Oracle® HRMS for Poland

Supplement

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

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle HRMS for Poland Supplement.*

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 x for more Oracle E-Business Suite product information.

Documentation Accessibility

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Structure

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.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Guides Related to This Product

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 Discoverer workbooks.

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 E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

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

Organization Structures

Organization Structures Overview

Oracle HRMS provides you with organization management functionality to represent the operating structures of your enterprise.

Representing Organization Structures Using Oracle HRMS

Using the Configuration Workbench for your implementation, you can configure the Oracle eBusiness Suite of applications to represent the management and operating structures of your enterprise.

The Configuration Workbench delivers an integrated configuration management toolset for HR systems and assists in the evaluation, configuration, deployment, and maintenance of HR applications. The workbench uses a configuration interview, to review the decisions and operational questions you make about setting up your enterprise using Oracle HRMS.

The Configuration Workbench configuration process suggests a combination of business groups and organizations to satisfy your integrated legal, financial, organization and employee management needs using Oracle HRMS. The suggested combination of business groups and organizations uses one of the following configuration models:

- A single operating company working within the legislative rules of a single country.
- A single operating company working within the legislative rules of multiple countries.
- Multiple operating companies working within the legislative rules of a single country.
- Multiple operating companies working within the legislative rules of multiple

countries.

These configuration models define the basic information model to represent any enterprise. You can add other location and internal work structures that represent your internal organization or reporting structures for specific legal, personnel, and financial management requirements.

Managing your Work Structures Using Graphical Charting Capabilities

You can plan and implement new working structures ahead of time using graphical charts. The hierarchy diagrammer enables you to create organization and position hierarchies to reflect reporting lines and control access to information in your enterprise. See:

- Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

The hierarchy diagrammers use the same security model as the other windows in Oracle HRMS and access to them is restricted by your responsibility.

Reporting on Organization Structures

Oracle HRMS and Oracle HRMSi enable you to produce several reports to satisfy the statutory requirements for your legislation and meet your business analysis needs. For example:

- Oracle HRMS enables employers in the U.S. to generate reports to comply with the VETS-100 government reporting requirements. The report lists the number of special disabled and Vietnam era veterans a U.S. enterprise employs in each of the nine job categories.
- Oracle HRMS provides you with a standard organization hierarchy report to view the relationships between organizations and their managers within a hierarchy.
- Oracle HRMSi offers the Organization Separation Report to investigate the performance of your best and worst organizations based on the workforce changes in an organization.

Reporting Costs for Your Organization Structures

With the Oracle eBusiness suite of applications, you can automatically create HR organizations to corresponding company cost center combinations that exist in your GL account combinations.

Key Concepts

To effectively use Oracle HRMS for organization management, see:

Key Concepts for Representing Enterprises, page 1-6

Organization Classifications, page 1-12

Extending the Enterprise Framework, page 1-8

Configuration Models for Your Enterprise Framework, page 1-23

Locations, *Oracle HRMS Enterprise and Workforce Management Guide*

Organization Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

Defaults for the Business Group, page 1-28

Internal Organizations and Cost Centers, *Oracle HRMS Enterprise and Workforce Management Guide*

Organization Structures

Oracle HRMS can represent all the components of your enterprise. You can record the physical locations where your employees work and all the different departments and sections that make up your enterprise. You can even record information about other organizations you work with, such as recruitment agencies or tax authorities.

See: Extending the Enterprise Framework, page 1-8

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

- The Organization Hierarchy Diagrammer
- The Position Hierarchy Diagrammer

How do you represent your enterprise as an employer?

You can use the GRE/Legal Entity and Employer organization classifications to represent the employer in each country you do business. If you use the Configuration Workbench to set up your organization structures, then an employer organization is set up in each country your enterprise operates.

In US and Canada, how do you manage government reporting?

Oracle HRMS enables you to set up one or more Government Reporting Entities (GREs) within each of your Business Groups. GREs represent an employer the government recognizes as being responsible for paying employees and for filing a variety of reports that government agencies require. If your enterprise has a single Employer Identification Number from the Internal Revenue Service, your Business Group and GRE are the same organization.

For Canada, you also need to set up Provincial Reporting Establishments (PREs). GREs and PREs represent an employer the governments recognise as being responsible for paying employees and for filing a variety of reports. There must be a GRE for each Business Number that the Canada Revenue Agency (CRA) assigns to an employer. There must be a PRE for each Quebec Identification Number that the Ministere du Revenu assigns to an employer. If your enterprise has a single Business Number from the CRA and a single Quebec Identification Number, your Business Group, GRE and PRE are the same organization.

How do you represent the structure of an enterprise?

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

The Configuration Workbench creates an enterprise structure that suits your operational (management and reporting), and geographical requirements. You can use the enterprise structure the workbench sets up as the basic infrastructure of your company. Once the basic structure is set up, you can define further locations and organizations and add them to your organization hierarchy.

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

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

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

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

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

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

Can I print the graphical versions of the hierarchies?

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

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

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

Organizations

Key Concepts for Representing Enterprises

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

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

See: Configuration Models for Your Enterprise Framework, page 1-23

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

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

See: Extending the Enterprise Framework, page 1-8

See: Organization Classifications, page 1-12

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

Business Group

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

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

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

- If you require legislative support for Oracle HR

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

Operating Company

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

Ultimate Legal Entity

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

Legal Entity/Employer

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

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

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

Consolidated Legal Entity

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

For information on how to model your enterprise using the key organization structures, see: Configuration Models for Your Enterprise Framework, page 1-23

Extending the Enterprise Framework

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

See: Key Concepts for Representing Enterprises, page 1-6

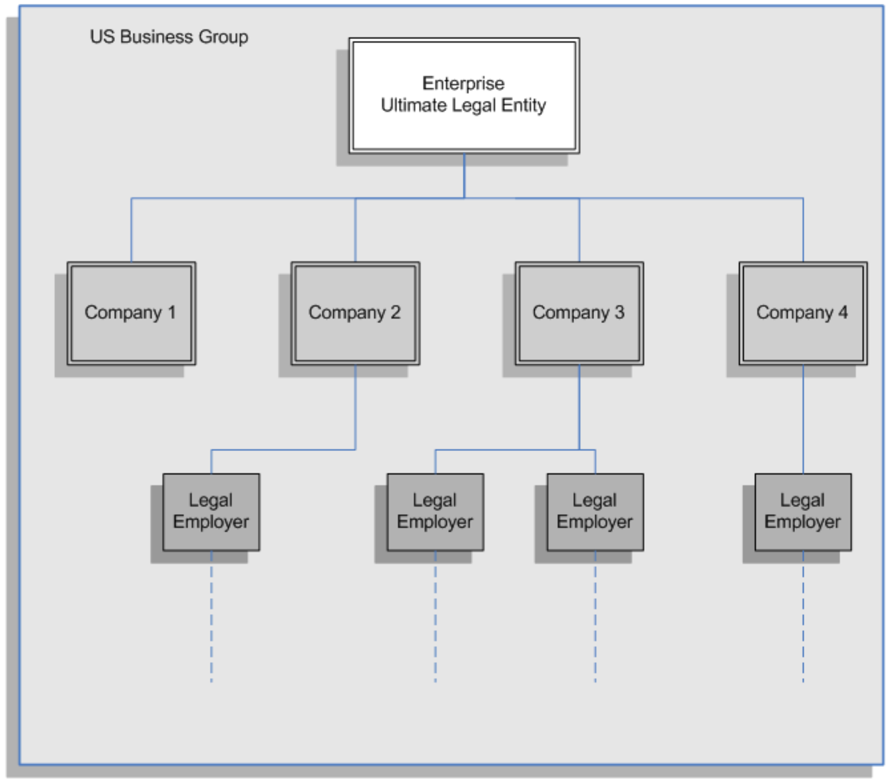
You use classifications to define the purpose of an organization, see: Organization Classifications, page 1-12

Basic Enterprise Structure

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

See: Key Concepts for Representing Enterprises, page 1-6

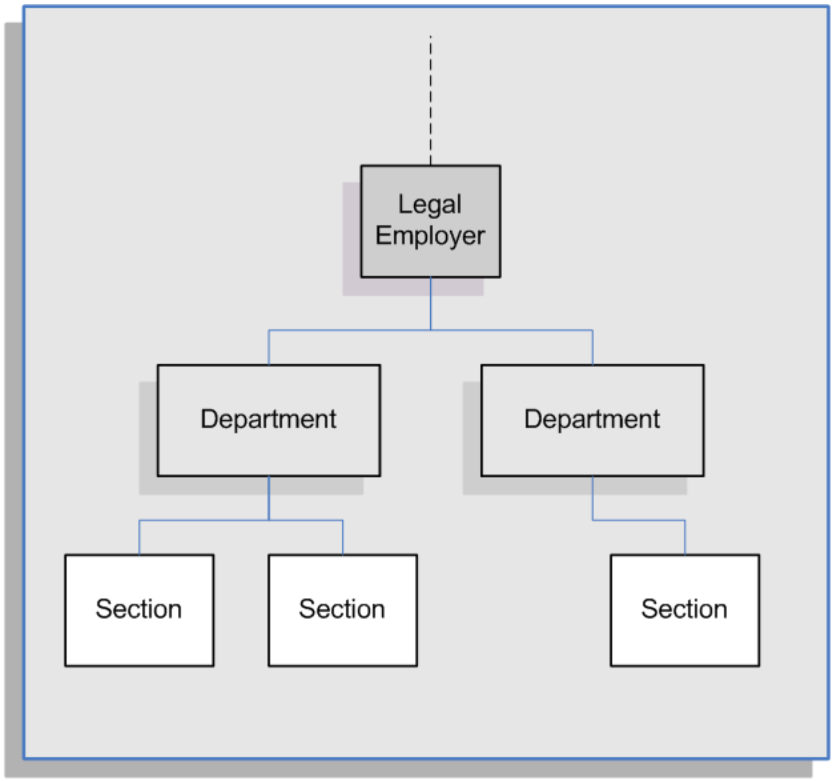
Basic Enterprise Structure



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

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

Reporting Structures Organization Setup



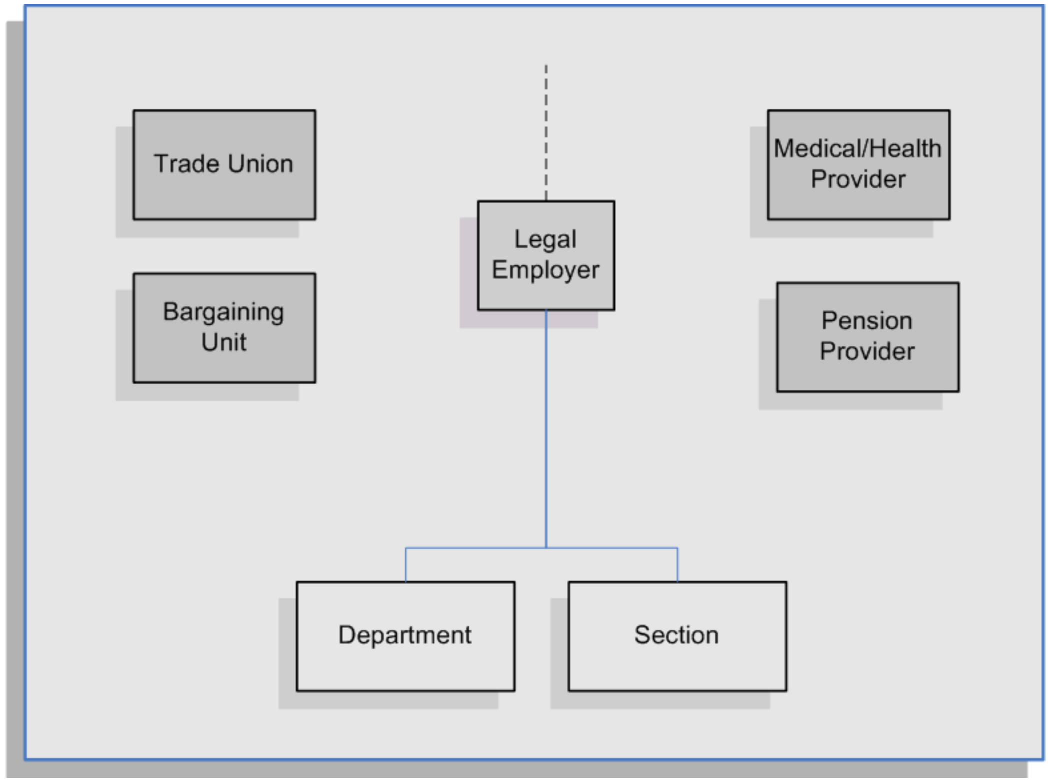
The organization setup in the preceding diagram represents a simplified structure of the different levels of management reporting. If your management reporting structures and your enterprise's costs are the same, then you can use roll-up reporting capabilities. For example, if you associate a cost center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

See: Internal Organizations and Cost Centers, *Oracle HRMS Enterprise and Workforce Management Guide*

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

See: Moving Organizations or Positions in a Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

Benefit Providers and Workers Representation Organization Setup

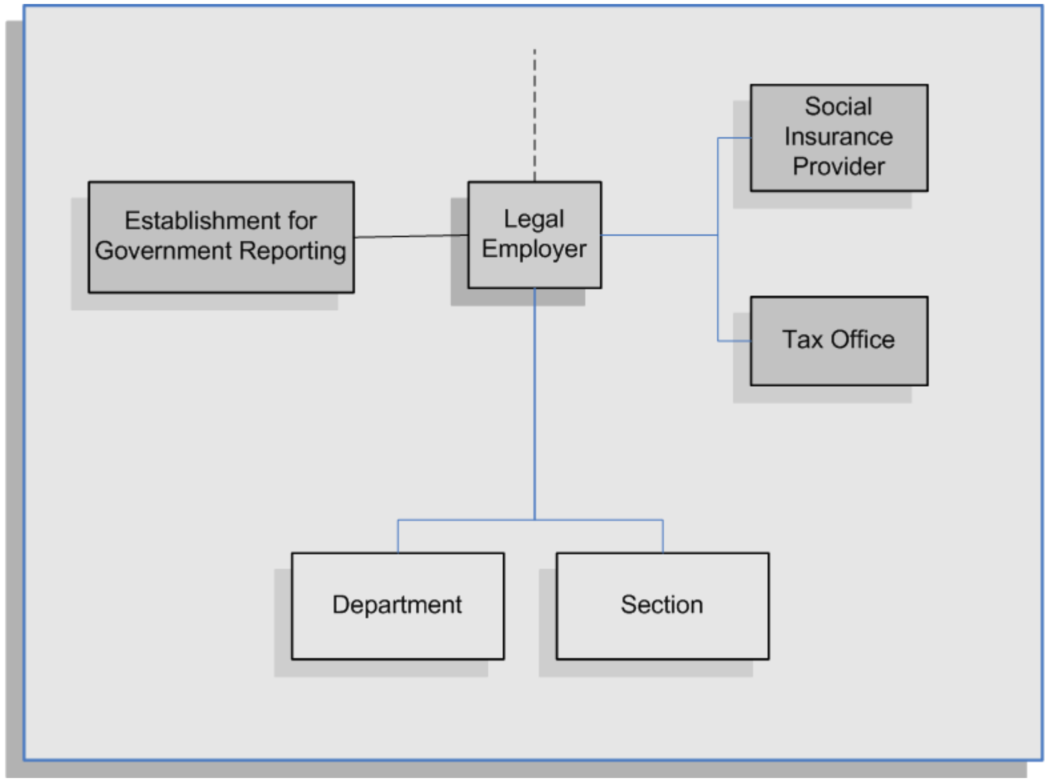


You can set up organizations to represent the benefit providers that supply benefits to the people in your enterprise. For example, in the preceding diagram, a pension provider and a medical/health provider are set up as external organizations in the business group. This set up provides your workforce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

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

For more information on the classifications you can choose for your organizations, see: Organization Classifications, page 1-12

Government Reporting Organization Setup



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

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

Organization Classifications

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

For more information on the key organization structures you use to represent your enterprise, see: Key Concepts for Representing Enterprises, page 1-6

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

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

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

All Legislations

All legislations can use the following classifications:

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

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

- **GRE/Legal Entity**: Use this classification to represent the following organizations:
  - **Ultimate Legal Entity**: this represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization.
  - **Legal Entity**: this represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.
  - **Consolidated Legal Entity**: this organization acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country.

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

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

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

- **HR Organization**: Use this classification for all organizations to which you want to assign employees and contingent workers.
- **Payee Organization**: Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.
- **Bargaining Association**: Use this when defining an organization that is involved in negotiating a collective agreement. A bargaining association could be any organization representing the employees in negotiations, for example a trade union. The UK legislation also enables you to select a bargaining association in the Union Processing window to set up a union element.
- **Representative Body**: Use this when defining a representative body. This may be a body defined in legislation, such as a European Works Council, or may be defined by the employer, such as a Sports and Social Club.
- **Disability Organization**: Use this when defining an external organization with which employee disabilities are registered.
- **Medical Service Provider**: Use this when defining an organization that provides any medical services, such as medical assessments, to the people in your enterprise.
- **Constituency**: Use this to define a constituency to group together workers eligible to vote for particular elections.
- **Company Cost Center**: Use this to define organizations in Oracle HRMS that map to cost centers in Oracle GL. You can set up your application so that whenever a cost center is defined in GL, a corresponding organization with this classification is defined automatically.
- **Professional Body Information**: Use this to define an organization that is a professional body. Organizations with this classification are available to assign to people in the Qualifications window.
- **Operating Unit** : Use the operating unit organization classification if you also use Multi-Org applications. You can associate an operating unit with an HR Organization. The application uses the HR Organization to find the operating unit to which a person belongs.

US Legislation

The US legislation can use the following classifications:

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

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

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

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

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

UK Legislation

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

Canadian Legislation

The Canadian legislation can use the following classifications:

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

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

French Legislation

The French legislation can use the following classifications:

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

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

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

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

Dutch Legislation

The Dutch legislation can use the following classifications:

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

German Legislation

The German legislation can use the following classifications:

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

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

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

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

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

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

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

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

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

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

- **German Work Incident Supervising Office**: Use this to indicate if your organization is a work incident supervising office.
- **German Workers' Liability Insurance Providers**: Use this to indicate if your organization is a provider of German workers' liability insurance.

Hong Kong Legislation

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

Mexico Legislation

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

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

Saudi Legislation

The Saudi legislation can use the following classifications:

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

Hungary Legislation

The Hungary legislation can use the following classifications:

- **Draft Agency**: Use this to represent an external defense organization to which you send employee military service details.
- **Company Information**: Use this to represent the organization which is legally entitled to hire employees.
- **Pension Provider**: Use this to indicate an external organization that provides pensions to your employees.

Spanish Legislation

The Spanish legislation can use the following classifications:

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

Korea Legislation

The Korean legislation can use the following classification:

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

Indian Legislation

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

The Indian legislation can use the following classifications:

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

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

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

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

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

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

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

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

Polish Legislation

The Polish legislation can use the following classifications:

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

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

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

Norwegian Legislation

The Norwegian legislation can use the following classifications:

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

Finnish Legislation

The Finnish legislation can use the following classifications:

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

Danish Legislation

The Danish legislation can use the following classifications:

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

- **Pension Provider**: Use this classification to define external pension providers.

Swedish Legislation

The Swedish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.

- **Social Security Office**: Use this to define external social security office organizations with which you coordinate medical reimbursements for the employees.

- **Swedish Enforcement Office**: Use this to define external enforcement office organizations with which you coordinate the attachment of earnings deductions for the employees.

South African Legislation

The South African legislation can use the following classification:

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

UAE Legislation

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

Irish Legislation

The Irish legislation can use the following classifications:

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

- **Pension Provider**: Use this classification to define external pension provider.

Configuration Models for Your Enterprise Framework

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

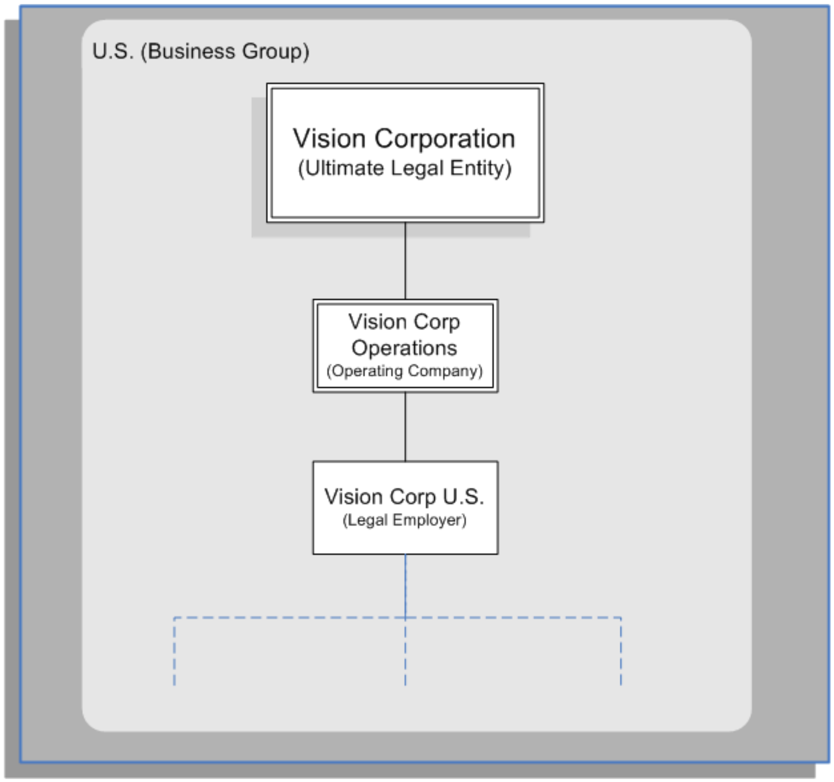
- Model 1: A single operating company in one country
- Model 2: A single operating company in multiple countries
- Model 3: Multiple operating companies in one country
- Model 4: Multiple operating companies in multiple countries

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

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

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

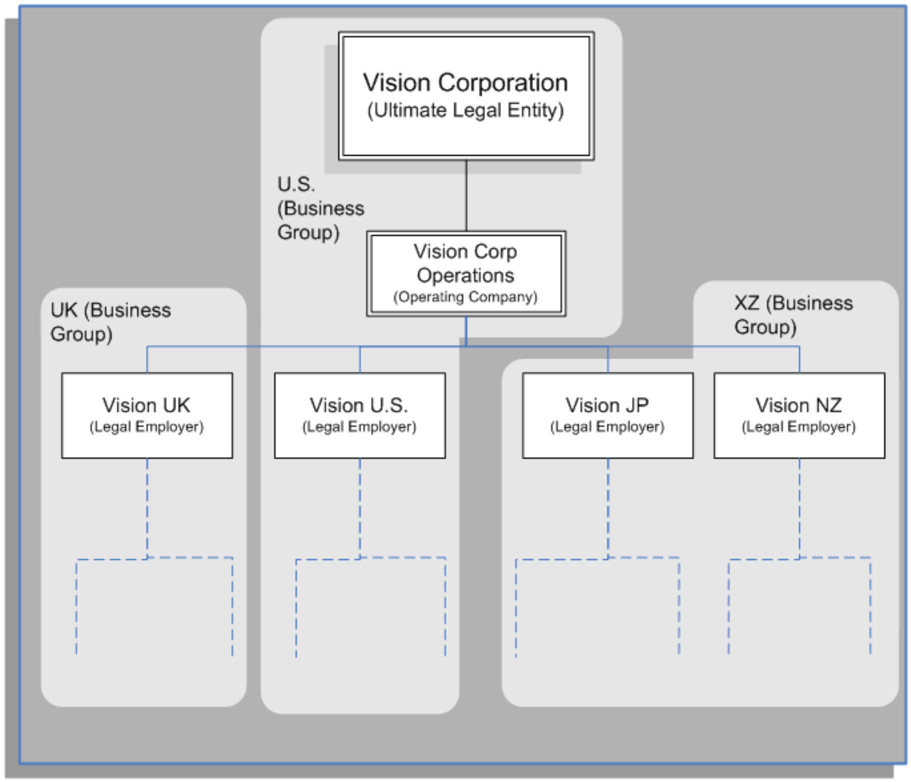
Single Operating Company in One Country



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

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

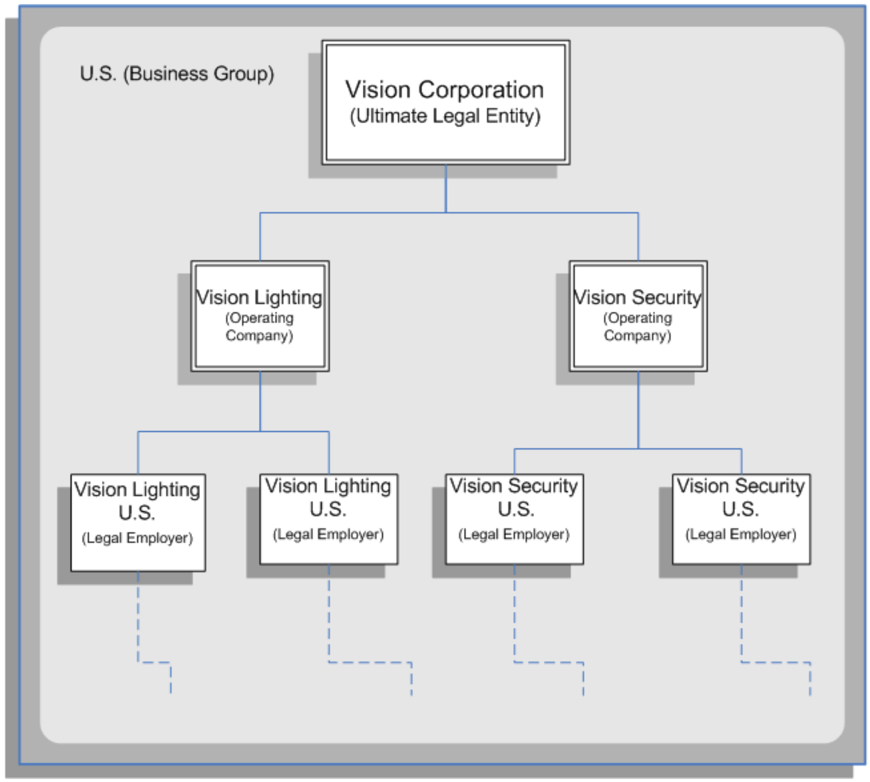
Single Operating Company in Multiple Countries



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

For more information on the key organization structures, see: Key Concepts for Representing Enterprises, page 1-6

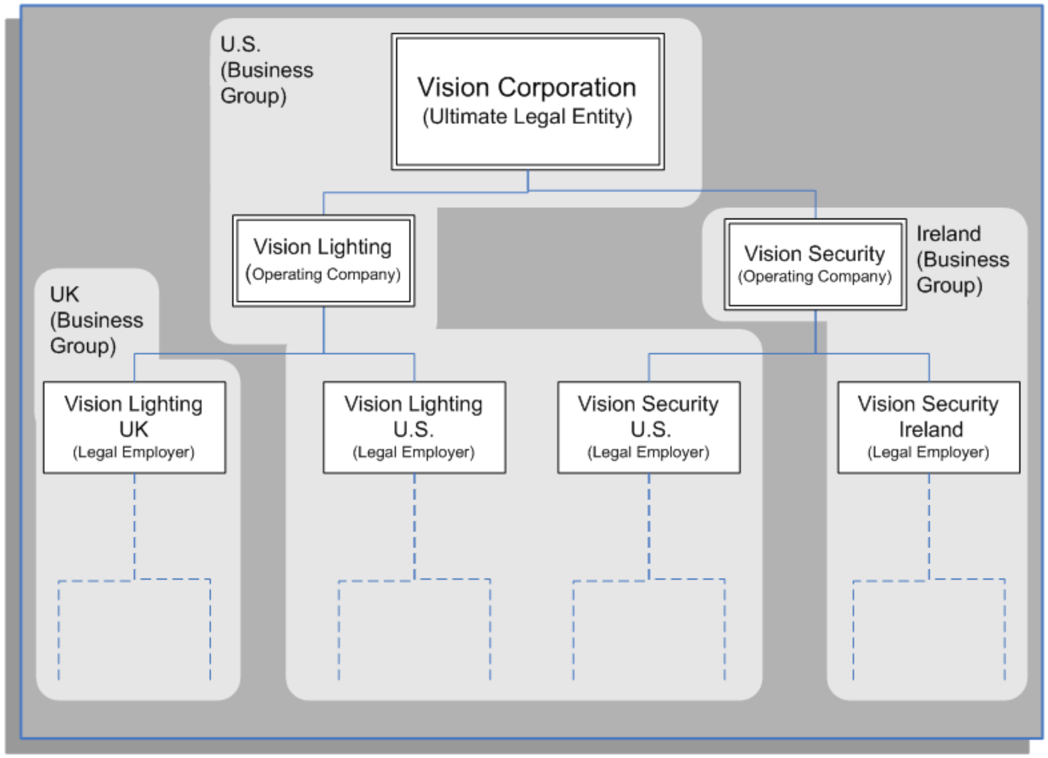
Multiple Operating Companies in One Country



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

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

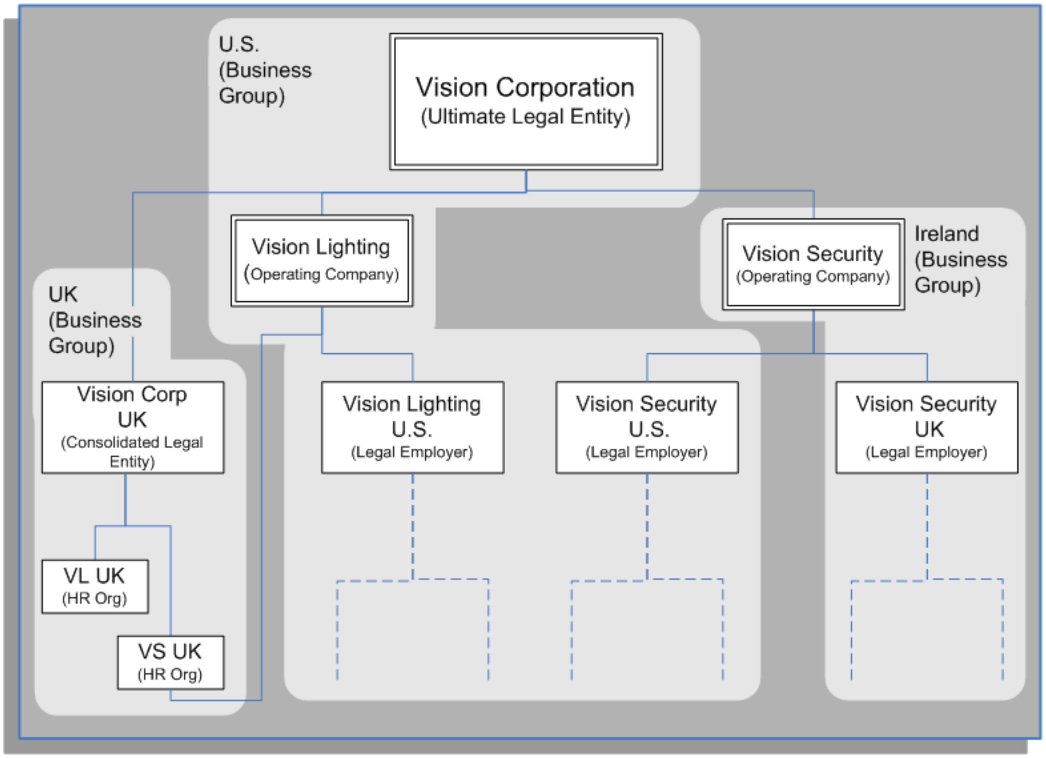
Multiple Operating Companies in Multiple Countries



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

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

Multiple Operating Companies in Multiple Countries with a Consolidated Legal Entity



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

For more information on the key organization structures, see: Key Concepts for Representing Enterprises, page 1-6

Defaults for the Business Group

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

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

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

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

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

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

Employee and Applicant Identification Numbers

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

- Automatic number generation

- Manual entry

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

Generic Hierarchies Overview

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

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

- What is the competency hierarchy for a given job?
- Who is qualified for which job?
- Who can take leave on a given date?
- What training is available in which location, for which jobs?
- What objectives apply to which job?
- Which are the vacancy locations that I can select when creating vacancies?

Defining and Maintaining Generic Hierarchies

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

Defining a New Hierarchy

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

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

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

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

Hierarchy Types and Node Types

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

PQH_GHR_MENU to your responsibility.

For example, the structure of the predefined Establishment Hierarchy type ("VETS, EEO, AAP, OSHA, Multi Work Sites") specifies that the top node must be a Parent Entity. The value set for a Parent Entity node type contains organizations with the classification of Parent Entity. Subordinate nodes must be an Establishment or a Location. The value set for the Location node type contains locations that store report information in a Location EIT.

Recruiting Area Region Hierarchy Type

Use the Recruiting Area Region hierarchy type to define recruiting areas for use in Oracle iRecruitment. You define recruiting area regions to enable managers to create vacancies in multiple locations in iRecruitment. A recruiting area consists of a set of countries, business groups, and locations. When you define recruiting area region hierarchies, hiring managers and recruiters can select appropriate locations as vacancy locations when creating vacancies iRecruitment.

Managers can create vacancies in:

- Multiple locations in a business group
- Multiple locations across business groups

For more information on types of vacancies, see: Vacancies in iRecruitment, *Oracle iRecruitment Implementation and User Guide*

Prerequisites: You must define work structure components such as business groups and locations in Oracle HRMS before you create recruiting areas using the Generic Hierarchies function. A recruiting area region hierarchy must have the following structure: Country > Business Group > Location.

For example, you can create a recruiting area region that has:

- One or more countries.
  - One or more business groups within a country.
    - One or more locations that you can associate with a business group.

Following are the steps to create a recruiting area region hierarchy type. In this example, you define the Australia Recruiting Area so that your managers can select vacancy locations in Australia.

1. Click Create Hierarchy on the Maintain Hierarchy Content page. The Create Hierarchy page opens.
2. Enter a hierarchy name, for example, Australia Recruiting Area.
3. Select Recruiting Area Region as the Hierarchy Type.

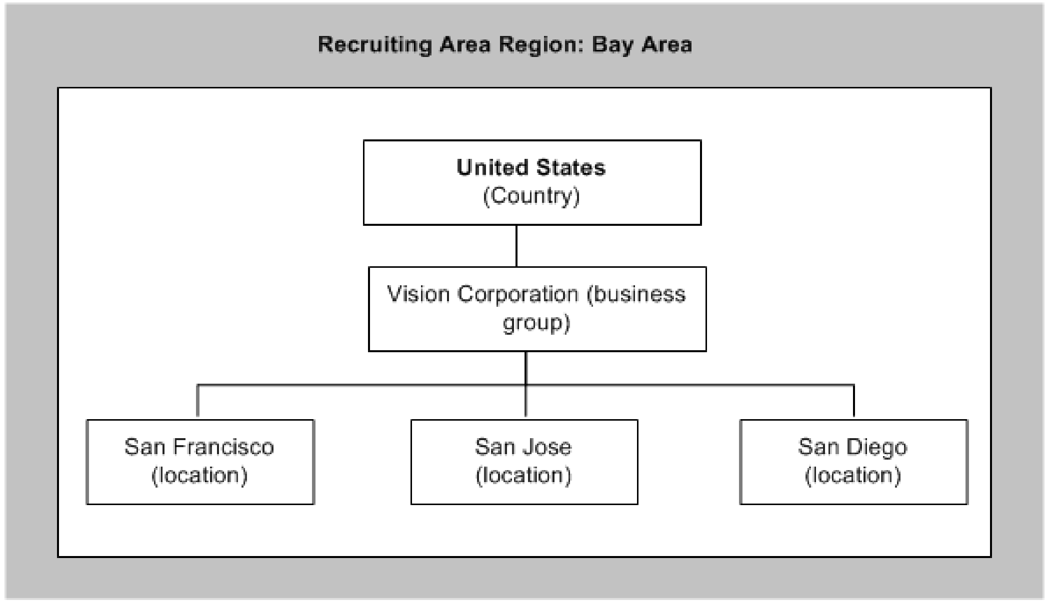
> **Important:** You must select the Global check box if you are creating a recruiting area region that spans multiple countries or multiple business groups. For example, if you are creating a recruiting area known as Asia Pacific that includes countries such as Japan, Australia, India and New Zealand, then you must select the Global check box.

4. Enter the version number and the valid from date.
5. Click Continue.
6. In the Nodes region, click Add Child. The Add Child Node page appears.
7. Select Country as the Node Type and Australia as the Node Name. Click Apply.
8. Click the Add Child icon in the country row to add a business group.
9. The Node Type field displays Business Group. Accept this value.
10. Select the appropriate business group in the Node Name field, for example, Vision Australia and click Apply.
11. Click the Add Child icon in the business group row to add locations.
12. The Node Type field displays Location. Accept this value.
13. Select the appropriate location as the node name. You can add more than one location if required.
14. Click Apply. This recruiting area is available to managers when they create vacancy details. Managers can select specific locations as vacancy locations.

You can create more than one recruiting area region hierarchy type. Analyze your business and recruitment requirements before you create recruiting areas.

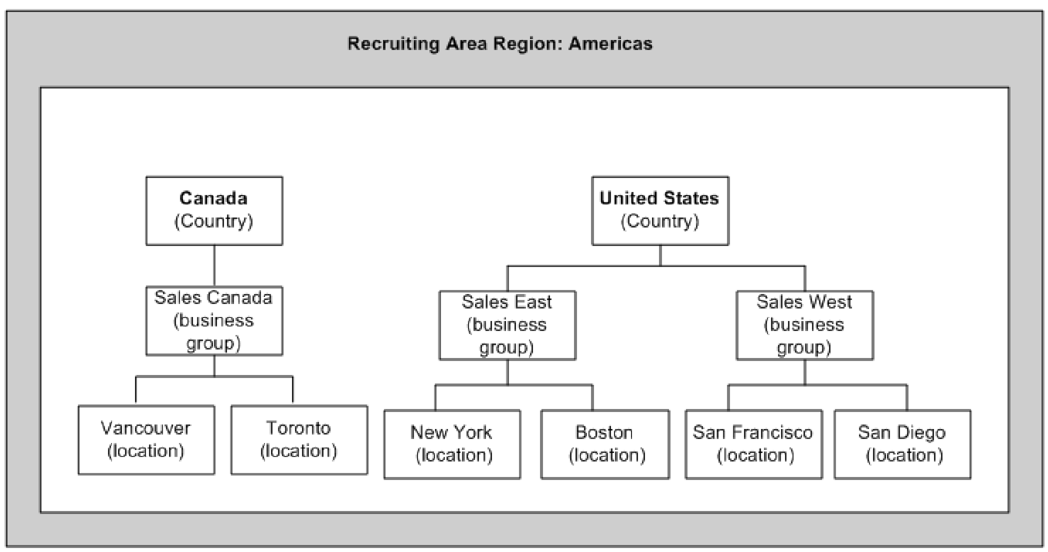
The Recruiting Area Region hierarchy type provides you with the flexibility to create different models of recruiting areas. The figures below describe two examples of recruiting areas that you can create.

Example 1: Recruiting Area Region with Multiple Locations in a Business Group



This figure shows the Bay Area recruiting area region that consists of a country with a single business group and multiple locations. If managers want to advertise vacancies in multiple locations in the Bay Area, then they can select the Bay Area recruiting area and select locations as vacancy locations.

Example 2: Recruiting Area Region with Multiple Locations across Business Groups



This figure shows the Americas recruiting area region, which contains two countries: Canada and the United States. There are two business groups in the United States with multiple locations. If there is a Sales Director vacancy requirement in the Americas region, managers can select the Americas recruiting area while defining the vacancy and select required locations in the United States and Canada as vacancy locations.

Updating or Deleting Recruiting Area Region Hierarchy Type.

The following rules apply when you try to update or delete a recruiting area region hierarchy type:

You can add locations to recruiting areas associated with vacancies even if active applications exist.

You must not:

- Delete a recruiting area that is associated with a vacancy.
- Delete a location in a recruiting area that is associated with a vacancy, which has active applications.

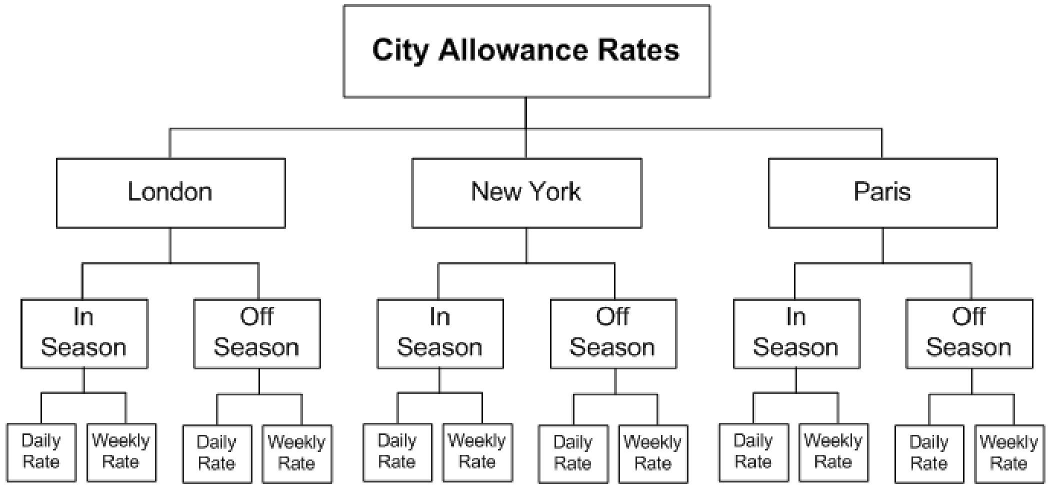
Hierarchy Versions

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

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

Example: City Allowance Rates Hierarchy

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



Creating an Organization

Use the Organization window to create:

- Business groups
- External organizations (for example, tax offices, pension providers, insurance carriers, disability organizations, benefit carriers, or recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs/Legal Entities

If you use the Configuration Workbench to configure your enterprise structure, then you only need to create the additional internal and external organizations you require. For example, you can set up additional organizations to represent the internal divisions or departments, and external organizations for reporting or third party payments.

See: Extending the Enterprise Framework, page 1-8

To create an organization:

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

   Note: For information about querying existing organizations, see: Finding an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Enter a name for your organization in the Name field. A check is performed to see if organizations with the same name already exist.

   All Oracle applications you install share the information entered in the

Organization window. Therefore organization names must be unique within a business group, and business group names must be unique across your applications network.

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

3. Optionally, select an organization type in the Type field.

   Organization types do not classify your organization, you use them for reporting purposes only. The type may identify the function an organization performs, such as Administration or Service, or the level of each organization in your enterprise, such as Division, Department or Cost Center. You create the organization types you require by entering values for the Lookup Type ORG_TYPE.

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

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

5. Enter a location, if one exists. You can also enter an internal address to add more details such as floor or office number.

   Dutch only: If you are setting up external organizations for a tax office, a social insurance provider or a private health insurance provider, you must enter the postal address and contact details using the NL_POSTAL_ADDRESS Location EIT.

   Mexico only: When defining a GRE/Legal Entity, if you select a location here, HRMS automatically associates it with this GRE in the Generic Hierarchy.

   US only: If you are using Oracle Payroll in the US, every organization to which employees can have assignments, including business groups, must have on record a location with a complete address. This is because the system uses the location of the organization of the employee's primary assignment to determine employee work locations for tax purposes. This does not apply to GREs, because the assignment to a GRE exists in addition to the assignment to an organization.

   India only: You can define an income tax organization and enter its location details. You can then select this organization at the GRE/Legal Entity Income Tax Office.

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

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

   Examples of external organizations that may require entry are disability organizations, benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

Entering Additional Information

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

For business group see: Business Group, page 1-37

For HR organization see: HR Organization, page 1-38

For legal employer see: Legal Employer, page 1-39

For PL tax office see: PL Tax Office, page 1-39

For representative body see: Representative Body, page 1-39

For constituency see: Constituency, page 1-40

For bargaining association see: Bargaining Association, page 1-41

For company cost center see: Company Cost Center, page 1-41

For professional body information see: Professional Body Information, page 1-41

See Classification and Additional Information Types, page 1-12 if you need to check which classification to select.

To enter Business Group additional information:

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

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

3. Select one of the following:

   - Business Group Information, see: Entering Business Group Information, *Using Oracle HRMS - The Fundamentals*

   - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Using Oracle HRMS - The Fundamentals*

- Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Using Oracle HRMS - The Fundamentals*

- Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Using Oracle HRMS - The Fundamentals*

- PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Using Oracle HRMS - The Fundamentals*

- Recruitment Information, see: Business Groups: Entering Recruitment Information, *Using Oracle HRMS - The Fundamentals*

- Payslip Information, see: Entering Payslip Information, *Using Oracle HRMS - The Fundamentals*

- Self Service Preference Information, see: Entering Self-Service Preference Information, *Using Oracle HRMS - The Fundamentals*

4. Repeat these steps to enter further information.

To enter HR organization additional information:

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

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

3. Select one of the following:

   - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Using Oracle HRMS - The Fundamentals*

   - Costing Information, see: HR Organizations: Entering Costing Information, *Using Oracle HRMS - The Fundamentals*

   - Parent Organization, see: HR Organizations: Entering Parent Organizations, *Using Oracle HRMS - The Fundamentals*

   - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults:, *Using Oracle HRMS - The Fundamentals*

   - Payslip Information, see Entering Payslip Information, *Using Oracle HRMS - The Fundamentals*

   - Self Service Preference Information, see Entering Self-Service Preference

Information, *Using Oracle HRMS - The Fundamentals*

4. Repeat these steps to enter further information.

To enter legal employer information:

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

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

3. Select one of the following:

   - Basic Employer Info, see: Entering Basic Employer Information, page 1-42

   - Contract Information, see: Entering Contract Information, page 1-42

   - Other Employer Info, see: Entering Other Employer Information, page 1-43

   - PLATNIK Information, see: Entering PLATNIK Information, page 1-43

   - Register Office Info, see: Entering Register Office Information, page 1-44

   - SII Information, see: Entering SII Information, page 1-44

   - Statistic Office Info, see: Entering Statistic Office Information, page 1-45

   - Tax Information, see: Entering Tax Information, page 1-45

4. Repeat these steps to enter further information.

To enter PL tax office information:

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

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

3. Select Tax Office Information, see: Entering Tax Office Information, page 1-46

4. Repeat these steps to enter further information.

To enter representative body additional information:

1. Click on the appropriate organization classification.

2. Click Others to open the Additional Organization Information window.
3. Select one of the following:
   - Representative Body Information, see: Entering Representative Body Information, *Using Oracle HRMS - The Fundamentals*
   - Constituency information, see: Entering Constituency Information for a Representative Body, *Using Oracle HRMS - The Fundamentals*
4. Repeat these steps to enter further information.

To enter constituency additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - Location, see Entering Location Information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Organization, see Entering Organization Information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Grade, see Entering Grade information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Job, see Entering Job information for Constituencies, *Using Oracle HRMS - The Fundamentals*
   - Collective Agreement Grade, see Entering Collective Agreement Grade information for Constituencies, *Using Oracle HRMS - The Fundamentals*
4. Repeat these steps to enter further information.

To enter bargaining association information:

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

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

3. Select Trade Union Information, see: Entering Trade Union Information for a Bargaining Association, *Using Oracle HRMS - The Fundamentals*

4. Repeat these steps to enter further information.

To enter company cost center information:

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

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

3. Select one of the following:

   - GL Company Cost Center, see: Entering GL Company Cost Center Information for a Company Cost Center, *Using Oracle HRMS - The Fundamentals*

   - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Using Oracle HRMS - The Fundamentals*

4. Repeat these steps to enter further information.

To enter professional body information:

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

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

3. Select Professional Body Info, see: Entering Additional Information for a Professional Body, *Using Oracle HRMS - The Fundamentals*.

4. Repeat these steps to enter further information.

Entering Basic Employer Information

Use the Basic Employer Info window to enter information about the legal employer, such as the name of the employer and REGON details. This information appears in HR reports.

To enter the basic employer information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Basic Employer Info.
2. Enter the effective start and end dates for the employer information. The end date is optional.
3. Enter the full name of the employer.
4. Enter a short name of the employer. You use the short name in HR and payroll reports.
5. Enter the REGON number provided by the central statistic office.
6. Enter the local REGON number provided by the local statistic office.
7. Save your work.

Entering Contract Information

Use the Contract Information window to record the basic contract information for the legal employer. This information is used in HR reports.

To enter contract information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Contract Information.
2. Enter the effective start and end dates for the contract information. The end date is optional.
3. Enter the name of the labour court that handles employment-related legal complaints of the employer and employees.
4. Enter the name of the bargaining unit, which is a commission comprising employer and employee representatives.

5. Enter the name of the locality where HR reports are generated.

6. Enter the alternative text to be entered in fields that are not applicable to each employee.

7. Enter the names of the employees who are responsible for normal and civil contracts.

8. Save your work.

Entering Other Employer Information

Use the Other Employer Info window to record additional information about the legal employer, such as the type of business.

To enter other employer information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Other Employer Info.

2. Enter the effective start and end dates for the additional employer information. The end date is optional.

3. In the Legal Base of Activity field, enter the primary business type, such as Aviation, Pharmaceutical company, or Telecommunication.

4. Enter the type of property where the legal employer is located, such as owned or leased.

5. Save your work.

Entering PLATNIK Information

Use the PLATNIK Information window to enter information about PLATNIK. You include the PLATNIK information in HR and payroll reports.

To enter PLATNIK information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select PLATNIK Information.

2. Enter the effective start and end dates for the PLATNIK information. The end date is optional.

3. Select the period of submission for sending employee information to the Social Insurance Institute (SII). For example, you can choose to submit the employee report on the 5th of the month, the 10th of the month, or the 15th of the month.

4. Select the type of application to National Institute of Rehabilitation for Disabled Persons (NIRDP). The information you enter appears in the ZUS DRA payroll report sent to SII. The default entry is Not Applicable.

5. Save your work.

Entering Register Office Information

You use the Register Office Info window to enter the register office details of the legal employer. The information you record here appears in the HR reports sent to NIRDP.

To enter the register office information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Register Office Info.

2. Enter the effective start and end dates for the register office information. The end date is optional.

3. Enter the registration details, such as the full name of the register office with which the legal employer is registered, the name of the register that contains the legal employer information, and the date of the registration.

4. Enter the register number.

5. Save your work.

Entering SII Information

Use the SII Information window to enter SII details of the legal employer. This information is used in HR reports.

To enter SII information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select SII Information.

2. Enter the effective start and end dates for the SII office information. The end date is optional.

3. Enter the EKD, which is the SII number associated with the employer.

4. Enter the name of the employer's SII branch.

5. Save your work.

Entering Statistic Office Information

Use the Statistic Office Info window to enter the details of the statistic office associated with the legal employer. This information appears in HR reports, such as DG1.

To enter statistic office information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Statistic Office Info.

2. Enter the effective start and end dates for the statistic office information. The end date is optional.

3. Enter the PKD.

4. Enter the e-mail address of the local statistic office.

5. Enter the status of the business, such as whether the business is active or not, to be liquidated, or bankrupt.

6. Enter the name of the statistic office.

7. Save your work.

Entering Tax Information

Use the Tax Information window to record information, such as the name of the tax office and the authorized personnel for various tax reports.

To enter tax information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select Legal Employer, click Others, and select Tax Information.

2. Enter the effective start and end dates for the tax information. The end date is optional.

3. Enter the NIP, which is the tax identifier, associated with the legal employer.

4. Enter the name of the tax office.

5. Enter the names of the authorized personnel for the PIT and IFT reports. An authorized person is the employer representative who is responsible for the information in these reports. Each report can have a different authorized person whose name appears on the report.

6. Save your work.

Entering Tax Office Information

Use the Tax Office Information window to record the bank account numbers for the various types of income of the employer. This includes the accounts that are used to transfer the taxes of the employer and the cumulative tax of all the employees.

To enter tax office information:

1. In the Organization window, query the legal employer. In the Organization Classifications region, select PL Tax Office and click Others.

2. Enter the bank account numbers for Company Income Tax (CIT), Personal Income Tax (PIT), Value Added Tax (VAT), Budgetory Income, and Other Income tax accounts.

3. Save your work.

2

People Management

People

Person Extra Information Types

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

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

The predefined person EITs are:

- Contact's Health Insurance - Records a contact person's insurance details.
- Contact's Household Information - Records if an employee and the contact person share the same residence.

Entering a New Person (People Window)

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

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

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

To enter a new person:

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

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

For Romanian users: First and last names are mandatory.

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

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

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

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

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

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

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

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

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

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

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

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

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

Placement action.

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

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

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

Entering Employee Information:

Enter the following information if the person is an employee.

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

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

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

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

Entering Identification Information:

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

1. If your enterprise uses a manual number generation scheme, enter an employee, applicant or contingent worker number. If your enterprise uses automatic number generation (including Use Employee Numbering for contingent workers), the

employee, applicant, or contingent worker number automatically displays when you save your entries in this window.

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

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

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

Entering Personal Details:

Enter personal details in the Personal tabbed region.

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

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

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

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

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

   For Romanian users only: You must select the country of birth first. If the country of birth is Romania, then the Region of Birth field displays the counties and on selecting the county, the Town of Birth displays the localities. If the country of birth is not Romania, then the Region of Birth and Town of Birth are free text fields.

3. **For Russian users only**: Enter the place of birth code in the Place of Birth field. The application uses this information when generating tax and pension statutory reports. You can find this code in the document *All Russian Classification of Subjects of Administrative and Territorial Division (OKATO)*.

4. **For Finnish and Romanian users only**: Enter the place of residence. The place of residence influences the regional membership. You use the place of residence and regional membership to calculate income tax and other statutory deductions. Romanian users can optionally specify whether the person is a resident of Romania, a non resident non European Union, or a non resident European Union.

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

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

7. Select a nationality.

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

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

9. **For Russian, Swedish, and Romanian users only**: Select the person's citizenship. In Russia, you require this information for some statutory reporting to migration authorities. In Sweden, you can use this information to track persons who are not Swedish citizens, since the taxation and pension insurance schemes differ from those for Swedish citizens. For Romania, you can optionally specify whether the person is a Romanian, European Union, or other citizen.

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

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

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

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

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

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

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

13. Save your work.

Multiple Person Records:

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

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

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

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

   Do one of the following four tasks:

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

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

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

linked to a person in your business group.

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: People in a Global Enterprise, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

What Next?:

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

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

Entering Additional Personal Information (People Window)

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

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

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

1. Choose the Office Details tabbed region.

2. Enter the office number.

3. Enter the internal location of this office.

4. Enter the office identifier for internal mail.

5. Enter the person's e-mail address.

6. In the Mail To field, select Home or Office to indicate the person's preferred mail

destination.

To enter information for an applicant:

1. Choose the Applicant tabbed region.

2. If the applicant's resume is on file, check the Exists check box.

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

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

To enter background check information:

1. Choose the Background tabbed region.

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

3. Select the date the background check was performed.

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

1. Choose the Rehire tabbed region.

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

3. Select the reason for this recommendation.

To enter further name information:

1. Choose the Further Name tabbed region.

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

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

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

To enter medical information for a person:

1. Choose the Medical tabbed region.

2. Select the person's blood type.

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

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

To enter other information for a person:

1. Choose the Other tabbed region.

2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week your employee works.

3. Enter the person's current full time/part time availability to work with your company.

4. Select the language the person prefers for correspondence. For example, select German if the person prefers to correspond or receive company information such as terms of pension plan in German.

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

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

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

   - In the Terminate window you enter the termination reason of deceased, but
     - You do not provide the actual termination date, and
     - You have not yet entered a date of death

6. Select the current student status, if the person is a student.

7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.

8. Check the Military Service check box if the person is employed in a military service.

   The value of this field can impact benefits calculations.

9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter benefits information:

1. Choose the Benefits tabbed region.

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

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

2. Enter a benefit group for your employee or applicant. Benefit groups help determine a person's eligibility for a plan or set benefit rates. For example, benefit groups can address mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into a very old plan.

3. Enter what kind of tobacco (cigarettes, pipe, cigar, or chewing, for example) your employee uses, if any.

4. Enter the medical plan number, which is the policy or group plan number of an externally provided medical plan.

5. Enter the adoption date, if the employee has adopted a child. This information, with the child's date of birth, can determine dependent eligibility. You can enter the adoption date only if you have entered a date of birth for the person. The adoption date must be the date of birth or later.

6. Enter the date you received the death certificate of a deceased employee. You can enter this only after you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.

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

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

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

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

To enter the NIP and contact details:

1. Choose the Employment tabbed region.
2. Enter the NIP for an employee. NIP is mandatory for assigning an employee onto a payroll.
3. If you are creating a contact person record, use the Insured by Employee and Inheritor fields to specify if the contact person is insured by an employee or is an heir. This information has tax implications for the contact person.
4. Select the name of the legal employer associated with the employee. This information has tax implications for the employee.
5. Specify whether the employee has old-age or pension rights, the branch name of the National Fund for Health, and the tax office.

Entering Disability Information

HRMS enables you to enter detailed disability information for the people in your enterprise.

You use the Disability window to enter this information.

> **Note:** If you want to record that a person is registered as disabled, but you do not need to hold information about that disability, you can just check the Registered Disabled check box on the Personal tab in the Person window.

See: Entering a New Person (People Window), page 2-2

To enter disability information:

1. Set your effective date early enough to handle any historical disability information that you want to enter.

   > **Note:** If you want to associate this disability record with an existing medical assessment or work incident, your current effective date must be later than the assessment and incident dates. Ask your system administrator to enable the Work Incidents and Medical Assessments windows if they are not available.

2. Select the category of disability, for example, Severely Disabled.

3. Enter into the FTE field the full-time equivalent that this person represents towards your enterprise's quota of disabled employees. If no quota scheme exists, then leave the default value as 1.00.

   Note: You can enter a number that is greater than 1.00, depending on the level of disability.

   The actual figure will normally be provided by the official disability organization.

4. Select the status of this disability information.

   - Active: This information will be included in reports. You cannot enter an Active status if the record has an end date.

   - Inactive: This information will not be included in reports.

   - Pending: This information is not yet complete because you entered it before you entered the medical assessment confirming this disability (where the consultation result was Disability.)

   - Closed: This information has an end date because the person no longer has this disability.

   For Russian users only: Disability status is not applicable in Russia, so the Status field is not available to Russian users. Instead, select the type of disability. You can find this information in the disability certificate provided by the Office of Medical Examination. The application uses this information to calculate any tax benefits and deductions for the employee.

5. Select the reason for the disability, for example, Occupational Incident. If the disability was diagnosed as the result of a medical assessment, select Occupational Assessment.

6. Enter the percentage of disability as determined by the official assessment of this disability.

   For Hungarian and Spanish users only: The degree of disability depends on the category of disability. For example, if the person's disability category states that the disability decreases the work capacity by 50%, enter 50 as the percentage.

7. Select the incident that is related to, or caused, this disability. The list of incidents is limited to incidents that occurred before the current effective date of this disability. When you select an incident, its date is displayed automatically.

8. Select the medical assessment that recorded this disability.

The list of assessments is limited to assessments that:

- have a result of Disability
- have a consultation date that is earlier than the current effective date of the disability
- are not already linked to a disability record for this person
- were linked to any incident that you selected in the previous step

To link an incident to an assessment, see: Entering Medical Assessments, *Oracle HRMS Enterprise and Workforce Management Guide*

This field is not datetracked.

Entering Disability Registration Information:

1. Choose the Registration tabbed region to enter the disability registration details.
2. Enter into the ID field the registration number assigned by the disability organization.
3. Select the name of the official disability organization with whom the person's disability is registered.

   You create disability organizations in the Organization window, selecting the Disability Organization classification.

   See: Creating an Organization, page 1-35
4. Enter the date on which the employee was registered as disabled with the disability organization and the date on which this registration expires.

Entering Additional Disability Information:

1. Choose the Other tabbed region to enter additional details about this disability.
2. Enter a description of the disability.

   For Russian users only: Disability description is not applicable in Russia. Instead, enter the job conditions under which the disabled employee can work. You can find this information in the disability certificate provided by the Office of Medical Examination. You can use this information to identify suitable assignments for the disabled employee.
3. Enter information about the work restrictions that the employee is subject to as a result of their disability.
4. Enter further information about this disability if the Further Information field has

been set up by your Oracle localization team.

For Hungarian users only: Record if the employee is blind. The application uses this information to calculate any additional holiday or tax benefit for the employee.

For Indian users only: Indicate if the employee has provided proof of disability, for claiming disability benefits.

For Korea users only: Specify the following:

- Disability grade
- Effective date of the disability
- If a certificate of disability is available or not.
- Disabled type

You require this information when the employee is eligible for disable exemption.

For Mexican users only: Specify the following:

- Disability ID of any related disabilities

  The list-of-values displays all previous disabilities for your employee.

- Number of disability days subsidized by the social security agencies
- Type of disability

  Valid values are:

  - General Disease
  - Maternity
  - Risk Incident

- Result of the disability

  The Consequence field provides the following options:

  - None
  - Temporary Disability
  - Provisional Initial Assessment
  - Definitive Initial Assessment
  - Death

    - Relapse
    - Assessment after start date
    - Provisional re-assessment
    - Relapse without medical discharge
    - Definitive re-assessment
  - Disability control

  For Spanish users only: Record if the employee or dependent contact has a condition with reduced mobility. This information affects the employee's tax withholding rate.

  For UAE users only: Indicate if the employee's disability will impact their social insurance contribution. Only one disability can be considered for calculating the social insurance contribution.

5. Save your work.

What Next?

To set up an assessment to evaluate this disability, choose the Medical Asse. (Assessment) button.

See: Entering a Medical Assessment, *Oracle HRMS Enterprise and Workforce Management Guide* for more information.

Maintaining Disability Information

You can make changes to the disability information that you saved previously, but if your disability record includes either incident or medical assessment information, you cannot change or delete this information once you have saved it.

Entering an Assignment (Assignment Window)

When you enter an employee or contingent worker, or hire an applicant, Oracle HRMS automatically creates a default assignment. You can view and update the default assignment in the Assignment window.

You can then enter additional assignments, if required, using the Assignment window.

To enter an assignment:

1. Set your effective date to the start date of the new assignment.

   Germany only: If you want to link a contract to this assignment, you should do so before completing any further fields, as some fields in the Assignment window default to values defined on the contract and cannot be overridden here. Add contract details using the Contract field on the Employment Terms tabbed region. If you are assigning a contingent worker, the Employment Terms tabbed region does not display, preventing you from adding a contract.

2. Select the organization to which you want to assign the employee or contingent worker. By default, the employee has an assignment either to the business group, or to the organization to which he or she applied. Contingent workers have a default assignment connected to the business group.

   If you overwrite these defaults, a window appears asking if the change is an update or a correction. Select Correction.

   If you are creating an additional assignment, no default business group or organization is displayed.

3. Select the job or position for which this person has been assigned.

   France only: For a public sector type organization, the Position field is read only. Oracle HRMS displays the position details you recorded using the HR Administrator Actions pages.

   Russia only: Click the Attachments Menu icon on the tool bar to enter the contingent worker's job description.

   India only: The position selected is displayed on the employee's Form 16.

4. For employee assignments, select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.

5. If you defined a location for the business group or other organization, it appears as a default. Change this, if required.

   Mexico only: The assignment's location determines its GRE.

   - If you have assigned multiple GREs to a location (through the generic hierarchy), you must choose which one applies to this assignment. Navigate to the Statutory Information tabbed region and make a selection in the Government Reporting Entity field.

   - If you change your assignment's GRE, you must specify a Social Security Leaving Reason (under the Social Security Affiliation tabbed region).

     See: Transferring Employees, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

6. **France only**: Select the establishment as it serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

Note: For a public sector type organization, the Establishment field is read only. Oracle HRMS displays the establishment details you recorded using the HR Administrator Actions pages.

7. **Netherlands only**: Select the reporting employer. The assignment is reported under this employer in the wage report. If you change the employer establishment after running the payroll and before running the Wage Report, the collective report section on the Wage report will not match the sum of nominative reports.

   Note: By default, the assignment is reported under the employer linked to the assignment's payroll. Changing the employer does not change the Payroll Object Group. To change the Payroll Object Group, terminate the existing assignment and create a new assignment with a new payroll. You can change the employer linked to the payroll using the Payroll window.

8. Select the people group and enter information defined in your people group flexfield. This is optional.

9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

   Note: If Oracle Payroll is installed and you are an HR User, you cannot assign employees to payrolls. Ask your system administrator to change your HR:User Type profile option if you need to assign employees to payrolls.

   Note: Denmark Users: Select Salaried or Hourly. There is no relation to the Payroll frequency.

10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

    See: Assignment Statuses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

    Australia Only: Select if the employee works overseas or as part of Joint Petroleum Development Area (JPDA). The status you specify determines which earnings appear on which Payment Summary.

11. **Korea Only**: Select the business place to which you assign your employee.

12. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee or contingent worker number, for the first assignment.

13. For employee assignments, select a collective agreement if the employee is covered by one.

    You can calculate values based on a collective agreement only for an employee's primary assignment.

14. Select an assignment category, for example part-time or full-time.

    Hungary only: Select an employment category, for example part-time or full-time.

    Ireland only: Select an employment category, for example part-time or full-time. Select Apprentice/Trainee if the assignment is an apprentice or a trainee.

    Mexico only: Select the employee's Social Security employment type.

    See: Define the Social Security Employment Types, *Oracle HRMS Implementation Guide (Mexico)*

    Romania only: Select a labor contract category as reported to REVISAL.

    Russia only: This field is mandatory to enable you to use them for reporting purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

15. For employee assignments, select the employee category, for example blue collar or white collar.

    Ireland only: Select a valid employment category from the list. The list displays all the occupation categories for reporting in the EHECS report.

    Mexico only: Select the employee's Social Security employment category.

    Spain only: Select the professional category, for example administration clerk or civil servant.

16. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points, or salary information.

    See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

    You can use the Oracle HRMS and Common application Components (CAC) integrated schedule features to assign a schedule to the worker's assignment. If you want the application to only display schedules the worker is eligible for, then run the Eligibility Engine process for the worker.

    See: Setting Up Availability, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Additional Assignment Details (Assignment Window)

Once you have set up basic assignment details, you can enter additional information, such as supervisor details, special ceiling progression points, and salary information, in the tabbed regions of the Assignment window. The tabbed regions that appear in the Assignment window vary according to person type and localization.

> **Note:** For countries other than the US or UK, your Oracle localization team may have created additional fields in a tabbed region to hold legislatively required additional information.

To enter salary information for an employee:

Using the Salary Administration window, you can enter a proposed salary change for an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

1. Choose the Salary Information tabbed region.

2. Select a salary basis for the employee.

3. You can also enter the frequency of salary and performance reviews.

   > **Warning:** If you change an employee's salary basis to one that uses a different salary element, the employee's existing salary element entry ends. Using the Salary Administration window, you should make a new salary entry for the employee, effective from the date of the salary basis change.

   For more information about salary administration, see: Salary Administration, *Managing Total Compensation Using Oracle HRMS*

To enter supplier information for a contingent worker:

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select the names of the supplier and the supplier site for the contingent worker.

3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

2. Select a purchase order number for this assignment.

3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.

4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.

5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.

2. Select the name and number of the worker's personal supervisor. If your organization uses assignment-based supervisor hierarchies, also enter the assignment number for the supervisor assignment. If you have already entered the supervisor name, the application displays a context-sensitive list of available assignments for the supervisor.

   You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.

   You can select a supervisor from another Business Group if the HR:Cross Business Group user profile option is set to Yes at your site.

   > **Note:** The application does not update this information. Use organization and position hierarchies to show management reporting lines.

To enter probation period and notice information for an employee:

The probation period defaults from the employee's position.

1. Choose the Probation and Notice Period tabbed region.

2. Amend the default probation period for your employee's assignment, if required.

3. Enter the notice period for the assignment, if required.

To enter standard conditions information for an employee or contingent worker:

The standard work day information (apart from the Hourly/Salaried field) defaults from the position. If standard conditions are not defined for the position, they default from the organization or Business Group.

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for your employee or contingent worker assignment, if required.
3. This step is for employees only. For benefit administration, enter whether the assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

   > **Note:** If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

To enter contract information:

1. Click the Statutory Information tab.
2. Select the contract category. The type of contract you choose impacts specific employee benefits.
3. Specify the contract type.
4. Enter the contract number and validity dates.

To enter primary or secondary assignment and miscellaneous information for an employee or contingent worker:

1. Choose the Miscellaneous tabbed region.
2. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.
3. Select a reason for adding or changing the assignment. For example, you can use the Reason field to record promotions for your employees. You define valid reasons

as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers.

4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)

5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, you must ensure that the Primary box is unchecked.

   Check the Primary check box to update a secondary assignment to Primary.

   See: Changing Primary Assignments, *Managing Your Workforce Using Oracle HRMS*

6. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

To enter special ceiling information for an employee:

A special ceiling progression point is the highest point to which the Increment Progression Points process can automatically progress the employee.

1. Choose the Special Ceiling tabbed region.

2. Enter a special ceiling only if the employee is assigned to a grade, and if a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

To enter a billing title for an employee or contingent worker (Oracle Projects only):

1. Choose the Project Information tabbed region.

   > **Note:** The Project Information tabbed region displays only if you have installed Oracle Projects.

2. Enter a billing title. The information you enter in the Billing Title field serves as the default title on project customer invoices. You can override this information using Project Accounting.

3. Enter a project title.

To enter grade ladder information for an employee:

You must enter grade ladder information to use the Grade/Step Progression process.

1. Choose the Grade Ladder tabbed region.

2. Select the grade ladder for this assignment. If you selected a grade for this assignment previously, all the grade ladders that use that grade are available. If you have not selected a grade, all the active grade ladders in your enterprise are available.

To enter bargaining unit and union membership information for an employee:

1. Choose the Bargaining Unit tabbed region.

2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

   Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE

3. Select whether the employee associated with the assignment is a member of a union.

To enter employment terms for an employee:

1. Choose the Employment Terms tabbed region.

2. Select the contract to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.

   Note: If you are a German public sector user, selecting a contract defaults some values, for example pay grade, from the contract into the assignment. If you want to amend these values you must change them on the contract as you cannot update them in this window.

3. Select the agreement grade structure for the collective agreement. A window shows the grade factors for that grade structure.

4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet those criteria.

If you enter values directly into the grade factor fields, they must correspond to an existing reference grade unless the Override Allowed check box in the Agreement Grades window is checked.

> **Note:** Any new combinations of values that you enter are unavailable for reuse with other assignments. To reuse a combination, you must define it as a reference grade in the Agreement Grades window.

To enter additional contract information for an employee:

1. Click the Other tab.
2. Specify the notice period dates for the employee contract, if applicable.
3. Select the special job ID for SII reporting.
4. Select the ID assigned to an employee for working in special conditions, which entitles the employee to special benefits, such as early old-age pensions.
5. Enter the contract-termination details, if applicable.
6. Save your work.

Entering Previous Employment Details

You can enter the details of the previous and parallel employment using the Previous Employment Information window. Parallel employment is any work that an employee performs simultaneously in any other organization while working in the current organization. The durations of an employee's various services in their previous and parallel employment appears in statutory reports.

> **Note:** If your localization currently uses the Employment History window see: Entering Employment History, *Managing Your Workforce Using Oracle HRMS*

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

- Previous Employer
- Previous Job
- Assignment - Previous Job Mappings

To enter previous employment details:

1. Enter the previous employer name.

2. Enter an address.

3. Select a country.

4. Select the type of employment, either Previous or Parallel.

5. Select a subtype for the type of employment selected in step 4.

6. Enter a description for the employer.

7. Enter the start and end dates for the employee's previous employment. If you enter the start and end dates, the application automatically calculates the period of service in years, months and days.

8. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

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

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

    Note: You can select the All Assignments check box only if there are no further previous job usages defined in the Assignment region. After you select the All Assignments check box, you cannot define further previous job usages.

11. Save your work.

To enter previous job details

12. Select an empty row in the Previous Job region or place your cursor within an existing row and choose the New button to add a new row.

13. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered in the Previous Employer region. The application automatically calculates the period of service in years, months and days.

14. Enter a job title.

15. Select an employee category.

16. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields. However, if you enter both start and end dates as well as the period of service in the Years, Months, and Days fields, the application considers only the start and end dates.

17. Enter a description for the previous job.

18. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

19. Use the Further Information flexfield to enter the benefits related to the type of service in the previous job, such as Old-age Rights or Vacation Rights.

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

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

21. Save your work.

To map previous jobs to an assignment

22. Select an empty row in the Assignment region or place your cursor within an existing row and choose the New button to add a new row.

23. Select an assignment to map to a previous job specified at steps 12 to 19.

24. Select a job to map to the assignment selected at step 23. Selecting a job automatically displays the Start Date and End Date fields for the job as specified in the Previous Job region.

25. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.

26. Use the Further Information flexfield to enter further previous job usage details.

27. Save your work.

3

General Compensation Structures

General Compensation Structures Overview

Using Oracle HRMS, you have all the flexibility you need to model your compensation and benefit packages. You decide exactly what information you want to hold for compensation management and, if you require it, for payroll processing.

This overview outlines the generic concepts and procedures for setting up compensation. However, there are additional considerations for salaries, absences and PTO accruals, benefit plans, collective agreements, and setting up earnings and deductions for payroll processing. These are covered in other areas.

Elements: Define - Administer - Process

Element is an Oracle HRMS term for the components of a compensation and benefits package, such as salary, PTO accrual plan, and health plan. By defining elements, you can structure information relating to employees' compensation and benefits in a highly flexible way.

First, you define elements, then you administer and process them.

Define

Definition includes rules about valid compensation values, who can receive the elements, and how they are processed. You define elements, and associated rules and formulas, as part of your Oracle HRMS implementation. You can define new elements and make certain changes to existing definitions at any time.

Administer

When definition is complete, you administer compensation and benefits by making element entries for your employees. You can quickly record earnings, deductions, time worked and other information by entering elements in batches.

Process

You process earnings and deductions by running payrolls. The payroll run automatically uses the calculations you have written as formulas, and uses other rules (such as processing frequency) that you have defined.

Compensation Objects

For most benefits and some types of compensation, you define compensation objects as well as elements. You can define a hierarchy of compensation objects, optionally starting with *programs* at the highest level, to represent a package of benefits you offer, followed by plan types, plans, and options. A *plan type* is a category of plans, such as a medical plan type. A *plan* is a specific offering, such as a bonus or a dental plan, and an *option* is an electable choice within a plan, such as 1 x Salary.

If you use SSHR, defining compensation objects enables you to delegate tasks such as the allocation of salary increases or bonuses to line managers, by issuing budgets. Employees can use self-service to enter voluntary contributions, such as savings plans, or charitable donations. They can also manage their own enrollments in benefit plans, while the back-office maintains control of the plan's administration.

If you use iRecruitment, defining compensation objects enables your hiring or line managers to assign benefits components to eligible applicants when they create or update offers. For example, you can set up plans such as car and relocation.

To speed up implementation, you can use Plan Design Copy to copy a plan or program and all its associated definitions, then you can configure these to create a new plan or program.

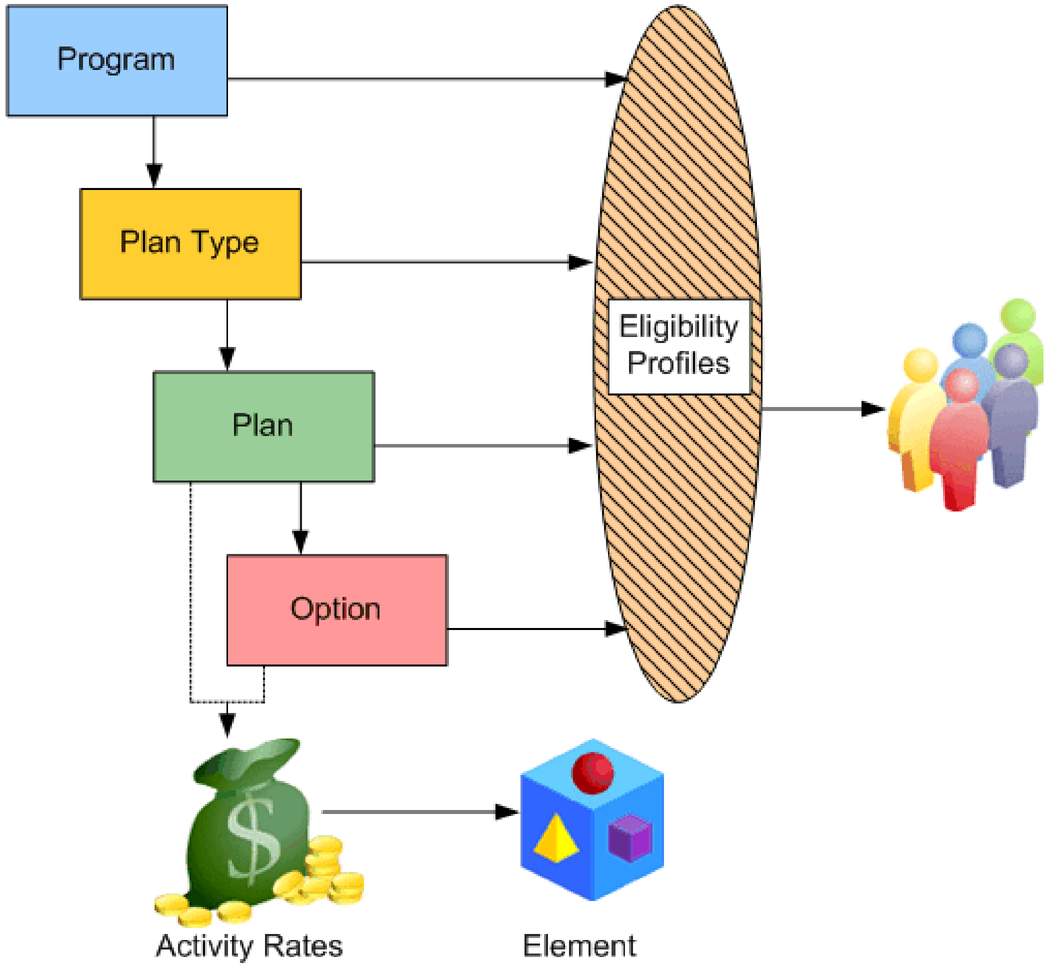
Eligibility Profiles

If you have defined compensation objects, you manage participation by defining eligibility profiles and attaching them to the appropriate level of the hierarchy. You can define several profiles for each object, and each profile can contain both required and optional criteria. For example, the profile could specify that eligible employees must work full time, and either have been employed for at least two years, or be assigned to a manager grade.

Activity Rates

You can attach any number of activity rates to a plan or option to specify the contributions made by employee and employer, or the distributions, such as compensation awards. When you define an activity rate, you can associate it with an element. Activity rates support a variety of calculation methods to determine how much a person pays or receives: flat amount, multiple of premium, multiple of elected coverage, and so on. When a participant enrolls in a plan, the enrollment process runs the calculation and enters the result on an element entry for the employee.

General Compensation Structures



Reporting On Compensation Data

Oracle HRMS includes a number of windows and reports for compensation data, such as the Salary Review Report, and the List Employees by Element window.

In SSHR, you can use the Compensation History page to view employee information such as salary changes, bonuses, stock options, monetary compensation grouped by year, ranking, jobs, and non-monetary compensation. If you use Compensation Workbench, this feature supplies several reports for salary changes, bonuses, and stock options.

Oracle HRMS also includes some Discoverer Workbooks to enable you to analyze salary information by organization, supervisor, and job, comparing with grade rate values where appropriate.

See: General Compensation Structures -- Reports, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Using System Extract, you can define interfaces to extract compensation data for reporting or transfer to third parties. Oracle HRMS supplies predefined extracts that you can use or configure. See: HR/Payroll Extracts, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Key Concepts

To get the most out of the compensation and benefits functionality of Oracle HRMS, you need to understand the following key concepts:

- Elements
- Input values
- Element links
- Element classifications
- Element entries
- Plan design
- Eligibility profiles
- Activity rates

General Compensation Structures

What kinds of compensation information can you record?

All kinds, depending on how much information you require. You decide what types of compensation and benefits you want to track, the information you need to hold for each type, and the rules that determine who receives the compensation and how often it is paid.

Can you monitor the costs of compensation policies?

Yes, you can allocate labor costs to particular departments, products, or projects. You can enter default cost centers for organizations and employees, then override these, if required, when you enter timecard data.

How can you review the effectiveness of compensation packages?

You can compare salaries and other compensation for any groups of employees, for example grouped by organization, position or grade. You can break down salary changes into components, such as Cost of Living, Location Adjustment, or Promotion, to identify any performance-related increases. You can also associate salary changes with performance reviews.

Using HRMS Intelligence, you can compare salary trends, manpower changes, and group skills analyses.

What happens when you need to change compensation policies?

With DateTrack you can make future-dated changes to your information safe in the knowledge that these changes will not become effective in the system until the correct date.

In this way you can use your compensation and benefit information to plan changes ahead of time; analyze the impact of these changes; adjust these changes and generally smooth out the workload that is often associated with major changes in compensation and benefits policy.

How do you manage individual salary packages?

You can define salaries for groups of employees, with default values and validation rules if you require them, and enter individual salary changes for employees at any time. You can associate salary changes with the results of performance reviews, and you can show the composition of any increase by components such as cost of living, and individual performance. You can enter proposed changes to take effect in the future and confirm these later with the click of a button.

What about grade-related pay?

Oracle HRMS handles both pay rates that are directly related to grades, and rates on grade-related pay scales. To relate pay directly to grades, you can specify valid salary ranges or fixed pay rates for each grade. If your employees are paid from a pay scale (perhaps determined by collective agreement), you can associate each grade with several points on a pay scale.

How do you ensure employees receive the compensation dictated by a collective agreement?

You can define entitlement items to represent the compensation and benefits that are subject to a collective agreement. You define an eligibility profile to determine who can receive this entitlement item, and associate both with a collective agreement. Provided that an employee already has an element entry for the compensation or benefit, applying the collective agreement to the employee updates the entry to the values recorded in the collective agreement.

What does Oracle offer for benefits administration?

We offer a choice, to match the varying complexity of benefits administration requirements.

The **Standard Benefits** feature set lets you define your benefits offering in a hierarchical manner, so that requirements you specify at the program level are inherited by the plans and options in that program. You can use a variety of factors, such as length of service, to define eligibility requirements for participation in a plan. The system supports centralized enrollment by benefit administrators or web-based self-service enrollments. Standard benefits is best for organizations that outsource a significant portion of their benefits administration. System extract features let you export data to third party benefits administrators.

If you administer your own benefits, or your requirements include offering flexible benefit plans, you should implement **Oracle Advanced Benefits**. This provides the full solution for benefits management, including life event triggered enrollments and communications, online life event processing, processing of flexible spending account claims, and what-if eligibility analysis.

For US implementations, we also continue to offer **Basic Benefits**, which is a limited feature set that supports administration of benefit plans for employees and their dependents, including COBRA coverage.

Can you be sure that compensation information remains confidential?

Yes, you can. Oracle HRMS security features enable you to choose which users can view compensation information, what types of compensation they need access to, which employees records they can see, and whether they are able to update them.

Can you enter weekly timecard data?

Yes, using Batch Element Entry, you can enter timecard information for a group of employees, using default values as appropriate. You can validate your entries against system rules and external control totals before uploading it to the database in time for the payroll run.

How does Oracle HRMS help reduce data entry errors?

There are three ways:

- By removing the need to make entries at all, when compensation entries are standard for a group of employees and can be entered automatically.

- By reducing keystrokes when you use Batch Element Entry to enter batches of entries.

- By validating all entries using rules you define at setup time.

Can you make one-time changes to entries?

Yes. Some types of compensation or payment (such as expense reimbursements) need only be entered for the period to which they apply. For others, the regular value can be adjusted if you need a different value for one payroll run.

I'm entering compensation details for analysis but not for payroll processing. How do you reduce data entry work to a minimum?

If the same compensation entry applies to a group of employees, the system can enter it automatically. You need to set up the element with *standard links*. Use Batch Element Entry to start or update other entries in batches.

You can download salary information to a spreadsheet, update it there, and upload the new information to the database.

Can you see a history of all compensation values for an employee over time?

Yes, you can view all changes for one or more types of compensation. For salaries, you can also see new proposed salary changes.

How do you compare compensation for groups of employees?

You can select employees by organization, job, position, or grade and view past and current salaries or new salary proposals. For other types of compensation, you can compare the latest values for all employees in any period of time you choose.

If you use grade rates, you can compare compensation entries for all employees on a certain grade, and also see these values as a percentage of the midpoint defined for the grade.

Elements

Elements: Building Blocks of Pay and Benefits

With Oracle HRMS, you define a working model of your own *types* of compensation and benefits and the policies or business rules that govern the allocation of these to your employees. You define these types as elements. Elements are the building blocks of pay and benefits, both for HR analysis and payroll processing.

Example

Elements can represent:

- Earnings, such as salary, wages, and bonuses
- Benefits, such as employee stock purchase and pension plans
- Absences from work
- Non-payroll payments, such as expense reimbursements
- Tangible items distributed to employees, such as tools, uniforms, mobile phones, or computers
- Voluntary and involuntary deductions, as well as pre-tax and tax deductions
- Employer taxes and other employer liabilities

There is no limit to the number of elements you can define, and all your definitions are datetracked.

How Are Elements Created?

Some elements are supplied predefined with Oracle HRMS, some are available in template libraries, others are generated by the system when you define certain types of compensation and benefits, and the remainder you can define using the Element window to best meet the needs of your own enterprise.

Predefined Elements

The predefined elements are specific to your localization. They typically include deductions for tax and wage attachments. They may also include standard earnings, such as salary. You should not make any changes to these predefined elements.

Template Elements

Using the Configuration Workbench, you can select many earnings and deductions from a template library for your country and industry. Your selected earnings and deductions form a template set that you can load into your business group. The template set includes the elements and the balances, balance feeds, and formulas required for payroll processing. You can configure any of these definitions to match your specific requirements.

Generated Elements

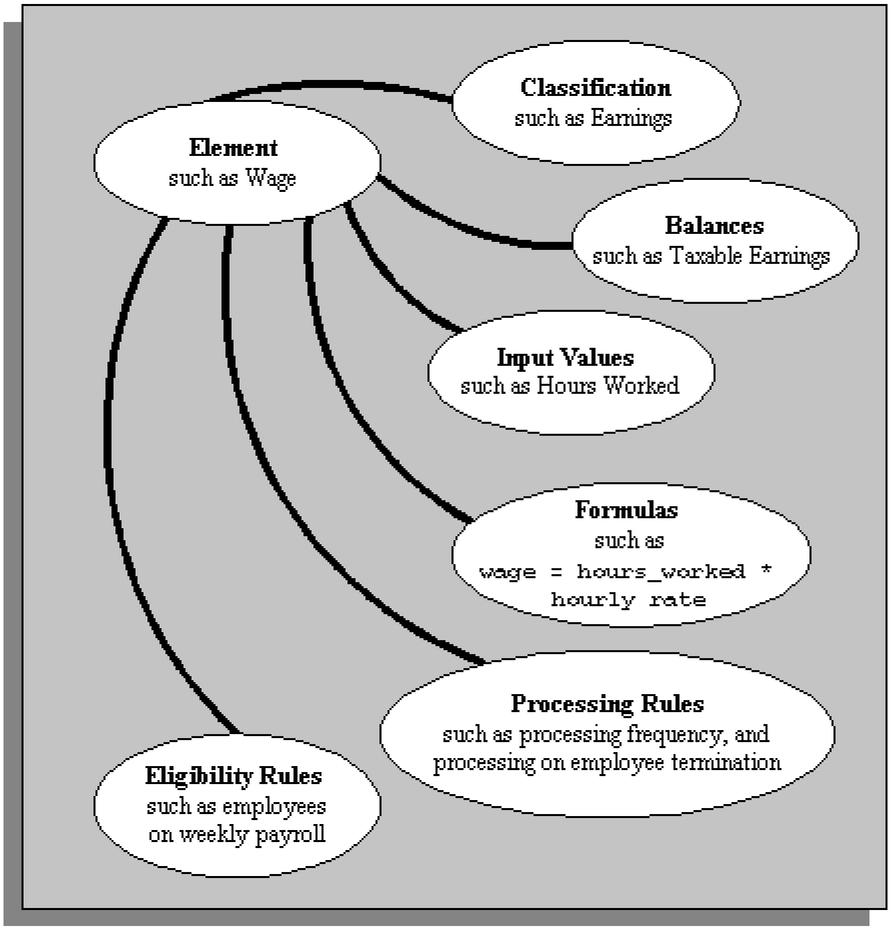
In certain legislations, including North America and the UK, Oracle Payroll users can initiate earnings and deductions, and the system generates the elements you require, along with balances, balance feeds, and formulas. The method of initiating earnings and deductions depends on your localization. Typically you use the Element Design Wizard, Earnings and Deductions windows, or other template windows for specific earnings and deduction types. The processing options you select in the wizard or window determine the rules embedded in the generated elements and formulas. As with template elements, you can configure generated elements and formulas to match any special requirements.

Also, when you create PTO Accrual Plans, the system generates elements for you.

Introduction to Element Definition

The following diagram illustrates the items that you can define or select to control the entry and processing of any earning, deduction, basic benefit, or payment.

Compensation Definition



To take a simplified example, you could define an element called Wage, for hourly paid employees. You classify it in the predefined classification Earnings, which determines when it is processed in the payroll run and what payroll balances it feeds.

You specify one input value, Hours Worked, which must be entered in each pay period. (If necessary, you can define up to 15 input values, with fixed values, defaults, or validation.)

You associate a formula with the element, to calculate the wage for the pay period. A simple formula might be hours worked (from the input value) multiplied by hourly rate (which might, for example, be entered in the Grade Rate window).

You define who is eligible for the element by linking it to components of the employee assignment, such as grade, payroll, salary basis, or organization. In this example, the wage element is available to all employees on the weekly payroll.

You can define other processing rules, such as a termination rule. For example, you might specify that the employees' entry of the wage element should not close down on their termination date but remain open for processing of final pay.

Input Values: Flexible Description of Compensation

To give an employee an earning or deduction, you make an element entry. An entry can contain up to 15 items of information, which you define when you create the element. For example, for a company car element, you might want to store car make, model, year, date of issue to the employee, and mileage when issued.

These items of information are called input values. You decide what validation to apply to these values, whether they are required or optional, and the type of information they can accept:

- Alphabetic characters or words
- Integers or numbers
- Money
- Hours and minutes
- Date, day, or time

This list of unit types is predefined and you cannot add to it.

Processing Input Values

Input values are so called because they are the inputs to calculations performed by Oracle Payroll. In a payroll run, formulas process the input values and other database information to produce *run results*.

For example if you have Payroll and your enterprise makes overtime payments, you might write a formula to calculate the payment amounts for each assignment from inputs of the overtime rate and the hours worked for the period. The payroll run then processes each assignment and produces the overtime payment amounts as run results.

Rules for Allocating Compensation

While some elements may represent compensation, equipment, or deductions available to all employees, many elements are available only to certain groups of employees. For example, your enterprise may provide company cars only to employees in the Sales Department.

To determine which employees are eligible for an element, you build links to the assignment components that employees must have to receive entries of the element. Links rule out the possibility of employees getting element entries by mistake.

For example, you might want to give a production bonus only to those employees who work full time in Production and are on the weekly payroll. To do this you would define a link between the element Production Bonus and the combination of the

Production organization, the Full-Time assignment category and the Weekly payroll.

> **Note:** When you define a link for a **benefit**, do not select any assignment components to restrict eligibility for the benefit. Instead use participation eligibility profiles.
>
> Similarly when you define a link for an element that you are going to select as an *entitlement item* for a collective agreement, do not restrict eligibility using the link. You restrict eligibility using eligibility profiles.

Assignment Components

The assignment components to which you can link elements are:

- **Payroll**: If employees on all your payrolls are eligible for an element, you can link it to **all payrolls**.
- **Salary basis**, whichestablishes the period of time (often hourly or monthly) for which you quote the employee's salary or wages.
- **Assignment category**, for example, Full Time-Regular or Part Time-Temporary
- **Organization,**for example department or section, in which employees work
- **Location** of employee's office
- **Job**,for example, Associate Professor or Secretary
- **Grade**
- **Groups** to which the employee belongs: You set up all the groups that are appropriate for your enterprise. For example, you could decide to group employees by company within a multi-company enterprise, and by union membership.
- **Position,** which is a class of job performed in a particular organization, for example, Associate Professor of Chemistry, or Finance Department Secretary.

Multiple Rules of Eligibility

You can define more than one link for each element but there must be no overlap between the eligibility criteria for the links. For example, you could create one link to the combination of grade 'A' and the job 'Accountant'. However, you could not create one link to grade 'A' and a second link to the job 'Accountant'. This would imply that an accountant on grade A is eligible for the same element twice.

If you have more than one link for an element, you can enter different default values, qualifying conditions, and costing information for each eligibility group.

Qualifying Conditions: Minimum Age or Period of Service

An employee might be eligible for an element and yet not receive it because he or she does not meet other qualifying conditions.

Two common qualifying conditions are a minimum age or a minimum period of service in the current assignment. You can define these conditions when you define the element. You can enter or adjust these conditions when you define the element links so that you have different qualifying conditions for different groups of assignments.

These qualifying conditions are checked automatically when you try to enter an element for an employee.

Compensation Entry: Making It Fast and Reliable

To reduce the work of entering compensation information for employees and to reduce the risk of errors, you specify rules about entries when you define an element. For example:

- You can specify defaults, lookups, minimum and maximum values, or other validation to control what is entered in input values.
- You also specify the duration of entries, that is, whether they are valid for one pay period only, or whether they persist until further action is taken to end the entry.
- For some elements, you can even set up automatic entry with default values so that no action is required to ensure that employees get the compensation for which they are eligible.

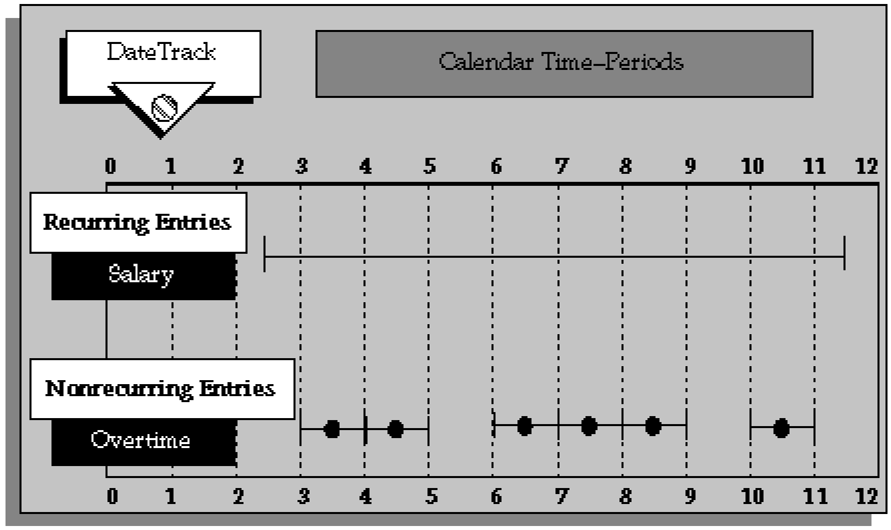
You can create customized versions of the Element Entries window. A customized version might restrict the elements a user can enter. This enhances speed, usability, and security for specific data entry scenarios. Users can also enter batches of entries using default values to reduce keystrokes and thus speed up data entry and reduce errors.

Duration of Element Entries

Some entries are valid for one pay period only. For example, to produce an employee's wages or overtime pay for a period you process the entries of regular hours worked or overtime hours. You define these elements with the processing type *nonrecurring*. Notice that pay periods are determined by the payroll to which an employee is assigned. Employees must be assigned to a payroll to receive nonrecurring elements, even if you are entering these for information only and not processing them.

Other entries, such as salary or company car, should persist until you change them, or they reach their end date, or the employee's assignment changes so that he or she is no longer eligible for the element. You define these elements with the processing type *recurring*.

Element Entry Validity Across Pay Periods



A recurring element entry is normally processed in every pay period, as determined by the employee's payroll. However, you can associate frequency rules with a recurring element to specify in which pay periods it should process. For example, you might deduct a monthly subscription in the second week of each month for weekly-paid employees.

Allowing Multiple Entries

Normally you can only give an employee one entry of an element. This is a useful safeguard against duplication errors. However, when you define an element, you can choose to allow multiple entries. For example, if you enter overtime hours on a weekly basis for monthly-paid employees, you might need to give an employee five entries of an overtime element in each period.

Automatic Entry

If you want all eligible employees to receive a recurring element automatically, you can define *standard* links to the element. With this link, the element and all its default input value entries go on record for all eligible employees, now and in the future.

For example, suppose your enterprise has an employee Sports Club whose members all agree to pay a fixed subscription each month by payroll deduction. You can set up an employee group called Sports Club on the system and record membership by assigning employees to the group. You can then link a Sports Club Dues element to the Sports Club employee group, mark this link as standard, and enter a default value reflecting the current monthly subscription.

Clearly, you will not choose to create standard links if there are any performance criteria (such as achieving a certain volume of sales) that employees must meet before they qualify for an element.

You can create a standard link if both the element is recurring and multiple entries are *not* allowed for the element

If you have not defined age or period of service criteria, the start date of the automatic entry is the date the assignment becomes eligible for the element. For example, this might be the employee's hire date, or the date of a promotion or transfer.

If you entered age or period of service criteria for the element, the start date of the automatic entry reflects the date on which the employee meets the qualifying conditions. For example, if a new hire is entitled to a company car after six months, an element entry is automatically created when the employee is entered on the system, and the start date of the entry is six months after the hire date.

If the employee's date of birth is altered on the system, this may change the date on which he or she qualifies for the element. In this case, the start date of the element entry changes automatically.

Default Values and Validation

When you define inputs for an element, you also define the validation for each input value. The validation you define controls the values a user can enter. The options are to:

- Provide a default value (or several defaults - one for each eligibility group, defined by a link)
- Provide a minimum and maximum value range
- Provide a fixed value
- Provide a lookup list of valid values
- Validate the input value using a formula

Using the formula option you can model complex business rules for validating entries. For example, for a bonus payment you might want to set a maximum bonus value that depends on length of service and current salary. With Oracle's formula writing tool, Oracle FastFormula, you can include conditional logic to validate input values using different criteria for different employees.

If you define a default value, you can specify that it is a *hot default*. This means that any changes to the default value not only affect future entries but will also update existing entries, provided that the default was not overridden when the entry was made.

When Assignments Change

When you update an assignment (for example, by promoting or relocating the employee), some changes are made automatically to the assignment's element entries:

- If the assignment is newly eligible for any elements with standard links, entries of these elements are created automatically.

- If the assignment is no longer eligible for an element, the existing element entry is ended.

- If the assignment continues to be eligible for an element but via a different non-standard element link, the existing element entry is ended and a new one created with the same values and costing information as the old entry.

  Note: This means that the system ignores any default values, default costing information, and qualifying conditions on the element link associated with the new entry. All values are taken from the old entry instead to provide continuity for the employee. Of course you can change the entry values manually if required.

  This does *not* apply to salary elements that are entered automatically when you approve a salary proposal. In this case the existing element entry is ended and a warning message is issued. You must re-enter and approve the salary proposal following the assignment change. This ensures the integrity of your salary data.

- If the assignment continues to be eligible for an element but via a different *standard* element link, the existing element entry is ended and a new one created using the default values on the standard element link.

Batch Entry

Using BEE (Batch Element Entry), you can enter earnings, deductions, timecard data, and other compensation and benefit information in batches. This is especially useful when the same values can be used for many employees. After entering a batch (for as many employees and elements as you require), you can validate it, make corrections, and validate again before transferring the information to the database.

Collective Agreements

If your employees are subject to collective agreements, you can define compensation elements as entitlement items, which form part of the collective agreement. You associate each entitlement item with one or more eligibility profiles to define who is eligible to receive the item and how much they should receive. Alternatively, you can write a formula to determine eligibility and how much eligible people should receive.

You must define and link the element before you apply a collective agreement to employee's assignments. This ensures that, when you apply collective agreement values, the application updates the element entry with the appropriate value (as defined in the Collective Agreement Entitlements window).

Configuring the Element Entries Window

You can create configured versions of the Element Entries window. A configured version restricts the elements a user can enter. For example, one version could be restricted to the element name Timesheet and accessed from a menu entry labelled Timesheet Entries.

Element entry can be restricted by:

- Element set (that is, a group of elements that you define)
- Element type (that is, recurring or nonrecurring)
- Element classification (such as, Earnings, or Direct Payment)

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

Non-Updateable Element Sets

You can prevent users updating the entry values of a set of elements on the Element Entries window. These will typically be elements that you update through legislation-specific forms. You must create a customization element set, and select it for the HR: Non-Updateable Element Set user profile option. You can set this profile option at any level: Site, Application, Responsibility, or User. You can edit the element set after selecting it in the user profile option.

Users will be able to view these elements in the Element Entries window, and they can edit fields such as Reason and Costing, but not the entry values. They cannot use the Update Override and Delete DateTrack modes, because these might remove entry values set elsewhere.

Element Classifications and Processing Sequence

Elements are grouped into primary classifications, such as Earnings and Voluntary Deductions. In a human resources department, you can use the primary classifications to identify groups of elements for information and analysis purposes. In a payroll department, the classifications control processing, including the sequence in which elements are processed and the balances they feed.

Oracle HRMS provides you with these primary classifications and some balances, mainly to reflect tax legislation. They are designed to meet the legislative requirements of your country, so you cannot change them. You can create additional balances to be fed by any of the primary classifications.

Processing Sequence in the Payroll Run

An element's primary classification provides a default processing priority for the element in payroll runs. Lower priority numbers process first.

Most classifications also have a priority range. When you define an element in these classifications, you can overwrite its default processing priority with another number from the range. This is useful if you need to establish the order in which the element processes with respect to other elements in the classification.

Sometimes you must prioritize the processing of certain element entries for an individual employee. For example, you may need to determine the precise order in which deductions taken for wage attachments process for an employee. You can enter a subpriority number for element entries in the Entry Values window.

Canada only: Processing sequence for wage attachments is not determined by subpriority. Instead you can specify Attachment Priority and Prorate Rules in the Further Information field on the Entry Values window.

Secondary Classifications

You can define secondary classifications to feed your own user defined balances. These secondary classifications are subsets of the primary classifications. In some legislations, secondary classifications have been predefined. As with primary classifications, you cannot remove or change any predefined secondary classifications, and you cannot disable any of the predefined balance feeds created for them.

> **Note:** Secondary classifications are not used in the United States, Canada, or Singapore versions of Oracle Payroll at this time.
>
> Mexican implementations use classifications and sub-classifications.

Categories - for US and Canadian Classifications

Most US and Canadian classifications are subdivided into several categories. Categories further define an element's purpose, and can help to determine applicable processing or tax rules. You can define additional categories.

Costing

On the Costing tab of the Element Classifications window, you can view whether elements of this classification are Costable and Distributable. If the classification is Costable, you can select any costing option for elements when you define the element links. If the classification is Distributable, you can create a distribution set from elements of this classification over which you can distribute costs (such as overheads).

You can also view the cost type for elements in the classification, that is, whether they debit or credit the accounts they feed.

Frequency Rules

On the Frequency Rules tab of the Element Classifications window, you can view whether you can define frequency rules for elements of this classification. The payroll run uses a frequency rule to determine in which pay periods it processes a recurring element. On this tab you can also see which date the payroll run uses, by default, to assess frequency rules in your localization. You can select a different date when you define a frequency rule.

Survey of the Classifications

The survey of the classifications identifies:

- The function of elements within each primary classification, page 3-19
- The processing priority range, default priority, and cost type for each classification, page 3-20
- Predefined secondary classifications within each primary classification, page 3-21

You cannot update or delete the predefined primary and secondary element classifications, which are provided to meet legislative requirements.

Primary Element Classifications

The following table lists the primary element classifications and their descriptions:

Classification	Meaning
Balance Initialization	Used for loading initial values into balances, for example, when transferring data from another payroll application
Information	Represent information items that are not used in payroll processing, hold information for use in other elements, or trigger the processing of other elements (for example, loan details)
Earnings	Represent most payments made to an employee. These payments are usually subject to deductions of tax and social insurance and are processed in the regular payroll run
Royalties	Represent earnings from royalties

Classification	Meaning
Payment After Leaving	Represent payments that eligible employees receive after leaving the enterprise
Royalties After Leaving	Represent royalty payments that eligible employees receive after leaving the enterprise
SII Information	Represent social and health insurance deductions
Deductions	Represent deductions other than social and health insurance deductions
Tax	Represent regular tax amounts
Alimony	Represent deduction amounts associated with alimony
Court Orders	Represent deductions from employee earnings as per court orders
Voluntary Deductions	Represent deductions employees authorize the employer to make on their behalf
Involuntary Deductions	Represent mandatory deductions
Direct Payments	Represent payments, such as expenses, reimbursed to employees without any tax or statutory-deduction liability

Primary Classification Processing Properties and Cost Types

The following table shows the priority range, default processing priority, and costing details for the supplied primary classifications.

Primary Classification	Priority Range	Default Priority	Cost Type
Balance Initialization	0 - 0	0	Credit
Information	1 - 1000	500	Debit

Primary Classification	Priority Range	Default Priority	Cost Type
Earnings	2001 - 3000	2500	Debit
Royalties	4001 - 5000	4500	Debit
Payment After Leaving	6001-7000	6500	Debit
Royalties After Leaving	6500 - 7500	7000	Debit
SII Information	16001 - 17000	16500	Debit
Deductions	20001 - 21000	20500	Credit
Tax	22001 - 23000	22500	Credit
Alimony	24001 - 25000	24500	Credit
Court Orders	26001 - 27000	26500	Credit
Voluntary Deductions	32001 - 33000	32500	Credit
Involuntary Deductions	28001 - 29000	28500	Credit
Direct Payments	30001 - 31000	30500	Credit

Predefined Secondary Element Classifications

This table lists the predefined secondary classifications.

An element automatically has any default secondary classifications defined for its primary classification.

Primary Classification	Secondary Classification	Default
Earnings	Subject to SI Contributions Only : Earnings	No

Primary Classification	Secondary Classification	Default
Earnings	Subject to HI Contributions Only : Earnings	No
Earnings	Subject to SI and HI Contributions : Earnings **Note:** If you select the Subject to SI and HI contributions : Earnings secondary classification, the application automatically provides the balance feeds for social insurance and health insurance earnings. Therefore, you must not use Subject to SI Contributions Only : Earnings or Subject to HI Contributions Only : Earnings classifications along with the Subject to SI and HI Contributions : Earnings classification. This is also applicable to other primary classifications that use Subject to SI and HI Contributions secondary classification.	Yes
Earnings	Subject to Tax : Earnings	Yes

Primary Classification	Secondary Classification	Default
Earnings	Not Subject to IR : Earnings **Note:** Ensure that you use the Not Subject to IR : Earnings classification in conjunction with the Subject to Tax : Earnings classification. This condition also applies to other primary classifications, such as Royalties, Royalties After Leaving, and Payment After Leaving.	No
Royalties	Subject to SI Contributions Only : Royalties	No
Royalties	Subject to HI Contributions Only : Royalties	No
Royalties	Subject to SI and HI Contributions : Royalties	Yes
Royalties	Subject to Tax : Royalties	Yes
Royalties	Not Subject to IR : Royalties	No
Payment After Leaving	Subject to SI Contributions Only : Payment After Leaving	No
Payment After Leaving	Subject to HI Contributions Only : Payment After Leaving	No
Payment After Leaving	Subject to SI and HI Contributions : Payment After Leaving	Yes
Payment After Leaving	Subject to Tax : Payment After Leaving	Yes

Primary Classification	Secondary Classification	Default
Payment After Leaving	Not Subject to IR : Payment After Leaving	No
Royalties After Leaving	Subject to SI Contributions Only : Royalties After Leaving	No
Royalties After Leaving	Subject to HI Contributions Only : Royalties After Leaving	No
Royalties After Leaving	Subject to SI and HI Contributions : Royalties After Leaving	Yes
Royalties After Leaving	Subject to Tax : Royalties After Leaving	Yes
Royalties After Leaving	Not Subject to IR : Royalties After Leaving	No

Note: In the table, SI, HI, and IR refer to Social Insurance, Health Insurance, and Income Reduction respectively.

Compensation Policy Changes

It is inevitable that your business rules for compensation and benefits will change over time. You can create new elements and disable existing ones at any time. You can also make certain changes to existing elements and links, as outlined below.

Element definitions, link definitions, and element entries are all datetracked. This lets you track the changes to your compensation and benefit policies without losing any of your historical employee information. The history of your definitions remains in place for validation and reporting, and for future calculations of back pay.

Maintaining Elements

After you have defined and used an element, you can make the following changes:

- Change a required input value to be not required.
- Alter the sequence in which input values appear in the Element Entries window.

- Change the input value validation rules for minimum, maximum, lookup, or formula.

- Change your specification of which input values create Database Items. Note, however, you cannot remove Database Items if they are used in any formulas or QuickPaint reports.

You cannot remove existing input values or add new ones if you have created any entries for the element. To add an input value to an element before you create any entries, ensure that you set your effective date to the element's start date.

Maintaining Links

Link rules always control the entry of element values at the time of entry. Changes to link rules affect existing entries in different ways, depending on your use of standard links and hot defaults. After you have used an element you can make the following changes to the link rules:

- Change the input value defaults and validation.

  These changes affect all new entries. Changes to hot defaults affect existing entries. The system also uses the new validation rules to check any updates you make to existing entries.

- Date-effectively end all of the rules that apply to an element and define a new set of rules, which are effective from a later date. For example, suppose you have defined eligibility for a company car based on grade. Following a change of policy you must now define eligibility based on job.

  - You will not be allowed to end the link if any nonrecurring entries exist at the date you want to end the rule. You must delete existing entries before you end the link.

  - You can end the link if recurring entries exist. Any existing entries will be ended automatically when you end the link.

- Change the qualifying conditions of age and length of service that employees must meet to be eligible for the element.

Policy Development

With DateTrack you can also make future-dated changes to your information safe in the knowledge that these changes will not become effective in the system until the correct date.

In this way you can use your compensation and benefit information to plan changes ahead of time; analyze the impact of these changes; adjust these changes and generally smooth out the workload that is often associated with major changes in compensation and benefits policy.

Setting Up Total Compensation Elements

Follow this process to set up elements for items in the compensation package you offer to employees. There are additional steps for setting up the following types of compensation and benefits:

- Salaries for Salary Administration

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

- Absence elements and PTO accrual plans

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

  See: Setting Up PTO Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide*

- Benefits

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

Also, there are additional steps if you want to process the elements in a payroll run.

See: Setting Up Total Compensation Elements for Payroll, *Oracle HRMS Compensation and Benefits Management Guide*

Define Validation and Lookups

Define validation for entries of any new elements you are creating.

1. To restrict compensation entries to a list of valid values, define a new Lookup Type and add Lookup Values for this new lookup.

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

2. To validate compensation entries using formulas, write a formula of type Element Input Validation.

   See: Writing Formulas for Validation, *Oracle HRMS FastFormula User Guide*.

3. To create a matrix of values (such as bonus amount against years of service) for use in formulas or QuickPaint reports, set up user tables.

   See: Setting Up User Tables, Columns, and Rows, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Define Elements and Links

4. Define elements and element input values to record information about employee compensation, benefits, and equipment:

   See: Defining an Element, page 3-27.

   See: Defining an Element's Input Values, page 3-36.

   See also: Defining and Linking an Element for Standard and Advanced Benefits, page 3-38

   See also: Deleting an Element, page 3-40

5. Define element links to identify one or more groups of employees who are eligible to receive an element.

   See: Defining Element Links, page 3-41

   See also: Running the Element Link Details Report, page 3-44

6. For elements without Standard links, make entries of your elements for all employee who should receive them.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

Defining an Element

Use the Element window to create an element to represent compensation and benefit types or earnings and deductions.

This procedure describes how to define elements using a Payroll responsibility (that is, a responsibility with the HR User Type profile option set to *Payroll User* or *HR with Payroll User*). If you are an HR-only user, you will not see certain fields relating to element processing information. You can just ignore the steps that apply to these fields.

> **Note:** Depending on your localization and the types of element you want to create, you may not need to start from scratch in the Element window. Check which earnings and deductions are available in the template library in the Configuration Workbench. If these template elements do not meet your requirements, you may be able to generate earnings and deductions using Earnings and Deductions windows or the Element Design Wizard. You can use the Element window to further configure template elements and generated elements.
>
> - For the United States and Canada, see: Earnings and Other Payments Overview, *Oracle HRMS Compensation and Benefits Management Guide* and Deductions Overview, *Oracle HRMS*

Compensation and Benefits Management Guide

- For Mexico, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For UAE, see: Element Design Wizard, *Oracle HRMS Compensation and Benefits Management Guide*
- For Norway: For each element, you must enter the End of Year codes using the list of values provided in the Further Information field.

Dates, Names and Classifications

To enter dates, names, and a classification for the element:

1. Set your effective date early enough to handle any historical element entries you want to make. Note that an element cannot be linked or entered until its start date.
2. Enter a unique:
   - Name
   - Reporting name

   Start the names with a letter of the alphabet (not a number or symbol). The reporting name is a short identifier for reports and pay advices.
3. Enter a description for the element.
4. Select a Primary Classification.

   This controls an element's processing priority and the balances it feeds. If you are defining a salary element for Salary Administration, you must select the classification Earnings.

Processing Information

To enter processing information for the element:

1. Select the processing type. Select *Recurring* if an entry of this element applies in every period until the entry is ended, or *Nonrecurring* if an entry applies in one pay period only. The dates of the pay period are determined by the payroll to which the employee is assigned.

   Note: If you are defining a salary element for salary administration, you must select the type Recurring. If you are defining a net-to-gross element you must select the type Nonrecurring.

2. Select a termination rule to determine how entries of the element are processed after termination of the employee:

   Note: UK only: Always select Actual Termination for UK proration.

   - *Actual Termination* if you want recurring entries to close down on the date the employee leaves. For a nonrecurring element, select Actual Termination if you want the entries to close down at the end of the pay period in which the employee leaves, or on the date the assignment ends (the final process date) if this is earlier.

   - *Final Close* if you want the entries to stay open beyond the employee's leaving date so that you can continue to pay the employee.

   If you are a Payroll user, you can also select:

   - *Last Standard Process* for all recurring and nonrecurring elements if you want their entries to close down on the Last Standard Process date or on the date the assignment ends (the final process date) if this is earlier. The Last Standard Process date defaults to the last day of the pay period in which the employee is terminated, but you can set it to a later period when you terminate an employee.

3. Select the Multiple Entries Allowed check box if you want to give an employee more than one entry of the element at the same time. If you are creating a net-to-gross element, you must select Multiple Entries Allowed.

4. Select the Additional Entries Allowed check box if you want to make occasional one-time entries of a recurring element (instead of, or in addition to, a normal recurring entry).

   US and Canada only: The Additional Entry Allowed rule is not applicable for US and Canadian installations.

5. Select the Closed for Entry check box if you want to prevent any new entries being made for the element, either temporarily or permanently. This does not affect any existing entries of the element.

   Important: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the application may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. Therefore, if you check Closed for Entry on an element, this might prevent users terminating employees and updating assignments. If there are standard links for the element, it will also prevent users hiring people who are eligible for the element.

HR-only users: Go to Currency.

Oracle Payroll Users:

6. Select the Process in Run check box if you want the element to process in payroll runs.

7. Select the Once Each Period check box to ensure that only the first payroll run of each period processes entries of this element.

   Note: If this check box is not available for your localization, you can select a ONCE_EACH_PERIOD skip rule for the element instead.

8. Select the Indirect Results check box if you want the element only to accept entries from indirect formula results. Leave the check box unchecked if you want to accept entries both from indirect formula results and from manual entries in the Element Entries window.

9. Select the Adjustment Only check box if you want to use the element only for creating balance adjustments.

10. Select the Third Party Payments check box if you want to use the element only for creating third party payments.

11. Overwrite the default priority number in the Priority field if you want to determine the order in which the element processes within its classification range. Lower numbers process before higher ones.

    If the order of processing within the element classification is not important, you can accept the default priority number, which is the midpoint of the range.

12. Select a formula in the Skip Rule field if you have written a skip rule formula to determine the circumstances in which the element should be processed.

    UK only: If you are using different run types, select the ONCE_EACH_PERIOD skip rule for all earnings, to ensure they are not processed by each child run type.

Currency

The default currency for element entry values is the currency defined for the

Business Group. You can select a different currency for the element if required.

Advanced Processing Information

Oracle Payroll users only: Use the Advanced tab to enter further processing information if you are defining:

- An earnings type, such as a bonus, that is to be taxed separately from the normal payroll run. The element can also be paid separately.
- An earnings type that requires a net-to-gross calculation. For example, this applies to bonus payments that are a fixed net amount. Oracle Payroll calculates the gross amount needed to meet the net pay.
- **UK:** A pre-tax deduction that you want to reduce if there is insufficient pay to cover the deduction along with taxes and court orders. This requires iterative processing.

> **Note:** The Advanced tab may not be available for some localizations.

To define an element as a separate payment:

1. On the Advanced tab, select the Separate Payment check box.

   The Process Separate box is checked automatically.

   UK users: Do not select this check box. This functionality is not currently available for UK Payroll.

To define an element to process separately:

1. On the Advanced tab, select the Process Separate check box.

To define an element for net-to-gross calculation:

1. On the Advanced tab, select the Gross Up check box.

   The Iterative Flag and Process Separate boxes are checked automatically.

2. Select DEFAULT_GROSSUP in the Iterative Formula field. This formula controls the iterative calculation of the pay value, adjusting an input value as necessary to get a result that is defined to be close enough to the required net payment.

   > **Note:** After saving your element, choose the Iterative Rules button to specify how to use the formula results. Also choose the Exclude Balances button to select which balances are grossed up for the element (meaning that these deductions are paid by the employer).

3. Optionally, enter a value in the Iterative Priority field to determine the sequence in which elements are adjusted during iterative calculations. Elements with lower iterative priority values are adjusted first.

4. Select the Separate Payment box if you want the payment to be made separately from the regular payment. **UK Payroll, Irish Payroll**: Do not select this check box.

5. Save your work.

To set up iterative processing for a pre-tax deduction (UK):

1. Check the Iterative Flag box.

2. Select PQP_GB_ITERATIVE_ARREARAGE in the Iterative Formula field.

3. Enter an Iterative Priority number in the range 1 to 1500. The element with the lowest iterative priority number is reduced first. If this deduction is reduced to zero and net pay is still insufficient to cover taxes and court orders, the element with the next lowest priority number is reduced, and so on.

   > **Important:** Iterative priority numbers must be in the reverse sequence of the processing priority numbers. This means that the element that is processed first is reduced last.

4. Choose Iterative Rules, and select the L_stopper rule.

Advance Pay Processing Information

Oracle Payroll Users only except Ireland. If Advance Pay by Element is enabled in your legislation, use the Advance Pay tab to:

- Indicate that an element may be processed as an Advance Pay element
- Establish the processing conditions for your Advance Pay element.

To define an element as an Advance Pay element:

1. On the Advance Pay tab, check the Mark as an Advance Pay Indicator check box.

   This marks the element as an Advance Pay indicator. This means that when you run the Advance Pay by Element process, it will identify this that this element can be potentially processed as an Advance Pay element according to the processing conditions that you define.

To set the processing conditions for an Advance Pay element:

On the Advance Pay tab:

1. Check the Include as an Advance Element check box if you want to process this element as an Advance Pay element.

2. If you want to specify a separate Advance Pay element, select this element from the list of available elements in Use Advance Element. If you leave Use Advance Element blank and do not specify an element, then you do not select a separate advance pay element. You can still process advance payments, but all the entries are held within your current earnings element rather than reported separately in an advance pay element.

3. Check the Deduct Advance Amount check box if you want to show the deduction for the advance in the current payroll period. Every advance payment has a deduction associated with it to bring the overall payroll amounts back into balance. You can use this check box to control the point at which the deduction should be applied.

4. If you want to specify a separate Deduction element, select this element from the list of available elements in Use Deduction Element. If you leave Use Deduction Element blank and do not specify an element, then you do not create a separate deduction element. You can still process deductions for advance payments, but all the entries are held within your current earnings elements rather than reported separately in a deduction element.

   Note that when you create either an Advance Pay element, or a Deductions element, you must ensure that it exists for the same period of time as the underlying earnings element, and that the input values match those on the underlying element.

5. Check the Process Advance Entry in Run check box if you want to include this element in a payroll run, If you do not check this box, then the element does not process in a payroll run and is reported as information in your Statement of Earnings report.

Continuous Calculation

For prerequisite steps to set up continuous calculation, see: Setting Up Continuous Calculation, *Oracle HRMS Payroll Processing Management Guide*

To set up an element for continuous calculation:

1. Choose the Recalculation tab and select a RetroPay element. This is an event group that defines the events that trigger proration for this element.

Proration

In some localizations, Oracle Payroll can calculate proportionate earnings amounts whenever payroll-relevant data changes during a payroll period. The Payroll Earnings and Deductions section describes the full setup steps for the relevant localizations. To enable proration for an element, choose the Proration tab.

To set up an element for proration:

1. Choose the Proration tab and select a proration group. This is an event group that defines the events that trigger proration for this element.

2. Optionally, select a proration formula. Alternatively you can edit the element's payroll formula to handle proration.

Further Information

1. Enter the Further Information field if:

   - Your Oracle localization team has set up additional fields for element definition

   - You are in the UK, and you use Oracle SSP/SMP

   French Payroll

   - Select a group, which is the name by which this element, and the others in the group, appears as one line on the pay advice.

   - On the pay advice, most earnings and deductions are shown as a base, a rate, and an amount. Select the base unit if you want this displayed on the pay advice.

   South African Payroll

   - Enter a clearance number for Statutory Information and Deduction elements, if applicable. This number appears on the tax certificate.

   Kuwait Payroll

   - Select a deduction type for the Deductions elements. This information is used by the PIFSS report.

   New Zealand Payroll:

   - If you want to display custom elements with the classification of Employer Charges in the Online Payslip, SOE form, and Statement of Earnings under Employer Superannuation Contribution section, select Yes in the Super Section Display field.

2. Choose Input Values to define input values for the element

   See: Defining an Element's Input Values, page 3-36

   #### Oracle Payroll Users:

3. Choose Balance Feeds to select balances you want this element to feed

   See: Creating Balance Feeds for Individual Elements, *Oracle HRMS Compensation and Benefits Management Guide*

4. Click Balance Feed Control to add or remove secondary element classifications for this element.

   Mexico only: Click this button to attach sub-classifications to your element.

   See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*

5. Choose Frequency Rules to enter frequency rules to determine when the element should be processed.

   See: Defining Frequency Rules, *Oracle HRMS Compensation and Benefits Management Guide*

6. For a net-to-gross element, choose Exclude Balances to select the deductions to be paid by the employer.

7. For a net-to-gross element, or any other element that is processed iteratively, choose Iterative Rules to specify how to use the Iterative Formula results.

Extra Information

Choose the Extra Information button to enter extra attribution for the element. You can link as much attribution as you need to an element.

> **Note:** You can only access Extra Information types if your system administrator has set them up for your responsibility.

If Payslip Modeling feature has been enabled for your localization, you can specify whether to enable the element for payslip modeling. If you select No, the elements will not be available for the users during payslip modeling process.

Payslip Modeler

If Payslip Modeler has been enabled, then you can specify whether to enable the element for payslip modeling. If you select No, the element will not be available for the users during payslip modeling process.

To enable an element to be available for payslip modeling, query the element and select Yes in the Enable Simulation field in the Element Extra Information window. You can select input values of this element which are to be made available for simulation. Only user enterable input values are available for Payslip modeling. Ensure to select all mandatory input values to be made available for simulation, if the element is available for simulation.

If the Multiple Entries checkbox is enabled for an element, then you cannot use this element for payslip modeling. Instead, create a copy of the base element, enter input values, attach the appropriate formulas and balances as the base element and then use this element for payslip modeling. Ensure that this new element is not used for payroll run.

Note: Please note that there is a restriction for predefined elements being used for payslip modeling. For predefined elements, if you setup the details in one business group, then these details will be accessible to other business groups. For example, for predefined element Regular Salary element, if you want to enable Input Value A for one Business Group and Input Value B for another Business group, then this is not possible. This limitation occurs for predefined elements applicable to all localizations. Therefore, if there are multiple business groups, then you must define a single structure for the predefined elements. If there are custom elements, then the custom elements are accessible only for that business group.

Usages

To exclude the element from a run type:

1. Choose the Usages button if you want to exclude this element from a run type, or combination of run types.

2. Select the run type or combination of run types from which you want to exclude this element.

   Note: For Norway: You must select the Employer Contributions run type to exclude the elements.

3. Select the effective dates for your exclusions.

4. Save your work.

Defining an Element's Input Values

Use the Input Values window to define the input values for the element. You can define up to 15 input values for an element.

Depending on the type of element you have defined, Oracle HRMS may have applied one or more default input values.

North America users: All elements must have the default Jurisdiction input value.

Norway users: All elements that feed the Holiday Pay Base classification must have the Tax Municipality input value. This input value must have the HR_NO_TAX_MUNICIPALITY valueset attached to it.

Payroll users: If you are creating balance feeds for individual elements, ensure you define an input value of the same unit of measure as the balance. Money units must be the same currency.

You can add new input values to a saved element only if you have not entered the element for any employees. To add an input value, you must set your effective date to the element's start date.

To define input values:

1. Set your effective date early enough to handle any historical element entries you want to make.

2. Enter or query the element in the Element or Element Link window and choose the Input Values button.

3. Enter the name of the first input value. Remember that if you want to define a *pay value* to hold run results, you must name it Pay Value.

4. Select the unit type of your input value (money, hours, character, date, number, or time). A Pay Value must have the unit type Money if the element is in a Payments type classification.

5. You can enter numbers in the Sequence field to change the order in which the input values appear in the Entry Values window.

6. Check the Required check box if all entries of the element must have a value for this input.

    Note: When you have saved an input value, you cannot change it to be Required. If you have saved it as Not Required by mistake (or you have generated an element that has an input value you want to make required), delete the input value and re-enter it with the correct values. If you are re-entering a generated input value, be careful to enter exactly the same name. You cannot delete the input value if you have made any entries of the element for employees.

7. Check the User Enterable check box if users can enter a value for this input. Uncheck it if you want to ensure that the default value is entered for all employees.

8. Check the Database Item check box if you want the value to be available to formulas or QuickPaint inquiries.

    Database Items are simple identifiers that the system uses to find specific items of information in the human resources database. Any spaces in the input value name are converted to underscores in the Database Item name.

Entering Element-Level Defaults

If you enter defaults at the element link level, these override the defaults at element level. If you update an element-level default, remember to check the values on the element links too.

To enter a default for an input value:

1. Enter the value in the Default field.

2. If you want existing entries to be updated whenever the default is changed, check the Hot Default check box. The input value must be required if you want to use this option.

   A hot default appears in the Entry Values window in quotation marks.

   > **Important:** If a user overrides a hot default in the Entry Values window, subsequent changes to the default will *not* affect the entry. For this reason, you may prefer to use BEE to change defaults for large groups of employees, rather than the hot default feature.

Defining Entry Validation

To enter validation for an input value:

1. Do *one* of the following:

   - Enter maximum and minimum values for the input.

   - Select a Lookup Type to act as a lookup supplying a list of valid values.

   - Select a formula to validate entries for this input value. Formulas can return messages to users about the success or failure of the validation.

2. Select Warning or Error to determine whether the system warns users that an entry is invalid or prevents them from saving an invalid entry. You cannot select a value if you chose a Lookup because a user cannot enter an invalid value for an input value validated by lookup.

Defining and Linking an Element for Standard and Advanced Benefits

You set up elements for Standard and Advanced Benefits as you would other elements, with certain restrictions noted below. Element setup is the same for Standard and Advanced Benefits.

In the US and Canada, use the Earnings or Deduction window to create an element if you process the element in a payroll run.

Outside the US and Canada--or if you are an HR-only customer in any legislation--use the Element window to create an element.

To define an element for Standard and Advanced Benefits:

1. Set your effective date early enough to handle any historical element entries you want to make.

2. Enter a unique element Name.

   When you define a standard activity rate, you select the element that corresponds to the rate you are defining.

3. Select the appropriate Classification for the earning or deduction.

4. For Payroll users in the US and Canada, select a Category on the Earnings or Deduction window.

   If you are using the Element window, you can select a Category in the Further Element Information flexfield.

5. In the US, optionally select a Benefit Classification.

   > **Note:** For any element attached to a standard activity rate, **do not** select a Benefit Classification of Dental, Medical, or Vision.

6. Select a Termination Rule of Final Close for any element attached to an activity rate.

7. Do not check the Standard Link check box (Earnings and Deduction windows) or the Standard check box (Element and Element Link windows) since you use eligibility profiles to control benefits eligibility.

8. Complete the definition of the element according to your business rules.

9. Save your work.

10. Choose Input Values.

    You can define multiple input values for the element, but you can only link one input value to a standard activity rate.

11. Save your work.

Defining an Element Link for Standard and Advanced Benefits

After you define an element, open the Element Link window. Because you create eligibility profiles for Standard and Advanced Benefits, you should limit use of the Element Link window to creating an *open link* for elements you do not cost.

To define an element link for Standard and Advanced Benefits:

1. Set your effective date.
2. In the Element Name field, select the element for which you are defining a link.
3. Save the record without selecting any assignment links to create an *open link*.

   Note: If you define links for costing, your links must not conflict with any eligibility profiles you set up for Standard and Advanced Benefits. Your element must have a valid link at all times.

For more help on element links and costing, see: Defining Element Links, page 3-41

Deleting an Element

Before you delete an element, you must first delete any entries of the element recorded for employees and then any links defined for the element.

Use the following process to delete any elements you defined in the Element window, Earnings or Deduction template, or Element Definition Wizard.

Important: Do not delete any predefined elements.

To delete an element:

1. Use the List Employees by Element window to get a list of all employees with entries for the element.
2. For each employee, query the element entry in the Element Entries window, choose Delete Record, and save.
3. Query the element in the Element Link window and, for each link for this element, choose Delete Record, and save.
4. Perform one of the following:
   - If you created this element through the Element Definition Wizard, query this element from within the wizard.
   - If you created this element through the US and Canadian Earnings or Deductions templates, query this element from within the template.
   - If you created this element through the Element window, query this element from that window.

5. Delete the element and save.

   The system prompts you to either End Date the element or Purge it. Select End Date if you want the element to remain in the system but be effective through a certain date. Select Purge if you made a mistake defining the element and you want to delete it from the system altogether.

Defining Element Links

Use the Element Link window to define groups of assignments that are eligible for an element.

> **Note:** When you define a link for a benefit or for an entitlement item in a collective agreement, do not select any eligibility criteria. Instead use participation eligibility profiles to restrict eligibility for the benefit or entitlement item.

> **Note:** When querying data the Element Link window returns values for Payroll, Location and Position and Organizations, irrespective of the security profile restrictions set, enabling you to view the links already created. You cannot create links for data outside your security profile.

To define an element link:

1. Set your effective date to the date you want the eligibility criteria to come into effect.

2. In the Element Name field, select the Element for which you are defining a link.

3. Check the Standard check box if you want all employees who are made eligible by the link to receive the element automatically.

   You can only create a standard link if the element is recurring and multiple entries are *not* allowed by the element definition.

4. In the Eligibility Criteria region, select the assignment components that constitute this eligibility rule. If you want to link to all employees, do not enter any eligibility criteria.

   You can link to all payrolls or to a specific payroll. Do one of the following:

   - Leave the Payroll field blank and check the Link to all Payrolls check box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees who are not assigned to a payroll.

   - Select the name of a specific payroll if you want only employees on that payroll to be eligible for the element. Do not check the Link to all Payrolls check box.

- Leave both fields blank if assignment to a payroll is irrelevant to eligibility for the element.

Costing

To enter costing information for the link:

1. Select the Costable Type. The default is *Not Costed*, meaning that the system maintains no costing information for the element.

   - To allow entry of costing information at all levels, including the assignment and element entry levels, select *Costed* This is the appropriate selection for most elements representing earnings types.

   - If you do not need to cost the element at organization and assignment levels, select *Fixed Costed*. This is appropriate for some deductions, which are irrelevant to labor distribution analyses.

   - If you want to distribute overhead costs (such as employer contributions to a pension plan) over other elements, select *Distributed*.Then select a Distribution Set.

     Note: Some element classifications for your legislation may be predefined as Not Costed and you cannot override this.

2. Check the Transfer to GL check box if the payroll run results from this link should be transferred to the general ledger.

3. Use the Costing field to select a GL account code and, if present, account codes of labor distribution or other systems in which to collect the run results of this element. Then use the Balancing field to select the GL account that balances this one.

   For deductions elements:

   - Select the code for the GL account to credit in the Costing field, and the code for the account to debit in the Balancing field.

   For elements in all other classifications:

   - Select the code for the GL account code to debit in the Costing field, and the code for the account to credit in the Balancing field.

     Note: Depending on your set up of the Cost Allocation flexfield, the

Balancing field may not be enabled.

Batch Creation of Element Links

You can use a batch process to create multiple links more efficiently than creating each link individually.

To create element links in a batch operation

1. Check the Create in Batch Mode check box to specify that you want to defer creation of this element link until later when you run the Generate Element Links process. Alternatively, leave the box unchecked if you want to create this element link immediately.

2. View the Link Status to confirm the status of your link:

   - Unprocessed - you have selected this element link for creation as part of a batch, but the Generate Element Links process has not started yet.

   - Processing - the Generate Element Links process is now attempting to create this link.

   - Complete - the Generate Element Links process has completed, and you have successfully created this element link.

   - Incomplete - the Generate Element Links process has completed, but this element link was not included in the processing and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.

   - Error - the Generate Element Links process failed to complete, and you have not yet created the element link. Correct the link definition before rerunning the Generate Element Links process.

3. Run the Generate Element Links process to complete the creation of those links that you selected for batch processing.

   See Generating Element Links, page 3-44

Qualifying Conditions

To enter qualifying conditions for the link:

1. Go to the Qualifying Conditions region. Here you can add or change age or length of service requirements for this particular eligibility rule.

   The system checks these conditions when you make an entry of the element. If the employee does not meet the qualifying conditions, you receive a warning.

Input Values

To adjust input values for the link:

1. Save your link definition and choose the Input Values button to display the Link Input Values window.

   Use this window to:

   - Enter a new default or change one entered at the element level
   - Check the Costed box to maintain costing information for an input value.
   - Change the maximum, minimum or both for an input value. Logically, the new values should be within the range you defined for the element as a whole. However the system does not enforce this.

Generating Element Links

Use the Generate Element Links process to create element links quickly. You must first select the links for batch creation when defining them on the Element Links window. Then, run the Generate Element Links process from the Submit Requests window to link to the element entries created.

To generate element links:

1. Select one of the following Generate Types to determine whether you want to process:

   - All element links that are not completed and are not processing currently.
   - A single element link. If you make this selection, go on to select the particular element link that you want to create. Note that you are selecting one element link from the range of links that are awaiting processing. You cannot change the characteristics of the link at this point, but you can return to the Element Links window to make changes.

2. Click OK
3. Click Submit

Running the Element Link Details Report

Use this report to check the eligibility criteria that have been defined for elements within a classification. You can report on links for the following categories:

- All elements within a classification
- Either recurring or nonrecurring elements in the classification
- Just a single element

You can choose to see only standard or non-standard links, and only active or inactive links. Further, you can choose to see links to a particular job, organization, payroll, or all payrolls.

You run reports from the Submit Requests window.

To run the Element Link Details report:

1. In the Name field, select Element Link Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Select the classification of elements you want to report on. Optionally select an element processing type (recurring or nonrecurring) or an individual element to report on.
5. To report only on standard links, select Yes in the Standard Link field. Select No to report only on non-standard links. Leave blank to report on all links.
6. Select a link status to report only on links that are either active or inactive as of the report's effective date.
7. To report on links to payrolls:
    - For links to one payroll only, select No in the All Payrolls field and select the payroll in the Payroll field.
    - For links to all payrolls, select Yes in the All Payrolls field and leave the Payroll field blank.
    - To see links irrespective of their payroll criteria, select No in the All Payrolls field and leave the Payroll field blank.
8. You can also select a job or organization to report on links to these assignment components only.
9. If you want to produce this report in Portable Document Format (PDF), select a template.
10. Choose the Submit button.

Defining an Element or Distribution Set

In the Element and Distribution Set window, you can select element classifications or individual elements to define a set. There are three types of set:

- **Customization set**: You can use a Customization set to:
    - Restrict the elements that can be entered or viewed on a configured version of the Element Entries window
    - Specify the elements to be entered for assignments using BEE in the Batch Assignment Entry window.
    - Prevent users updating entry values in the Element Entries window for a group of elements. You select the element set in the HR:Non-Updateable Element Set user profile option.
    - Restrict the elements displayed in the Compensation Activity view in SSHR. You select this element set in the Element Set Name user profile option.
    - Canada, Mexico, and US users can define an element exclusion set for the Paylip Modeling functionality.

      For more information:

      See:Paycheck Modeling (US), *Oracle SSHR Deploy Self-Service Capability Guide*

      See: Payslip Modeling (Canada), *Oracle SSHR Deploy Self-Service Capability Guide*

      Payslip Modeling (Mexico), *Oracle SSHR Deploy Self-Service Capability Guide*
- **Run set**: You can use a Run set to:
    - Specify the elements that the application must process in a payroll run. This functionality is available only for Oracle Payroll users. If you are creating a Run set for US payroll, and you are using the Enhanced Tax Interface, you must include the US_TAX_VERTEX recurring element (see step 4). If you have not enabled the Enhanced Tax Interface, you must include the VERTEX recurring element.
    - Display accrual balances
- **Distribution set**: Oracle Payroll users can use a Distribution set to define the elements over which the costs of other elements are to be distributed.

To define an element or distribution set:

1. Enter a unique name for the set and select the type: Distribution, Run, or

Customization.

2. Save your new set.

3. If you want to include all elements in a classification, choose the Classification Rules button.

   - In the Classification Rules window, select one or more classifications to include. Save the set and close this window.

     The elements in the classifications you choose are now listed in the Elements region.

   - If you want to exclude individual elements, place your cursor in the element's row and choose the Exclude Element button.

4. If you want to include particular elements from other classifications, choose the Include Element button.

5. Select the element you want to include in the Elements window, and choose the OK button.

   > **Note:** After you include a particular element, you cannot go to the Classification Rules window and include the classification to which this element belongs.

6. Save your set.

7. If you want to see a list of the individual elements you have included or excluded from the set, choose the Element Rules button. The Element Rules window is view-only.

4

Compensation and Awards Management

Compensation and Awards Management Overview

In an enterprise, you need to compensate and award benefits to eligible employees. Your enterprise determines who is eligible for compensation and awards, and who can allocate them. Most compensation cycles include or exclude certain employees, based on enterprise requirements. Compensation could include salary, bonus, allowances, vehicle mileage payments, and stock options. Allocation of compensation may depend on factors such as current salary, grade, position, time since last pay raise, and other factors. You also need to convey this compensation information to your employees easily.

Managing Compensation and Awards Using Oracle HRMS

You can set up compensation and awards programs for managers to use to evaluate and make compensation decisions. Well-designed programs help you achieve your goals, retain qualified employees, and reward performance. Oracle HRMS helps you design a successful compensation program and convey compensation information to your employees.

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

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

See: Setting Up Compensation History, *Oracle HRMS Compensation and Benefits Management Guide*

See: Setting up Total Compensation Statement, *Oracle HRMS Compensation and Benefits Management Guide*

Using Oracle SSHR to Manage Compensation and Awards

As a manager, you can use Oracle SSHR to effectively manage compensation, make informed decisions and create and allocate budgets.

Using Individual Compensation Distribution (ICD), you can:

- Assign one-time or recurring awards, bonuses, and allowances to qualified employees.
- Navigate a self-service flow that creates a proposal for a spot bonus. You can use the same process to award a car allowance or relocation package to an eligible employee.
- Define recommended amounts by using the plan and a common eligibility engine.
- Enroll and set contribution levels in discretionary contribution plans such as a charitable contribution plan, or a savings bond plan.

Other modules enable adjustment of employee or contingent worker pay. The Pay Rate module enables you to change a person's overall pay rate or update an individual component of the pay rate. HR Views provide insight into the compensation activity within your organization.

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

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

See: Vehicle Repository, page 4-9

Key Concepts

To use Compensation and Awards to suit your enterprise's requirements, you need to understand the following key concepts and activities:

- Key Decision Areas in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Plan Design for Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Budgeting in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Promotion and Rating in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Standard Rates for Compensation Workbench, *Oracle HRMS Compensation and*

Benefits Management Guide

- Hierarchies for Award Allocations and Approvals, *Oracle HRMS Compensation and Benefits Management Guide*
- Eligibility, Award Limits and Targets, *Oracle HRMS Compensation and Benefits Management Guide*
- Access Levels in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Switch Manager, *Oracle HRMS Compensation and Benefits Management Guide*
- Approval Modes, *Oracle HRMS Compensation and Benefits Management Guide*
- Self-Service Individual Compensation Distribution, *Oracle HRMS Compensation and Benefits Management Guide*
- Compensation History Views, *Oracle HRMS Compensation and Benefits Management Guide*
- Total Compensation Statement Overview, *Oracle HRMS Compensation and Benefits Management Guide*
- Vehicle Repository, page 4-9

Reporting on Compensation and Awards

To track compensation and awards activities in your enterprise, Oracle HRMS provides you a range of reports. For example:

- Managers use the Flexible Summary Report to view Salary, Bonus, and Stock Option totals for their direct reports. The report also includes values such as each manager's budget and the amount used.
- Managers or Administrators use the Employee Stock Options Total Position Report to view summary or detailed information about employee stock option grants, such as total shares granted, and total vested shares.
- Compensation Professionals use the Stock Option Download for Third Party Administration Systems to download stock option grant results for all participants in a plan in an enrollment period.
- Administrators use the Total Compensation Progress Report to check the progress of the compensation cycle for a specific availability period and plan.

See: Compensation and Awards Management, *Oracle HRMS Configuring, Reporting, and System Administration Guide* in Reports and Processes in Oracle HRMS.

Compensation Awards Management: Requirements

Using Compensation and Awards Management, you can determine and allocate compensation and awards for your enterprise.

Can managers view employee details from Compensation Workbench?

Yes, managers can view employee details for their direct reports and any employee further down in the reporting hierarchy. You can update certain employee information in Compensation Workbench, so you do not have to change functions while you are working in your compensation cycle.

How are compensation allocations awarded?

A line manager uses the Allocate Compensation task to award compensation to any employee at a lower level in the reporting hierarchy. Line managers cannot allocate their own compensation.

How are budgets prepared?

You can define a budget at the top-level of an organization hierarchy. A high-level manager in the hierarchy issues budgets to managers who have direct reports -- and these direct reports can be managers as well. You can issue monetary amounts or percentages of eligible salaries. You can also use the Allocation wizard to help you calculate the amount/percentages to issue.

Additionally, you can auto-issue a predefined budget (typically as a flat percentage of eligible salaries) to all allocating managers.

Can other managers fill in for me if I am unavailable?

Using Switch Manager, you can act as another manager within your security profile, and view or make updates to another manager's worksheet.

Can managers assign employees to their own worksheets?

The Employee Reassignment feature provides managers a facility to add an employee to their own worksheets as well as to assign employees to other managers' worksheets. The employee reassignment is valid for the selected compensation plan and enrollment period and does not affect the current supervisor relationship.

Can managers promote and rate or assess employees at the same time as allocating salaries?

Yes, using the Promotion and Performance features, you can process a promotion or complete a performance rating and ranking in conjunction with processing a pay increase, bonus, or stock award. Self-service Compensation Workbench uses the same jobs, position, and grades as the compensation professionals use in the "back office."

Does Compensation Workbench handle approving allocations, promotions, appraisals, and employee performance ranking?

Oracle HRMS routes a completed worksheet for approval based on the Compensation Workbench hierarchy as specified in the enrollment requirements for the compensation plan. There is a single approval for the entire worksheet.

Additionally, if you use Performance Management to manage performance appraisals, managers can view complete appraisal details directly from the Compensation Workbench allocation worksheet. As a manager, you can review your employees' latest completed Appraisals using CWB without having to switch responsibilities to Performance Management.

Can I budget and allocate compensation based on salary components?

If you itemize a compensation plan into two or more components, for example Cost of Living and Performance, you can budget and allocate for each component. You can link compensation components to Oracle HRMS salary components.

Can I budget and allocate compensation across business groups?

Yes, you can budget and allocate compensation across business groups, between different currencies, and plan types within the same compensation cycle.

Can I download and save information visible on the worksheets?

Yes, you can download information available on the worksheets. Use the Download to Spreadsheet feature to download the default definition or download the custom definition of worksheet columns.

Can I attach supporting documents in Compensation Workbench?

Yes. If your organization requires you to provide justification or supporting documents, then during the compensation process, you can attach files such as a Microsoft Word or Microsoft Excel spreadsheet to each employee record. Note that these attachments are specific to a plan and a plan period and are not automatically carried over to another plan or plan period.

If you do not want managers to attach supporting documents, you can hide the attachment feature using Self-Service Personalization.

When I allocate compensation or prepare budgets, are there any guidelines that I can follow?

Yes, you can use Company Targets as a guideline when you prepare a budget or allocate compensation. Target amounts include an actual target and a range. You can also view the target percentage of eligible salary. You can use the Quick Fill feature to copy the target amounts into the compensation amount for a specific employee or for all employees displayed in the worksheet.

You use Budgeting Targets to view the aggregate of all employee level targets for a manager. For example, if you have two employees with a compensation target amount of 1000 US dollars, your target budget will display 2000 US dollars.

What type of information can I view in Compensation History?

As a manager, you can get a complete view of the compensation, performance, ranking, and job history for all employees in your security group. This includes information about all in-progress transactions as well for salary changes, bonuses, basic or stock option history, ranking, jobs, and details of other non-monetary compensation.

Can employees use Compensation History?

Yes. Employees can view all their compensation information. They can view information about current compensation data and previously processed salary changes, bonuses, basic or extended stock option history, and details of other non-monetary compensations. Employee ranking is hidden by default in the employee view but you can configure Compensation History to make it viewable. Employees can view their job details such as name, date of the job change, position, grade, people group, and reason for the job change.

Are there any security features associated with Compensation History?

Yes - Oracle HRMS security features ensure that you view ranking history of employees within your security group. History includes in-progress transactions. This information is hidden from employees.

To whom can I assign an Individual Compensation Distribution?

As a manager, you can assign an Individual Compensation Distribution only to those qualified employees who belong to your security group. In addition, participant eligibility profiles offer a further method to limit eligibility for those employees who are eligible to receive compensation.

Does Individual Compensation Distribution use Approvals?

Yes. Oracle Self-Service HR provides a workflow approval process. This automatically sends a notification to the supervisor of the manager who distributes the award. The supervisor can either approve or reject the distribution.

Can employees use Individual Compensation Distribution ?

Yes - if your enterprise configures employee self-service Individual Compensation Distribution for use by non-manager employees. Employees can use Self-Service Individual Compensation Distribution to contribute to charitable contribution plans, savings bond plans and so on.

Can I grant Compensation Awards based on employee specific effective dates?

Yes. You can allocate compensation awards to employees based on their individual effective date. You can configure the effective date according to your business rules such as date of the employee's last salary increase, or their hire date.

Can I view award information in a currency of my choice?

Yes, ICD enables you to view award amounts in your preferred currency to avoid having to convert the currency manually.

What type of information can I record in the vehicle repository?

You can record the following information:

- 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

What type of information can I display in Total Compensation Statements?

You can configure Total Compensation Statement to display information based on your enterprise's requirements. You can tailor statements to display information for groups of employees in your enterprise. You can group compensation into categories such as benefits, cash compensation, company stock, stock options, retirement and savings, or create your own custom category. You can display information from various sources, including Oracle Payroll, third party payroll, element entries, and rules (fast formulas).

Is the Total Compensation Statements feature applicable to contingent workers?

Yes, you can use Total Compensation Statements to configure and generate statements for contingent workers also.

Can I customize the display of the Total Compensation Statements?

Yes, you can customize Total Compensation Statements to suit your enterprise's requirements. Besides configuring the items that display in the statement, you can use a rich text editor to format the welcome page for employees to view. You can also add graphs and links to your statements. Employees can print and view their statements in a pdf format at their convenience.

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 4-11

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	--

5

Personal Documents

Personal Documents

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.

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 5-4

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, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

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, *Oracle Configuring, Reporting, and System Administration Guide*

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, *Oracle Configuring, Reporting, and System Administration Guide*

6. Specify whether authorization is required for the new document type.

7. Click Submit.

6

Profiles

User Profiles

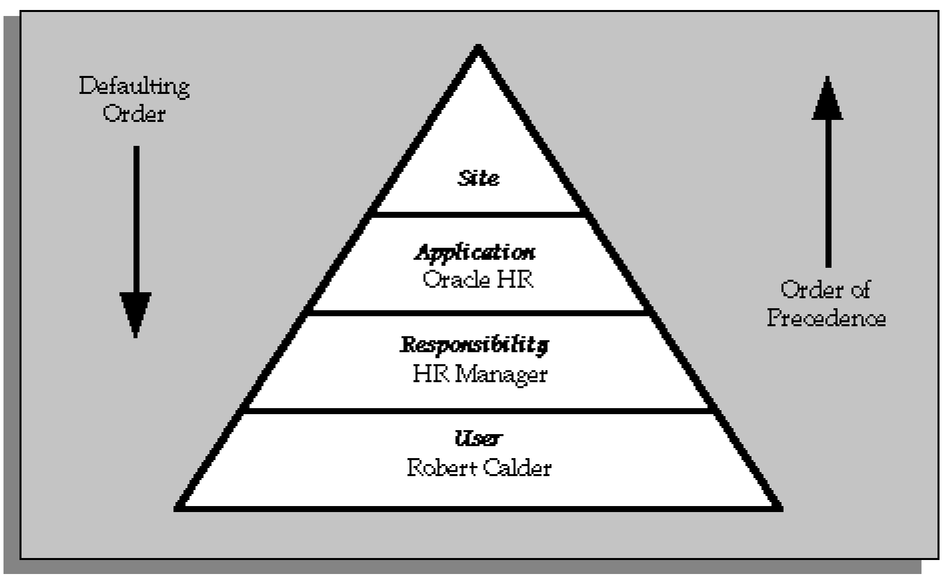
User Profiles

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

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

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

Levels For Setting User Profile Options



Tip: Set site-level options first to ensure that all options have a default. If a profile option does not have a default value, it might cause errors when you use windows, run reports, or run concurrent requests.

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

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

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

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

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

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

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

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

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

Profile Options Summary

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

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

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

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

Summary of Profile Options

Profile Option	Admin UpdateLevels	User	Required	Default Value
Apply Assessment Competencies to Person	Site	No	No	No
AME:Installed	App	Yes	No	NA
AuditTrail:Activate	AppSite	No	No	No
BEN:BEN HOURLY ANNUALIZATION FACTOR	SiteAppResp	Yes	No	2080
BEN:Benefits Preferred Currency	SiteAppRespUser	Yes	No	NA
BEN: Carry Forward Certification	SiteAppRespUser	No	No	No
BEN: Check Enrollment Limits	Site	No	No	No
BEN:Compensation Manager	SiteAppRespUser	Yes	No	NA
BEN:Comp Objects Display Name Basis	SiteApp	No	No	Session

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN: Cross Business Group for Plan Design Copy	SiteAppResp	Yes	No	Yes
BEN: CWB Approval Mode	Site	No	No	Submission at any time
BEN: CWB Allocation as Percent of Eligible Salary Decimals				
BEN: CWB Budget as Percent of Eligible Salary Decimals				
BEN: CWB Budget Rows Displayed	SiteAppRespUser			
BEN: CWB Download Expire Seconds	SiteAppRespUser	Yes	No	60
BEN:CWB Display Currency Type	SiteAppRespUser	Yes	No	Corporate Currency
BEN: CWB Encrypt/Decrypt Key	SiteAppRespUser	No	No	NA
BEN: CWB Estimated Market Price	SiteAppRespUser	Yes	No	NA
BEN: CWB History Type Display	SiteAppResp	Yes	No	Basic Stock History
BEN: CWB Home Plans Displayed	SiteAppRespUser	Yes	No	NA
BEN: CWB Layout Lock Time	SiteAppRespUser	Yes	No	10
BEN: CWB Maximum Number of Layouts	SiteAppRespUser	Yes	No	10

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN: CWB Plan Context for Reporting	Site	Yes	No	Plan
BEN: CWB Show In-Progress Compensation	Site	Yes	No	
BEN: CWB Spreadsheet Version	SiteAppRespUser			
BEN:CWB Summary Level	SiteAppRespUser	Yes	No	NA
BEN:CWB Table Population	SiteAppRespUser	Yes	No	
BEN: CWB Show In-Progress Compensation	SiteAppRespUser	Yes	No	
BEN: CWB Valid Grade Filtering	SiteAppRespUser	Yes	No	Yes
BEN: CWB Validate Performance/Assignment Changes Online	SiteAppRespUser	Yes	No	No
BEN: CWB Wizard Compratio Range	SiteAppRespUser	Yes	No	5
BEN: CWB Wizard Years Worked Range	SiteAppRespUser	Yes	No	1
BEN: CWB Worksheet Rows Displayed	SiteAppRespUser			
BEN:Designation No Change	SiteAppResp	Yes	No	No
BEN:Eligible Profile Rule	SiteAppResp	Yes	No	AND

Profile Option	Admin UpdateLevels	User	Required	Default Value
BEN: Enable Absence Plans Functionality	SiteAppResp	Yes	No	No
BEN:Enable Quartile in Grade Life Event	SiteAppResp	Yes	No	Yes
BEN:Imputed Income Post Tax Deduction	SiteAppRespUser	Yes	No	No
BEN:Max Extract Line Size	SiteAppRespUser	Yes	No	10000
BEN:VAPRO Rule	SiteAppResp	Yes	No	AND
DateTrack:Date Security	SiteAppRespUser	Viewonly	No	NA
DateTrack:Delete Mode	-	-	Not in use	
DateTrack:Enabled **Note:** This profile option applies to Full HR only.	App	Viewonly	No	Yes
DateTrack:Login Date (YYYY/MM/DD)	SiteAppRespUser	Viewonly	NA	NA
DateTrack:Override Mode	-	-	Not in use	
DateTrack:Reminder	SiteAppRespUser	Yes	No	No
DateTrack:Update Mode	-	-	Not in use	
Disable Self-Service Personal	SiteAppRespUser	Yes	No	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
Display Messages	SiteAppRespUser	Yes		
Employer Payment Summary (EPS) Approval	SiteAppRespUser	Yes	No	Null
Enable Security Groups	SiteApp	No	Yes	Security groups are not enabled
Flexfields:Open Descr Window	SiteAppRespUser	Yes	Yes	Yes
Flexfields:Open Key Window	SiteAppRespUser	Yes	Yes	Yes
GHR: Allow Ex-Emp Purge	Site , Responsibility, User	Yes	No	No
Help Localization Code	RespUser	Yes	Yes, by HRMS	The Responsibility is associated with the Global set of help files rather than a localized or verticalized set.
HR: Absence Duration Auto Overwrite	SiteResp	No	No	No
HR: Absence Start Date	SiteAppRespUser	No	No	The start date of the Absence being recorded on the Absence form
HR: Absence View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Access Non-Current Employee Data	SiteResp	No	No	No
HR: Accrual Plan Element Set Displayed to User	SiteAppRespUser	Yes	No	Null

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Action Parameter Group Name	SiteAppRespUser	Yes		
HR: Actions - Validation	SiteAppRespUser	Yes	No	Validate all Functions
HR: Allow Approver Updates to Self Service Actions	Site	No	No	No
HR: Future Dated Person Change	Site User	No	No	
HR:Allow Concurrent Self Service Actions	Site	No	No	No
HR: Allow change Hire beyond Payroll actions	Site	No	No	
HR:Allow Functions Access During Hrglobal Run	View only	Viewonly	No	No
HR:Allow Online W-2 Viewing as of (MM/DD)	SiteAppRespUser	Yes		
HR:Allow Processing of Ineligible Self Service Actions	Site	No	No	No
HR:Allow Use of Eligibility for Self Service Actions	Site	No	No	No
HR: Applicant Assignment Cleanup Run Mode	Site	No	No	In Patch Process
HR: Applications View Layout	SiteAppRespUser	Viewonly	No	FORM or TABLE

Profile Option	Admin UpdateL evels	User	Required	Default Value
HR: Appraisal Template Lov	SiteAppR espUser	Yes	No	No
HR: Assignment ID	-	-	Internal use only.	
HR: Authoria Integration Enabled	SiteAppR espUser	Yes	Yes (if linking to Authoria HR)	No
HR: Authoria UK URL	Site	No	Yes (if linking to Authoria HR)	
HR: Authoria US URL	Site	No	Yes (if linking to Authoria HR)	
HR: Auto Apply Collective Agreement Entitlements	SiteAppR esp	Yes	Yes	No
HR: Auto Evaluate Collective Agreement Entitlements	SiteAppR esp	No	Yes	No
HR: Automatically synchronize single GL company cost centers with HR	Site	Yes	Yes	No
HR: Base Salary Required	Site	No	No	Null
HR: BIS Job Hierarchy - Job Grouping Level 1	Site	No	No	Null
HR: BIS Job Hierarchy - Job Grouping Level 2	Site	No	No	Null

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: BIS Reporting Hierarchy	-	-	Obsolete.	
HR:Blank Effective Date	SiteAppRespUser	Yes	No	No
HR:Business Group	SiteResp	Viewonly	Yes	Default Setup Business Group at Site level.
HR: Cancel Application	SiteAppResp	Viewonly	No	Default is Null. This is interpreted by the system as No.
HR: Check Entitlement Cache	SiteAppResp	No	Yes	Yes
HR: Collective Agreement Logging	SiteAppRespUser	Yes	Yes	Low
HR:Contingent Worker Manager Actions Menu	SiteAppRespUser	Yes	Yes	Contingent Worker Manager Actions Menu
HR:Contingent Worker Personal Actions Menu	SiteAppRespUser	Yes	Yes	Contingent Worker Personal Actions Menu
HR: Copy period details for budget	SiteAppRespUser	Yes	No	Default is No.
HR:Cross Business Group	Site AppResp	Viewonly	NA	Default is No.
HR: Cross BG Duplicate Person Check	SiteAppResp	No	No	Yes
HR: CWK in Head Count Reports	SiteAppRespUser	Yes	No	Yes
HR: Data Exchange Directory	SiteAppResp	Viewonly	No	

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Data Migrator Business Group Lockout	Site	No	NA	NA
HR:Data Pump Action Parameter Group	SiteAppRespUser	Yes	No	Null
HR: Date From	-	-	Internal use only.	
HR:Default Assignment Costing	SiteAppRespUser	Yes	No	.
HR:Default Check/Cheque Number Method	SiteAppRespUser	Yes	No	Null
HR: Default Correspondence Language	SiteAppRespUser	Yes	No	No default.
HR: Default Full Name Format	SiteAppRespUser	Viewonly	No	Surname Prefix Initials Prefix (Partner) Surname (Partner)
HR: Default Nationality	SiteAppRespUser	Yes	No	NA
HR: Defer Update After Approval	SiteAppRespUser	Yes	Yes	Yes
HR: Disable Ethnicity Tab	SiteAppRespUser	Viewonly	No	Enabled
HR: Disallow Template Reference	SiteAppRespUser	Yes		
HR: Display All Candidate Offers	-	-	Obsolete.	
HR:Display Competencies	SiteAppresp	Yes		

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Display Brief Person Name	Site	No	No	No
HR:Display Person Name	SiteAppRespUser	Yes	No	Brief Name
HR:Display Person Search	SiteAppRespUser	Yes	No	Yes
HR: Display Position Hierarchy	Site	No	No	No
HR:Employee Directory Global Menu	Site	No	No	Employee Directory Global Menu
HR: Employment View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR:Enable Bank Branch Validation	SiteAppRespUser	Yes	No	Null
HR: Enable Initiator to Delete a Pending-Approval Transaction	SiteAppRespUser	Yes	No	No
HR:Enable Multiple Assignments for Payroll Simulation	SiteAppRespUser	Yes		
HR:Enable Payroll Simulation	SiteAppResp	Yes	Yes	
HR:Enable Security for Batch Element Entry	SiteAppRespUser	Yes	Yes	

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Enable DTW4 defaulting **Note:** This profile option is US legislation specific profile related to tax rules and works with Full HR only.	Site	Viewonly	No	Yes
HR:Enable Multiple Assignments in SSHR	SiteAppRespUser	Yes	No	No
HR:Enforce Costing Mandatory Segment Check at Data Entry	SiteAppRespUser	Yes		Default is Null. This is interpreted by the application as No.
HR:Execute Legislative Check Formula within Run	SiteAppRespUser	Yes	No	NA
HR: Expand Role of Contingent Worker	Site	Yes	Yes	Default is Null. This is interpreted by the application as No.
HR: Extension Agent	SiteUser	No	No	
HR: Extension Agent Client Timeout		Yes	No	NA
HR: Extension Agent Enabled	Site	No	Yes (if using Info online)	No
HR: Extension For Endeca	Site	No	No	No
HR: FastFormula Debug Level	SiteAppRespUser	Yes	NA	NA
HR: Free text school name allowed in Self Service	SiteAppRespUser	Yes	No	Null

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:French HRMS check mandatory payroll assignment attributes exist	SiteAppRespUser	Yes		Yes
HR: FTE Factor				
HR: GL Cost Center Org Classifications	Site	Viewonly	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	None
HR: GL Cost Center Synchronization Options	Site	Viewonly	No - This profile option is obsolete.	NA
HR: GL Organization Name Format	Site	Viewonly	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	NA
HR:Global Competence Flex Structure	Site	Viewonly	Yes (if you want to create global competencies)	NA
HR:Grade Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR:Grade Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:HR/Payroll Representative Source	Site	Viewonly	No	No default
HR:Hide Work Phone on Person		-	Obsolete.	
HR:IE P35 Reporting Year	Site	Yes	Yes	NA
HR: Info Online: Open in New Window		No	No	
HR: Info Online: RIA Password	SiteAppRespUser	Yes		
HR: Info Online: RIA Username	SiteAppRespUser	Yes		
HR: Info Online Toolbar Icon	NA	NA	No	
HR: Info Online: Use Field Context	SiteAppRespUser	Yes		
HR: Informal Name Format	Site	No	No	NA
HR:Job Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR:Job Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA
HR: Job Level	SiteAppResp	No	No	NA
HR: KI Framework Version	SiteAppRespUser	Yes	Yes	Default is Null. This is interpreted by the system as Version 1.

Profile Option	Admin UpdateL evels	User	Required	Default Value
HR: KI Maximum Topics and Integrations	SiteAppR espUser	Yes	No	Default is Null. This is interpreted by the system as Version 3.
HR: Class Name to Fetch KI Data	Site	No	Yes (if linking to Enwisen)	Default is Null.
HR: KI Providers Enabled	SiteResp User	Yes	No	Default is No.
HR: KI User Options Enabled	SiteResp User	Yes	No	Default is No.
HR: KI Topics Enabled	SiteResp User	Yes	No	Default is Null. This is interpreted by the application as Yes.
HR: Enwisen Login URL	Site	No	Yes (if linking to Enwisen)	Default is Null.
HR: Local or Global Name Format	SiteAppR espUser	Yes	No	Local Format
HR: Localization in SSHR	-	-	Valid for SSHR 3.4 only.	
HR: Location ID	-	-	Internal use only.	
HR: Local Nationality	-	-	-	No default value exists, and the system administrator can set the value at any level.
HR:Manage Self Service Actions When Future-Dated Changes Exist	Site	No	No	Stop with an Error

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Manager Actions Menu	SiteAppRespUser	Yes	Yes	Manager Actions Menu
HR: Mask Characters	SiteAppRespUser	No		
HR: Metalink Integration Application	SiteAppRespUser	Yes	No	Human Resource Management Systems
HR: Metalink Integration Enabled	SiteAppRespUser	Yes	No	Yes
HR:Monitor Balance Retrieval	SiteAppRespUser	Yes	No	
HR:NI Unique Error or Warning	SiteResp	No	No	NA
HR:National Identifier Validation	SiteAppRespUser	No	No	Error on Fail
HR:Non-Updateable Element Set	SiteAppRespUser	Yes	No	NA
HR: Number Separator	Site	No	No	NA
HR:OAB New Benefits Model	SiteAppRespUser	Yes	No	NA
HR: Offers - Hiring Manager Initiation	-	-	Obsolete	
HR:Online Tax Forms Update Method	SiteUser	Viewonly	No	All
HR: Organization ID	-	-	Internal use only.	
HR: Override Grade Defaults	SiteAppRespUser	Yes	No	Defaults to Yes

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Payroll Payments Self-Service Enable Multiple Assignments	SiteAppRespUser	Yes	No	No
HR:Payroll Payments Self-Service Payment Function	SiteAppRespUser	Yes	No	
HR:Payroll Payments Self-Service Payments List Mode	SiteAppRespUser	Yes	No	Null
HR:Performance View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Person ID	-	-	Internal use only.	
HR:Personal Actions Menu	SiteAppRespUser	Yes	Yes	Personal Actions Menu
HR:Personal Info Check Pending	-	-	Obsolete.	
HR: PL NI Unique Error or Warning	SiteAppRespUser	Yes	Yes	Warn
HR:Position Key Flex-Identify 1st Segment	SiteAppResp	Yes	No	NA
HR: Position Default Options for SSHR	SiteAppRespUser	Yes	Yes	Default with User Decision
HR:Position Key Flex-Identify 2nd Segment	SiteAppResp	Yes	No	NA
HR:Propagate Data Changes	Site	Yes	No	Default is Null. This is interpreted by the application as No.
HR:Purge Element Entry Permission	SiteAppRespUser	Viewonly	NA	NA

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Query Only Mode	SiteAppRespUser	Viewonly	No	NA
HR: Refresh Self Service Actions with Data from Intervening Actions	No	No	No	No
HR: Restrict Letter by Vacancy or Event	Site	Viewonly	No	Default is Null
HR:Restrict Transactions across Legislations for SSHR	SiteResp	No	No	No
HR: RIA Integration Enabled	SiteAppRespUser	Yes	No	Yes
HR:Run BENMNGLE When Processing a Self Service Action	Site	No	No	No
HR:Salary View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: Schedule Based Absence Calculation	SiteResp	No		
HR: Security Profile	SiteResp	No	Yes	Default view-all security profile at Site level
HR: Security Performance Enhancer	Responsibility	No	No	No
HR: Self Service HR Licensed	Site	No	No	Defaults to No
HR:Self Service Hire and Placement Default Values	SiteAppRespUser	No		Yes
HR:Self-Service Save for Later	Site	No	No	Yes

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR: Servlet Timeout	SiteAppRespUser	Yes	No	Default is Null. This is interpreted by the system as 40 (seconds).
HR: SM Employee Find Work Opp Menu	Resp	No	Yes	HR_SM_EMP_PERSONAL_FUNCTIONS
HR: SM Manager Find Person Menu	Resp	No	Yes	HR_SM_MANAGER_FUNCTIONS
HR: SM Manager Find Work Opp Menu	Resp	No	Yes	HR_SM_PERSONAL_FUNCTIONS
HR:Subrogation	SiteAppRespUser	Yes	No	No
HR: Supervisor Hierarchy Usage	Site	Yes	No	
HR:TCA Unmerge Options	Site	No	No	In Patch Process
HR:Training View Layout	SiteAppRespUser	Yes	No	FORM or TABLE
HR: US Address Line Length	SiteAppRespUser	Yes	Yes	NA
HR: Use Fast Formula Based PTO Accruals	Site	No	Yes	No
HR:Use Global Applicant Numbering	Site	Viewonly	Yes	No
HR:Use Global Contingent Worker Numbering	Site	Viewonly	Yes	No
HR:Use Global Employee Numbering	Site	Viewonly	Yes	No

Profile Option	Admin UpdateLevels	User	Required	Default Value
HR:Use Grade Defaults	SiteAppRespUser	Viewonly		Defaults to Yes
HR:Use Standard Attachments	SiteAppRespUser	No	Yes	Yes at Site Level, No at Seeded Responsibility Level
HR:User Type	AppResp	Viewonly	Yes	NA
HR: Use Title in Person's full name	Site	No	NA	Yes
HR: Verification External Node	SiteResp	No	Yes	No default value
HR: View Payslip From Date for WEB (MM/DD/YYYY)	SiteAppRespUser	Yes	Yes	01/01/1997
HR:View Unpublished Employee 360 Self Appraisal	SiteAppResp	Yes	No	Default value is Null
HR: Views Layer Size	SiteAppRespUser	Yes	Yes	300 pixels
HR:Webapps Tips Test Mode	User	Yes	No	No
HR: Web Proxy Host		No		
HR: Web Proxy Port		No		
HR: ZA Nature of Person Mandatory at Person Level	SiteAppRespUser	Yes	No	
HRI: Collect Manager Snapshots	Site	No	Yes	Yes

Profile Option	Admin UpdateL evels	User	Required	Default Value
HRI: Collect Open Enrollment in Progress	Site	No	Yes	No
HRI:DBI Chief HR Officer Named User	Site	No	Yes	No
HRI:DBI Force Foundation HR Processes	Site	No	Yes	No
HRI:DBI Link to Transaction System	Site	No	Yes	Disable Link
HRI:Enable Benefits Collections and Event Queue	Site	No	Yes	Yes
HRI:Enable Captured Events Archive	Site	No	Yes	No
HRI:Enable Detailed Logging	Site	No	Yes	No
HRI:Enable Detailed Logging	Site	No	Yes	No
HRI: Manager Snapshot Threshold	Site	No	Yes	2500
HRI:Multithreading Chunk Size	Site	No	Yes	200
HRI:Number of Threads to Launch	Site	No	Yes	8
HRI:Period of Service / Placement Date Start Source	Site	No	Yes	Start Date
HRI:Populate Assignment Events Queue	Site	No	Yes	Yes

Profile Option	Admin UpdateLevels	User	Required	Default Value
HRI: Populate Supervisor Hierarchy Events Queue	Site	No	Yes	Yes
HRI:Populate Supervisor Status History Events Queu	Site	No	Yes	Yes
HRI:Populate Supervisor Status History Events Queue	Site	No	Yes	Yes
HRI: Workforce in Period Calculation Method	Site	No	No	Null
HZ: Protect HR Person Information	Site	No	No	No
Limit By Persons Organization	SiteAppRespUser	Yes	No	No
OAB: Enable Self-Service Benefits Trace		Yes	No	Null
OAB:Self Registered User Responsibility	SiteAppRespUser	Yes	No	Self Registered Employee Default responsibility
OAB:User to Organization Link	SiteAppRespUser	Yes	No	Null
OAB:User to Payroll Link	SiteAppRespUser	Yes	No	Null
PAY: Enable Workflow for Assignment Costing	SiteAppRespUser	View only	No	Null. A system administrator can set the value at any level.
PAY: Display Reset Years in Payroll	SiteAppRespUser	Yes	No	No
PAY: Generate Periods for Tax Year	SiteAppRespUser	Yes		

Profile Option	Admin UpdateLevels	User	Required	Default Value
PAY:Statement of Earnings User Category	SiteResp User	Yes		
PER:Automatic Save	Site	Yes		
PER:Navigation	Site	Yes		
Personalize Self-Service Defn	SiteAppRespUser	Yes	No	No
PO: Services Procurement Enabled	Site	Viewonly	No	No
Performance Management Source Type	Site	No	Yes (if you enable automatic update of competency profiles)	NA
RTI Uptake	SiteAppRespUser	Yes	No	Null
Workforce Measurement Type	Site	No	Yes	

Profile Options

Apply Assessment Competencies to Person

Controls whether HRMS updates an appraisee's competency profile automatically when an appraisal is complete. Set this option to Yes to enable automatic update of competency profiles.

AME:Installed

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

AuditTrail:Activate

Determines whether the AuditTrail functionality is enabled or disabled.

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

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

BEN:BEN HOURLY ANNUALIZATION FACTOR

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

BEN: Carry Forward Certification

Determines if benefits administrators can carry forward interim and suspended coverage created due to coverage restrictions configured for a life event when subsequent life events do not have coverage restrictions.

BEN:Benefits Preferred Currency

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

BEN: Check Enrollment Limits

Determines if the application should execute the check for minimum and maximum Plan Type in Program when an event is processed and the person cannot make elections.

BEN:Compensation Manager

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

BEN:Comp Objects Display Name Basis

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

BEN: Cross Business Group for Plan Design Copy

Controls whether a user can copy plan design data between business groups using the

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

Ben: CWB Approval Mode

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

BEN: CWB Allocation as Percent of Eligible Salary Decimals

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

BEN: CWB Budget as Percent of Eligible Salary Decimals

Determines if the application displays budgets as percent of eligible salary

BEN: CWB Budget Rows Displayed

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

> **Note:** This profile option is available only in Oracle Applications Release 12

BEN: CWB Download Expire Seconds

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

BEN:CWB Display Currency Type

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

BEN: CWB Encrypt/Decrypt Key

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

BEN: CWB Estimated Market Price

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

BEN: CWB History Type Display

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

BEN: CWB Home Plans Displayed

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

BEN: CWB Layout Lock Time

BEN: CWB Maximum Number of Layouts

BEN: CWB Plan Context for Reporting

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

BEN: CWB Show In-Progress Compensation

Determines if in-progress salary records should be suppressed or displayed in Employee History when managers do not or should not have access to view salary-based plans.

BEN: CWB Spreadsheet Version

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

> **Note:** This profile option is available only in Oracle Applications Release 12.

BEN:CWB Summary Level

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

BEN:CWB Table Population

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

BEN: CWB Show In-Progress Compensation

Determines if the application displays in-progress salary records in Employee History. Set the new profile option to No to suppress in-progress salary records from being displayed in Employee History when managers do not or should not have access to view salary-based plans. By default, this profile option is set to Yes.

BEN: CWB Valid Grade Filtering

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

BEN: CWB Validate Performance/Assignment Changes Online

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

BEN: CWB Wizard Compratio Range

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

BEN: CWB Wizard Years Worked Range

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

BEN: CWB Worksheet Rows Displayed

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

> **Note:** This profile option is available only in Oracle Applications Release 12.

BEN: Designation No Change

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

BEN:Eligible Profile Rule

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

BEN:Enable Absence Plans Functionality

Displays the Enroll Absences button on the Absence Detail window. If you set this profile option to Yes for the users or responsibilities who will enter absences for absence benefit plans, they can run the Participation Process to process the absence life events.

BEN:Enable Quartile in Grade Life Event

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

BEN:Imputed Income Post Tax Deduction

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

BEN:Max Extract Line Size

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

BEN:VAPRO Rule

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

DateTrack:Date Security

Controls the way users can change their effective date:

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

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

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

DateTrack:Enabled

Controls whether the DateTrack functionality is enabled. Set to Yes at the Application level for Oracle HRMS.

> **Important:** This profile option applies to Full HR only. If you are installing Shared HR, the profile option value must be set to No.

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

DateTrack:Login Date (YYYY/MM/DD)

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

DateTrack:Reminder

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

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

Disable Self-Service Personalizations

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

This profile option is used in SSHR.

Employer Payment Summary (EPS) Approval

Set this profile value to No if you do not want the approval process to take place for Employer Payment Summary submission. The EPS process skips the part of the process that sets the EPS record status to 'completed' and there is no approver interaction required. When you submit the record, it is set to 'verified' directly. The default value is Yes. If it is left as the default , then the EPS submit process sets the EPS record status to 'completed', sends it to the approver, and when the approver submits the record, EPS process sets the status to 'verified' which subsequently is picked up for EDI file creation process.

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

Enable Security Groups

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

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

Change the profile option to Yes at application level *only* if your enterprise is implementing a Security Groups Enabled system (multiple security groups). If you change the profile option to Yes, you must run the Enable Multiple Security Groups process. See Security Models, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

> **Important:** Once you have changed to Security Groups Enabled

Security you *cannot* revert to the Standard Security model.

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

Flexfields:Open Descr Window

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

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

Flexfields:Open Key Window

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

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

GHR: Allow Ex-Emp Purge

This profile option is applicable to Oracle US Federal Human Resources only.

Use this profile option to determine whether data related to separated or ex-employees can be removed from the database. If the value is set to Yes, then when the system administrator runs the Ex-Employees Report/Purge process after selecting the Purge option, the application removes all data that is associated with separated or terminated employees.

See: Running the Ex-Employees Report/Purge Process, *Oracle US Federal Human Resources Configuring, Reporting, and System Administration Guide*

Help Localization Code

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

Help Localization Code	Localization
AE	UAE
AU	Australia
BE	Belgium
CA	Canada
CN	China
DE	Germany
DK	Denmark
ES	Spain
FD	US Federal
FI	Finland
FR	France
HK	Hong Kong
HU	Hungary
IE	Ireland
IN	India
IT	Italy
JP	Japan
KR	Korea
KW	Kuwait
MX	Mexico

Help Localization Code	Localization
NL	Netherlands
NO	Norway
NZ	New Zealand
PL	Poland
RO	Romania
RU	Russia
SA	Saudi Arabia
SG	Singapore
SE	Sweden
UK	UK
US	US
ZA	South Africa

Note: These entries must be in upper case.

HR: Absence Duration Auto Overwrite

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

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

HR: Absence View Layout

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

This profile option is used in SSHR.

HR: Access Non-Current Employee Data

Controls the display of records of ex-employees and future dated employees. Set the profile option value to Yes to enable HR users to view data of ex-employees and future dated employees if you are using user-based security.

> **Note:** This profile option does not apply to security profiles based on the supervisor hierarchy. You can use this profile option if your security profiles are based on user-based organization security, or user-based position security, or user-based custom security. For information on user-based security, see: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Accrual Plan Element Set Displayed to User

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

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

HR:Action Parameter Group Name

Identifies the set of action parameter values for all payroll processes supported by the Action Parameter group. You use action parameter values to control the process run, for example, to enable parallel processing, to control the number of API batch calls, and to specify the number of errors allowed before the process run fails.

See: Maintaining Parameters and Parameter Groups for Payroll Processes, *Oracle HRMS Implementation Guide*

HR: Actions - Validation

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

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

This profile option is used in SSHR.

HR:Allow Approver Updates to Self Service Actions

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

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

This profile option is used in SSHR.

HR: Future Dated Person Change

Determines whether HR users can make changes to person records that have person type changes at a future date.

If you set the value to Yes, then HR users can make changes to the person records that have person type changes at a future date. The default value is null or blank. If you set the value to No or leave the profile option value blank, then HR users cannot make changes to the person records that have person type changes at a future date.

Oracle HRMS and Oracle SSHR use this profile option.

See: Performing Business Transactions when Person Type Changes Exist at a Future Date, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

HR:Allow Concurrent Self Service Actions

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

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

This profile option is used in SSHR.

HR: Allow change Hire beyond Payroll actions

Enables payroll users to move the hire date beyond payroll actions. Along with this profile option, you must set the AMEND_HIRE_WITH_PAYACT legislation rule value to Y to enable this functionality. For more information on how to use the profile option and set the legislation rule, refer to note IDs 822228.1 and 1160327.1 on My Oracle Support.

HR:Allow Functions Access During Hrglobal Run

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

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

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

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

This profile option is used in SSHR.

HR:Allow Processing of Ineligible Self Service Actions

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

> **Note:** This option depends on also enabling the profile option HR: Allow Use of Eligibility for Self Service Actions in order to display ineligible actions in the first instance.
>
> See: HR:Allow Use of Eligibility for Self Service Actions, page 6-38

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

This profile option is used in SSHR.

HR:Allow Use of Eligibility for Self Service Actions

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

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

> **Note:** Managers will not be able to process ineligible actions unless the profile option HR:Allow Processing of Ineligible Self Service Actions is also set to Yes.
>
> See: HR:Allow Processing of Ineligible Self Service Actions, page 6-38

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

This profile option is used in SSHR.

HR: Applicant Assignment Cleanup Run Mode

Controls how the HR Applicant Assignment Cleanup script (delivered in PER Family Pack J) is run.

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

HR:Applications View Layout

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

This User Profile Option is used in SSHR.

HR: Appraisal Template LOV

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

This profile option is used in SSHR 3.4.

HR: Appraisee Can Add Participants

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

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

HR: Authoria Integration Enabled

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

See: Info Online Links to Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Authoria UK URL

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

See: Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Authoria US URL

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

See: Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Auto Apply Collective Agreement Entitlements

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

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

HR: Auto Evaluate Collective Agreement Entitlements

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

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

HR:Automatically Synchronize Single GL Company Cost Centers with HR

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

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

HR: Base Salary Required

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

HR: BIS Job Hierarchy - Job Grouping Level 1

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

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

HR: BIS Job Hierarchy - Job Grouping Level 2

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

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

HR:Blank Effective Date

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

The default date can differ, depending on:

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

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

HR:Business Group

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

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

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

HR: Cancel Application

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

HR: Check Entitlement Cache

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

This profile option enables you to control whether the entitlement evaluation process first looks to see if a value for a particular entitlement exists in the cache before re-evaluating.

HR: Collective Agreement Logging

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

HR:Contingent Worker Manager Actions Menu

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

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

HR:Contingent Worker Personal Actions Menu

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

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

HR: Copy Period Details for Budget

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

HR:Cross Business Group

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

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

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

- Enables users to select benchmark jobs from other business groups
- Checks for the uniqueness of job names across all business groups and issues a warning if you attempt to enter a non-unique name
- Enforces that there can only be one master job group
- Enables users to create global competencies and rating scales
- Controls whether users can select people from other business groups in the following fields in HRMS windows:
  - Absence: authorizing person, replacement person
  - Applicant Assignment: recruiter, supervisor, referred by
  - Assignment: supervisor
  - Organization Manager Relationship: manager - also controls whether organizations from other business groups are available.
  - Events: event participants, internal contact person
  - Employee review: reviewers
  - Requisitions and Vacancies: requisition raised by, recruiter
  - Recruitment Activity: authorized by, internal contact
  - Termination: accepted by

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

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

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

HR: Cross BG Duplicate Person Check

Controls the duplicate person check functionality across multiple business groups in

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

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

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

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

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

HR: CWK in Head Count Reports

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

HR: Data Exchange Directory

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

HR: Data Migrator Business Group Lockout

This profile option is for a future release.

HR:Data Pump Action Parameter Group

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

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

HR:Default Assignment Costing

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

HR:Default Check/Cheque Number Method

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

HR: Default Correspondence Language

Specifies a default language for the Correspondence Language field.

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

HR: Default Full Name Format

Controls the default value for the full name format.

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

HR: Default Nationality

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

HR: Defer Update After Approval

Defers save of SSHR transactions after the final approval. The transaction is saved automatically when the Workflow Background Proces runs.

This applies to Self Service.

HR: Disable Ethnicity Tab

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

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

HR:Display Competencies

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

- Apply for a Job
- Enroll in a Class

This User Profile Option is used in SSHR.

HR:Display Brief Person Name

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

HR: Display Position Hierarchy

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

HR:Employee Directory Global Menu

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

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

HR: Employment View Layout

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

This User Profile Option is used in SSHR.

HR:Enable Bank Branch Validation

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

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

HR: Enable DTW4 defaulting

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

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

> **Important:** This profile option is US legislation specific profile related to tax rules and works with Full HR only. If you are installing Shared HR, the profile option must be set to No.

HR: Enable Multiple Assignments in SSHR

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

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

This profile option is used in SSHR.

HR: Enable Initiator to Delete a Pending-Approval Transaction

Determines whether managers or workers can delete any transactions that they have initiated before approval in Oracle SSHR. If you set this profile option to Yes, then the initiator of the transaction can view the transaction in the list of Pending-Approval action items or in the All Actions Awaiting Your Attention table, and use the Delete icon to remove that transaction. The default value is No.

For information about the delete transactions pending approval functionality, see: Self-Service Functionality, *Oracle Self-Service Human Resources Deploy Self-Service Capability*

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HR:Enable Multiple Assignments for Payroll Simulation

Enables you to choose the assignment for which you can run payroll simulation if you have multiple assignments by setting the profile option to Yes. If the profile option is set to No, then you can run the payroll simulation process only for the primary assignment.

For more information on payslip modeler functionality, see Payslip Modeler, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

HR:Enable Payroll Simulation

Determines whether a professional payroll user or employee can run payroll simulation. If you set the profile option to Yes, you can model the payslip/paycheck by changing the payroll information and generating a sample payslip.

For more information on payslip modeler functionality, see Payslip Modeler, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

HR: Enable Security for Batch Element Entry

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

HR: Enforce Costing Mandatory Segment Check at Data Entry

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

HR: Execute Legislative Check Formula within Run

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

HR: Expand Role of Contingent Worker

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

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

- Supervisor
- Recruiter
- Interviewer
- Cost center manager

- Reviewer
- Event attendee
- Termination authority
- Manager
- Preparer
- Requester
- Approver
- Buyer

HR: Extension Agent

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

HR: Extension Agent Client Timeout

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

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

HR: Extension Agent Enabled

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

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

HR: Extension For Endeca

Determines whether HR extensions for Endeca is enabled or not.

Set this profile option to Yes if you want to use Oracle Human Resources Extensions for Oracle Endeca.

For more information about how to set up Oracle Human Resources Extensions for Oracle Endeca and using the Workforce Explorer Page, refer to the *Oracle Human*

Resources Extensions for Oracle Endeca, chapter in the *Oracle E-Business Suite Extensions for Oracle Endeca Integration and System Administration Guide*

HR: FastFormula Debug Level

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

HR: Free text school name allowed in Self Service

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

HR:French HRMS check mandatory payroll assignment attributes exist

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

HR: FTE Factor

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

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

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

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

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

HR: GL Cost Center Org Classifications

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

- None
- Company Cost Centers
- HR Organizations and Company Cost Centers

HR: GL Cost Center Synchronization Options

This profile option is obsolete.

HR: GL Organization Name Format

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

HR:Global Competence Flex Structure

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

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

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

This profile option is used in SSHR.

HR: HR/Payroll Representative Source

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

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

This profile option is used in SSHR.

HR:IE P35 Reporting Year

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

HR: Info Online: Open in New Window

If you are using Info Online to allow users to access information provider web sites from a button on the Oracle HRMS toolbar, this profile option controls whether the results are displayed in a separate browser window each time the user follows a link.

Set to Yes to open a new window for each link followed; set to No to use the same window for each link.

HR: Info Online: RIA Password

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

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

HR: Info Online: RIA Username

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

HR: Info Online Toolbar Icon

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

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

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

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

/OA_JAVA/oracle/apps/media

In most installations this would be the directory:

$JAVA_TOP/oracle/apps/media.

HR: Info Online: Use Field Context

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

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

HR:Informal Name Format

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

Use the following values:

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

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

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

This profile option is used in SSHR.

HR: Job Level

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

HR: KI Framework Version

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

HR: KI Maximum Topics and Integrations

If you are using Info Online to allow users to access information provider web sites, use this profile to set the maximum number of topics or providers to display in the Content

Container before the More link appears.

HR: Enwisen Login URL

Defines the URL of Enwisen web site, a third-party information provider that end users can access from Oracle iRecruitment, Oracle Performance Management, Oracle SSHR, and Oracle Time and Labor pages.

See: Info Online Links to Information Provider Web Sites, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: KI Providers Enabled

If you are using Info Online to allow users to access information provider web sites, then this profile option controls the Providers region in the Info Online content container. Set to Yes to display the Providers region.

See: Info Online Content Container, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: KI Topics Enabled

If you are using Info Online to allow users to access information provider web sites, then this profile option controls the Topics region in the Info Online content container. Set to Yes to display the Topics region.

See: Info Online Content Container, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: KI User Options Enabled

If you are using Info Online to allow users to access information provider web sites, then this profile option controls the User Options region in the Info Online content container. Set to Yes to display the User Options region.

See: Info Online Content Container, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Class Name to Fetch KI Data

Use this profile option to implement additional security when accessing Enwisen, a third-party information provider. The value for this profile option must be a fully qualified name of a Java class that implements Oracle's predefined Java interface: oracle.apps.per.ki.kiserver.KIDataFetcher. The Java class contains the method to retrieve login values when end users access Enwisen from Oracle HRMS product pages.

See: Configuring Links between HRMS Products and Enwisen, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR:Local Nationality

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

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

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

HR: Localization in SSHR

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

HR: Local or Global Name Format

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

HR: Make National Identifier Optional

Enables recording employee information without entering the SOFI Number in the Person window, the People Management Templates, and the Self-Service page. To make entering the BSN/SOFI Number optional, set this option to Yes. To make it a mandatory field, set this option to No.

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

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

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

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

> **Important:** If you are setting this profile option to Allow Approval, and you have enabled HR:Allow Approver Updates to Self Service Actions,

Oracle recommends that you also enable HR:Refresh Self Service Actions with Data from Intervening Actions.

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

This profile option is used in SSHR.

HR:Manager Actions Menu

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

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

This profile option is used in SSHR.

HR: Mask Characters

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

HR: Metalink Integration Application

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

HR: Metalink Integration Enabled

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

HR:Monitor Balance Retrieval

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

HR: NI Unique Error or Warning

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

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

HR: National Identifier Validation

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

- **Error on Fail** (default value). If a user enters an invalid national identifier, an error message is displayed and the user cannot save the national identifier until they have entered it in the correct format.
- **Warning on Fail**. If a user enters an invalid national identifier, a warning is displayed, but the user can save the national identifier.
- **No Validation**. A user can enter and save the national identifier in any format. No validation is performed and no message is displayed.

HR:Non-Updateable Element Set

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

HR: Number Separator

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

HR: Online Tax Forms Update Method

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

- **Primary**. Only the tax information for the primary assignment is updated when a user changes tax information using the Online Tax Form.
- **All** (default value). The tax information for all assignments is updated when a user changes tax information.
- **None.** Users cannot update tax information using the Online Tax Form. The update functionality is disabled.

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

This profile option is used in SSHR.

HR: OAB New Benefits Model

Enables you to set up whether you are using the new benefits model, that is, Standard or Advanced Benefits. Enter Yes, if you are using the new benefits model. Enter No, if you are using the compensation and benefit models from previous releases.

HR: Override Grade Defaults

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

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

This profile option is used in SSHR.

HR:Payroll Payments Self-Service Enable Multiple Assignments

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

This profile option is used in SSHR.

HR:Payroll Payments Self-Service Payment Function

This profile option determines the defaults for the Organizational Payment Method (OPM). It operates differently depending on whether you have applied a foreign payment method enhancement.

Before Applying a Foreign Payment Method Enhancement:

- Null Value. If the profile value is null, then each of the allowed payment categories takes the default from the first valid payment method in the cursor for that payment method.

- Valid Function Name. If you supply a valid function name, then the organizational payment method is dynamically determined for each payment category. The returned OPM id becomes the default payment method.

After Applying a Foreign Payment Method Enhancement:

- ALL. If the profile value is ALL, then there is no single default organizational payment method. Instead, all available payment methods are returned in a list of values so that the employee can select from them.

- Null Value. If the profile value is null, then each of the allowed payment categories takes the default from the first valid payment method in the cursor for that payment method.

- Valid Function Name. If you supply a valid function name, then the organizational payment method is dynamically determined for each payment category. The returned OPM id becomes the default payment method.

HR:Payroll Payments Self-Service Payments List Mode

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

HR: Performance View Layout

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

This profile option is used in SSHR.

HR:Personal Actions Menu

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

This profile option is used in SSHR.

HR: PL NI Unique Error or Warning

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

See: HR: NI Unique Error or Warning, page 6-56

HR: Position Default Options for SSHR

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

- Default with No Warning

- Default with User Decision

- Default with Warning

- No Defaulting

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

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

This profile option is used in SSHR.

HR: Propagate Data Changes

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

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

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

HR:Purge Element Entry Permission

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

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

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

HR:Query Only Mode

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

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

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

> **Note:** You can set the parameter QUERY_ONLY=YES for a form

function that also launches a task flow. In this case, specify two parameters in the Form Function window:

QUERY_ONLY=YES

WORKFLOW_NAME="*task flow name*"

The entire task flow will be query-only, not just the first form.

See: Restricting Access to Query-Only Mode, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

HR:Refresh Self Service Actions with Data from Intervening Actions

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

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

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

HR: Restrict Letter by Vacancy or Event

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

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

HR:Restrict Transactions across Legislations in SSHR

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

HR: RIA Integration Enabled

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

HR:Run BENMNGLE When Processing a Self Service Action

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

HR: Salary View Layout

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

This User Profile Option is used in SSHR.

HR: Schedule Based Absence Calculation

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

HR: Security Profile

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

If you use Standard HRMS security you must set up the HR: Security Profile profile option for each responsibility.

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

HR: Security Performance Enhancer

Set this profile if you want to use the security performance enhancement feature. When you select Pick Performance Table(Assignment) as the value, the Oracle HRMS security mechanism retrieves information from the PER_ALL_ASSIGNMENTS_F_PERF performance table instead of the PER_ALL_ASSIGNMENTS_F base table when the person security evaluation happens and display of data is faster. You can set this profile option at the Responsibility level only.

See: Setting Up the Security Performance Enhancement Feature, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Important: Before you set the profile option, you must run the Synchronize Security Performance Tables process. For more information, see: Running the Synchronize Security Performance Tables Process, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HR: Self Service HR Licensed

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

This profile option is used in SSHR.

HR:Self Service New Hire Default Values

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

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

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

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

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

This profile is used in SSHR.

HR:Self-Service Save for Later

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

HR: Servlet Timeout

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

HR: SM Employee Find Work Opp Menu

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

HR: SM Manager Find Person Menu

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

HR: SM Manager Find Work Opp Menu

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

HR: Subrogation

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

HR: Supervisor Hierarchy Usage

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

HR: Training View Layout

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

This profile option is used in SSHR.

HR:TCA Unmerge Options

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

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

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

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

HR: US Address Line Length

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

HR: Use Fast Formula Based PTO Accruals

This user profile option is disabled.

HR: Use Global Applicant Numbering

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

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

HR: Use Global Contingent Worker Numbering

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

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

HR: Use Global Employee Numbering

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

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

HR:Use Grade Defaults

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

This Profile Option is used in SSHR.

HR:Use Standard Attachments

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

HR:User Type

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

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

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

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

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

Form	Profile Setting	Behavior
Define Element Classification (PAYWSDEC)	HR User	You cannot create secondary element classifications.

Form	Profile Setting	Behavior
Define Element Type (PAYWSDET)	HR User	Some payroll fields are not available.
Define Payroll (PAYWSDPG)	HR User	The Statutory Information field is not visible. **Note:** Statutory Information is not available at payroll level for all localizations, for example, it is not available for the UK.
Element Entries (PAYWSMEE)	HR User	The Processing Priority field in the Element Entry Values window is not available.
Define Assignment Status (PERWSDAS)	HR User	You cannot use the Payroll Status as a query criterion in Enter Query mode.
Define Benefit Contributions (PERWSEBC)	Payroll User	You cannot change the coverage type or contribution amounts for an existing benefit contributions record. You cannot create benefit contribution records.
SSP/SMP (SSPWSENT) (UK Only)	HR User	You must enter the average earnings amount for your employee before you can calculate their entitlement to statutory payments.
SSP/SMP (SSPWSENT) (UK Only)	Payroll User or HR with Payroll User	You can derive the average earnings automatically.
Employee Assignment (PERWSEMA)	HR User	Payroll field is display only.

Form	Profile Setting	Behavior
Employee Address and Define Location (US Federal Only)	HR User	The default address style is United States (International).
Employee Address and Define Location (US Federal Only)	Payroll User or HR with Payroll User	The default address style is United States.
Define Element Type (US Federal Only)	HR User	The application uses the predefined Federal element names.
Define Element Type (US Federal Only)	HR with Payroll User	The application uses the element names you define for the Federal elements.
Terminate (US Federal Only)	HR with Payroll User	You can update the Final Process Date.

HR: Use Title in Person's full name

Enables you to remove title from a person's full name so that it does not appear in person search lists, such as the Find window on the Person window.

This user profile option is only effective when you insert new records or update existing records. To remove title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process.

HR: Verification External Node

Defines the URL for the external node for the Employment Verification function. The node redirects the access request from outside the security firewall to the HTML page containing the released employment information.

This profile option is used in SSHR.

HR: View Payslip From Date for WEB

Limits the number of pay periods an employee can view.

This profile option is used in SSHR.

HR: Views Layer Size

Enables you to set the width of the Employee Name and Employee Number floating layer to the longest name and number you have.

This profile option is used in SSHR.

HR:View Unpublished Employee 360 Degree Self Appraisal

Enables a manager to view employees' unpublished 360 Degree appraisals. (This option does not affect self appraisals.) Set this option to Yes to view employees' unpublished 360 Degree appraisals. The default value is Null.

HR:Webapps Tips Test Mode

Forces all tip icons in SSHR to be displayed whether tip text is defined or not.

This User Profile Option is used in SSHR.

HR: Web Proxy Host

This option is used as part of the Knowledge Management which allows the Proxy Host to be used when accessing an external site.

HR: Web Proxy Port

This option is used as part of the Knowledge Management which allows the Proxy Port to be used when accessing an external site.

HR: ZA Nature of Person Mandatory at Person Level

Set this profile option to Yes to make the Nature of Person mandatory at the Person level. This ensures the application validates the Nature of Person during data entry. If you set this profile option to No, then Nature of Person is optional at the person level, and the application performs validations only when you run the Tax Year End Validation report. You must run the Generic Upgrade Mechanism process using the South Africa: Populate Nature of Person at the Person Level parameter to display the Nature of Person details at the person level for existing employees.

HRI: Collect Manager Snapshots

If you turn this profile option on, the DBI for HRMS collection process collects an additional summary layer for managers who have more staff than a specified number reporting to them. The default value is No. Use in conjunction with HRI: Manager Snapshot Threshold.

HRI: Collect Open Enrollment in Progress

Determines the enrollment data that DBI for HRMS collects. Set this profile option to Yes to collect data for the current open enrollment period. To collect historic data of enrollments along with the open enrollment data, set the profile option to No.

HRI:DBI Chief HR Officer Named User

Enables users of the Chief HR officer responsibility to access the Chief HR Officer dashboards effectively as the CEO of the enterprise.

> **Note:** You must have successfully run an Initial Load before you set this profile option.

Select the name of the user from the profile option list. The list of managers shown for the profile is only those at level 1 (the top of the hierarchy). To turn this profile off, set the profile option value to No.

Note: This new profile option only affects the Chief HR Officer responsibility.

HRI:DBI Force Foundation HR Processes

Determines whether the HRI Collection Programs run in Foundation HR mode (on a Full HR Installation). The Foundation HR mode only collects data as of the system date; it does not maintain historical data. If you are an HRI DBI customer, you must set this profile option to No.

Non-DBI for HRMS customers, who do not require any more than the basic data collected in a Foundation HR implementation, can set the HRI:DBI Force Foundation HR Processes profile option to Yes. This setting reduces the amount of data collected and improves load times.

HRI:DBI Link to Transaction System

Enables users of DBI for HRMS to drill from detail reports to employee records in the HR Self Service Employee Directory.

Set this profile option to HR Employee Directory to turn this feature on. The default value is Disable Link.

HRI:Enable Benefits Collections and Event Queue

Enables managers to view the life event statuses for participants in the open enrollment period. Set this profile option to display the life event statuses in the DBI for HRMS Enrollment Process Status report.

HRI:Enable Captured Events Archive

Controls the archive mode for the events capture process in DBI for HRMS. Set this option to Yes to archive all events that trigger incremental processing.

HRI:Enable Detailed Logging

Enables you to include a debug message in the concurrent manager log to troubleshoot errors during the HRI data collection process. Set the HRI:Enable Detailed Logging profile option to Yes. The default is No.

> **Caution:** Only set this profile option to Yes if you encounter an error. Debugging the collection process impacts the collection timings.

HRI: Manager Snapshot Threshold

Determines the minimum number of staff required to enable snapshot collection for a manager. The default is 2500. Use this profile in conjunction with HRI: Collect Manager Snapshots.

HRI:Multithreading Chunk Size

Determines the number of objects processed at one time during the DBI for HRMS collection phase. The default value is 200. You can change this to a value between 1 and 16000. However, you should avoid processing a large numbers of objects, as the default value is the result of benchmark tests. If you receive the error "Oracle exception: cannot extend rollback segment" during the collection process, then reduce the value for this profile option.

HRI:Number of Threads to Launch

Determines the number of threads, or sub-processes, that run in parallel on multi-processor machines. If you have already installed PYUGEN on your system, then set this profile option to equal the THREADS parameter defined for PYUGEN. The default value for this parameter is 8.

> **Caution:** Your Applications System Administrator must define the concurrent manager to allow the required number of sub-processes to run in parallel.

HRI:Period of Service / Placement Date Start Source

Determines how DBI for HRMS calculates the employee's periods of service. The default value is Start Date. With this setting, DBI for HRMS calculates periods of service from the beginning of employees' current period of service. To calculate the employee's period of service from the beginning of their first period of service, change the value to Adjusted Service Date.

> **Caution:** HRMS also uses the Adjusted Service Date to calculate benefits. You must therefore consider the effect on benefits if you use this feature.

HRI:Populate Assignment Events Queue

Determines whether the events collection process in DBI for HRMS populates the incremental update queue for the assignment events collection process. If you never run the assignment events process, set this profile option to No to reduce the load times of other processes. If you are a DBI for HRMS customer, you must set this profile option to Yes.

HRI:Populate Supervisor Hierarchy Events Queue

Determines whether the events collection process in DBI for HRMS populates the incremental update queue for the supervisor hierarchy collection process. If you never run the supervisor hierarchy process, set this profile option to No to reduce the load times of other processes. If you are a DBI for HRMS customer, you must set this profile option to Yes.

HRI:Populate Supervisor Status History Events Queue

Determines whether the events collection process in DBI for HRMS populates the incremental update queue for the supervisor status history collection process. If you never run the supervisor status history process, set this profile option to No to reduce the load times of other processes. If you are a DBI for HRMS customer, you must set this profile option to Yes.

HRI: Workforce in Period Calculation Method

Determines the calculation that DBI reports use in averaging values over a period, for example, workforce turnover or average employee absence. Select from:

- Workforce End: headcount at the end date of the reporting period.
- Workforce Start + End Average: average of the headcount at the start date and the headcount at the end date of the reporting period.

The default is null, which means that the calculation will use the headcount at the end date of the reporting period

Workforce Measurement Type

Determines how DBI for HRMS measures the size of your workforce. The application currently only supports the value of Headcount.

HZ: Protect HR Person Information

Controls the synchronization of common data between Oracle HRMS and Oracle Student System (OSS). By default (when this option is set to No) data synchronization is enabled.

Limit by Persons Organization

Set this profile option to Y to limit the Compensation Objects selected by the Participation Process to only those linked to the employee's organization.

OAB:Self Registered User Responsibility

Identifies the responsibility to be granted to new users who successfully self-register in SSHR using the New User Registration processes. This profile option is seeded at site level with the seeded responsibility *Self Registered Employee Default Responsibility*. You can set this profile at responsibility level if you have created several responsibilities for different groups of users to use after initial registration.

This profile option is used in SSHR.

OAB:Enable Self-Service Benefits Trace

This profile option enables to you to generate a PYUPIP trace file for a particular Self-Service Benefits user that you select. Use this profile option to debug Self-Service Benefits election problems.

This profile option is used in SSHR.

OAB:User to Organization Link

In the self-service New User Registration processes, links the responsibility you give to new users to register on SSHR with the organization to which they belong.

This profile option is used in SSHR.

OAB:User to Payroll Link

In the self-service New User Registration processes, provides a default employee payroll linked to the responsibility you give to new users to register on SSHR.

This profile option is used in SSHR.

PAY: Enable Workflow for Assignment Costing

Enables the user to toggle between the two processes of using with or without the workflow option. If the profile is set to Yes, the application saves the data on approval. If the rule is set to No, the application saves the data immediately. The default is No.

PAY: Generate Periods for Tax Year

Since the lunar month has only 28 days, the yearly start date of a period would be always less than the legislation specific start date. This profile option enables you to reset the generated payroll period start date back to the legislation start date. You should set the profile option to Yes to display Reset Years in the Payroll window. The default value is No.

PAY:Statement of Earnings User Category

You use this profile when setting up a global statement of earnings to be viewed online. It enables you to select user category when setting up the global statement of earnings.

PER:Automatic Save

You use this profile when setting up iRecruitment. Set the profile option to Y to enable an automatic Save For Later operation when users navigate to a new web page.

PER:Navigation

You use this profile when setting up iRecruitment. Set the profile option to Y if you want the application to validate data on the current web page when users navigate to a new page (Next or Previous).

Personalize Self-Service Defn

This profile option enables or disables the global Personalize link and Personalize Region link that appear on self-service functions from SSHR 4.0 and above.

This profile option is used in SSHR.

PO: Services Procurement Enabled

Controls the availability of purchase-order information from Oracle Services Procurement to Oracle HRMS. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, you must set this profile option to Yes.

Performance Management Source Type

Enables you to select a default value from the "PROFICIENCY_SOURCE" (Source of Proficiency Rating) user lookup. HRMS uses this value when updating a person's competency profile automatically after an appraisal.

> **Note:** This profile option was previously known as Talent Management Source Type.

RTI Uptake

Use this profile if you are not yet on RTI or migrating PAYE schemes to RTI in batches. This profile enables you to continue to use the existing BACS file creation functionality that does not generate the random number which is required to accommodate the HASHing requirement within RTI. Additionally, if you are migrating in batches, then you have this option for the non-RTI PAYE schemes. This profile has the following values:

- All - Choose this if the whole population (all PAYE schemes) is migrating to RTI at the same time
- None (default option) - This is the default option set for all customers who have not yet taken up the RTI patch and are not migrating to RTI as yet.
- Partial - Choose this option if RTI migration is to take place for PAYE schemes in a staged manner, for example where PAYE schemes are administered by an employer and these are not being migrated in mass. If you select this option, then you must perform a further step using the Configuration Values page where each PAYE scheme must be 'marked' as being migrated. Use the RTI Uptake configuration type for this purpose.

Ensure that you set the correct option prior to submitting the BACS processes for the payrolls within the PAYE schemes after installing RTI functionality.

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

Related Topics

For information about profile options used in:

- Oracle iRecruitment, see: iRecruitment Profile Options, *Oracle iRecruitment Implementation and User Guide*
- Oracle Learning Management, see: Profile Options, *Oracle Learning Management User Guide*
- Oracle Performance Management, see: Profile Options in Oracle Performance Management, *Oracle Performance Management Implementation and User Guide*
- Oracle Succession Planning, see: Profile Options in Oracle Succession Planning, *Oracle Succession Planning Implementation and User Guide*

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Additional Implementation Steps

Additional Implementation Steps for Poland

If you are implementing Oracle Payroll for Poland, you must complete the following additional implementation steps.

Please see the following implementation sections in Implementing Oracle HRMS for all other implementation steps that are not specific to Poland.

See: Enterprise and Workforce Management, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Payroll Process Management, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Compensation, Benefits and Payroll, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Workforce Sourcing and Deployment, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Additional Implementation Steps

Step 1: Configure SII Insurance Codes

If you use SII insurance codes relevant to your enterprise, define those codes and related column values using the Table Structure window. You must attach the supplied PL_CONTRIBUTION_TYPE_FF FastFormula to each column you add. You must also add each new code and its description to the PL_EMP_SOCIAL_SECURITY_MEANING lookup.

Step 2: Define Contribution Types For New Codes

For new codes, you must define the relevant contribution types and their valid values, O, D, and N using the Table Values window.

Step 3: Set Up Statement of Earnings (SOE)

You use the new profile option PAY: PL Statement of Earnings Display Zero to control the display of earnings or deductions elements with a zero Pay Value. You can set the profile value to Yes to display earnings and deductions elements with a zero Pay Value processed in the payroll run on the Statement of Earnings page.

> **Note:** Ensure that you restart the apache server after setting up this profile option.

Step 4: Set the Profile Option PL+PER_NI_UNIQUE_ERROR_WARN

HRMS can flag duplicate PESEL entries at the legal-employer level by issuing either an error or a warning message. By default, HRMS issues a warning message. To switch to an error or prevent validation, set the profile option to Error or None respectively.

See: User Profiles, page 6-2