Management Guide*

The online P11D functionality in SSHR enables employees, workers, and Payroll Professional users to view their P11D information using a self-service interface. The user can select components to include in the report and select whether to display the P11D Expenses and Benefits report or the P11D Summary report.

If required, the user can print out the information.

### Menu and Function Names

The P11D report is not attached to any self-service menu when delivered. However, you can add the function to self-service menus if required.

See: Viewing P11Ds Online, *Oracle HRMS Payroll Processing Management Guide*

### Workflow

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable Flexfields

Not applicable

### Configurable Profile Options

Not applicable

### Additional Configuration Steps

If you are a Payroll Professional and choose to view the P11D reports for leavers, you must create an assignment set and run the P11D Reports process for that assignment set.

See: Viewing P11Ds Online, *Oracle HRMS Payroll Processing Management Guide*

## Online Payslip (UK)

The Online Payslip for the UK is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 16-11.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip V4.0 |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Not applicable

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

## Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.

   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Payroll Processing Management Guide*

   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Payroll Processing Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

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

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Generation Self-Service process to enable SSHR users to view their payslip.

   See: Generating the Payslip, *Oracle HRMS Payroll Processing Management Guide*

6. View Online Payslip Using SSHR

   After completing the above configuration, you can view payslips through the Self-Service HR application using the Employee Self-Service responsibility. Click Payslip to view the most recent pay period's payslip. You can choose other pay periods from the drop-down list available under the Choose a Payslip region. Up to ten payslips can be selected in the drop-down list of values. To see other payslips, click on next 10 or previous 10. Alternatively, use the Quick Select Payslip region to quickly view a payslip report. Based on the date range, all the available payslips are displayed in this region in the reverse chronological order. Select a report to view or download the payslip in PDF format.

# Payroll Management - APAC

## Online Payslip (Australia, Hong Kong, Korea, Singapore, New Zealand, India, Kuwait)

The Online Payslips for the above localizations are localized versions of the generic payslip and have been designed to meet local requirements. For example, the Australian online payslip displays hourly rate information for the number of hours worked and the exact rate paid for those hours.

For information on the generic payslip functionality, see Online Payslip, page 16-11.

### Menu and Function Names

This module can be accessed from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip |

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable FlexFields

Not applicable

## Configurable Profile Options

| Profile | Configurable Level | Values | Default |
|---|---|---|---|
| HR:View Payslip From Date for WEB (MM/DD/YYYY) | User specification | Date | 01/01/1997 |

**HR:View Payslip From Date for WEB**

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

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

## Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.
   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

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

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Archive process for the appropriate legislation to enable SSHR users to view their payslip.

## Self Printed Payment Summary Report (AU)

Employers who submit their Payment Summary data to the ATO electronically can print these reports on paper. The online Payment Summary Report functionality in SSHR enables employees to view the payment summary information using a self-service interface.

Managers can search and view the payment summaries for their employees using the following criteria:

- financial year
- employee full name
- employee number
- start year

Based on the above criteria, managers can view and print the payment summary for an employee. For example, if you specify the financial year, then the application displays all the employees within all legal employers within the financial year. You can view a normal Payment Summary for existing employees and view the normal and employment termination payment details for terminated employees.

When a start year has been enabled, then you cannot view or search for the payment summary created earlier than the start year and later than the financial year.

> **Note:** You cannot, however, print a payment summary report submitted before the financial year 2005-2006.

For information on the generic payment summary functionality, see Self Printed Payment Summary Archive.

### Menu and Function Names

You can access the Payment Summary Report using the self-service menu AU Self Printed Report.

| User Menu Name | Function Name |
|---|---|
| AU Self Printed Report | AU View Payment Summary |
| AU Manager Payment Summary | Manager Self Service Self Printed Report |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

**Workflow Process Display Name:**

Not Applicable

**Configurable Workflow Attributes:**

Not Applicable

**Configurable Tips and Instructions**

Not Applicable

**Configurable Flexfields**

Not Applicable

**Configurable Profile Options**

Not Applicable

**Additional Configuration Steps**

To view Payment Summary report using Self Service interface, you must complete the process Self Printed Payment Summary Archive for the employee.

You can enable the Self Service interface for an employee by setting the Self Service Preferences at Business group, Organization, Location or Person Level.

The Self Service Preference is defined at four levels:

- Person
- Location
- HR Organization
- Business Group

For Person and Location level, the statutory document printing option is delivered as an Extra Information Type (EIT) called 'Self Service Preference for Person' and 'Self Service Preference for Location' respectively. This EIT must be added to your user-defined responsibility to access the statutory document printing option.

For Organization and Business Group, the self-service preference for statutory document printing is delivered through an Org Developer DF. A segment called 'Self Service Preference' is added to the Descriptive Flexfield for HR Organization and Business Group.

Navigation: Work Structures > Organization > Description > Find the applicable Business Group or HR Organization > click Others and select Self Service Preference.

For more information, see : Entering Self-Service Preference Information, *Oracle HRMS*

# Payslip Modeler (AU)

The Payslip Modeling feature for Australia is a localized version of the generic Payslip Modeling functionality and is designed to meet local requirements.

Employees can model their payslip using the Payslip Modeler available online. This a payslip calculator that can be used by individuals to quickly and accurately answer payslip related questions and address "what-if" scenarios such as how their net pay would be impacted. Employees can elect to print a PDF copy of their model payslip results. This feature is available to both employees and payroll professionals (administrators) via Self Service HR.

> **Note:** Users cannot run Payslip modeling process, if there is a prepayment or costing process already executed for the current pay period. The modeling process does not impact the data present in the application.

Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their Payslip. Employees can elect to print a PDF copy of their sample payslip.

For Australia, the Payslip Modeling functionality enables employees or payroll administrators to model the following information to determine the impact on payroll calculations:

- All types of Custom Earnings elements of the type Standard, Allowances, Additional, Nontaxable, Progressive, Leave Loading and the Bonus Earnings elements (Fixed/Spread) can be simulated.

  > **Note:** These custom elements must have the Multiple Entries Allowed Flag set to No, otherwise the simulation is not possible if the Multiple Entries Allowed flag is set to Yes.

- Predefined Termination payment elements - Annual Leave on Termination and Long Service Leave on Termination

## Using Payslip Modeling

Payslip Modeling allows you to simulate the results of a payroll run and display those results as a payslip. You can view certain personal and pay information such as employee name, job title, payroll, pay basis, and annual salary.

Use the upper part of the Payslip Modeler window to change tax details and enter termination information. You can add extra Earnings, Pre Tax deductions, and

Termination Payment elements if required in the lower part of the Payslip Modeler window.

As this is a simulation the actual data is changed data within the application when running the simulation and rolled back at the end of simulation. Users can simulate custom Earnings, Pre Tax Deductions elements with Multiple Entries Allowed Flag as No.

You can only simulate in current open period in which the system date falls and cannot simulate in any other past periods or future payroll periods.

### View and Print Model Payslip

Payroll administrators can view and print sample payslip results.

## Configuring the Readiness Check for TFN

Using the payroll dashboard, payroll users can now perform the readiness check for employees for Tax File Number (TFN). Using this check, they can identify the number of employees who do not have TFN or who have the default TFN of 111 111 111 for more than 28 days from the date of hire. Run the following steps for performing the readiness check for TFN of employees.

1. Use the Payroll Professional responsibility.
2. Navigate to System Administrator > Security > Responsibility. Query for Payroll Professional responsibility. Attach request group as AU HRMS Reports and Processes to this responsibility.
3. Using the AU HRMS responsibility, run concurrent program Employees with TFN 111111111 in Business Group (Australia).
4. Associate the readiness check with all payroll or selected payrolls.
5. Navigate to Payroll Professional > Payroll Dashboard > Payroll Dashboard. In the Payroll Readiness Details section, query for the payroll and perform the readiness check.
6. Check the output. You can sort by payroll, employee number, or employee name.

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Payroll Professional | Payroll Dashboard |

# Configuration Information for Payslip Modeling (Australia)

This topic provides configuration information for the Payslip Modeling (Australia) function.

For information about the generic Payslip Modeler:

See: Using Payslip Modeler, page 16-23

Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

## Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip Modeling |

## Workflow

Not Applicable

## Configurable Profile Options

- HR: Enable Payroll Simulation - Users can use the Payslip Modeling module only if the profile option HR:Enable Payroll Simulation is set to Yes.

- HR: Enable Multiple Assignments for Payroll Simulation - If an employee has multiple active assignments, then users can choose whether they can perform payslip modeling on just their primary assignment or select from a list of all their active assignments. Setting profile option "HR: Enable Multiple Assignments for Payroll Simulation" to Yes will allow employees to select any of their active assignments on which they wish to perform payslip modeling. If the profile option is set to No, then payslip modeling can only be performed on their primary assignment.

## Setup Steps

The following sections provide information to set up the Payslip Modeling functionality:

### Set Up the Modeling Availability Rule

Further (optional) control of when Payslip Modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition.

1. Navigate to the Payroll window (Payroll > Description).
2. Query the required payroll definition.
3. Click Further Information.
4. Set the following fields:

   Modeling Availability Rule to either Available or Unavailable.

   Set the Days After Period Start and Days Before Period End as appropriate.

For more information, see: *Defining a Payroll, Oracle HRMS Oracle HRMS Payroll Processing Management Guide*

### Add the Simulation Details Extra Information to the Required Responsibility

1. Navigate to the Information Types Security window.
2. Select the Information Type of SIMULATION_ELEMENTS (Simulation Details) and attach the type to the required Responsibility.
3. Save your work and close the Information Types Security window.

### Define Element Exclusion Set

By default, an employee's existing element entries will be processed as part of the model payslip, even if the element has not been configured to be available for Payslip Modeling. To exclude elements from even being processed, payroll administrators can optionally define an exclusion element set to exclude these elements from being included in the model payslip process. An example of when this feature might be useful is when a bonus is being paid out in the pay cycle that is being processed and administrators do not want the element to be seen by the employee in their model payslip results. By defining an element exclusion set to specifically exclude that bonus element, it will neither be available for modeling by the end user nor will it be processed when the model payslip is submitted.

For more information on how to exclude elements, see *Defining an Element or*

*Distribution Set, Oracle HRMS Compensation and Benefits Management Guide*

After defining an element exclusion set, you must select this set in the Modeling Exclusion Element Set field of the Self Service Preference window for your business group. For more information, see: *Entering Self-Service Preference Information, Oracle HRMS Enterprise and Workforce Management Guide.*

## Tax Declaration (India)

Employees declare their income and investments at the beginning of the financial year. The Tax Declaration module enables you to declare the tax related investments and other tax related details using the self-service interface. You can update the tax declarations any time during the financial year, other than the freeze period specified by the employer. You can submit physical proofs of earnings and investments to the employer at the proof submission time that depends on employer.

**Income Tax Calculation Method**

You can use the Income Tax Calculation Method page to select the New Tax Regime method to calculate the taxes. Select Yes in the New Tax Regime field to calculate taxes according to the new tax regime under section 115BAC of the income tax act. If employees select No, then the application uses the existing method to calculate the taxes.

**House Rent Information**

You can record the house rent details using the self-service interface. Click on the Action icon to view the House Rent Details page. You can record the rent amount for each month.

PAN of the landlord or a declaration by the landlord (if PAN is not available) is mandatory to get the HRA exemption if the annual house rent amount is greater than one lakh rupees. The attribute Proof of Landlord is set to Yes if the PAN or if a declaration by the landlord is submitted.

**Details of Landlords**

If you reside in different houses during the financial year, then you can provide the details of the landlords of different houses. You can enter the name, address, and PAN of the landlord including the period of stay in that particular house.

**House Loan Information**

You can record the house loan information in the Tax Declaration page through employee self-service interface. This can be for self-occupied property and/or let out property. You can also record for multiple properties. For a self-occupied property, these details include address of the property, date of possession, the date and amount of the loan sanctioned, the total interest amount paid during the financial, the total principal amount repaid during the financial year, if the loan is a joint loan, pre EMI interest amounts for the current and previous financial years, lender type, lender name, lenders address, and the lender's PAN.

You can record any rental income received for the financial year and the amount of municipal taxes paid for a let out property.

You can also declare the amounts for the additional deduction under section 80EE or section 80EEA.

The application calculates the Income/loss from house property based on the details provided and applies the applicable tax exemptions.

> **Note:** Enter only the amount of interest and principal to claim in case of a joint loan and the same will be validated when the proofs are submitted.
>
> The application calculates the deduction under section 80EE or section 80EEA based on the value of the Loan Sanctioned Date when the check box is selected.

**Deductions under Chapter VI A**

You can use the self-service interface to record the details for the following investments. Click the + icon to add the investments:

- Interest on Higher Education Loan (80E)
- Donation for Research and Rural Development (80GGA)
- Claim Exemption under Sec 80GG - Select Yes only if you have expenses towards house rent and if there is no House Rent Allowance or accommodation provided by company.
- Loss from house property carried forward from previous financial years.
- Investments under Section 80CCE - Select the investment type and enter the amount invested.
- Investments under Section 80CCD(1B) - You can record multiple entries under 80CCD1B investment.
- Life Insurance Premium - You can record the policy number, premium paid, and the sum assured for the insurance policy you have taken.
- Medical Insurance Premium (80D) - You can record the insurance amount for medical premiums and expenses towards preventive health check paid for self and dependents. You can also record if these are paid for parents who are senior citizens or very senior citizens.
- Medical Treatment for Disabled Dependants (80DD) amount - You can record disability type, disability percentage, and treatment amount.

- Medical Treatment for Specified Diseases (80DDB) - You can record treatment amount and can specify if this treatment amount is for a senior citizen or a very senior citizen.

- Donations under Section 80G - You can record donation type and donation amount.

- Investments under Section 80EEB - You can enter vehicle name, lender name, loan sanction date, amount of loan sanctioned, date sanctioned, amount sanctioned for the vehicle purchased, the lender name, and the interest amount paid during the financial year.

**Other Income**

You can record the amounts for profit and gains from business, long term capital gains, short term capital gains, income from any other sources, TDS paid on other income and interest on deposits.

Use the Review and Submit options to review the information provided and to submit the tax declaration.

**Form 12BB**

If the Form 12BB report has been run, then you can view it using the Form 12BB option. If a password has been set up at the business group level, then the you must enter the password to access the PDF.

## Upload Documents of Proofs

When you submit the tax declaration, you can upload the document of proof to support these declarations using the Upload Proofs option. You can upload multiple documents for each tax deduction element. For example, if you have declared the house loans for two different houses, then you can click Show details to make sure that the document being uploaded is for the appropriate house loan.

## Copy Previous Year Declaration

When you have the same set of tax declarations to make for the current financial year as that of the previous year, then you can use the Copy Previous Declaration option to copy these details.

## Verifying the Tax Declaration as a Payroll Professional

Employees submit physical proofs of their earnings and investments to the employer at the proof submission time which depends on the employer.

A payroll professional can search for employees and their tax details on the Tax Declaration page by specifying the payroll.

As payroll professional, you can configure the tax declaration freeze period for employees including new joinees using Tax Declaration Information window. You can

enable new employees to enter their tax declarations during the freeze period if required.

For steps on how to configure these details, see: Entering Tax Declaration Information, *Oracle HRMS Enterprise and Workforce Management Guide*

You can view and approve the details submitted for the house rent information or make any updates. You can validate and update the tax declarations of employees through self-service module. You can also download tax declarations of multiple employees in a Microsoft Excel file to validate and upload after reviewing.

A payroll professional can configure the documents of proof required to be submitted by the employee for each tax declaration element. A payroll professional can search for the employees and verify the documents of proof submitted by them. A payroll professional can modify the declared amount if there is any discrepancy between the declared amount and the amount verified according to the submitted proof. This will update the element entries used in the tax calculations.

## Menu and Function Names

Access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| India Employee Self Service | Tax Declaration |
| India Professional User Self Service | Search Tax Declarations |

See: Defining Menus for SSHR, page 3-10

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not Applicable

### Configurable Workflow Attributes:

Not applicable

## Configurable Definitions for the Personalization Framework

***Regions***

| Page Name | Region Code | Region Name |
|---|---|---|
| Tax Declaration | InformationDetails | Information Details |
| Deductions under Chapter VI A | Chapter6aLimits | Chapter VI A Maximum Exemption |
| Rebates under Section 88 | RebateLimits | Rebates Maximum Exemption |
| Tax Declaration Review | ReviewProofs | Proof required |

## Configurable Tips and Instructions

| Region | Tip Type | Message Name |
|---|---|---|
| RentDetails | Long Message | PER_IN_CITY_TYPE |
| Chapter6aDetails | Long Message | PER_IN_SECTION_8GG |
| Chapter6aDetails | Long Message | PER_IN_MEDICAL_INSURANCE |
| Chapter6aDetails | Long Message | PER_IN_SPECIFIED_DISEASES |
| MedicalDetailsTable | Long Message | PER_IN_DISABILITY_CATEGORY |
| PremiumTable | Long Message | PER_IN_PREMIUM_PAID |
| OtherIncome | Instruction | PER_IN_HOUSE_PROPERTY |

See: Adding Instructions to a Web Page, page 5-35

### Configurable FlexFields

Not applicable

### Configurable Profile Options

Not Applicable

## Medical Expenses (India)

Employees submit and reimburse their medical expenses for self or their dependents at any time during the financial year to be eligible for a tax exemption. The Medical Expenses self-service module enables employees to record and submit their medical expenses and enables employers to validate and approve these expenses.

Employees must also submit physical proofs of their medical expenses to the employer. Employers validate the physical proofs and the details submitted. If there are any changes, then employers modify the amount and approve the benefit amount payable to employees.

The Professional User uses the self-service module to:

- view the medical expense details
- validate the details submitted and the physical proofs
- approve the exempted amount for employees
- update the actual benefit amount to pay employees

Users can search for bills submitted within the specified date range and approve. Additionally, users can download and upload medical expenses for multiple employees as a Microsoft Excel file.

Users can use the Element Design Wizard to create elements to record the medical expense information. You can use the following elements:

- Medical Fringe Benefit Element – this element holds information such as benefit amount, maximum annual limit, and if part of net pay. This is a non-recurring element.
- Bills Element – this element holds information such as exempted value of the bill amount. This is a non - recurring element.

See:Setting up Medical Expenses, *Oracle HRMS Payroll Processing Management Guide (India)*

When employees submit their medical expenses, Oracle HRMS stores the exempted amount of each bill in the PER Extra Information - Medical Details

(PER_IN_MEDICAL_BILLS).

Users can validate the details submitted and the physical proofs and modify the benefit amount if there are any changes to the benefit amount. Use the Change Payment function on the self-service module to modify the benefit amount.

On validation, users can approve and submit the medical expenses. Employees cannot update the expenses once the professional user approves and submits the medical expenses. The application automatically creates the element entries for the month selected. To process medical expenses during a payroll run, users must attach the Medical Fringe Benefit element during a payroll run. The application then adjusts the taxable/non-taxable value of the medical benefit.

## Menu and Function Names

Access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| India Employee Self Service | Medical Expenses |
| India Professional User Self Service | Approve/Update Medical Expenses |

See: Defining Menus for SSHR, page 3-10

## Workflow:

The workflow details for this module are listed below

### Workflow Process Display Name:

Not Applicable

### Configurable Workflow Attributes:

Not Applicable

## Configurable Definitions for the Personalization Framework

Region

| Page Name | Region Code | Region Name |
|---|---|---|
| Medical Bill Entry | InstructionList | Instructions |

### Configurable Tips and Instructions

Not Applicable

### Configurable FlexFields

Not Applicable

### Configurable Profile Options

Not Applicable

## Leave Travel Concession Expenses (India)

Employees can submit and reimburse their leave travel expenses for self or their dependents at any time during the financial year. Employees are eligible for a tax exemption on their leave expenses. The approved bill amount for LTC is non-taxable. Only the employer contribution that exceeds the exempted bill amount is taxable.

The Leave Travel Concession (LTC) expenses module enables employees to submit their leave expenses. It enables professional users to view, validate, and approve the leave travel expenses. For taxation purposes, Oracle HRMS enables you to setup and process Leave Travel Concession under the classification Regular Earnings. Use the Element Design Wizard to create the elements for processing LTC.

See: Setting up Regular Earnings, *Oracle HRMS Payroll Processing Management Guide (India)* and Setting up LTC Expenses, *Oracle HRMS Payroll Processing Management Guide (India)*

Employees submit the travel expense details such as the mode of travel, source and destination of travel, and the ticket as the physical proof of their travel expenses to the employer for self and their dependents.

When employees submit their leave expenses using self-service, the application stores the exempted amount of each bill in the Assignment Extra Information - LTC Bill Details (PER_IN_LTC_BILLS). You record information such as the ticket fare, employer contribution, and if carried over from previous block. The application holds the bills and the benefit amount in a single element.

The professional user uses the self-service module to:

- view the leave expense details
- update the actual benefit amount to pay employees
- validate and approve the exempted amount for employees

Users can search for bills submitted within the specified date range and approve them. Additionally, they can download and upload LTC expenses for multiple employees as a

Microsoft Excel file.

The LTC self-service module enables users to specify the date to create the element entries. Oracle HRMS creates element entries only when the professional user enters exempted value of bill amount and uses the exempted amount during payroll calculations.

Users can use the Validate LTC Bills option to verify and approve the bills and physical proofs the employee submits. If there are any changes to expenses, users can use the Change LTC Payment option to update the benefit amount and pay employees.

Employees can also avail advance payment prior to an LTC journey. The advance is not taxed at the time of payment but is later adjusted with the benefit amount.

## Menu and Function Names

Access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| India Employee Self Service | LTC Expenses |
| India Professional User Self Service | Approve/Update LTC Expense |

See: Defining Menus for SSHR, page 3-10

### Workflow

Not Applicable

### Workflow Process Display Name

Not Applicable

### Configurable Workflow Attributes

Not Applicable

## Configurable Definitions for the Personalization Framework

**Regions**

| Page Name | Region Code | Region Name |
|---|---|---|
| LTC Bill Entry | InstructionList | Instructions |

### Configurable Tips and Instructions

Not Applicable

### Configurable FlexFields

Not Applicable

### Configurable Profile Options

Not Applicable

## Payslip Modeler (India)

The Payslip Modeling feature for the India is a localized version of the generic Payslip Modeling functionality and is designed to meet local requirements.

Employees can model their payslip using the Payslip Modeler available online. This a payslip calculator that can be used by individuals to quickly and accurately answer payslip related questions and address "what-if" scenarios such as how their net pay would be impacted . Employees can elect to print a PDF copy of their model payslip results. This feature is available to both employees and payroll professionals (administrators) via Self Service HR.

> **Note:** Users cannot run Payslip modeling process, if there is a prepayment or costing process already executed for the current pay period. The modeling process does not impact the data present in the application.

Users must first agree to the Usage Terms and Conditions in the Welcome page before they can begin modeling their Payslip. Employees can choose to print a PDF copy of their sample payslip.

Using employee self-service, users can select the desired tax declaration components for what-if-analysis and generate a sample payslip.

The application enables simulation of the following elements for multiple entries.

- Deduction under Section 80CCE (Investment Under Section 80CCE)
- Life Insurance Premium
- Deduction under Section 80DD (Medical Treatment for Disabled Dependents)
- Deduction under Section 80G (Donations Under Section 80G)

The elements can be attached to the employee "n" number of times based on the input

values/component types.

### View and Print Model Payslip

Payroll administrators can view and print sample payslip results.

## Configuration Information for Payslip Modeling (India)

This topic provides configuration information for the Payslip Modeling (India) function.

For information about the generic Payslip Modeler:

See: Using Payslip Modeler, page 16-23

Setting up Payslip Modeler, *Oracle Payroll Processing Management Guide*

### Menu and Function Names

You can access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| Employee Self-Service | Payslip Modeling |
| Payroll Professional User | Payslip Modeling |

### Workflow

Not Applicable

### Configurable Profile Options

- HR: Enable Payroll Simulation - Users can use the Payslip Modeling module only if the profile option HR:Enable Payroll Simulation is set to Yes.

- HR: Enable Multiple Assignments for Payroll Simulation - If an employee has multiple active assignments, then users can choose whether they can perform payslip modeling on just their primary assignment or select from a list of all their active assignments. Setting profile option "HR: Enable Multiple Assignments for Payroll Simulation" to Yes will allow employees to select any of their active assignments on which they wish to perform payslip modeling. If the profile option is set to No, then payslip modeling can only be performed on their primary assignment.

## Setup Steps

The following sections provide information to set up the Payslip Modeling functionality:

### Set Up the Modeling Availability Rule

Further (optional) control of when Payslip Modeling is available to end users can be defined by setting the Modeling Availability Rule and the applicable Days After Period Start and End in Further Information for a payroll definition.

1. Navigate to the Payroll window (Payroll > Description).
2. Query the required payroll definition.
3. Click Further Information.
4. Set the following fields:

   Modeling Availability Rule to either Available or Unavailable.

   Set the Days After Period Start and Days Before Period End as appropriate.

For more information, see: *Defining a Payroll, Oracle HRMS Payroll Processing Management Guide*

### Add the Simulation Details Extra Information to the Required Responsibility

1. Navigate to the Information Types Security window.
2. Select the Information Type of SIMULATION_ELEMENTS (Simulation Details) and attach the type to the required Responsibility.
3. Save your work and close the Information Types Security window.

### Define Element Exclusion Set

By default, an employee's existing element entries will be processed as part of the model payslip, even if the element has not been configured to be available for Payslip Modeling. To exclude elements from even being processed, payroll administrators can optionally define an exclusion element set to exclude these elements from being included in the model payslip process. An example of when this feature might be useful is when a bonus is being paid out in the pay cycle that is being processed and administrators do not want the element to be seen by the employee in their model payslip results. By defining an element exclusion set to specifically exclude that bonus element, it will neither be available for modeling by the end user nor will it be processed when the model payslip is submitted.

For more information on how to exclude elements, see *Defining an Element or*

*Distribution Set, Oracle HRMS Compensation and Benefits Management Guide*

After defining an element exclusion set, you must select this set in the Modeling Exclusion Element Set field of the Self Service Preference window for your business group. For more information, see: *Entering Self-Service Preference Information, Oracle HRMS Enterprise and Workforce Management Guide.*

## Form 16 and 12BA (India)

Form 16 is a certificate of proof of the TDS deducted and deposited by the employer. When employees receives perquisites from their job, Form 12BA is provided by the employer to the employee. Perquisites are the benefits derived from a job or a position and these are in addition to salary already being paid to the employee.

The Form 16 page accessed through the Employee Self-Service responsibility, Form16 and 12BA function, enables employees to view their Form 16 and 12BA information using self-service.

When the users click the Form 16 and 12BA function, the current assessment year appears by default. They can change the assessment year to generate the Form 16 and Form 12BA reports.

Payroll professionals can search for employees using the Form 16 Search Page function. When they click the Form 16 Search Page, the Form 16 Search Page displays. They can specify any of the search criteria as follows - assessment year, payroll, employee name, assignment set, period of employment (in the Employee From and Employee To fields), department, and GRE. Users can select the Form 16 details.

### Menu and Function Names

Access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| India Employee Self Service | Form 16 and 12BA |
| India Professional User Self Service | Form 16 Search Page |

See: Defining Menus for SSHR, page 3-10

#### Workflow

Not Applicable

#### Workflow Process Display Name

Not Applicable

### Configurable Workflow Attributes

Not Applicable

## Configurable Definitions for the Personalization Framework

**Regions**

| Page Name | Region Code | Region Name |
|---|---|---|
| Form 16 and 12BA | InstructionList | Instructions |

## Configurable Tips and Instructions

Not Applicable

## Configurable FlexFields

Not Applicable

## Configurable Profile Options

Not Applicable

# Form 12BB (India)

Form 12BB is a declaration of tax deductions that employees have made to the employer. Employees can view their Form 12BB using the self-service interface.

When users click the Form 12BB function to access the Form 12BB report using the Employee Self Service responsibility, the current assessment year appears by default. They can change the assessment year to generate the Form 12BB.

Use the Download PDF option to save a copy of the declarations made.

Payroll professionals can view the details of the employees using the Form 12BB Search page function. When payroll users click the Form 12BB Search Page option, the Form 12BB Search Page displays. They can specify any one of the criteria to search for employees - payroll, employee name, assignment set, period of employment, department, and GRE

They can select the employee to view the Form 12BB details.

## Menu and Function Names

Access this module from the following menus and functions:

| User Menu Name | Function Name |
|---|---|
| India Employee Self Service | Form 12BB |
| India Professional User Self Service | Form12BB Search Page |

See: Defining Menus for SSHR, page 3-10

### Workflow

Not Applicable

### Workflow Process Display Name

Not Applicable

### Configurable Workflow Attributes

Not Applicable

## Configurable Definitions for the Personalization Framework

**Regions**

| Page Name | Region Code | Region Name |
|---|---|---|
| Form 12BB | InstructionList | Instructions |

## Configurable Tips and Instructions

Not Applicable

## Configurable FlexFields

Not Applicable

## Configurable Profile Options

Not Applicable

## Commutation Allowance (Japan)

The Commutation Allowance form enables you to enter, view and print information about a worker's commutation or travel allowance information.

Employees in Japan are entitled to allowances for transportation or commuting methods to and from work. The Commutation Allowance form provides allowance information about public transportation, and traffic tools - which encompass other methods of traveling to and from work.

From this form, users can add, update, delete and view future actions for each allowance.

## Withholding ITAX (Japan)

The Withholding ITAX Report for Employee form enables you to enter and view information about a worker's withholding ITAX information.

Employees in Japan are requried to submit their Certificate of Withholding Income Tax to the National Tax Agency (NTA) at the end of the financial year. From this form, users can add, update, delete and view ITAX information.

The Withholding ITAX Report for Payroll Manager form enables payroll managers to enter, view and update infomration about a worker's withholding ITAX information. From this form, the payroll manager can define the open and close dates for which changes can be made, view results, and update a worker's information.

### Function Names

This module can be accessed from the following function:

- JP Tax Withheld Report: Payroll Manager

See: Defining Menus for SSHR, page 3-10

### Workflow

The workflow details for this module are listed below:

#### Workflow Process Display Name:

Not applicable

#### Configurable Workflow Attributes:

Not applicable

### Configurable Tips and Instructions

Not applicable

### Configurable Flexfields

Not applicable

### Configurable Profile Options

Not applicable

## Personal Number (Japan)

The Personal Number module enables employees to enter and view their personal number and for their dependents using their self-service responsibility. An employee can enter/update Personal Number details and dependents within the entry period start and end dates. When employee leave the organization, the Personal Number details of self and dependents must be updated as 999999999999 and card expiry details with blank. For dependent, HR users update the Personal Number of dependent with 999999999999 after the retention period of records is completed. After the entry period end/closing date, employees can no longer enter/update the Personal Number details. Once entered, they can view only the number with first 8 digits are masked (XXXX-XXXX-1234 format)

HR and Payroll representatives can search, view, and update the Personal Number details of employees and dependents.

They can search, view and update the list of dependents whose Personal Number is missing.

### Menu and Function Names

This module can be accessed from the following functions:

- JP Personal Number : Employee
- JP Personal Number : Payroll Representative - JP Personal Number : Search Employee and JP Personal Number : Search Dependent
- JP Personal Number: Human Resources Representative - JP Personal Number : Search Employee and JP Personal Number : Search Dependent

See: Defining Menus for SSHR, page 3-10

## Human Resource Representative

An HR representative can enter the entry period dates at business group, HR organization or assignment levels to enable users to enter the Personal Number. HR representative can enter or update the Personal Number details of all self service and non self service employees within the start date and end dates of entry periods. After the entry period end or closing date, they can no longer enter or update the Personal Number details.

HR representative can also update the start and end dates of entry period for any assignment whenever required. This will give access to the employee to update the Personal Number details even after end or closing dates at business group or organization levels.

Besides entering the details, an HR representative can access Employee Search page to search and enter or update the Personal Number details. Additionally, they can access Dependent Search page to find dependents whose Personal Number is missing and can enter the Personal Number details of dependents.

HR representative can view both the masked and full personal number to check whether the number is correct or not. The option Display Personal Number has the values:

- Based on Entry Periods
- Always Display Full Personal Number
- Always Display Masked Personal Number

## Payroll Representative

Payroll representative can view the masked Personal Number details of employee and their dependents. Payroll representative can only check if number is entered or not which is required for processing the payroll. The payroll professional can notify the employee to update the information if it is not entered. Payroll representative can access the Dependent Search page and view the list of dependents whose personal number is not entered.

## Workflow

The workflow details for this module are listed below:

### Workflow Process Display Name:

Not applicable

**Configurable Workflow Attributes:**

Not applicable

## Configurable Tips and Instructions

Not applicable

## Configurable Flexfields

Not applicable

## Configurable Profile Options

Not applicable

# 17

# Self-Service Benefits Enrollments -US Federal

# Self-Service Benefits Enrollments - US Federal

## US Federal Self-Service Benefits

US Federal employees can use self-service to enroll and manage their Federal Employee Health Benefits and Thrift Savings Plans elections. Employees can review their current elections using self-service benefits. They can also review their current, past, and future benefit elections from their My Information self-service page, as well as other employment-related information.

See: Information Overview , page 9-76

### Federal Employee Health Benefits

Federal government employees can elect, change, or cancel Federal Employee Health Benefits (FEHB). You can enroll employees when you process an Appointment, Conversion to Appointment, or Extension RPA. Employees enroll and manage their FEHB benefits using self-service. As an HR specialist, you can also enroll and administer benefits for employees using the professional user interface.

See: Federal Employee Health Benefits Overview, *Oracle HRMS Compensation and Benefits Management Guide*

### Thrift Savings Plans

Federal government employees covered by the Federal Employee's Retirement System (FERS) and the Civil Service Retirement System (CSRS) can participate in Thrift Savings Plans (TSP) and, where eligible, contribute to Thrift Savings Catch-up plans.

You can enroll employees when you process an Appointment, conversion to Appointment, or Extension RPA. Employees enroll and manage their TSP benefits using Oracle Self-Service Human Resources (SSHR). As an HR specialist, you can also enroll and administer benefits for employees using the professional user interface.

See: Thrift Savings Plan Overview, *Oracle HRMS Compensation and Benefits Management Guide*

See: Managing the Thrift Savings Plans (TSP) Information Using Self-Service, page 17-3

### Appointment, Conversion, and Extension Enrolments

When you process an Appointment or Conversion to Appointment RPA action, you can enter employee benefits, and upon update to HR, the application establishes the Health Benefits elements, Federal Employee Group Life Insurance, and Thrift Savings Plan (TSP) elements. Similarly, for Extension actions, you can enter new employee benefits

and change existing health benefits. (OPM does not authorize changes to these benefits for Extension actions.)

When you update the RPA action, the application initiates appropriate potential life events, such as an Initial Opportunity. The employee can then modify the choices during the life event period using self-service, or you can enter the elections for the employee using the professional user interface.

Appointment, Conversion, and Extension Enrolments, *Oracle HRMS Compensation and Benefits Management Guide*

# Managing the Thrift Savings Plans (TSP) Information Using Self-Service

Employees covered by the Federal Employee Retirement System (FERS), Civil Service Retirement System (CSRS), or Foreign Service Retirement and Disability System (FSRDS) can participate in Thrift Savings Plans (TSP). Oracle US Federal Human Resources (HR) enables employees and HR professionals acting on behalf of employees to manage their TSP contributions and changes using self-service. Employees and HR professionals can view and update information about their TSPs using the TSP For Employees self-service page.

To update the TSP information:

- As an employee acting on your own behalf, click the TSP link in your Employee Self-Service responsibility page to navigate to the **TSP For Employees** page.

- As an HR Professional acting on behalf of an employee, click the TSP link in your HR Professional Self-Service responsibility to navigate to the **TSP: People** page. In the **TSP: People** page, search for the employee whose TSP details that you want to update. Click the **Action** icon to navigate to the **TSP For Employees** page.

The TSPs that appear in the TSP for Employees page are accessible to employees and HR professionals regardless of open life events for health benefits or life insurance actions. If an employee's current TSP status is Ineligible (I), then the employee cannot access the TSP For Employees self-service page.

## Using the TSP For Employees Page

Use the **TSP For Employees** page to:

- View your current TSP enrollment information such as the TSP name, the contribution percent or amount, and the plan enrollment start date.

- View the details of your TSP enrollments that will become active at a future date. You can change the following information for a TSP that is pending enrollment:

    - Effective date

- Percent
- Amount
- End date

You can also cancel a pending enrollment.

- Perform the following actions:
  - **Change a pending enrollment**: Use this action to enter the percent or the amount that you want to contribute to a TSP enrollment that will become active at a future date. If you want to change the effective date, then you must first cancel the enrollment that is pending and then change the effective date of the pending enrollment.
  - **Cancel a pending enrollment**: Use this action to unenroll from a future enrollment in a TSP.
  - Change the contribution of a current enrollment. Use this action to change the following details of your current TSP enrollment:

    Effective date

    Percent or an amount for each TSP contribution

- **Stop the contribution to a current enrollment**: Use this action to stop your contribution to all TSPs or a specific TSP. When you perform this action, the application automatically updates the contributed value (the percent or the amount) to zero.
- **Print a Form TSP-1 for the latest election**: Use this action to view the TSP-1 form and print. You can save the form to your local directory.

## Understanding the TSP Status and the TSP Status Date Fields

When an employee or an HR professional changes the TSP enrollment details using self-service, Oracle US Federal HR uses rules to default the correct TSP status code in the TSP Status field. For more information, see Default Rules for the TSP Status and the TSP Status Date Fields, page 17-5 table. Employees cannot change the default TSP status. However, HR professionals can edit the default TSP status using the HR Professional self-service responsibility.

The TSP status codes and their descriptions are:

- A: Automatically Enrolled Participant (A)
- N: Elected Not To Contribute (N)

- Y: Elected To Contribute (Y)
- E: Eligible To Contribute (E)
- I: Ineligible to Participate (I)
- S: Stop Employee Contrib Before Eligible for Agency Contrib (S)
- T: Terminated Contributions (T)
- W: Waiting to Receive Agency Contributions (W)

The following table explains how the default rules work for the **TSP Status** and **TSP Status Date** fields when an employee or an HR professional changes the enrollment details of a TSP.

***Default Rules for the TSP Status and the TSP Status Date Fields***

| Current TSP Status Is: | Employee or HR Professional Enters: | Employee or HR Professional Stops: | New TSP Status Will Be: | New TSP Status Date Will Be: |
|---|---|---|---|---|
| A | Any contribution value other than zero | ----- | Y | Effective date of the change |
| E | Any contribution value other than zero | ----- | Y | Effective date of the change |
| Y | Any contribution value other than zero | ----- | Y | Unchanged |
| A or E or Y | | All contributions | T | Effective date of the change |
| A | | Any of the contributions, but not all | Y | Effective date of the change |
| Y | | Any of the contributions, but not all | Y | Unchanged |

| Current TSP Status Is: | Employee or HR Professional Enters: | Employee or HR Professional Stops: | New TSP Status Will Be: | New TSP Status Date Will Be: |
|---|---|---|---|---|
| **Current TSP Status Is:** | **HR Professional Selects:** | **HR Professional Stops:** | **New TSP Status Will Be:** | **New TSP Status Date Will Be:** |
| A or E or Y | The Hardship check box* | All contributions | T | Effective date of the change |

* When an employee or an HR Professional acting on behalf of an employee elects to terminate all TSP contributions, the employee continues to be eligible to reelect participation at any time. In a termination instance, the TSP Status is set to T and the TSP Employee Contribution Eligibility Date remains unchanged.

The TSP status changes occur only when an employee or an HR professional updates the TSP and the TSP Catch-Up fields. If an employee or an HR Professional updates the TSP Roth fields, the Roth Catch-Up fields, or both, then the TSP status code and the TSP status date remain the same. When an HR professional terminates all of any employee's contributions due to a hardship withdrawal, the employee will be ineligible to reelect for a period of 6 months. In such a case, the HR professional must select the Hardship check box, and then the application defaults the TSP Status to T.

### Submitting TSP Changes

When you submit TSP changes, the application updates the relevant TSP element entries based on the effective date. The application uses pay period pay dates, the dates on which the agency issues employee pay checks, as a basis for validating an employee's TSP enrollment eligibility. See Pay Period Pay Dates, *Oracle US Federal Human Resources Compensation and Benefits Management Guide* for more information.

## Configuring Thrift Savings Plan (TSP) Self-Service Pages

This topic provides technical information about the Thrift Savings Plan (TSP) self-service pages.

For an overview, see Managing the Thrift Savings Plans (TSP) Information Using Self-Service, page 17-3.

The TSP pages can be accessed from the following predefined responsibilities, menus, and functions:

## Responsibility, Menu, and Function Names

## Responsibility: US Federal Employee Self Service (FED_EMPLOYEE_DIRECT_ACCESS)

Menu: Federal Employee Self Service (GHR_EMPLOYEE_DIRECT_ACCESS)

The Federal Employee Self Service menu provides the following function to manage the TSP information:

| Prompt | Submenu | Submenu Type | Function |
|---|---|---|---|
| TSP | | | TSP Employee (GHR_SS_ACTION_TSP_EMP) |

## Responsibility: US Federal HR Self Service (FED_HR_PROFESSIONAL_ACCESS)

Menu: Federal HR Self Service (GHR_HR_MANAGER_ACCESS)

The Federal HR Self Service menu provides the following function to manage the TSP information:

| Prompt | Submenu | Submenu Type | Function |
|---|---|---|---|
| TSP | | | GHR TSP Action HR Self Service (GHR_SS_ACTION_TSP_HR_SS) |

## Functions

The following table provides information about TSP functions.

| User Function Name (Function) | Type | Parameters | Web HTML |
|---|---|---|---|
| TSP Employee (GHR_SS_ACTION_TSP_EMP) | JSP | pActionType=GHR_EMP_TSP | OA.jsp?page=/oracle/apps/ghr/selfservice/ben/tsp/webui/EmpTSPPG&akRegionApplicationId=800 |
| GHR TSP HR (GHR_SS_ACTION_TSP_HR) | JSP | pActionType=GHR_HR_TSP | OA.jsp?page=/oracle/apps/ghr/selfservice/ben/tsp/webui/EmpTSPPG&akRegionApplicationId=800pCalledFrom=GHR_SS_ACTION_TSP_HR&pPersonID=&OAFunc=GHR_SS_ACTION_TSP_HR |
| GHR TSP Action HR Self Service (GHR_SS_ACTION_TSP_HR_SS) | JSP | pPersonID=&pFromMenu=Y&pManagerEnabled=N&pCalledFrom=GHR_SS_ACTION_TSP_HR&pIsHRProf=Y&pActionType=GHR_HR_TSP | OA.jsp?akRegionCode=HR_PERSON_SEARCH_TOP_SS&akRegionApplicationId=800 |
| Cancel Pending Enrollment Employee (GHR_TSP_CAN_PEND_ENROLL_EMP) | JSP | pAMETranType=SSHRMS&pAMEAppId=800&pActionType=GHR_EMP_CAN_TSPPEND_ENR&pProcessName=GHR_ACTIONS_PRC&pItemType=HRSSA&pCalledFrom=GHR_TSP_CAN_PEND_ENROLL_EMP&pAplReq=N&pNtfFyiDetails=Y | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=GHR_TSP_CAN_PEND_ENROLL_EMP |

| User Function Name (Function) | Type | Parameters | Web HTML |
|---|---|---|---|
| Change Current Enrollment Employee (GHR_TSP_CHG_CURR_ENROLL_EMP) | JSP | pAMETranType=SSHRMS&pAMEAppId=800&pActionType=GHR_EMP_CHG_TSPCURR_ENR&pProcessName=GHR_ACTIONS_PRC&pItemType=HRSSA&pCalledFrom=GHR_TSP_CHG_CURR_ENROLL_EMP&pAplReq=N&pNtfFyiDetails=Y | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=GHR_TSP_CHG_CURR_ENROLL_EMP |
| Change Pending Enrollment Employee (GHR_TSP_CHG_PEND_ENROLL_EMP) | JSP | pAMETranType=SSHRMS&pAMEAppId=800&pActionType=GHR_EMP_CHG_TSPPEND_ENR&pProcessName=GHR_ACTIONS_PRC&pItemType=HRSSA&pCalledFrom=GHR_TSP_CHG_PEND_ENROLL_EMP&pAplReq=N&pNtfFyiDetails=Y | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=GHR_TSP_CHG_PEND_ENROLL_EMP |
| Stop Current Enrollment Employee (GHR_TSP_STP_CURR_ENROLL_EMP) | JSP | pAMETranType=SSHRMS&pAMEAppId=800&pActionType=GHR_EMP_STP_TSPCURR_ENR&pProcessName=GHR_ACTIONS_PRC&pItemType=HRSSA&pCalledFrom=GHR_TSP_STP_CURR_ENROLL_EMP&pAplReq=N&pNtfFyiDetails=Y | OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=GHR_TSP_STP_CURR_ENROLL_EMP |

## Configurable Flexfields

Not applicable

### Configurable Profile Options

Not applicable

## Setting Up User Access to Self-Service Benefits

Self-Service Benefits functions are attached to the Benefits Self-Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

See: Configuring Tabbed Regions, page 5-28

See: User's Menu *(Oracle E-Business Suite System Administrator's Guide - Security)* for more information on configuring menus.

### To set up user access to self-service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self-Service Menu in the Menu field: GHR_EMPLOYEE_DIRECT_ACCESS. The following Self-Service User Menu Name displays to users:

   - Federal Employee Self-Service

   You can change the menu name if required.
4. Query the global Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:

   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.

   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self-service web page.
5. Save your work.

6. Add a new row for the US Federal benefits function.

7. Enter a sequence number.

8. Enter a prompt, such as US Federal HR Benefits.

9. Choose the Self-Service Benefits Enrollment - Federal function, (GHR_SS_BNFT_ENRT).

10. Save your work and close the Menus window.

11. You can use the Form Functions window to customize the predefined functions--GHR_SS_BNFT_ENRT.

12. Use the Form Functions window to create your own Self-Service Benefit functions from the sample functions supplied. The sample User Function Names are:

    - Self Service View Current Benefits
    - Self Service Benefits Enrollment

    The Function Names are:

    - BEN_SS_CURR_BNFT
    - GHR_SS_BNFT_ENRT

    If you update the predefined functions, you must update your custom function to use the predefined parameters and HTML Calls.

    > **Note:** It is a good practice to check the Readme for each Self-Service Benefits patch you apply to see if the parameters and HTML Calls for the predefined functions have changed.

    See: Form Functions Window *(Oracle E-Business Suite System Administrator's Guide - Security)*

13. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:

    - HR: Security Profile

    > **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

See: User Profiles (*Oracle E-Business Suite User's Guide* and *Oracle E-Business Suite System Administrator's Guide - Security*)

14. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:

    - HR: Business Group

15. Define the people you would like to access Self-Service Benefits.

    There are two ways to do this. You can follow the typical steps for defining a new user and assign each user a responsibility that enables access to Self-Service Benefits, one at a time.

    See: Users Window *(Oracle E-Business Suite System Administrator's Guide - Security)*.

    Or, you can set up concurrent programs to automate this manual process.

## Enabling US Federal Benefits Notifications

As a general practice, most federal personnel offices approve a participant's benefits elections, such as health benefit and TSP selections. If your agency's policies include this review or approval process, you can have Oracle workflow send a notification to the POI groupbox when employees enroll or update their benefit elections. The notification contains a link to the employee's confirmation page. After reviewing the elections, you can contact the participant to correct and resubmit the elections or manually override the changes in the professional user interface.

When you want to change the predefined function, you copy and rename the original process. By leaving the original process intact, you can refer to it and also use it as a basis for future upgrade. After you copy the process, use the Function window and the system administrator responsibility to change the notification setting and attach the function to your menu Federal Employee Self Service Benefits.

See: Defining SSHR Functions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### To have Oracle Workflow send the POI groupbox a benefit notification:

1. Click the Forms tab.

2. Query the function GHR_SS_BNFT_ENRT

3. Navigate to the Parameters field and change the send Notification parameter from N to Y. The entire parameter should read:

   displayDate=N&allowEnrt=Y&ssProcessUnrestricted=Y&sessionDate=&sendFYINotification=Y&wfProcessName=GHR_FYI_NOTIFICATION_PRC&displayAgreemen

t=N

4. Save the form function.

# 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 |

**Additional Information:** 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 |

| Effective Date | Place Date | End Placement Date | Current Period of Placement? |
|---|---|---|---|
| 12 Oct 2004 | 14 Oct 2004 | ANY | No |
| 12 Oct 2004 | 14 Mar 2000 | NONE | Yes |
| 12 Oct 2004 | 11 Sep 2001 | 15 Oct 2004 | Yes |

### Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

### Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

### Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

### Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-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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