

Oracle® HRMS for United Arab Emirates

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Oracle HRMS for United Arab Emirates Supplement, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle HRMS for United Arab Emirates 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.

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Structure

- 1 **Enterprise and Workforce Management**
- 2 **Workforce Sourcing and Deployment**
- 3 **Compensation and Benefits Management**
- 4 **Payroll Management**
- 5 **HR Information Systems**
- 6 **Implementing Oracle HRMS**

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.

Enterprise and Workforce Management

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, *Oracle HRMS Enterprise and Workforce Management Guide*

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, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Classifications, page 1-4

See: Setting Up Organizations, page 1-14

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, *Oracle HRMS Enterprise and Workforce Management Guide*

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 1-2

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.
- **National Pension Scheme:** Records the National Pension office information. You can enter the corporate registration account number and the corporate branch

account number in the NPS Account Set Up 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.

Setting Up Organizations

You set up organizations to represent your enterprise structure in Oracle HRMS. To find out what organizations you require for your enterprise, see: Key Concepts for Representing Enterprises, page 1-2

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

See: Extending the Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

2. Create your organizations.

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

See: Creating an Organization, page 1-15

3. Enter the appropriate classifications for each organization.

See: Entering Organization Classifications, page 1-16

4. Enter details for any extra information types.

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

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, *Oracle HRMS Enterprise and Workforce Management Guide*

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 Organization Classifications

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

large part on its classification.

See: Organization Classifications, page 1-4

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

To enter organization classifications:

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

Note: Save each classification after entering and enabling it.

Entering Additional Information

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

For business group see: Business Group, page 1-17

For HR organization see: HR Organization, page 1-18

For representative body see: Representative Body, page 1-19

For constituency see: Constituency, page 1-19

For bargaining association see: Bargaining Association, page 1-20

For company cost center see: Company Cost Center, page 1-20

For professional body information see: Professional Body Information, page 1-21

For legal employer see: Legal Employer, page 1-21

See Classification and Additional Information Types, page 1-4 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. Click the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Work Day Information, see: Business Groups and HR Organizations: Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Benefits Defaults, see: Business Groups: Defining a Default Monthly Payroll, *Oracle HRMS Enterprise and Workforce Management Guide*
 - PTO Balance Type, see Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Recruitment Information, see: Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Payslip Information, see: Entering Payslip Information, page 1-21
 - Self Service Preference Information, see: Entering Self-Service Preference Information, page 1-22
 - UAE Information,
see: Entering Local Nationality Information, page 1-25
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. Click 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., *Oracle HRMS Enterprise and Workforce Management Guide*
 - Costing Information, see: HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*

- Parent Organization, see: HR Organizations: Entering Parent Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Payslip Information, see Entering Payslip Information, page 1-21
 - Self Service Preference Information, see Entering Self-Service Preference Information, page 1-22
 - Related Organizations Information, see: Entering Related Organizations Information for an HR Organization, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter representative body additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Click the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Representative Body Information, see: Entering Representative Body Information, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Constituency information, see: Entering Constituency Information for a Representative Body, *Oracle HRMS Enterprise and Workforce Management Guide*
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. Click the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - Location, see Entering Location Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Organization, see Entering Organization Information for Constituencies, *Oracle*

HRMS Enterprise and Workforce Management Guide

- Organization Hierarchy, see Entering Organization Hierarchy information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Grade, see Entering Grade information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Bargaining Unit, see Entering Bargaining Unit information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- Job, see Entering Job information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*
- 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. Click the Others button to open the Additional Organization Information window.
3. Select Trade Union Information, see: Entering Trade Union Information for a Bargaining Association, *Oracle HRMS Enterprise and Workforce Management Guide*
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. Click 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, *Oracle HRMS Enterprise and Workforce Management Guide*
 - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center., *Oracle HRMS Enterprise and Workforce Management Guide*
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. Click the Others button to open the Additional Organization Information window.
3. Select Professional Body Info, see: Entering Additional Information for a Professional Body, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter legal employer information:

1. Click on the Legal Employer organization classification to enter additional information.
2. Click the Others button to open the Additional Organization Information window.
3. Select one of the following:
 - UAE Employer Details
See: Entering Legal Employer Details, page 1-25
 - UAE Gratuity Details
See: Entering Gratuity Details, page 1-26
 - UAE Reference Formula
See: Entering Reference Formula, page 1-26
 - UAE Reporting Data
See: Entering UAE Reporting Data, page 1-27

Entering Payslip Information

To enter payslip information:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select either Business Group or HR Organization, choose Others, and select Payslip Information.
2. Click in a field of the Additional Organization Information window to open the Payslip Information window.
3. Select the type of extra information to be displayed on the payslip. The choices are:

- Balance
- Element
- Message

Your selection determines which other fields you must complete in this window.

To enter Balance extra information:

1. Select a balance name.
2. Select a dimension.
3. Optionally, enter a display name for the balance.
4. Optionally, enter a message text.
5. Save your work.

To enter Element extra information:

1. Select the element you want to display.
2. Select the input value for the element.
3. Optionally, enter a display name for the element.
4. Optionally, enter a message text.
5. Save your work.

To enter Message extra information:

1. Enter a display name for the message.
2. Enter a message text. This message will be displayed on the employees' online payslip.
3. Save your work.

Entering Self-Service Preference Information

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

Note: You can also enter this information at the Person or Location level.

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

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

To enter Self-Service Preference information:

1. In the Organization window, query the Business Group or HR Organization if it does not already appear there.
2. In the Organization Classifications region, select Business Group or HR Organization, choose Others, and select Self Service Preference.
3. Click in a field of the Additional Organization Information window to open the Self Service Preference window.
4. Select the document type for which you want to define preferences.
If Payslip Modeler functionality is available, you must select the document type as Payslip Modeler.
5. Select whether you want the document to be available online.
6. Select whether you want the document to be available on paper.
7. If you are providing payslips in PDF format:
 - Select the appropriate localization template. If you do not select the a payslip template, then the web-based payslip is displayed.

Note: Australia, China, India, Hong Kong, Singapore, Korea, and New Zealand users should select the appropriate predefined localization template.
 - You can append custom data to the generated XML. Specify the custom

package and procedure in the XML Code field as : <custom.package>.<custom.procedure>

- Specify the dates these changes are to take effect.

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

The application generates either an Oracle Applications Framework (OAF)-based payslip or PDF payslip depending on the values entered in the Template and Effective Date fields. A PDF Payslip is generated when you select the template and enter the effective date on or before the payroll payment date.

For example, consider the effective date of PDF payslip as 01-Jun-2016:

- If the payment date is prior to effective date (31-May-2016), then the application generates an OAF payslip.
- If the payment date later than effective date (30-Jun-2016), then the application generates a PDF payslip.

For UAE only: The application supports only PDF payslip.

8. If payslip modelling is enabled for your localization, then select the template that you want to use for payslip modeling process to use, if you do not want the application to use the default template.
9. Select the element set to exclude the elements from being selected when you run a payslip modelling process.
10. Select either GRE/Legal Entity Address or HR Organization Address (default) for display on the payslip.

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

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

11. If you selected GRE/Legal Entity Address for the Payslip Employer Address field, then select the effective date after which the GRE address displays on the payslip.

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

For Canada only:This field is not applicable.

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

Note: By default, Payslip View Date – Check Date for any period will be equal to the Payslip offset defined for the payroll. However, if the user manually changes these dates for any period, then the Payslip Offset for that period will be considered as the Payslip View Date – Check Date and not the Offset defined for the Payroll.

Further, if the Payslip View Date and/or the Payslip Offset is set to null, then all payslips (prior, current and future) will be available to the employee. (By default, the Payslip Offset is set to zero when defining a payroll.)

13. Select whether you want to display the rate details section.
14. Save your work.

Business Group: Entering Local Nationality Information

Use the UAE Information window to indicate the business group that represents your enterprise's interests within UAE. Employees whose nationality matches the one you set in this window are eligible for various compensation benefits.

To enter local nationality:

1. In the Organization window, query the organization. In the Organization Classifications region, select Business Group, and click Others.
2. Select UAE Information to display the Additional Organization Information window.
3. Click in the UAE Information field, and select the local nationality for the enterprise.
4. Save your work.

Entering Legal Employer Information

Use the UAE Employer Details window to record information about the legal employer. Labor office and social insurance reports require information about the legal employer.

To enter legal employer information:

1. In the Organization window, query the organization. In the Organization Classifications region, select Legal Employer, click Others, and select UAE Employer Details.
2. Enter the employer's social security number.
3. Enter the 8-digit employer or establishment number. Each UAE employer has a unique identification number.
4. Enter the type of services that the employer provides. If the employer provides multiple services, enter the primary service.
5. Select what type of enterprise it is, for example, free zone, airlines, or private enterprise.
6. Select a position hierarchy to indicate who can act as a signatory for this organization. Any person who holds a position in the hierarchy has this authority.

Entering Gratuity Details

You can calculate gratuity amount based on the actual number of days in a year, or on a fixed 30 days in a month and 360 days in a year.

Use the UAE Gratuity Details window to select the basis of gratuity calculation.

To select the basis of calculation:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, click Others, and select UAE Gratuity Details.
2. Click the UAE Gratuity Details field to open the UAE Gratuity Details window.
3. Select the basis for gratuity calculation.
4. Save your work.

Entering Reference Formula Details

The UAE Reference Formula window contains the following sections:

- **Contributory Salary Reference Formula** - This segment holds the user-defined formula with return variable `contributory_salary_reference` to calculate the salary used for SI contributions.

- Gratuity Reference Formula - Employers can enter their own gratuity calculation formula here that stores the calculated monthly gratuity and paid gratuity in the return variables MONTHLY_GRATUITY and PAID_GRATUITY, respectively.
- Gratuity Daily Salary Formula - In this segment, employers can enter a formula with return variable MONTHLY_SALARY to calculate the salary used for processing standard gratuity based on labor law. The application converts this salary into daily salary, which is used as input for gratuity processing.

To enter reference formula details:

1. In the Formula window, define the formula to attach in the UAE Reference Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*
2. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Legal Employer, click Others, and select UAE Reference Formula.
3. Click the UAE Reference Formula field to open the UAE Reference Formula window.
4. Attach your formula to the appropriate field.
5. Save your work.

Entering UAE Reporting Data

Use the UAE Reporting Data window to record the employer contributions for basic salary, various allowances, and end of service deductions. You capture this data to ensure that it appears in social insurance reports.

To enter UAE reporting data:

1. In the Organization window, query the organization.
2. In the Organization Classifications region, select Legal Employer, click Others, and select UAE Reporting Data.
3. Select the user-defined balance and the attached dimension for the contribution you want to capture.

The application uses the combination of the selected balance and dimension to calculate the appropriate contribution and display the value in the report.
4. Click OK.

Jobs and Positions

Jobs and Positions

You define roles to represent the ways that different groups of employees work. In Oracle HRMS you can use *jobs* or *positions*, or a combination, to define roles.

Job: A job is a generic role within a Business Group, which is independent of any single organization. For example, the jobs Manager and Consultant can occur in many organizations. You can also use jobs to set up supplementary roles that an employee might hold, for example, fire warden, or health and safety officer. You can distinguish these supplementary roles from other jobs by using Job Groups.

Position: A position is a specific occurrence of one job, fixed within one organization. For example, the position Finance Manager would be an instance of the job of Manager in the Finance organization. The position belongs to the organization. There may be one, many, or no holders of a position at any time.

Example

In a large structured organization, you may have a permanent establishment of positions for most of your employees.

However, you may also have groups of employees hired to perform specific tasks. This can be on a temporary or a permanent basis. Staff in this category can include agency workers, consultants and contractors. For these staff, you can define the role more flexibly as a job.

Model Your Organization and Roles

When you plan how to model your organizations and roles, consider the following points:

- Positions are normally used in role-based enterprise structures where clearly defined rules largely determine the ways employees work, and the compensation and benefits they receive.
- To manage fixed establishments of posts that exist independently of the employee assignment, it is best to use positions.

If you decide to use positions to represent your enterprise structures you need to consider carefully how to use organizations.

Positions provide you with a finer degree of structural definition and control than organizations on their own. You can use both organizations and positions to represent your reporting structures. However, if you define both, you must also maintain both

over time. This may lead you into duplication of effort and information.

Tip: If you decide to use positions to represent how people work in your enterprise, it is best to define most of the detail at the level of the position. Do not duplicate this detail in organization structures.

Use organizations to show your highest level of departments or divisions. Use positions and position hierarchies to show the reporting groups existing in your enterprise.

If you use positions to define roles, you can use Oracle's position and budget functionality to stay within budget and adjust position expenditures or budgets in response to changes in organizations, personnel, and funding sources. You can also use Oracle Workflow for routing position definitions and budgets for approval, and configure predefined business rules that perform necessary validations. See: Position Control, *Oracle HRMS Enterprise and Workforce Management Guide*.

Additional Information About Roles

As you define roles in your enterprise you can describe their responsibilities, requirements, and working conditions. This can be done in a number of ways:

- For positions you can enter the location, probation period and working hours in the standard fields. Entering location and working hours for an organization provides a default for all positions within that organization.
- You can attach documents, for example, text describing the objectives and tasks of the job or position, to each record.
- You can add up to twenty additional fields to each window in a descriptive flexfield. These fields can be global (they always appear) or context-sensitive (they appear only when triggered by another piece of information). For example, you could set up fields to record the health and safety requirements of a position, or its suitability for job share.
- You can add any number of Extra Information Types (EITs). This would enable you to set up fields to hold information to which only users with certain responsibilities would have access. For example, you could set up fields only to be used by managers.
- You can enter competencies against both jobs and positions. Then, using the suitability matching tool, you can match employees' competencies to those required by a job or position. This enables you to identify training needs or rank potential successors. You can also enter which position is the planned successor for each position in your enterprise.

Job Groups

Each job is held in a job group. The job group is used to store jobs of a similar type together in one group. All standard jobs created in Oracle HRMS, that is, those jobs that define the role the person is employed to fulfil, must be stored in the Default HR Job Group. This job group is automatically created for your business group and is given the same display name as the business group. The internal name for the job group is of the format HR_<Business_Group_ID>, for example HR_2273.

Only jobs entered in the Default HR Job Group will be available in other windows in Oracle HRMS such as Position, Competencies, or Assignment. The only windows within Oracle HRMS that can access jobs outside of the Default HR Job Group are the Supplementary Roles window and the Elections window.

You can set up additional job groups to store supplementary roles that your employees might fulfil. These would be performed in addition to the roles described above and could be as a result of company defined initiatives like fire warden, or defined by legislation such as health and safety representative.

See: Workers' Representation and Supplementary Roles, *Oracle HRMS Enterprise and Workforce Management Guide*

You can also set up job groups to be used by Oracle Projects.

The way in which your enterprise uses job groups will depend on the setting of the HR: Cross Business Group profile option. If this is set to Y then you can create global job groups that can be accessed by all business groups on your system. If it is set to N then you can only create job groups for use within your business group.

Note: The HR Default Job Group is business group specific and therefore all jobs held within it are only available within your business group. Global job groups only apply to supplementary roles within Oracle HRMS, and Oracle Projects.

Defining a Job

You use the Job window to define jobs, the skills that workers require, and the grades to which they can be assigned. You can also enter job evaluation scores, if you have set up a job evaluation system.

You can also enter supplementary roles in the Job window. You can record information about any roles an employee holds which are not part of the employee's contract; for example, fire warden or health and safety representative.

If you intend loading historic assignment details into Oracle HRMS, ensure you enter valid start dates for your jobs. You cannot assign an employee to a job before the start date of the job.

Tip: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This simplifies your data entry.

To define a job:

1. Enter a start date early enough to handle any historical information you want to enter.
2. Select the required job group. This defaults to the Default HR Job Group for your Business Group and should not be changed unless you want to enter a job that describes a supplementary role to a person's normal employment, such as a fire warden or health and safety representative, or you are setting up a job to be used in Oracle Projects.

Only jobs entered in the Default HR Job Group will be available in other windows in Oracle HRMS such as Position, Competencies, or Assignment. The only windows within Oracle HRMS that can access jobs outside of the Default HR Job Group are the Supplementary Roles window and the Elections window.

3. Enter a unique name for the job. If there is at least one enabled segment in the Job Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.

The flexfield that opens is dependent on the Job Group you have selected.

4. Enter a numerical approval authority value to define an approval level for incumbents of this job. This value is used by Oracle Approvals Management to determine whether a person has sufficient authority to approve a transaction.
5. Indicate whether the job carries any additional employment rights or is a benchmark job. A benchmark job is one that can be used to represent a number of jobs in reports such as salary surveys.

Save your work and do not complete any further steps, if you are entering a supplementary role.

6. Select a benchmark job, if required.

Note: For Indian users only: In the Further Job Information field, select the classification of the job, such as highly skilled or skilled. This is used for information purposes only.

7. Save the job. You can now enter further information for the job you have defined. Note that you can only enter some types of further information, such as valid grades or work choices, for jobs defined in the Default HR Job Group.

8. Choose Evaluation to enter evaluation information and an overall evaluation score for the job.

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

If you are using suitability matching, then enter your competencies using the Competence Requirements window.

See: Defining Competency Requirements, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Defining Job Requirements

9. Choose Requirements to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

See: Entering Job and Position Requirements, *Oracle HRMS Enterprise and Workforce Management Guide*

Other Information

10. Choose Valid Grades to enter the grades to which workers can be assigned.

See: Entering Valid Grades for Jobs or Positions, *Oracle HRMS Enterprise and Workforce Management Guide*

11. Choose Work Choices to enter work choices relevant to the job.

See: Entering Work Choices for a Job or Position, *Oracle HRMS Enterprise and Workforce Management Guide*

12. Choose Survey Mapping to link salary survey lines to your job.

See: Mapping Salary Survey Lines, *Oracle HRMS Compensation and Benefits Management Guide*

13. Choose Extra Information to enter job categories for the job. You can link as many categories as you need to a job.

Mexico only: You must click this button and specify a Social Security Salary Type for this job.

Note: If you have Oracle Projects installed, you can enter further information in the Extra Job Information flexfield.

See: Implementing Resource Utilization, *Oracle Project Resource Management Implementation and Administration Guide*.

You can investigate the job categories in your enterprise using HRMS Intelligence.

14. Enter any additional types of job information for your enterprise.

Note: You can only access job categories and other types of Extra Information if your system administrator has set them up for your responsibility.

Employment Agreements and Legal Compliance

Occupational Health: Medical Assessments, Disabilities and Work Incidents

Oracle HRMS enables you to record medical assessments, disability information, and work incidents for the people in your enterprise. It also enables you to link this information together. For example, if a medical assessment is required as the result of a work accident, and that assessment then diagnoses a disability in the person, you could relate these records to one another.

Note: The Medical assessments, disabilities and work incidents functionality may not be used by your localization.

Medical Assessments

The Medical Assessment window enables you to enter information about the medical assessments (consultations) provided to the people in your enterprise. For example, you can record:

- When the assessment took place, and the organization and person who performed it.
- The result of the assessment, for example, if a disability was identified.
- If the purpose of the assessment is to evaluate a particular disability, whether the person is considered fit for work.
- Any work incident that was the reason for this assessment.

A person can have multiple medical assessment records. For example, a person may have a recruitment medical and several annual medicals.

Disabilities

Using the datetracked Disabilities window, you can enter information about a person's disabilities. For example, you can record:

- The nature and severity of the disability
- The full-time equivalent that this person represents towards your enterprise's quota of disabled employees
- The details of the registration of this disability with an official organization

- Any work incident that was the cause of this disability
- The medical assessment that first identified this disability.

A person can have multiple disability records. Each disability can be linked to one work incident and to one medical assessment that diagnosed (or identified) the condition. Once a disability has been diagnosed and recorded, you can link it to multiple assessments that evaluate the disability.

Work Incidents

Oracle HRMS enables you to record work incidents, for example, accidents, that involve the people in your enterprise. Work incidents are incidents that occur:

- at work
- on the way to or from work
- in other circumstances that are defined as work-related by your enterprise.

Using the Work Incidents window, you can record:

- The details of the incident, for example, when and where it occurred.
- The health and safety official and/or representative body that were notified of the incident
- Medical details, such as any injury occurred, treatment given, and medical organizations involved
- Whether any compensation was paid
- Whether this person was absent as a result of the incident
- The job the person was doing when the incident occurred

A person can have multiple work incident records.

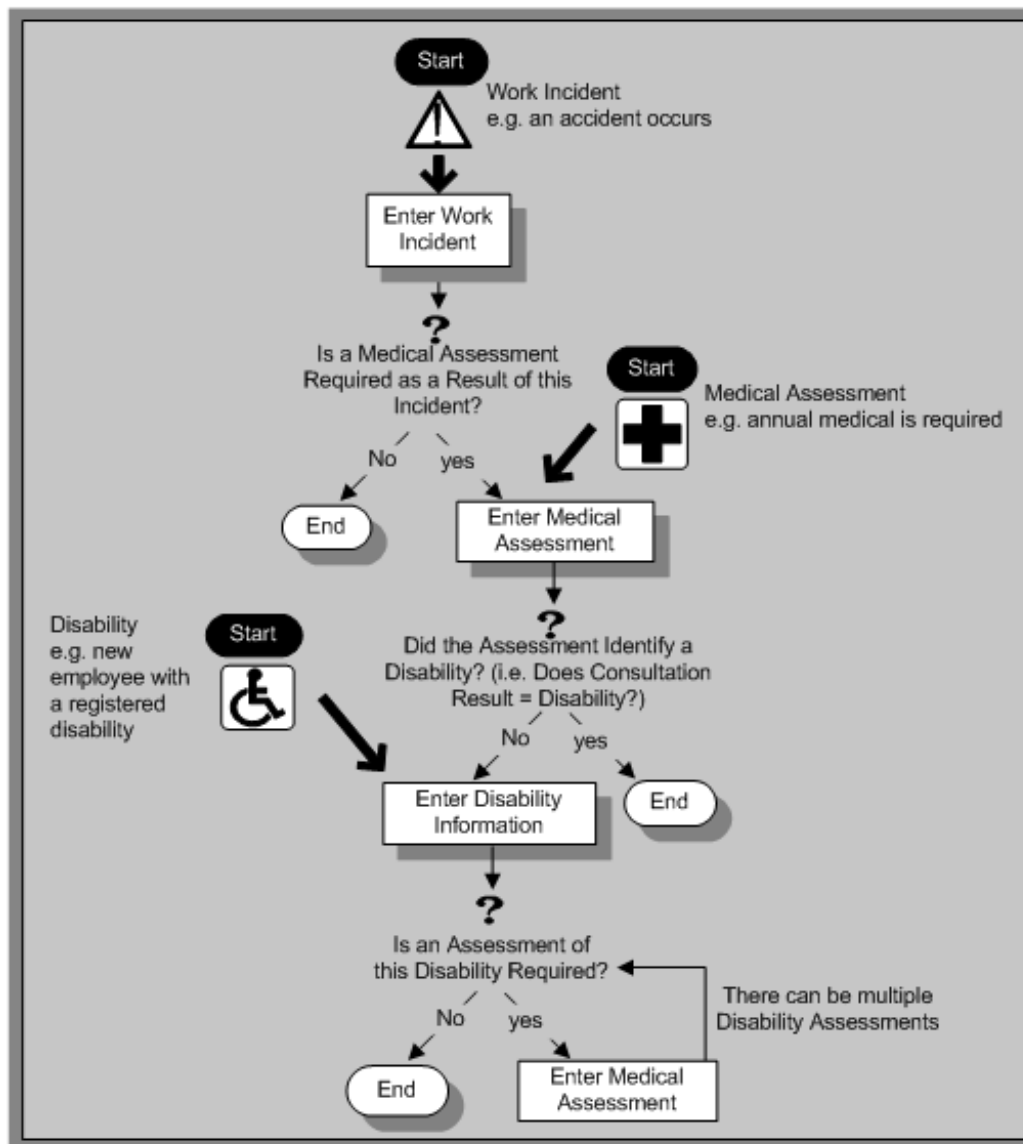
The graphic illustrates the relationship between the medical assessment, disability and work incident tasks. It shows the full process that you could follow if you wanted to record:

- A work incident that occurred
- The medical assessment that was required as a result of the work incident
- The disability record that was required as a result of a "Disability" result in the medical assessment

- The subsequent "Disability type" medical assessments that were required to evaluate the disability on a regular basis

The "Start" boxes show the points at which you can start the process, depending on the task you need to perform.

Recording a Disability



Entering 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 2-12

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 1-15

4. Enter the date on which the employee was registered as disabled with the disability organization and the date on which this registration expires.

Japanese users only: Select the confirmation method by which the disability was confirmed (by the employer).

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.

For Japanese users only: Specify the following:

You require the following information to submit the disability reports to the authorities for statutory purposes.

- Degree/Grade - select the degree if the employee is intellectually disabled and the grade if physically disabled.

- Confirmation Method - select the confirmation method by which the disability was confirmed by the employer.
- Severely Disabled - select Yes if the employee has severe physical disability or severe intellectual disability and must be counted as 2 disabled persons for reporting purposes.
- Part-time Worker - select Yes if the employee is a part-timer for reporting purposes.

The following information is required for the worker insurance report if the employee is disabled or injured as a result of work accident.

- Wa Insurance Disability Grade - select the grade for work insurance purposes.
- Insurance Injury and Sickness - select the values for the work insurance purposes.

5. Save your work.

What Next?

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

Workforce Sourcing and Deployment

Appointment

Appointments and the Hiring Process

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

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

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

Hire Dates and Future-Dated Changes

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

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

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

Back-to-Back Employment and Placements

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

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

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

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

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

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

Earliest Hire Dates

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

Note: Australia, Canada, China, Hong Kong, India, Korea, Mexico, New Zealand, Singapore, US, Russia, and South Africa Payroll users can rehire ex-employee before the final process date. See: *Rehire Before Final Process Date*, page 2-3

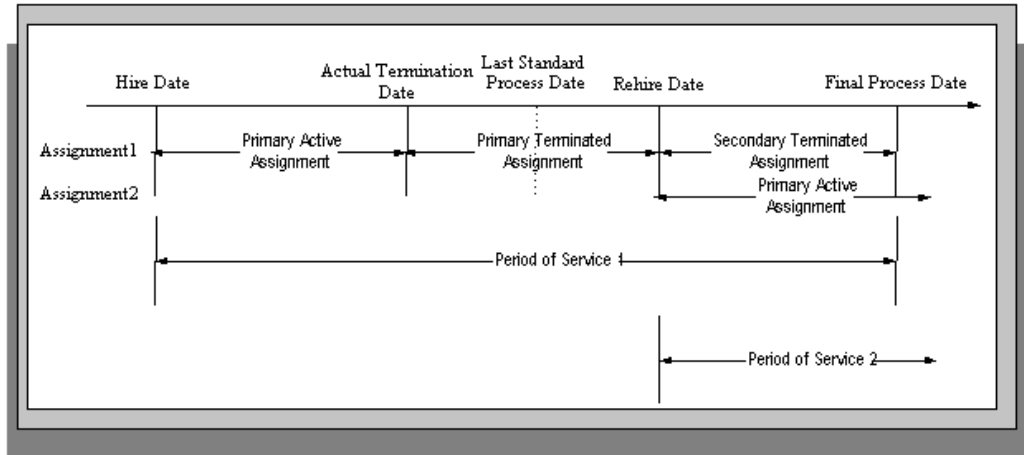
- An ex-contingent worker's earliest hire date is either 1 day after the actual termination date of the most recent placement or the day after the last of any future-dated changes, whichever is later. For back-to-back hiring, there can be no future-dated changes.

Rehire before Final Process Date

Note: Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Mexico, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Russia, UK, US, and United Arab Emirates Payroll users can rehire ex-employee before the final process date. See: *Rehire Before Final Process Date*, page 2-3

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

Rehire before Final Process Date



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

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

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

Valid Person Types for Applicants

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

Hiring an Applicant (People Window and Application Window)

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

To hire an applicant:

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

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

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

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

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

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

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

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

Enrolling New Hires in the Compensation Plans:

After you hire iRecruitment applicants, run the iRecruitment Create Enrollment process to enroll new hires in the compensation plans included in their offer letters. For more information, see: Running the iRecruitment Create Enrollment Process, page 2-9

Updating the Assignment:

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

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

If you choose Yes where there are future dated assignments:

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

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

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

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

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

Hiring an Ex-Employee or Ex-Contingent Worker

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

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

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

See: Appointments and the Hiring Process, page 2-2

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

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

See: Rehire before the Final Process Date, page 2-3

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

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

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

Changing the Hire Date

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

To change the hire date:

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

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

See: Appointments and the Hiring Process, page 2-2

3. Save your changes.

Canceling a Hire

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

Note: You cannot cancel a hire if:

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

See: Deleting a Person from the System, page 2-22

To cancel a hire:

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

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

Running the iRecruitment Create Enrollment Process

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

Using this program, you can create enrollment records for:

- An individual person hired for a vacancy.

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

You run this process from the Submit Request window.

To run the iRecruitment Create Enrollment process:

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

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

What's Next

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

People

Person Extra Information Types

You can define as many Extra Information Types as you require to hold information about people. The application provides some predefined person EITs.

Note: To be able to access the predefined EITs, you must link the EIT to your responsibility.

See:

Setting Up Extra Information Types Against a Responsibility, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide

The predefined EIT is:

- Language - Records the languages that an employee knows. DNRD requires this information for legislative transactions.

Contracts

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

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

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

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

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

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

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

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

- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.
- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

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.

Note: For Norway users only: A gender value will be automatically generated based on the person's National Identity number.

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*

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.

For Japanese users: If you have entered the personal number using the self-service pages, then you can view the masked personal number. You cannot update the personal number here. This is a unique identification number and is used for taxation and social insurance purposes and for display on the withholding income tax report, notification of acquisition of insurance qualification.

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.

Note: For Norway and Sweden users only: 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.

For Japanese users only: Enter the country of birth.

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 Norway, 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.

Additional Information: 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. Click the Office Details tab.
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 email address.
6. In the Mail To field, select Home or Office to indicate the person's preferred mail destination.

To enter information for an applicant:

1. Click the Applicant tab.
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 further name information:

1. Click the Further Name tab.
2. Enter one or more honors or degrees (BA, MBA, or JD, for example) that the person has earned.
3. Enter a preferred name (such as a nickname).
4. If the person was previously using a different name, enter the previous last name.
5. Enter the first part of the person's name, such as van der in the Prefix field. For someone whose last name is van der Zee, you can sort by the last word of the name , Zee. If you enter in the Last Name field, the application sorts name under van.
6. Enter the last part of the person's name, such as Junior or II in the Suffix field.

7. Enter the person's middle name.
8. Enter the mother's name of the person. Legislative forms such as visa renewal form require this information.

To enter other information for a person:

1. Click the Other tab.
2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week your employee works.
3. Enter the employee's work availability with your enterprise. You select either the full time or part time work availability for the employees. You need to select Full time option for all the employees.
4. Select the language the person prefers for correspondence. For example, select German if the person prefers to correspond or receive enterprise information such as terms of pension plan in German.

Additional Information: The Correspondence language list includes 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 alternate names:

1. Click the Alternate Name tab to enter name details in a different language, such as English. The passport office uses this information.
2. Enter the person's name in the First Name field.
3. Enter the name of the person's father.
4. Enter the name of the person's grandfather.
5. Enter the person's family name.
6. Enter the name of the person's mother.
7. Save your work.

To enter additional information:

1. Click the Additional Information tab.
2. Select your employee's nationality. This information enables you to calculate your employee's social insurance and other compensation benefits.
3. Select your employee's religion. This information can affect your employee's leave entitlements.
4. Select your employee's former nationality. For example, if your non-Emriti employee is an American citizen and has migrated from Spain, then you enter American as their nationality and Spanish as their previous nationality.
5. Enter the reason for the change in the employee's nationality and the effective date of this change.

Important: The Date of Change and Reason for Change fields are enabled only if you enter a nationality that matches the local nationality associated with the business group and the previous nationality of the employee.

6. Select the education level of the employee. If the employee has more than one education level, then enter the highest or the most recent education level.
7. Indicate whether the organization is providing accommodation and transportation to the employee.
8. Enter the place of birth for the employee in the alternate language.

9. Save your work.

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

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

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

Contacts

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

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

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

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

To delete all records of a person:

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

Entering and Maintaining Documents of Record

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

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

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

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

See: Documents of Record, page 5-2

To search for documents of record:

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

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

3. Click Go to perform the search.

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

To create or maintain documents of record for an individual:

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

See: *Finding a Person Using the Find Person Window, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

For Romanian users: Ensure that you set up the identity documents. See: *Additional Implementation Steps for Romania, Oracle Human Resources Management Systems Implementation Guide*

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

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

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

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

The Create Document of Record page appears.

See: Documents of Record, page 5-2

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

Creating Contract Statuses

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

To create contract statuses:

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

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

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

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

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

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

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.

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

See: Creating Contract Statuses, page 2-24

4. Select the type of contract.
5. Select the status reason of the contract, such as contract still going-on and contract finishing. You must set up status reason using user defined Lookup Type CONTRACT_STATUS_REASON.
6. Enter the description of the contract.
7. Select the document status of the contract, such as pending, opened, printed and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT_STATUS.
8. Enter the date the document status of the contract changed.

Note: The document status is not DateTracked.

9. You can enter start and end reason information of the contract.
10. Enter the duration and the units of the contract, such as days, months, and weeks.

Note: On entering the duration for a fixed-term contract, Oracle HRMS displays the expiry date of the contract. The expiry date is calculated only for the specified period. If required, you can change the expiry date of the contract.

The expiry date field is disabled for the unlimited contract.

11. Enter the profession of the employee.
12. Enter the details about the parties that are involved in the contract.
13. You enter information about the extension of the contract in the extension period, number of extensions, and extension reason fields.
14. Select the employment status. This is used to calculate the compensation benefits for the employee.
15. Save your changes.

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

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

Maintaining Contracts

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

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

Deleting Contracts

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

Note: Contracts cannot be date effectively end dated.

To delete a contract:

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

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.

To enter supervisor information for an employee or contingent worker:

1. Click the Supervisor tab.
2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

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

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

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

To enter probation period and notice information for an employee:

1. Click the Probation and Notice Period tab.
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:

1. Click the Standard Conditions tab.
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.

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

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

1. Click the Miscellaneous tab.
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. Check the Primary check box to update a secondary assignment to Primary.
See: Changing Primary Assignments, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide
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 employment terms for the employee:

1. Click the Employment Terms tab.
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.
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. Alternatively, click 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 special ceiling information for an employee:

1. Click the Special Ceiling tab.

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 salary information for an employee:

1. Click the Salary Information tab.
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.

4. For more information about salary administration, see: Salary Administration, *Oracle HRMS Compensation and Benefits Management Guide*

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

1. Click the Bargaining Unit tab.
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 a billing title for an employee or contingent worker (Oracle Projects only):

1. Click the Project Information tab.

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 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. Click the Supplier tabbed region.
2. Select the name 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.
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 grade ladder information for an employee:

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

1. Click 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 employment details information for an employee:

1. Click the Employment Details tabbed region.
2. Select the employer.
3. Enter the civil registration number for the employee.
4. Enter the social security number for the employee.

Note: Entering social security number is mandatory only if you enter the civil registration number.

5. Enter the contribution date for the employee.
6. Select the most recent qualification of the employee.

Note: When you select the most recent qualification, the application displays the default major for the selected qualification.

Entering Previous Employment Details

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

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

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

To enter previous employment details:

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

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

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

10. To record additional previous employment information required for the social insurance report Form 1, click the Further Information field and enter the following:
 - Reason of termination from the previous employment
 - Date of transfer if the termination reason is transfer between two federal sector organizations
 - Department in which the employee worked with the previous employer
 - Whether the employee received payment from any other sector in the previous employment

Note: For employees who received payment from other sectors, the employer needs to submit the payment details separately.

11. Save your work.

To enter the previous job details:

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

into account for all assignments.

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

8. Click the Extra Information button to open the Previous Job Extra Information window.

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

9. Save your work.

To map previous jobs to an assignment:

1. Select an empty row in the Assignment region or place your cursor within an existing row and click the New button to add a new row.
2. Select an assignment to map to a previous job specified earlier.
3. Select a job to map to the assignment. Selecting a job automatically displays the Start Date and End Date fields as specified for the job in the Previous Job region.
4. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
5. Use the Further Information flexfield to enter further previous job usage details.
6. Save your work.

Entering Payment Methods for an Employee Assignment

For each employee assignment, you can enter one or more payment methods, selecting from the list of valid methods for the employee's payroll.

If you enter multiple methods (for example because the employee is paid from more than one source account), you can enter the proportion of pay for each method and its processing priority. An assignment can have two instances of the same payment method, for example if salary is divided between two bank accounts.

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

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

payments.

To enter payment methods you must:

- Assign the employee to a payroll.
- For third party payment methods, define the payee in the Organization window (using the classification Payee Organization) or the Contact window (using the relationship Payments Recipient).

To enter a personal payment method for remuneration:

1. Set your effective date to the date on which to begin paying the employee by this method.
2. In the Name field, select a payment method.
3. Enter a number in the Priority field to determine the order for Oracle Payroll to use each payment method. It uses the method with the lowest number first.
4. When you select the payment type, the application automatically displays the balance currency and payment currency fields depending on the currency defined at the business group level.
5. Enter either the amount or percentage of the assignment's pay to be paid by this method.

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

For UAE users only: To specify the method of payment for an employee's end of service remuneration or pension, enter the payment method details, click the Further Information field, and then select Yes.

6. For everywhere apart from the UK, if the payment method is a magnetic transfer type, open the Bank Details window for entry of information about the employee's bank account.

To enter a third party payment method:

1. Set your effective date to the date on which to begin making payments using this method.
2. In the Name field, select a third party payment method.

Third party payment methods automatically receive priority 1 (the highest priority) and you cannot change this. You cannot split a third party payment between different payment methods; the Percentage field always displays 100%.

3. In the Payee region, select an organization or a person.

When you select the payee type as organization, the bank details entered at the payee organization level display by default, provided you have not entered any bank details here.

4. Save your work.

You can select this third party payment method in the Payee Details entry value when you enter a deduction to be paid as a third party payment.

Entering Next of Kin and Other Contacts

Use the Contact window to hold information about contacts, for example:

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.
- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

A person entered as a contact can be one, some, or all of the above.

The coverage start date for an employee contact, is the employee hire date or the contact relationship start date, whichever is later. This can be important in benefits processing, where eligibility for certain benefits starts from the start date of a contact relationship.

Creating The Same Contact Relationship More Than Once

You can set up the same relationship more than once between the same two people. However, these relationships must not occur in the same time period. For example, you can set up that Person A married Person B from 01-Jan-1990 to 01-Feb-1991. Person A could then marry Person B again, starting from the 02-Feb-1991. However, you cannot enter that the couple remarried on 01-Jan-1991, as this would mean that they were married twice in the same time period.

Updating a Contact Relationship Start Date to Make it Earlier

You can update the contact relationship start date between two people, creating a supplementary record to cover the additional period.

For example, Person A exists on the application as an employee with a hire date of 01-Apr-1990. Person B exists on the application as a contact, with a creation date of 01-Jun-1990. Person A then marries Person B on 01-May-1990. As the application holds a contact coverage start date of 01-Jun-1990, a new contact record is entered to cover 01-May-1990 and 31-May-1990.

To enter a contact:

1. Do one of the following:
 - Enter the name of a new person.
 - Select from a list of people already entered on the system.
2. If you enter a new person:
 - Enter their gender and date of birth.

For UAE users only: Additionally, you must enter the father, grandfather, and family name.

For Romanian users only: Enter the Numerical Person Code (NPC/FRN) as the identification information.
 - Select the user person type.

You can only select user person types which are set up for the system person type of Other, for example contact.
3. Enter details about the different contacts for your employee in the Contact Relationship fields.
4. **For Japanese users only:** You can view the masked personal number of the employee's dependent if the number has been entered using the self service pages.

To enter contact relationships:

1. Select the contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship.

Note: For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.
3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.
4. Select whether the contact:

- Is the primary contact.
- Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.

- Shares the same residence as the employee.
 - Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
 - Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.
5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

For example, Person A has a relationship type of spouse with Person B. This is given the sequence number of 1. Person A also has a relationship type of father to Person C. This is given the sequence number of 2.

Person A also has a relationship type of emergency contact with Person B. This must also have the sequence number of 1 as a relationship between these two people is already recorded against Person A.

Person B is also an employee and therefore has her own set of contacts recorded against her. She has a relationship type of spouse with Person A. However, this relationship does not have to have the same sequence number as the relationship recorded against Person A, that is, this relationship has a sequence number of 5.

6. Select whether you want to create a mirror relationship and enter the mirror relationship type.

Important: You can only enter a mirror relationship and type when you first create the contact. Once the mirror relationship is saved, the relationships are maintained independently of each other, except for mirror relationships that are created automatically.

Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

Furthermore, if you update a relationship that has had a mirror relationship

automatically created, the mirror is also updated accordingly. For example, if you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

7. Enter further information about the contact if your localization team has setup the configuration of the further information field.

For Spanish users only: Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to calculate the tax reductions the employee may be eligible for. You can also record if the employee is a single parent as this affects the employee's the tax-withholding rate.

For Russian users only: If the contact type is child, indicate whether the child is in full-time education. The application uses this information to calculate the employee's tax reductions. You must also record any disability information for the child contact, as this affects an employee's social security contributions, tax, and leave benefits.

See: Entering Disability Information, page 1-37

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, page 2-17

What Next?

If you want to enter addresses or phones for the contact, choose the Contact Details button.

Running the Contract Expiry Report

Run the Contract Expiry Report to create a list of all the contracts due to expire for a selected period.

You run the Contract Expiry Report from the Submit Request window.

To run the contract report:

1. Select UAE Contract Expiry Report in the Name field
2. In the Parameters window, enter the date on which you want to generate the report. The report will list the contracts that expire in the specified time period starting from this date.
3. Enter the organization name and hierarchy for which you want to view the information.

4. Enter the version of the organization hierarchy.
5. Enter the period within which the contract expires and a duration such as months, years, and weeks. For example, if you enter 6 as the expiry period and months as duration, the report lists the contracts that expire in six months starting from the report generation date.
6. Click Submit.

Using People Management Templates

Template Windows User Interface

The following is an introduction to the windows that have been created from the example predefined templates. If you have been using the standard Oracle HRMS windows such as the People window, there are additional features that you need to be aware of:

- Configurable Find window
- Configurable Summary and Maintenance windows
- Graphical navigator
- Checklist tab
- Graphical timeline bar
- Actions button and Notify button

Find Window

The Find window enables you to perform detailed queries to find a person or group of people you need to work with. You can enter queries using basic search criteria such as name. You can also use advanced criteria such as grade ranges, or combinations of criteria (for example Job is Sales Manager AND Organization is not Northern Sales).

The Find window expands to display the results of the find when you choose the Find button.

To edit a person's details, select the record and choose the Show Details button. You can save the query, results, or a selection of the results into folders so that you can access those people again without performing the search again. See: *Saving Search Criteria or Search Results to a Folder, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* for more information.

The Effective Date field must contain a value. This date controls which values are displayed in lists of values. It can differ from the date set in the calendar. However, when you choose the Find button, the effective date is set to what was entered in the Find window. If you do not enter a date, the current effective date from the calendar is used.

Important: The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you

cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

See: Finding a Person or Group of People, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

Summary Window

The Summary window enables you to browse and select records from the database using the Data Organizer, which is the navigator on the left hand side of the window. You can select a Person, Assignment, or Application in the Data Organizer to see a summary of information in the Details region. This window only enables you to make changes to the checklist information on the Checklist tab. You cannot edit a person's details using this window.

Data Organizer

There are three root nodes in the Data Organizer:

- People By Name (or People by Job, or People by Organization depending on what is selected in the View By poplist).
- Personal Folders, which you have created for your own use only.
- Public Folders, which have been created from the Find window and made public for everyone to see

People By Name, Job or Organization

By expanding People by Name, you can see folders in alphabetical order containing all the people in your security profile. You can order the information in this branch by name, job, or organization.

Personal Folders

There are two types of Personal folders:

- Search Criteria
Search Criteria folders contain a query. They are dynamic. When you open the folder, the query is performed. This saves you re-entering commonly used queries in the Find window each time you need to use them.
- Group
Group folders are static. They contain the groups of people you most commonly need to work with. You can create a Group folder by saving search results or

pasting people in from other folders. People in a Group folder are sorted by name.

See: Saving Search Criteria or Search Results to a Folders, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: Managing Your Group Folders, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

Public Folders

Public folders are Search Criteria folders that have been made available to all users.

Checklist Tab

The Summary and Maintenance windows can contain a Checklist tab. This contains checklist items set up by your system administrator to enable you to record the progress of tasks. For example, there might be a check to record that a job offer has been issued, along with a status and date.

Important: The checklist is only a visual reference and does not perform any actions.

Actions Button

The Actions button on the Summary and Maintenance window enables you to perform tasks such as Activate Assignment or Hire Into Job.

The list of actions available depends upon the person type and their assignment status. For example, if you select an employee (not their assignment), the actions available are:

- Apply for Internal Vacancy
- New Assignment

If you select a contingent worker (not their assignment), an available action is:

- New Contingent Worker Assignment

If you select an employee or contingent worker assignment, available actions include:

- Make Primary Assignment
- Activate Assignment
- Suspend Assignment

If you select a secondary employee assignment, additional actions are available:

- Terminate Secondary Employee Assignment
- End Secondary Employee Assignment

Notify Button

The Notify button on the Summary and Maintenance windows enables you to send workflow notifications to other people. For example, when hiring a new person, you might need to send notifications to security to organize a new security card and to inform the system administrator to set up a new account. You select the notification message and the person or role to send it to. You can preview the notification before you send it.

The notification emails are displayed in the Workflow Notification Mailer. See Oracle Workflow for more information.

Creating New Records

If you select People By Name, Job or Organization, you can also create new records. For example, you can create a new employee or new applicant depending on how the template restrictions have been set up. You can choose New from the toolbar or from the right mouse menu.

Maintenance Window

The Maintenance window enables you to enter and update information. The Maintenance window can contain tabbed regions each holding logical groups of information. Choose a tab to view the information in it. This window also contains a timeline bar that you can use to navigate to specific points in time such as a future date or the date of the last change to a record.

Correction or Update

The template window makes datetracked changes on a day-to-day basis in the same way as other datetracked windows. You can make datetracked changes to any of the fields on the window by using the option buttons to choose whether to update or correct information.

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

If you are trying to update the record and the system will only let you make a correction, check whether your effective date is the date of the last change. You cannot record two updates for one day, so the system forces you to correct the last update.

Important: This interface only enables you to update or correct the latest information about a person or assignment. If there is a future change (after your effective date) to any personal information, all personal information fields are greyed out. Similarly, if there is a future change to any assignment information, all assignment fields are greyed

out. To make complex retroactive changes to history, you must use the People and Assignment windows, where all the DateTrack modes are available for corrections.

Using the Timeline Bar

The Maintenance window contains a graphical timeline bar. The timeline is color coded to help you see when changes happened. You can move to a new date either by scrolling forwards or backwards using the arrow buttons or by entering a date and choosing the Go button. You can also click in the DateTrack timeline to move forwards or backwards in time.

You can choose to view specific changes on the timeline by choosing from the poplist next to the timeline bar. For example, you can choose to view changes only for Last name. You can then use the arrow buttons to navigate to the first, previous, next, or last change made to this field.

Note: The fields listed in the poplist are defined by your system administrator in the template.

There can be a number of types of information included in the Maintenance window, depending on the template design, for example, personal information, assignment information, tax information. These types may have been updated at different times, so the date of the last update can vary depending on the type of information.

If a field is listed in the poplist next to the timeline bar, you can also view its DateTrack history by right-clicking on the field and choosing DateTrack History.

Accessing More Field Information Using the Right Mouse Menu

Your system administrator may have enabled the display of more information for some fields. For example, on the Job field you might be able to display the normal working conditions. To view this information, right-click in the field and choose the appropriate option from the right mouse menu.

Entering a New Employee

Two templates are provided in Oracle HRMS that enable you to enter employees. These are:

- **Enter Employees** - This enables users such as data entry clerks to enter new employees onto the system. It only uses the Maintain window and includes all the fields required to set up an employee.
- **Maintain Employees** - This enables users to enter employees onto the system, and also to maintain existing records. It uses the Find, Summary, and Maintain

windows to enable users to control a large amount of information about employees and their assignments.

Your system administrator will have set up these templates according to the needs of your enterprise and will have restricted your access according to the role you have to perform.

To enter a new employee using the Enter Employees template:

Using the Enter Employee template, you can enter the following details:

- Employee details
- Alternate names
- Additional information
- Employment details

Employee Details:

1. Click the Employee Details tab.
2. If the New window is not displayed, click the New icon in the toolbar. Select New Employee.
3. Enter the personal details for the new employee. You must enter:
 - First name
 - Family name
 - Gender
 - Person type
 - Employee number and hire date

All other personal information is optional.

4. Enter the assignment details for the new employee. You must enter:
 - Assignment status
 - Organization (this defaults to the current business group)

You can also enter other employment information, such as, job or position, grade, supervisor, and payroll details.

5. Save your work.

Alternate Names:

1. Click the Additional Name Details tab and enter the alternate name details.
2. Save your work.

Additional Information:

1. Click the Additional Information tab.
2. Select the employee's nationality. This information enables you to calculate the employee's social insurance and other compensation benefits.
3. Select the employee's religion. This information can affect your employee's leave entitlements.
4. Select the employee's former nationality. For example, if your non-Emriti employee is an American citizen, and has migrated from Spain, then you enter American as their nationality and Spanish as their previous nationality.
5. Enter the reason for change in the employee's nationality and the date of this change.

Note: The Date of Change and Reason for Change fields are enabled only if you enter a nationality that matches the local nationality associated with the business group and the previous nationality for the employee.

6. Select the education level of the employee. If the employee has more than one qualifications, then enter the highest or the most recent education level.
7. Indicate whether the organization is providing accommodation and transportation to the employee.
8. Enter the place of birth for the employee in the alternate language.
9. Save your work.

Employment Details:

1. Click the Employment Details tab.
2. Select the employer.

3. Enter the civil registration number for the employee.
4. Enter a valid social security number for the employee.

Note: Entering social security number is mandatory only if you enter the civil registration number.

5. Enter the contribution date for the employee.
6. Select the most recent qualification of the employee.

Note: When you select the most recent qualification, the application displays the default major for the selected qualification.

To enter a new employee using the Maintain Employees template:

1. Display the Summary window of the Maintaining Employees form.
2. Click the New icon in the toolbar or right-click People By Name in the Data Organizer and select New from the shortcut menu.
3. Select New Employee and click OK.
4. The Personal tab is displayed for you to start entering information about the employee.
5. Set your effective date to the date when you want the assignment to begin, such as the hire date. You can enter a date in the Date field next to the timeline bar and click Go.
6. Enter personal information for the employee. You must enter:
 - Name
 - Person type
 - Gender
 - Nationality

All other personal information is optional.

7. Click the Communication tab to enter contact information, such as addresses and phone numbers.
8. Enter application information in the Assignment, Compensation, and Schedule

tabs, as required.

9. Click the Additional Name Details tab to enter the alternate name details of the employee.
10. Enter the employment details, such as employer name, civil registration number, and latest qualification, in the Employment Details tab.
11. Save your work.
12. If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details.

Hiring Applicants

The Hiring Applicants template enables you to enter an applicant, track the applicant up to the point of hire, and hire the applicant. You can use the Hiring Applicants window for the complete hiring process. You can access both employees and applicants in this template. This enables you to hire applicants and to process internal applicants.

To enter an applicant:

1. Display the Summary window of the Hire Applicants form.
2. Click the New icon in the toolbar.
3. Select New Applicant and click OK.
4. Set your effective date to the date when you want the assignment to begin, such as the hire date. You can enter a date in the Date field next to the timeline bar and click Go.
5. Enter personal information for the employee. You must enter:
 - Name
 - Family
 - Applicant number

All other personal information is optional.

6. Click the Communication tab to enter contact information, such as addresses and phone numbers.

7. Enter application information in the Assignment, Compensation, and Schedule tabs, as required.
8. Click the Additional Name Details tab to enter the alternate name details of the applicant.
9. Click the Pre Offer Checks tab to enter the status of pre-offer checks, such as checking references and work permit of the applicant.
10. If the applicant is already an employee, Oracle HRMS presents the question 'Do you want to update the primary assignment'. You can select one of the following options:
 - Yes. Make existing assignment secondary:

The application makes the new applicant assignment the employee primary assignment. The existing employee primary assignment becomes the secondary assignment.
 - Yes. Merge with existing primary assignment:

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

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

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

Compensation and Benefits Management

General Compensation Structures

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

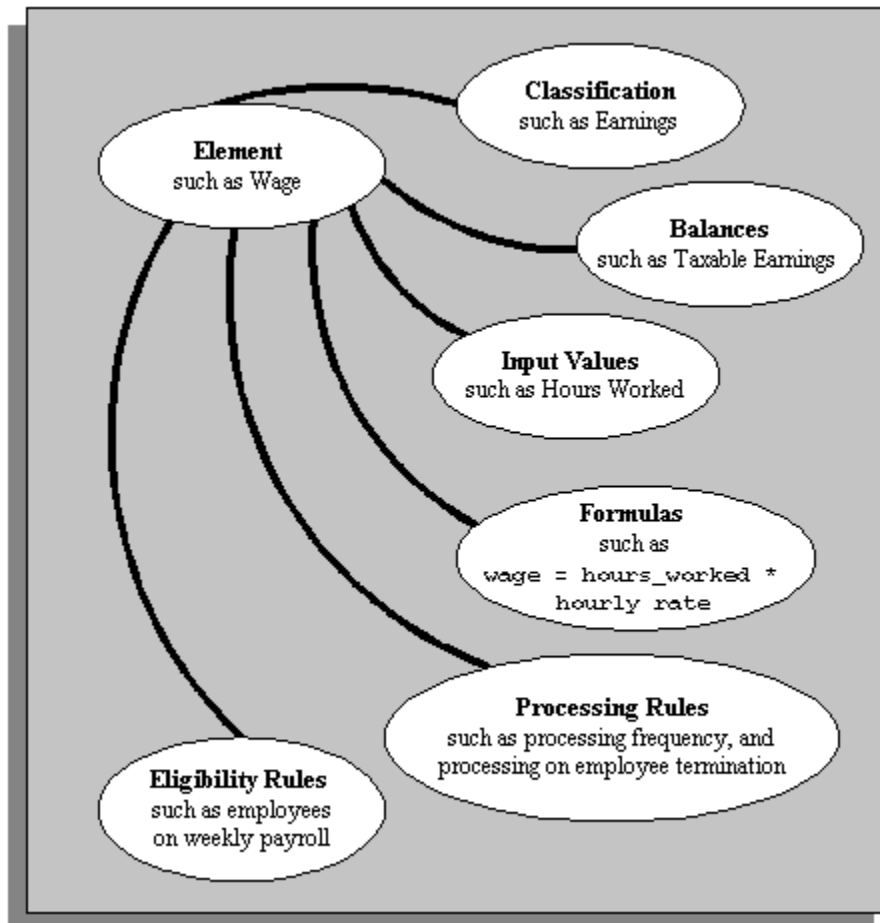
In certain legislations, including North America and the UK, Oracle Payroll users can initiate earnings and deductions, and the system generates the elements you require, along with balances, balance feeds, and formulas. The method of initiating earnings and deductions depends on your localization. Typically 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.

Predefined Elements

The following table lists the predefined elements provided with Oracle HRMS for UAE.

Element Name	Description
Social Insurance	Social Insurance
Contributory Salary	Contributory Salary
Contributory Salary Override	Contributory Salary Override
Contributory Salary Adjustment	Contributory Salary Adjustment
Employee Social Insurance	Employee Social Insurance
Employee Social Insurance Adjustment	Employee Social Insurance Adjustment
Employer Social Insurance	Employer Social Insurance
Employee Social Insurance Arrears	Employee Social Insurance Arrears
Employee Social Insurance Arrears Payment	Employee Social Insurance Arrears Payment
Social Insurance Adjustment	Social Insurance Adjustment
Employer Social Insurance Adjustment	Employer Social Insurance Adjustment
Gratuity	Gratuity
Gratuity Accrual Adjustment	Gratuity Accrual Adjustment
Gratuity Accrued	Gratuity Accrued
Gratuity Payment	Gratuity Payment
Leave Without Pay	Leave Without Pay
Loan Recovery	Loan Recovery
Loan Repayment Information	Loan Repayment Information

Element Name	Description
Loan Outstanding Information	Loan Outstanding Information
Retro Contributory Salary	Retro Contributory Salary
Retro Employee Social Insurance	Retro Employee Social Insurance
Retro Employer Social Insurance	Retro Employer Social Insurance
Retro Employer Social Insurance Adjustment	Retro Employer Social Insurance Adjustment
Retro Employee Social Insurance Adjustment	Retro Employee Social Insurance Adjustment
Retro Employee Social Insurance Arrears	Retro Employee Social Insurance Arrears

Survey of the Classifications

The survey of the classifications identifies:

The function of elements within each primary classification, page 3-6

The processing priority range, default priority, and cost type for each classification, page 3-7

A list of the predefined secondary classifications within each primary classification, page 3-8

Primary Element Classifications

The survey of classifications identifies a list of classifications for predefined elements.

Classification	Meaning
Balance Initialization	This is only applicable to element types used in balance initialization.
Information	Information
Direct Payment	Direct Payment
Absence	Absence

Classification	Meaning
Earnings	Earnings
Employer Charges	Employer Charges
Pre Social Insurance Deductions	Pre Social Insurance Deductions
Social Insurance	Social Insurance
Voluntary Deductions	Voluntary Deductions
Termination Payments	Termination Payments
Involuntary Deductions	Involuntary Deductions

Primary Classification Processing Properties and Cost Types

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

Primary Classification	Priority Range	Default Priority	Cost Type(D= Debit, C=Credit)
Balance Initialization	0-0	0	Null
Information	1-10000	500	D
Direct Payment	1001-1500	1250 1	D
Absence	1501-2000	750	D
Earnings	2001-3000	2500	D
Employer Charges	3001-7000	3500	D
Termination Payments	4001-5000	4500	D
Pre Social Insurance Deductions	5001-6000	5500	C

Primary Classification	Priority Range	Default Priority	Cost Type(D= Debit, C=Credit)
Social Insurance	6001-6500	6250	C
Voluntary Deductions	7101-8000	7550	C
Involuntary Deductions	8101-9000	8550	C

Predefined Elements Classification

This table shows the predefined secondary classifications that the implementers use to create new elements. You cannot update or delete these predefined classifications.

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

Primary Classification	Secondary Classifications	Default
Earnings	Subject to Unpaid Leave : Earnings	N
	Attachable Earnings	Y
	Subject To Social Insurance: Earnings	N
Information	Subject to Unpaid Leave : Information	N
	Subject to Social Insurance : Information	N
Absence	Subject to Social Insurance : Absence	N
Pre Social Insurance Deductions	Attachable Pre Social Insurance	Y

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, page 3-19
- For Norway:
 - For each element, you must enter the End of Year codes using the list of values provided in the Further Information field.
 - You must set up an extra information type (EIT) element for a-melding reporting.

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, *Oracle Compensation and Benefits Management Guide*

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.

Additional Resources: For more information about using the payslip modeler, see the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Payslip Modeling (UK)*.

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.

Other Payroll Earnings and Deductions

Proration

Oracle HRMS enables you to calculate proportionate earnings amounts whenever payroll-relevant data is changed during a payroll period, for example, if an employee joins or leaves the company during a payroll period or if an employee's pay grade changes during a payroll period. Oracle HRMS performs a proration calculation to ensure that the employees' earnings are calculated correctly after taking account of these changes.

If you want to prorate an earnings element, such as basic salary, assign a proration **event group** to it. You can create an event group to group together all proration points (events) that affect an employee's salary, for example. The events might include:

- An employee joining or leaving the enterprise
- Changes to pay grades or grade rates
- Changes to pay scales and progression points
- Changes to hourly or annual pay rates
- Changes to working hours
- Changes to allowances or deductions

You then process the element using a formula that handles proration. You can either use a payroll formula that handles proration, or create a separate proration formula that runs after the main payroll formula only in payroll periods when a proration event occurs.

See: Writing Proration Formulas, *Oracle HRMS Fast Formula User Guide*

Element Design Wizard

Oracle HRMS provides a browser-based wizard, Element Design Wizard, through which you can define the following commonly used earnings and deductions elements:

- Children Social Allowance (Earnings)
- Cost of Living Allowance (Earnings)
- Grade Allowance (Earnings)
- Hourly Salary (Earnings)

- Housing Allowance (Earnings)
- Overtime Allowance (Earnings)
- Shift Allowance (Earnings)
- Social Allowance (Earnings)
- Transport Allowance (Earnings)
- Unpaid Leave (Absence)
- Flat amount elements - for which you can define a flat amount as the element value
- Percentage of basic salary elements - for which you can define a percentage of the basic salary as the element value

The Element Design wizard provides an easy, step-to-step guide to define elements, thus making the element creation process quick and error free.

You can select any of the following as the classification for your element:

- Absence
- Earnings

After you select the element classification, the wizard displays the list of secondary classifications available for the selected element.

Oracle HRMS provides predefined templates to create the above-mentioned elements. Each template applies a different calculation rule for the element.

When you define an element through the Element Design wizard, it automatically creates the following attributes for the element:

- Input Values
- Balances
- Fast Formulas
- Formula results

Setting Up Proration or Retro-Notification

Follow these steps if you want to set up your system for proration or retro-notification.

To complete basic setup for proration or retro-notification:

1. In the Table Event Updates window, ensure that the events you want to use are already included in the required tables. Enter the table name. The lower half of the screen displays the fields that trigger proration or retro-notification if their values are changed.

If the table has already been defined but the required event is missing, create either an Update, Delete, or Insert event and enter the table row or column to which the event refers. You can only enter a column name if you are creating an Update event. Select the change type defined by the event.

Note: The Table Event Update window is not available in all localizations.

See: Making Table Event Updates, *Oracle HRMS Payroll Processing Management Guide*

2. If the events you require have not been defined in the Table Event Update window, set up the dynamic triggers for proration or retro-notification in the Dynamic Trigger Generation window. The triggers you need depend on the method you use to compensate your employees. For example, the tables required for compensation using Salary Administration are different from those required for compensation using pay grades. The tables you are likely to use are:

- PER_ALL_ASSIGNMENTS_F
- PER_ALL_PEOPLE_F
- PAY_ELEMENT_ENTRIES_F
- PAY_ELEMENT_ENTRY_VALUES_F
- PER_SPINAL_POINT_PLACEMENTS_F
- PER_GRADE_RULES_F

See: Defining Dynamic Triggers, *Oracle HRMS Payroll Processing Management Guide*

Note: French users: Ensure you enable the dynamic triggers for PAY_ELEMENT_ENTRIES_F and PER_ALL_ASSIGNMENTS_F.

3. Create an event group for your proration or retro-notification events. You must create the event groups before you can create your elements.

See: Defining Event Groups, page 3-23

4. Select the Incident Register functional area in the Functional Area Maintenance window. Make sure that your triggers are included in this functional area. If your triggers are not included, insert them.

You must also activate the triggers according to legislation or business group. For more information, see: *Grouping Dynamic Triggers into Legislative Functional Areas, Oracle HRMS Payroll Processing Management Guide*

Setup for retro-notification should now be complete, meaning you can proceed to running the appropriate report. However, if you are setting up proration continue with the next steps.

See: *Running the Retro-Notifications Report, Oracle HRMS Payroll Processing Management Guide*

To set up the elements for proration:

1. Create your proration element. **US and Mexico users:** Initiate the earnings type or deduction, then query the generated element in the Element window to add a proration group and, optionally, a proration formula.
 - Make sure that you select a proration group for each element
 - Select a proration formula if you are using a separate proration formula to handle proration events (rather than enabling your payroll formula to handle proration)
 - Select Actual Termination as the termination processing rule
2. Define the input values for the element. For example, if you were using the sample payroll formulas that are enabled for proration, you would create the following input values:
 - Amount for a salary management element
 - Date Worked for a spinal point/pay scale element
 - Annual Deduction for a deduction or allowance

See: *Defining an Element's Input Values, Oracle HRMS Compensation and Benefits Management Guide*

3. Link the element to a specific payroll or payrolls. If you want the element to be used automatically each time the payroll is assigned, select the Standard check box. If you do not select this check box, you must enter the element for each assignment.

See: *Defining Element Links, Oracle HRMS Compensation and Benefits Management Guide*

To create the formula:

1. Check that the database items to be used in your formula are available. If the required database items are not available, create them.
2. Create the proration formula or write a payroll formula that is enabled for proration.

To create a proration formula, see: *Writing Proration Formulas, Oracle HRMS FastFormula User Guide*

UK users: For examples of payroll formulas enabled for proration, see: *Sample Payroll Formulas Enabled for Proration, Oracle HRMS FastFormula User Guide*

For more information on writing formulas, see: *Writing or Editing a Formula, Oracle HRMS FastFormula User Guide* and *Writing Payroll Formulas for Elements, Oracle HRMS FastFormula User Guide*

3. Link the formula to your element in the Formula Result Rules window.

See: *Defining Formula Processing and Result Rules, Oracle HRMS FastFormula User Guide*

4. Attach the element to the salary basis if the salary is relevant for proration. Select the input value you created (such as Amount) in the Input Value Name field of the Salary Basis window.

See: *Defining a Salary Basis, Oracle HRMS Compensation and Benefits Management Guide*

Defining Event Groups

You define an event group from the Table Event Group window. You use an event group to group together all proration or retro-notification points that affect an employee's salary, such as salary increases.

To define an event group:

1. Enter a name for your event group.
2. Select one of the following event group types:
 - Proration for a proration event group
 - Retro for a retro-notification event group
3. Select the proration or retro period.
4. Save your entries.

5. Select the events that can trigger proration or retro-notification in the Datetracked Events region. To do this, select the update type, the table containing the data, and the table column.
6. Save your work.

Loans

Loan Processing

If an employee has taken an approved loan, you can use Oracle HRMS to process the loan recovery. You can provide information about the type of loan, the repayable amount and the number of installments in which employees complete the repayment.

If you enter loan details for an employee using the Loan Recovery element, Oracle Payroll uses a predefined formula to deduct the loan amount and maintain the Loan Outstanding balance.

You can use the following predefined elements for loan recovery process:

- Loan Recovery - To hold the information for loan processing
- Loan Repayment Information - To hold information used internally for loan processing
- Loan Outstanding Information - To hold information about outstanding loan

Oracle HRMS provides three balances to hold loan information:

- Loan repaid balance - To hold the loan amount that the employee repays
- Loan installments paid - To hold the total number of installments that the employee pays
- Loan outstanding to hold the outstanding loan amount

Processing Loans

To process the loan recovery amount, you must complete several steps.

1. Attach the element Loan Recovery to the employee, who has taken the loan, to calculate the loan repayment amount.

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

2. Enter the details of loan repayment, such as Loan Type, Loan Amount, Approved Date, Repayment Start Date, Monthly Repayment, and Installments.

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

Additional Information: You must enter values either for Monthly Repayment Amount or Total Number of Installments. If you enter both these values, the loan processing formula will use the monthly repayment amount to calculate the repayment amount.

3. For any particular month, if you want to put the loan deduction on hold for an employee for any reason, then set Hold Amortization to Yes.
4. Run the payroll process.

See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

Payroll Management

Payroll Payment and Distributions Overview

Using Oracle HRMS you can define payment methods for your enterprise and define any rules for validating or processing the distribution of pay.

Payroll Payment and Distributions in Oracle HRMS

You provide for payment and distribution by defining payment methods for your enterprise and then specifying which of these organizational payment methods are valid for the payrolls that you create. This enables you to set up a flexible pattern of payment in which you can pay individual employees by a single payment method, or by a combination of valid payment methods.

Key Concepts

To enable you to set up payment and distributions correctly, you need to understand these key concepts:

- Payment methods for your enterprise, page 4-2
- Cash Management and Oracle Payroll, page 4-4

Reporting on Payroll Payment and Distributions

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

Payment and Distributions

Payment Methods for Your Enterprise

You can define as many payment methods as you require for your enterprise. When you create a payroll, you can select which of these methods are valid for employees assigned to that payroll. You select one method as the default method for the payroll. To choose the payment methods for an individual employee, use the Personal Payment Method window. If you do not enter any personal payment methods, the employee is paid by the default method for the payroll.

Payment Methods and Payment Types

Any payment method that you define must belong to one of the payment method types that your enterprise supports. The most common payment method types are:

- Direct Deposit
- Check/Cheque
- Cash

Your particular enterprise may support a different range of types. Additionally, there can be local variations within each type. For example, the direct deposit type is NACHA in the U.S., BACS in the U.K. and BECS in Australia.

However, in all enterprises you can define multiple payment methods for the same payment method type.

You can also define payment methods for third party payments, such as court-ordered wage attachments. Third party payments are always made by cheque/check, so methods for these payments must have the type Cheque (Check).

Valid Payment Methods

A valid payment method is a payment method that:

- Belongs to one of the payment method types approved in your enterprise
For example, payments by cash are not allowed in some enterprises.
- Is an accepted local variation for your enterprise
For example, U.S. direct deposit payments can be made only by NACHA transfer and not by BACS

Payment Method Types: Required Information

When you define a payment method, always include the required information for the payment method type:

Payment Method Type	Required Information
Check/Cheque	<p>Source bank account name and number.</p> <p>The source account is the account from which your enterprise makes the payment.</p> <p>The payee account details are only known to the payee. You do not record them in Oracle Payroll.</p>
Direct Deposit	<p>Source and destination account details.</p> <p>The destination account is the payee account.</p> <p>Because payments transfer directly to a named account, Oracle Payroll can make direct deposits only if you supply source and destination account details.</p>
Cash	<p>Coinage analysis.</p> <p>If your enterprise makes cash payments, you use the coinage analysis to specify the denominations of notes and coins in which employees receive payment.</p>

Payment Methods and Employees

Each employee must have at least one valid payment method, but you can also use multiple payment methods for an individual employee.

Payment Methods and Source Bank Accounts

When you pay employees from separate source accounts, each source account must have a separate payment method. You cannot share a payment method across several different source bank accounts. However, you can create multiple payment methods for the same source bank account.

Payment Methods: Summary

Observe these guidelines when defining your payment methods:

- Each payroll must have at least one valid payment method.
- Each payroll must have a default payment method.
- Each employee must have at least one valid payment method.
- Each source account must have at least one valid payment method.

Your sequence for defining payment methods and attaching them to a payroll is:

1. Define your organizational payment methods.
See: Defining a Payment Method, page 4-6
2. Link your organizational payment methods to a payroll.
See: Defining a Payroll, *Oracle HRMS Payroll Processing Management Guide*

Cash Management and Oracle Payroll

Oracle Cash Management manages and controls the enterprise cash cycle. The Cash Management auto reconciliation matches Oracle Payroll against bank statement lines if the transaction meets the following criteria:

- The Oracle Payroll payment number matches the statement line payment number.
- The Oracle Payroll payment amount matches the statement line payment amount.

Cash Management accesses a view of payments generated by Oracle Payroll and compares it against the information on the bank statement. This process generates error messages on mismatched transactions.

Each time a new payment method is created, the bank details transfer to Oracle Accounts Payable. When defining a payment method, you must enter the GL Cash Account field to work with Cash Management.

Important: Because payment method details are passed to Accounts Payable from Payroll, it is important to ensure that you are entering this information correctly. If you inadvertently enter incorrect details, you could end up with reconciliation issues later.

Cash Management is available only for the Payroll payment methods of checks/cheques and electronic fund transfers (such as NACHA in the U.S, Direct Deposit in India).

Important: If you want to use Cash Management fully, you must install Oracle Accounts Payable and Oracle Accounts Receivable due to the interdependency of the products. All accounting functions take place in

Accounts Payable and Accounts Receivable, and Cash Management provides the engine for reconciliation and forecast.

Payslip Modeler Overview

The Payslip Modeler enables employees and payroll administrators to model a paycheck/payslip by running a mock payroll run.

Employees can use this feature to make decisions regarding various benefit options and savings using the estimates. They can check their estimated take-home pay based on an upcoming bonus or tax refunds.

Payroll administrators can use this feature to answer employee queries or to perform what-if analysis.

The terms Payslip Modeler/Paycheck Modeler refer to the same functionality. The application displays these terms depending on your localization.

The Payslip Modeler is not available by default for your localization. Contact your system administrator to check if it is available for your localization.

For more information, see *Using Payslip Modeler, Oracle Self Service Human Resources Deploy Self-Service Capability Guide*

See: Setting up Payslip Modeler, page 4-20

Setting Up Integration of Cash Management with Oracle Payroll for EFT Reconciliation

For setup steps to integrate Cash Management with Oracle Payroll, see the Oracle Cash Management User Guide.

Additional Steps to reconcile EFT payments for the UAE legislation:

Oracle HRMS provides a reconciliation function, `pay_ae_tran_identifiers.get_eft_recon_data` for AE EFT Payments (AE Direct Deposit AED). This function is predefined in the `RECONCILIATION_FUNCTION` column of the `PAY_PAYMENT_TYPES` table. This function retrieves your Unique Identifier for the bank statements.

To specify your own Unique Identifier:

1. Add the following data to the lookup `PAYMENT_TRX_CONC_IDENTS`
 - Code: AE Direct Deposit AED
 - Meaning: <Your Unique Identifier>
 - Enabled: Y

2. Create your reconciliation function. For details on how to write a reconciliation function, refer to *Creating a Reconciliation Function on My Oracle Support*, with note ID 949409.1.
3. Use the HRMS Manager responsibility and navigate to the Further Payment Method Info flexfield (Payroll > Payment Methods > Others). Specify the new function name in the Reconciliation Function segment of the flexfield.

Defining a Payment Method

Use the Organizational Payment Method window to define payment methods for your enterprise.

From this window, you:

- Supply the name and starting date of your payment method.
- Enter the details of the source bank account from which your enterprise makes the payment.
- Specify the General Ledger (GL) accounts that hold reconciliation and error details for the payment method.
- Handle costing for the payment method. For example, you can specify whether to transfer the costs to GL and whether costing applies to cleared payments only, uncleared payments only, or a combination of cleared and uncleared payments.
- Confirm that your source bank account in Oracle Payroll is the same bank account that Oracle Cash Management uses to clear your payments. This confirmation assures you that you are operating with a single consistent bank account rather than with duplicate accounts that introduce accounting errors.

To define a payment method:

Supply a name and start date for your payment method

1. Set your effective date so that it reflects the date when you want to begin using this payment method.
2. Enter a name for the payment method, and select the payment method type.
For a third-party payment method, always select the type Check/Cheque. The default currency for your business group appears automatically.
3. If an alternative currency exists for your payment method, select it.
4. If your payment method controls payments to a third party such as a benefits carrier or garnishment receiver, check the Third Party Payment box.

Enter the source bank details for your payment method

5. Navigate to the Source Bank tab. The Country for your source bank account appears automatically.
6. Enter the Bank Details field to open the Bank Details window. Enter information about the account from which your enterprise intends to make payments.

If you are using Cash Management, include the following information:

- Account Name
- Account Type
- Account Number
- Bank Name: If this already exists, enter the name exactly as it appears in Accounts Payable.
- Bank Branch: If this already exists, enter the name exactly as it appears in Accounts Payable.

Italy Users: You can enter the Bank Name, Bank Location, Account Number, and Account Name. The IBAN Account displays by default.

Ensure that you enter any additional bank details that are specific to your enterprise. For example, bank details for U.S. payment methods always require a transit code. The transit code, or transit routing number is the nine-digit number that identifies the financial institution. If the transit code is incorrect, the funds will not be posted to the account.

South Africa Users: Enter the account holder's name and indicate whether the account holder relationship is joint, own, or third party.

Belgium, Denmark, Finland, France, Germany, Hungary, Ireland, the Netherlands, Norway, Poland, Russia, Spain, and Sweden users: Enter the Bank Identifier Code (BIC) and International Bank Account Number (IBAN) in the Bank Identifier Code and the IBAN Number fields, respectively. Note that you must enter at least one of the account numbers, that is, either the International Bank Account Number (IBAN) or the Account Number. If you enter the Account Number, then the Bank Code and Branch Code fields are mandatory.

Warning: Always review the account setup for Oracle Accounts Payable before you define the account in Oracle Payroll. The details for your Payroll account must exactly match the account details in Accounts Payable. Otherwise, Accounts Payable creates an extra account with marginally different details. This duplicate account introduces errors when you reconcile payments between Payroll and Accounts Payable.

Specify what type of payments to cost for this payment method

7. Navigate to the Costing tab. Each check box indicates a particular type of payment. Check the boxes for each type of payment that you want to cost. When you subsequently run the Costing of Payment process, it costs each type of payment as you have indicated. The entries that you make for an individual check box can imply automatic checking of related boxes. Your choices are:
 - **Cost Payment:** Check this box to specify that you want to cost only uncleared payments for this payment method.
 - **Cost Cleared Payment:** Check this box to specify that you want to cost only cleared payments for this payment method. If you check this box, the Cost Payment box is also checked by default.
 - **Cost Cleared Voided Payment only:** Check this box to specify that you want to cost any voided payments that have also been cleared by Oracle Cash Management. If you check this box, the Cost Payment and Cost Cleared Payment boxes are also checked by default.
 - **Exclude External/Manual Payment:** Check this box to exclude any external/manual payments from costing. This exclusion is useful if you are using this payment method as a dummy payment method to cancel a previous payment, or if you are making a payment by cash. If you check this box, the Cost Payment box is also checked by default.
 - **Transfer to GL:** Check this box to specify that costed payments should transfer to General Ledger. If you check this box, the Cost Payment box is also checked by default.

Specify the GL accounts for this payment method

8. Navigate to the General Ledger tab.
9. Select Ledger to indicate the ledger to use if you intend to reconcile payments using Oracle Cash Management.
10. Select the GL Control Account.
11. Select GL Cash Account to indicate which cash account to use for the reconciliation of payments.

The entry for Description appears automatically by default, depending on what you enter in the GL Cash Account details.
12. Select the Cash Clearing Account.
13. Select the Error Account.

When you first specify the GL accounts for a bank account, these then become the default GL accounts for any other payment methods that use the same bank account. The defaults apply for all new payment methods using the bank account. They also apply retrospectively for any existing payment methods that were already using the same account. However, you can override these defaults by entering your preferred GL accounts on the General Ledger tab.

At this point, check that your Payroll setup and Cash Management setup are fully integrated.

Confirm that you can reconcile payments in Cash Management

14. Navigate to the Cash Management tab. You cannot change the information on this tab, but you can confirm that your GL accounts are correct.
15. To confirm that Oracle Cash Management is operating with the same source bank account that you are using in Oracle Payroll, view the check box. If the box is checked, then Oracle Cash Management holds the bank account for this payment method, and you can reconcile payments knowing that you are using an identical account in Payroll, and in Cash Management.

However, if the box is not checked, this indicates that Oracle Cash Management does not hold the details for your Payroll account. This may indicate that duplicate accounts exist and you should exercise caution when you reconcile your payments.

Map the Payee organization to make third party payments

16. Click the Payees button.
17. The Payees button is enabled only when the following conditions are met:
 - The Third Party Prepayments functionality has been enabled for your legislation.
 - The profile option PAY: Use Third Party PrePayments Rollup is set to Yes using the System Profile Values window for all Payment Methods with Third Party Payment check box selected. See *User Profiles, Oracle HRMS Configuring, Reporting, and System Administration Guide* for more information.
18. In the Payee Organization window, enter any number of Third Party Payee Organization with different bank account details.
19. You can specify the payment period on which the payment becomes eligible to be paid, in Payment Period field, thus deferring the payments from each period until the payments are paid.
20. When you enter an organization with multiple bank accounts, enter the Overriding Balance to distinguish the amounts to be paid into each account.

Enter further information for the payment method

21. Enter further information to determine how to process this payment method. Click in the Further Information field to see the range of further information for your enterprise.

For Japan users only: Enter the company code and company name. Select the delimiter type for the Direct Deposit file.

22. **For Norway users only:** Enter values for the following fields to define the payment method level. (The same payment type supports the ISO20022 and older Telepay process).

Field	Description
Initiating Party Name	Enter the name of the known party.
Sender ID	Enter the initiating party ID. This unique organization identification is assigned by an institution using an identification scheme. Typically, this is the customer-ID in the debtor bank based on the <i>Brønnøysundregistrene</i> and their Central Coordinating Register of Legal Entities, or other identification arranged with the bank.
Scheme Name	Enter the code for the identification scheme as published in an external list. The options are BANK and CUST: <ul style="list-style-type: none">• BANK: Debtor/creditor relates to a sub-level agreement under the main agreement (a bilateral agreement between a customer and a bank) regarding a special service or subsidiaries or divisions. When the scheme name is BANK, the Sender ID should have a Customer Service ID assigned by the bank.• CUST: Debtor/creditor relates to the main-agreement with the financial institution. When the scheme name is CUST, the sender ID should be the organization number of the initiating party.

Field	Description
Batch Booking	<p>Indicate whether [the requestor] has requested a single entry per individual transaction or a batch entry for the sum of the amounts of all transactions within the group of a message. The options are:</p> <ul style="list-style-type: none"> • No: Single Booking requested. • Yes: Batch Booking requested. This default value is Yes. <p>Note: The Yes and No values are reflected in XML as true and false.</p>
Service Level Code	<p>The service level code specifies a pre-agreed upon service or level of service between the parties as published in an external service level code list. Select one of the following options:</p> <ul style="list-style-type: none"> • NURG (Non-urgent Payment): Select as the default. • SDVA (Same Day Value): Intercompany only (not for salaries). • SEPA (Single Euro Payments Area) • URGP (Urgent Payment): Only suppliers (SUPP) but not for salaries.

Field	Description
Payment File Format	<p>This field indicates which supported payment file format and process are in use. The supported processes are Telepay and ISO 20022.</p> <ul style="list-style-type: none"> • Telepay: Indicates that the older file format and process, the Norwegian Payment Process, are in use. This is the default value if the field is blank. If this value is set, and you run the newer ISO20022 process, then an error occurs. • ISO20022: Indicates that the ISO 20022 file format and process are in use. If this value is set and you run the older Telepay process, the following error message appears: <i>Bank file format processed is not according to specified set up on Payment method.</i> <p>Note: If you see this message, you must roll back the error process before running the new process.</p>
Payment Identification ID	The payment identification ID is a reference assigned by a sending party to identify the payment information block within a message.
Payment Method	<p>Select one of the following values to specify the payment type to use for transferring the funds:</p> <ul style="list-style-type: none"> • CHK: Cheque • TRF: Credit Transfer. This default value is TRF.
Debtor Name	Enter the name of the debtor party.
Debtor ID	The debtor ID is a unique identifier assigned to a debtor organization by an institution using an identification scheme.

Setting Up a Global Statement of Earnings

Oracle HRMS enables you to view the online statement of earnings (SOE). To enable the correct display of values on your statement of earnings, you must complete each of

these setup steps.

To set up the global statement of earnings:

1. Create a user category through the lookup SOE_USER_CATEGORY.
See: *Creating User Types and Statuses, Oracle HRMS Enterprise and Workforce Management Guide*
2. Set the value of the user category that you created as the profile value for the profile PAY: Statement of Earnings User Category.

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

3. Add the predefined element sets for your earnings and deductions to the SOE Information EIT at the business group level.

For Canadian and US users only: SOE Information functionality is not available for Canadian and US legislations.

Swedish users only: Ensure that you have enabled your elements to display a code. You do this at the business group level by entering Extra Element Details for each element. When you select the EIT, you can make a further selection of Element Name, and specify a code for your selected element. This ensures that your SOE displays the element code in the earnings, deductions, and information regions.

See: *Business Group: Entering SOE Information, Oracle HRMS Enterprise and Workforce Management Guide*

4. Create an element set containing all the elements that you want to see displayed in the information region of the SOE.

For South Africa only: The Information region has been renamed to Fringe Benefits and Other Non Payments region. You use the predefined ZA SOE Fringe Benefits and Other Non Payments element set to display information in that region. You enter this element set in the Elements 3 field when you define your SOE Information at business group level.

The South African localization does not use balance attribution.

Users should now restart the Apache server as instructed in the final step.

5. Complete the SOE Detail Information EIT by adding the elements in your element set, and the SOE display balances to the EIT at the business group level.

See: *Business Group: Entering SOE Detail Information, Oracle HRMS Enterprise and Workforce Management Guide*

6. Link the predefined SOE balance attribute to your business group. The attribute name is likely to have a leading localization code followed by the stem `_SOE_BALANCE_ATTRIBUTES`.

7. Define the attributes for your SOE balances.
8. Restart the Apache server and then check the SOE to ensure that the SOE displays the requirements that you selected.

Running the Enable or Disable Global SOE Process

You use this process to determine how your statements of earnings are displayed. You have a choice of the forms-based SOE, or the global SOE which is framework-based and readily customizable. You can either:

- Enable the global SOE if you want to override the forms-based default
- Disable the global SOE if you prefer to continue using the old forms-based format.

You run the Enable or Disable Global SOE process from the Submit Request window.

To run the Enable or Disable Global SOE:

1. Select the Enable or Disable Global SOE process in the name field.
2. Enter whether you want to Disable or Enable the Global SOE in the parameters window.
3. Click OK and choose the Submit button.

Viewing Statement of Earnings

Oracle Payroll enables you to view an employee's statement of earnings (pay advice) without having to run the Pay Advice report.

You do this using the Statement of Earnings window.

There are various ways to access statement of earnings information. The information displayed may vary depending on whether you have run the PrePayments process or just a payroll run.

The information displayed in the Statement of Earnings window reflects the information in the printed pay advice.

The payroll run generates four types of Statement of Earnings (SOE):

- Master Assignment Action SOE for each employee and shows aggregate Year to Date balances
- Regular Payroll Run SOE for each employee and shows Period to Date and Year to Date balances

- Separate Check SOE only if employee has an element with Separate Check input value set to Yes
- Tax Separate Run SOE if employee has an element(s) with any of the following input values:
 - Separate Check set to Yes
 - Tax Separately set to Yes
 - Deduction Processing is set to other than All

Canada only: The Payroll Run SOE displays one "Master Assignment Action" master record and multiple records with second and third layer run types.

If you are processing Multiple Assignment Payments, then the PrePayment Statement of Earnings displays consolidated earnings and deductions information. The header information displayed on the Statement of Earnings is obtained from the primary assignment; however, if this assignment is not processed, then the header information is taken from the first assignment processed in the PrePayment process.

To view the last payroll with PrePayments run against it:

Perform one of the following:

- Select View | Statement of Earnings.
- From the Assignment window, choose Others and select Statement of Earnings.
- Choose the Statement of Earnings window in Fastpath.

To view the most recently run QuickPay results:

1. From the Assignment window, choose Others and select QuickPay.
2. Choose View Results, and select Statement of Earnings from the View Results window.

To view the statement of earnings information without running PrePayments:

See Viewing Assignment Process Results for an Assignment or Viewing Assignment Process Results for a Payroll Assignment.

Setting Up Payslip Information and Generating Payslips

You need to identify any additional information you want to appear on your payslips using payslip balances and elements. Once you have identified the information to

archive and display, run your regular payment and archive processes and generate your payslip for printing or viewing online.

To set up your payslip:

1. Select the payslip balances and elements to be included in your payslips.

See: Entering Payslip Information, page 1-21

For UK, Netherlands, and South Africa: Enter the information balances and elements through the following:

See: Identifying Balances for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide* and Identifying Elements for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide*

For Ireland: Enter the balances and elements information in the SOE Balances and SOE Elements windows.

See: Selecting SOE Balances, *Oracle HRMS for Ireland Supplement* and Selecting SOE Elements, *Oracle HRMS for Ireland Supplement*

2. For online payslips, enter self-service preference information to indicate how you want to view them. You can specify these settings at the organization, location, and person levels.

See: Entering Self-Service Preference Information, page 1-22, Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*, and Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Configure your online payslip to view through Oracle Self-Service.

See: Online Payslip, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

US, Canada, Mexico, and UAE only: Oracle Payroll uses an RTF template to produce the online payslip through XML Publisher. You can use the default template or create your own.

See: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide.

For Ireland: To include the regular payment date of the payroll period in your online payslip, set the Visible property of the Regular Payment Date field to Yes.

4. **US, Canada, Mexico, and UAE only:** Oracle Payroll provides the ability to customize the content of your employee payslips to suit your business needs. Prior to making any changes, however, you should review the default content to best determine what changes you require. See: Payslip Region Information, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

To change balances or include additional balances on the payslip:

1. From the Total Compensation menu, select Basic and then Balance.
2. Query for the element whose balance you want to add, and click Attribute.
3. Click on a new row under Attribute, and choose the attribute you want to display from the list of values. This represents where the current balance will appear on the payslip.
4. Choose a dimension from the list of values.
5. To delete an entry, select the row and click Delete.
6. Save your changes.

Note: These changes do not take effect on the payslip until you rerun the Payroll Archiver Process for the affected payroll period.

Generating the Payslip

You must have completed the payroll runs, prepayments, and payment processes prior to generating the payslip.

5. Run the archive process to gather the latest payroll information.

See: *Extracting Information to Appear on the Payslip*, page 4-17

6. You can view the payslip online through Self-Service.
7. Print your payslips in the usual way. Users in the Netherlands and China, run the payslip report to produce a formatted report ready for printing and sending out to your employees.

See: *Printing the Payslip*, *Oracle HRMS Payroll Processing Management Guide*

8. **US and Canada only:** Oracle Payroll provides the flexibility to choose the way annual salary is calculated and reported on the Online Payslip (both HTML and PDF). This flexibility is available through the HR: Base Annual Salary Display on Standard Work Conditions profile option.

See: *Defining the Profile Option for Pay Annualization*, *Oracle HRMS Payroll Processing Management Guide (US)*

Extracting Information to Appear on the Payslip

You run the payslip archive process to extract and gather relevant information to appear on your employees' payslips. The archiver accesses the payslip information for the dates you select and copies the information across to storage archive tables, where it

is picked up and converted into a format for printing and distributing to employees or for viewing online through the self service application.

Run this process after each payroll period to enable Self-Service. You must complete the payroll runs, prepayments, and payment processes before you can run the payslip archive process.

Netherlands, US, and Mexico only: If you are producing paper reports, use this process to view your current payslip.

Run the payslip archiver from the **Submit Request** window.

To run the payslip archiver:

1. Select your country's payslip archive process in the **Name** field.

China and Netherlands: Select the Payslip Archiver.

India: Select the Payroll Reports Archive (India).

Ireland: Select the IE Legislative Reports Generator. See: Running the Legislative Reports Generator, *Oracle HRMS for Ireland Supplement*

Mexico: Select the Payroll Archiver. See: Managing the Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

South Africa: See: Pay Advice Generation - Self Service (South Africa), *Oracle HRMS for South Africa Supplement*

UK: See: Payslip Generation Self-Service, *Oracle HRMS Payroll Processing Management Guide (UK)*

US and Canada Payroll: If required, you can set the PAY:Show Payslip with Zero Net Pay profile option to archive the payroll data and generate payslips for those employees receiving a net pay amount of zero.

For US, see: Managing the Payroll Archive, *Oracle HRMS Payroll Processing Management Guide (US)*

For Canada, see: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Canada)*

2. In the **Parameters** window, select a payroll name and consolidation set. This selects the employees for whom you want to run the report. When you select a payroll, the default consolidation set is displayed.
3. Enter the start and end dates for the period of time you want the information extracted. You typically run this process for the same dates you ran your payroll.
4. **India:** Select whether you want to mail individual payslip or view consolidated payslips in the Generate Payslip field.
5. Choose Submit.

After running the Payroll Archiver, you can use the Payroll Actions Not Processed report to see what employees (and corresponding payroll processes) were not archived but did fall within the report's parameters.

Running the Pay Advice Alignment Report

Run this report before you run the Pay Advice report. It shows printer alignment details for your sample pay advice.

You run the Pay Advice Alignment report from the Submit Requests window.

To run the Pay Advice Alignment report:

1. In the Name field, select the report name.
2. Choose the Submit button.

Running the Payments Summary Report

Run this report when you want to see payments totalled by payment method type and organizational payment method for a specified payroll and payroll period. Account details for each organizational payment method are also listed.

You run the report in the Submit Requests window.

To run the Payments Summary Report:

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.
2. Select the payroll and payroll period for which you want to see the information.
3. If you want to restrict the information by consolidation set, select the name of the set.
4. Choose the Submit button.

Running the Pay Advice Report

Run this report to generate pay advice for all employees for a specified payroll and period. This is a sample report which you can customize. You run it after completing the Pre-payments process for a payroll. To check printing alignment before generating pay advice run the Pay Advice Alignment report.

You run the Pay Advice report from the Submit Requests window.

To run the Pay Advice report:

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.
2. Select the payroll for which you want to generate pay advices.
3. Enter the period for which you want to generate pay advices and the date on which you want to generate them.
4. Do one of the following:
 - If you want to generate pay advices for all employee assignments, leave the Assignment Number field blank.
 - If you want to generate a single pay advice for an employee assignment, enter the employee assignment number.
5. Select the sort orders 1 to 6 for employees whose mailing address is set to Office/Blank.

Note: Use the people group flexfields to capture or configure office address details.

6. Choose the Submit button.

Note: You can also view this report from the Assignment Process Results window, where you select an individual assignment and the process you want to view the report for.

Setting Up Payslip Modeling

Before you can use the Payslip Modeler, you must ensure to set up the following:

1. Ensure set the profile option HR: Enable Payroll Simulation to Yes to use this module. If the profile option is set to No, you cannot use the payslip modeler.
See: User Profiles, Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide
2. You can set the profile option HR: Enable Multiple Assignments for Payroll Simulation to Yes to select the secondary assignment when there are multiple assignments. If set to No, then you can run the payslip modeler process on the primary assignment only.

See: User Profiles, *Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide*

3. You can enable or disable the payslip modeler at the Payroll level by specifying Yes in the Enable Simulation field. You cannot run a payroll run and payslip modeling simultaneously. If the Payslip Modeler is enabled, then you can set locking period, number of days prior to and after a specified date for enabling or disabling the payslip modeler. This restricts users from making updates to payroll information while modeling their payslip during a mock payroll run during the specified period.

See: Defining Payroll, *Oracle HRMS Payroll Processing Management Guide*

4. If you want use payslip modeler then you must select the document type as Payslip Modeler in the Self-Service Preference window at the business group level or the organization level.

See: Entering Self Service Preference Information, page 1-22

5. If you want to restrict any elements from being processed in the modeler process, create an element set and include the elements you want to exclude. Specify the element set in the Modeler Exclusion Element Set in the Self-Service Preference window at the business group level or the organization level.

This skips the elements within the element set from being processed and the elements are not available for users to select while running a modeling process.

6. Specify the Payroll Simulator Template in the Self Service Preference window at the business group level or organization level. If no template is specified, then the application uses the default template to generate the model payslip. Users can create their own templates associated with the Data Definition PAY<LEG_CODE>SIMPAYSLIP.

See: Entering Self Service Preference Information, page 1-22

7. 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 enter input values for this element required for simulation in the Element Description window. Only user enterable input values are available for Payslip modeling.

If the Multiple Entries check box 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.

It is necessary to create a new element for the corresponding Multiple Entries Allowed element and setup the new element as Yes for Enable Simulation. Ensure to specify the earlier element as Original Element under Simulation Details for the

new element. Enter input values, attach the appropriate formulas and balances as the new element. This is to ensure that Simulation ignores the Original element entries in Simulation run and uses only new element entry.

Example to Understand the Restrictions on Multiple Entries Allowed Enabled Elements

The unavailability of Yes for Multiple Entries Allowed enabled elements is an expected behavior of Paycheck Modeling.

For example, consider an employee with an Overtime Element. This element entry is added on the days when employee works overtime. For a month, if employee does overtime for 10 days, then this element entry gets added 10 times. If the employee wants to model a paycheck and view the net take home after working overtime for 10 days or more, then it will not be practical to add 10 entries for 10 days from Paycheck Modeling page. Instead, the employee can add the total overtime hours. Therefore an element which conveys the total overtime hours for the Pay period instead of each day can be used. If there are already some Overtime entries added to the employee in the application for current period, then it is necessary to suppress these entries when the employee tries to model Overtime hours so that Paycheck Modeling/Simulation gives desired results depending on the inputs.

To handle this scenario, the Overtime Element (the elements with Multiple Entries Allowed) is not allowed to be directly enabled for Simulation. Instead it is necessary to create a new element to support Simulation. The element created for simulation can have changes to Input Values validation. If there are any rules or validations on the maximum number of hours that can be entered, say, Overtime entries can accept maximum of 5 hours per day, these can be relaxed in new element to suit the requirement of simulation so that users can add 50 hours for complete month in single entry.

For the new element, it is necessary to specify the existing Overtime element as Original Element under Simulation Details. This will ensure that whenever employee tries to model Overtime hours using new element, any existing Overtime element entries are ignored during Paycheck Modeling/Simulation.

See: Defining Elements, page 3-9

Note: There is a restriction for Predefined elements being used for payslip modeling. For predefined elements, if you setup the details for a predefined element 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 other 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.

Payroll Processing and Analysis

Post-Processing for a Payroll

PrePayments Process

Within Oracle Payroll the PrePayments process enables you to select a payment method to pay your employees. You can distribute employee pay over more than one method using either a percentage or monetary split.

You can override the PrePayments process. For example, suppose you have run the normal payroll run and made payments via one payment method. You then have to run supplementary payments for some employees and pay them by a different payment method. The PrePayments process, having distributed the regular payments over the payment methods entered, allocates the supplementary payments to the override method.

Cheque/Check Writer Process

Run the Cheque/Check Writer process to determine the generation of cheques/checks for a specified payroll and consolidation set over a specified time period.

You can generate contiguous serial numbers for cheque/check printing, and you can use this feature to account for cheque/check stationery used during the cheque/check printing process. If you do this, you also need to take into account the cheques/checks you use to carry out the alignment of your printer.

A sample cheque/check report is supplied with the Cheque/Check Writer process. You can customize this report, or add your own cheque/check style to meet your enterprise requirements.

Oracle Payroll provides automatic cheque/check numbering for the Check Writer process. You can keep track of cheque/check numbers when you process multiple cheques/checks per day.

Note: Your System Administrator can enable the HR: Default Check/Cheque Number Method profile which enables you to use the automatic check/cheque numbering process.

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

Void Cheque/Check Payments Process

Run the Void Cheque/Check Payments process when you want to void cheques/checks you have issued using Oracle Cheque/Check Writer. You may want to do this if there is

a printing error or if the cheques/checks you print are afterwards lost. The process cancels the cheques/checks issued, records details of the cancellation, and enables you to give a reason for cancelling.

Check Writer - Override Payment Date Process

When you reissue a check after voiding it using the Void Check Payments process, the Check Writer process prints the check with the original Payment Date by default. Using the Override Check Date feature, you can replace the original check date with a check date of your choice. For reporting purposes, the Payment Register Report captures the replacement date from the reprinted check.

External/Manual Payments Process

Use the External/Manual Payments window to record cash or cheque/check payments to employees from external sources or petty cash. The window enables you to record details of each payment.

Setting up Electronic File Transfer

Oracle HRMS enables you to submit employee and payment details to the bank in the form of a bank transfer file. To process the electronic file transfer, you must complete several steps.

1. Create a formula for each section of the EFT file: Header, Details, and Footer, to write the appropriate record in the specific format. You can use the following three sample formulas to create your own formula:
 - AE_EFT_HEADER_CUSTOMER
 - AE_EFT_BODY_CUSTOMER
 - AE_EFT_FOOTER_CUSTOMER

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

2. Record the formula details to the payment method.

See: Defining a Payment Method, page 4-6

3. Enter the values for Bank codes in the user extensible lookup AE_BANK_CODES.

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

4. Run the payroll process.

See: Starting a Payroll Run, *Oracle HRMS Payroll Processing Management Guide*

5. Run the pre-payment process.
See: *Running the Pre-payment Process, Oracle HRMS Payroll Processing Management Guide*
6. Submit the EFT request using the Submit Request window.
See: *Running the Payment Output File, page 4-26*
7. View the output of the EFT file.

Running the Payment Output File

You run the Payment Output File from the Submit Request window.

To run the payment output file:

1. Select the payment output file in the Name field.
2. In the Parameters window, optionally enter the payroll name.
Note: You can restrict the processing of assignments to the specified payroll on the effective date.
3. Select the consolidation set.
4. Enter a start date for any prepayments to the employee.
5. Enter the effective date.
6. Select a payment method.
7. Enter the process date or date of transfer.
8. Click Submit.

Running the Payroll Register Report

You can review payroll run results for each employee by running the Payroll Register report. This report helps you validate employee earnings and deductions, and identify any exceptions for further investigation. Payroll Register report is also useful for auditing. For example, auditors can refer to this report to verify that all listed employees exist and are at work or that the employer is following the updated pay rates to pay the employees. For best advantage, run the payroll register report once a month after the main payroll run and before the actual payment to employees.

You can run the payroll register report for either an organization or a payroll. If you run the payroll register for an organization, the application runs the report for all the payslip archives in the specified period. If you run the payroll register for a payroll, the application reports any payslip archives processed for that particular payroll in the selected period.

You run this report from the Submit Request window.

To run the payroll register report:

1. In the Name field, select one of the following to open the Parameters window:
 - For UAE - UAE Payroll Register
 - For Kuwait - Kuwait Payroll Register
2. Select the entity to run the report for organization or payroll.

If you select Organization, you can also select the organization hierarchy and version, or the name of the organization for this payroll report.

If you select Payroll, select the payroll name for the business group.
3. Select the end date for archived payrolls. If you do not select an end date, the application selects an end date closest to the date of the last archive.
4. Select a sort order for the report. You can choose up to three sort parameters. If you do not choose a sort order, the application sorts the records by employee number.
5. Click the Submit button.

Calculating Social Insurance

Oracle HRMS enables you to record and process the SI contributions for both private and federal sector employees. You can also calculate payment exceptions, such as the employer temporarily paying the employee's SI contribution.

The application uses the SI contributory salary of an employee as input to calculate the SI contribution.

To calculate SI contributions for private sector employees:

1. Select the employer sector at the Legal Employer level.

See: Entering Legal Employer Details, page 1-25
2. Select the local nationality at the Business Group level. All the employees whose nationality matches the business group nationality are eligible for social insurance.

See: Entering Local Nationality Information, page 1-25

3. Select the formula for determining SI contributory salary.

See: Entering Reference Formula Details, page 1-26

4. Attach the predefined Social Insurance element to the employee to ensure that Social Insurance processing occurs when you run the payroll for this employee. For other nationals working in UAE, you can do the following:

- For a Saudi national working in UAE, you can ensure that the social insurance calculation is according to the percentages stipulated by Saudi law. For this, you must create the SA GOSI element and link it to the Saudi national. If this element is not attached to the employee, then the employee's and employer's contribution for social insurance is as per UAE percentages. However, when the employer's subscription is less than the amount calculated through percentages as per the Saudi laws, the SA Surplus Employer Social Insurance element holds the difference in subscription in case the country of citizenship is going to pay the difference. The SA Employee GOSI on behalf of Employer element holds the difference in case the employee is going to pay on behalf of the country of citizenship. If the employee decides to pay, then the amount is held in SA Employee GOSI element on behalf of employer. If the country of citizenship decides to pay on behalf of the employee, then the amount is held in the SA Surplus Employer Social Insurance element.
- For a Kuwait national working in UAE, you can ensure that the social insurance calculation is according to the percentages stipulated by Kuwait law. For this, you must create the KW Social Insurance and link it to the Kuwait national. If this element is not attached to the employee, then the employee's and employer's contribution for social insurance is as per UAE percentages. However, when the employer's subscription is less than the amount calculated through percentages as per the Kuwait laws, the KW Surplus Employer Social Insurance element holds the difference in subscription in case the country of citizenship is going to pay the difference or, the KW Employee Social Insurance on behalf of Employer element holds the difference in case employee is going to pay on behalf of the country of citizenship. If the employee decides to pay, then the amount is held in KW Employee Social Insurance element on behalf of employer. If the country of citizenship decides to pay on behalf of the employee, then the amount is held in the KW Surplus Employer Social Insurance element.

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

5. Run the payroll process for the employee.

See: Starting a Payroll, *Oracle HRMS Payroll Processing Management Guide*

To calculate SI contributions for federal sector employees:

1. Create an event group to group together the proration events, such as change in working hours or pay grades.

See: Defining Event Groups, page 3-23

2. Write a proration formula that calculates the value of the elements according to the changes made during the pay period to the values of these elements.

See: Writing Proration Formula, *Oracle HRMS FastFormula User Guide*

3. Create an element with a primary classification of Earnings and a secondary classification of Subject to Social Insurance.

See: Defining an Element, page 3-9

4. Link the proration formula and the event group to the element using the Proration tab in the Element Description window.

5. Link the earnings element to payroll using the Element Link window.

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

6. Attach the Social Insurance element to the employee to ensure that Social Insurance processing occurs when you run the payroll for this employee. For other nationals working in UAE, you can do the following:

- For a Saudi national working in UAE, you can ensure that the social insurance calculation is according to the percentages stipulated by Saudi law. For this, you must create the SA GOSI element and link it to the Saudi national. If this element is not attached to the employee, then the employee's and employer's contribution for social insurance is as per UAE percentages. However, when the employer's subscription is less than the amount calculated through percentages as per the Saudi laws, the SA Surplus Employer Social Insurance element holds the difference in subscription in case the country of citizenship is going to pay the difference. The SA Employee GOSI on behalf of Employer element holds the difference in case the employee is going to pay on behalf of the country of citizenship. If the employee decides to pay, then the amount is held in SA Employee GOSI element on behalf of employer. If the country of citizenship decides to pay on behalf of the employee, then the amount is held in the SA Surplus Employer Social Insurance element.
- For a Kuwait national working in UAE, you can ensure that the social insurance calculation is according to the percentages stipulated by Kuwait law. For this, you must create the KW Social Insurance and link it to the Kuwait national. If this element is not attached to the employee, then the employee's and employer's contribution for social insurance is as per UAE percentages.

However, when the employer's subscription is less than the amount calculated through percentages as per the Kuwait laws, the KW Surplus Employer Social Insurance element holds the difference in subscription in case the country of citizenship is going to pay the difference or, the KW Employee Social Insurance on behalf of Employer element holds the difference in case employee is going to pay on behalf of the country of citizenship. If the employee decides to pay, then the amount is held in KW Employee Social Insurance element on behalf of employer. If the country of citizenship decides to pay on behalf of the employee, then the amount is held in the KW Surplus Employer Social Insurance element.

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

7. Select the employer sector at the Legal Employer level.

See: Entering Legal Employer Details, page 1-25

8. Select the local nationality at the Business Group level. All the employees whose nationality matches the business group nationality are eligible for social insurance.

See: Entering Local Nationality Information, page 1-25

9. Run the payroll process for the employee.

See: Starting a Payroll, *Oracle HRMS Payroll Processing Management Guide*

Calculating Gratuity

Oracle HRMS for UAE calculates the gratuity amount payable to an employee on termination. In accordance with UAE Labor Law, you calculate the gratuity when you process the termination of the employee. You have the flexibility to offer the standard gratuity based on contract types, or a discretionary gratuity which can vary from the recommended standard amount but is still within UAE Labor Law. You can also supply a list of termination reasons to determine employee eligibility for the gratuity payment.

To calculate standard gratuity based on labor law requirements:

1. Select the basis of gratuity calculation at the Legal Employer level.

See: Entering UAE Gratuity Details, page 1-26

2. Attach the formula at the Legal Employer level for calculating the monthly salary of the employee.

See: Entering Reference Formula Details, page 1-26

3. Define the contract type for the employee. The gratuity payable differs for each contract type.

See: Entering Additional Assignment Details, page 2-26

4. The application does not consider any unapproved or unauthorized absence from work while calculating the period of service for gratuity processing. To track such absences, create an absence type of category Unpaid Leave and create an absence record for the employee.

See: Absence Categories and Types, *Oracle HRMS Compensation and Benefits Management Guide*

See: Entering Absences, *Oracle HRMS Compensation and Benefits Management Guide*

5. The application includes a predefined list of termination reasons that you can use to determine if the employee is eligible for a gratuity. You can also define your own termination reason for the employee.

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

6. Attach the Gratuity element to the employee to ensure that gratuity processing occurs when you run the payroll for this employee.

See: Making Manual Element Entries, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

7. Run the payroll process for the employee.

See: Starting a Payroll, *Oracle HRMS Payroll Processing Management Guide*

To calculate gratuity using your own gratuity formula:

1. Attach the formula at the Legal Employer level for calculating the gratuity payable to the employee.

See: Entering Reference Formula Details, page 1-26

2. Attach the Gratuity element to the employee to ensure that gratuity processing occurs when you run the payroll for this employee.

See: Making Manual Element Entries, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Run the payroll process for the employee.

See: Starting a Payroll, *Oracle HRMS Payroll Processing Management Guide*

Payroll Statutory Deductions and Reporting

Process Part of a Payroll

Oracle Payroll enables you to run a payroll and conduct post-processing on a payroll that has completed successfully. You can also enter subsequent changes and corrections for a payroll that has not completed successfully.

Oracle Payroll makes use of the following concepts when implementing payroll procedures:

Assignment Sets

Occasions when you need to use assignment sets for the payroll run include:

- You need to process the night shift earlier than the rest of the payroll as they must receive their pay advices the night before the rest.
- You need to process a correction run, as entries were not received in time for the normal run and the overtime must be paid this period.
- You want to process an additional run for a long service award, which the enterprise is presenting as a cheque/check to each qualifying employee.

To fulfil these requirements, you can select from a range of assignments:

- Include all assignments
- Include or exclude individually identified assignments
- Use a formula to include or exclude certain groups of assignments

Consolidation Sets

A consolidation set is a grouping of payrolls that simplify post-run processing and reporting. It enables you to produce a single set of reports, costing results, and other results for all payrolls in a consolidation set. When you run a payroll, make sure that you have named the consolidation set to which the payroll belongs.

Element and Distribution Sets

With a normal payroll run, you would want to include all elements, but for a long service award bonus you would want to include only the bonus element and the statutory elements. You first calculate gross pay for ascertaining the gross amount to transfer into the payroll account. Then you complete the gross to net calculation.

You can select element sets as follows:

- Include all elements
- Include or exclude individually identified elements
- Include or exclude classifications of elements.

Canada only: When creating a Run set, you need to explicitly add the Canadian Tax recurring element to your element set.

US only: When creating a Run set, you need to explicitly add the VERTEX recurring element to your element set.

The predefined elements for Oracle Payroll are processed for every payroll run in which they have been included. The deductions are recalculated using the period totals, the amount already paid in previous runs is deducted, leaving the remainder as the deduction for the new payroll run.

QuickPay

QuickPay enables you to carry out payroll processing for individual employees. You can use QuickPay to pay employees who are leaving and who require payment immediately. If an employee asks what their net pay will be this month, you can run QuickPay to find the answer, then roll it back to remove all results from the database.

QuickPay: Two Options for PrePayments:

Once the QuickPay run has a status of Complete, you have a choice of two options for post-run processing:

- Include the QuickPay in the batch prepayments processing for the assignment's payroll.

Choose this option if, for example, you have a new employee who joins after the payroll run for the current period has taken place. Instead of rolling back the whole payroll and resubmitting it with the new employee added, you run QuickPay instead so that you can include the new employee in the consolidation set for batch prepayments.

- Start the PrePayments process from the QuickPay window, if necessary overriding the default payment method.

Choose this option if, for example, an employee is leaving and is waiting to be paid by cash or cheque/check.

Troubleshooting QuickPay: Concurrent Manager

When you start the QuickPay process, the screen freezes, and you cannot delete or update the QuickPay definition until the process completes.

You may receive one of the following error messages:

- **The process has not started**

This means either that the concurrent manager has not been started, or that there are other requests of a higher priority. Ask your system administrator to start your request or change its priority.

- **The process has started but has not finished**

Ask your system administrator to investigate the reason for this.

Running Social Insurance Reports

You can generate the following statutory social insurance reports for submission to GPSSA from the Submit Request window:

Report	Report Name in Submit Request Window
Form 1	UAE Form 1
Form 2	UAE Form 2
Form 6	UAE Form 6
Form 7	UAE Form 7
Monthly contributions for private sector employees	UAE Monthly Contributions (Private Sector)
Monthly contributions for federal sector employees	UAE Monthly contributions (Federal Sector)

To run the SI reports:

1. Select the name of the report that you want to generate.
2. In the Parameters window, select the employer for whom you want to run the report.
3. Enter the year and month for which you want to generate the report.
4. Click OK.

Running the Wage Protection System (Private Sector) Report

UAE Private Sector employers submit a monthly Wage Protection System report to the Ministry of Labor. This report contains information about employees' wages and certifies that the employers pay the correct amount to all the employees.

Use the UAE Wage Protection System (Private Sector) Report to track the total number of employees, the total number of employees paid, the total number of employees not paid, and the total amount paid to the employees. This information helps to detect any violation in comparison to the Ministry of Labor records.

Run this report from the Submit Requests window.

To run the Wage Protection System (Private Sector) Report:

1. In the Name field, select the report name and click in the Parameters field to open the Parameters window.
2. Enter the following:
 - Employer
 - Month
 - Year
 - Name
 - Title
 - Total Number of employees according to Minister of Labour records.
 - Total Number of employees according to payroll.
 - Total Number of employees paid.
 - Total Number of employees who did not get paid.
 - Total Amount Paid to employees.

Note: The last four parameters are not mandatory. If they are not entered, they will get calculated in the system and will be displayed in the output of the UAE Wage Protection System report.

3. Choose the Submit button.

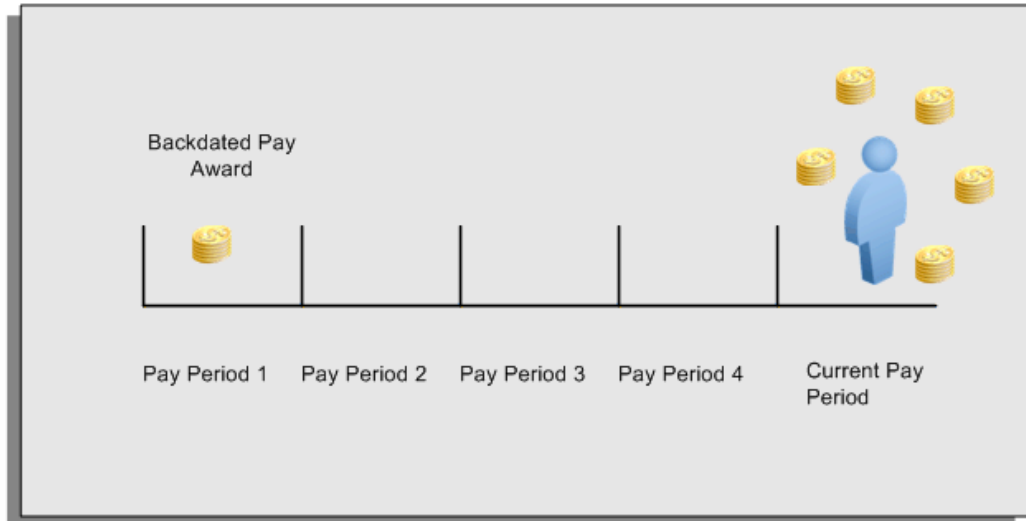
RetroPay Processing

Overview of RetroPay Processing

Purpose of the RetroPay Process

Run the RetroPay process to ensure that your payroll run for the current period reflects any backdated payments or deductions. Backdated adjustments can occur when:

- An employee receives a pay award that is backdated to a previous pay period.
- The payroll department makes a retrospective correction for an error that occurred in a previous pay period

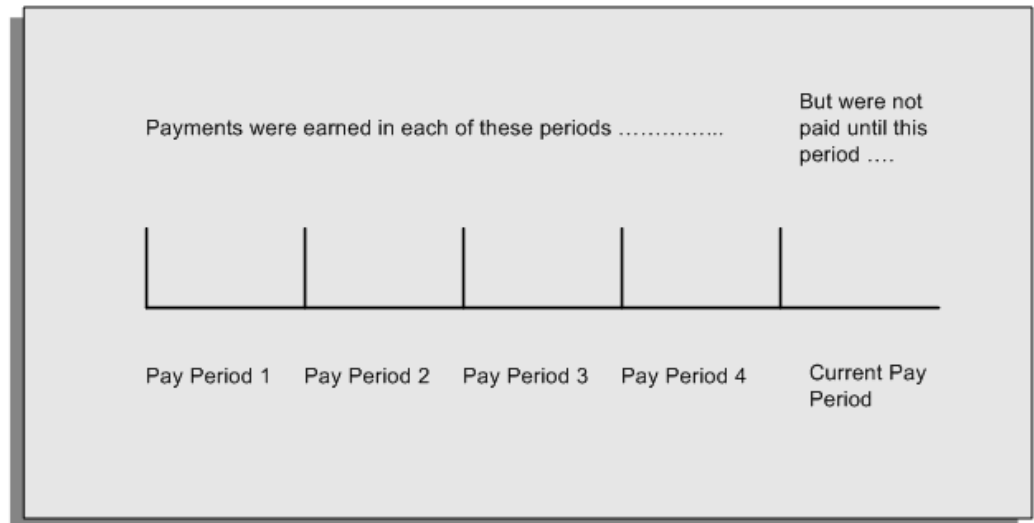


For example, at the start of the current pay period, this employee has a pay award backdated to pay period 1. The employee has not yet received any payments for this award. In the current pay period the employee is entitled to payments that represent the backdated amounts for:

- Each of the preceding payroll periods (pay periods 1 to 4)
- The current pay period

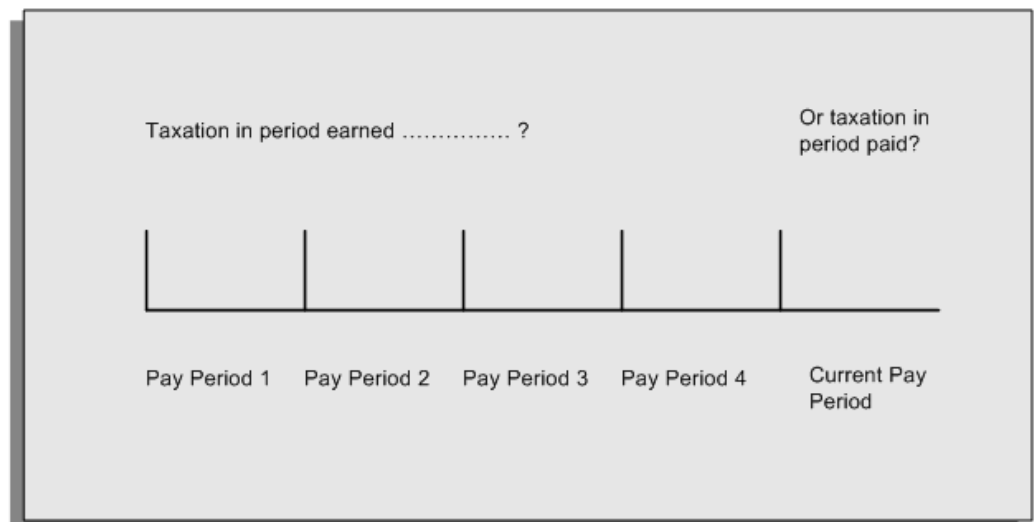
You run your RetroPay process to ensure that the employee receives correct payment when you next run the payroll.

Period Earned is Distinct from Period Paid



When backdated payments occur, the accuracy of your subsequent payroll processing depends on distinguishing between:

- The period in which the payment was earned
- The period in which the payment was made

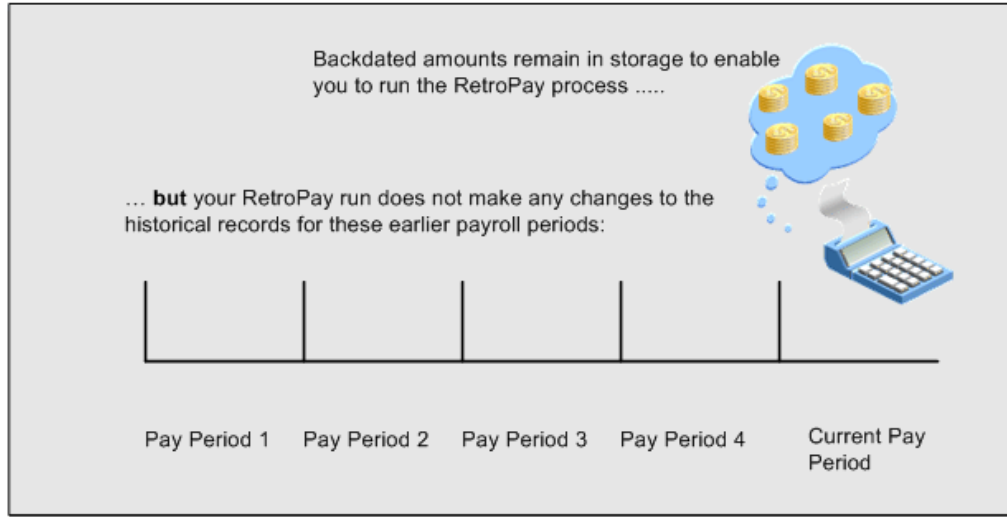


For example, the taxation implications are different for:

- A pay award backdated to period 1 and not paid until the current period. You may want to tax this award in the current period.

- A correction to an underpayment in period 3 which is paid to the employee in the current period. You may want to tax this correction in period 3 rather than in the current period.

The RetroPay Process Does Not Overwrite Your Historical Payment Records



You never overwrite historical payroll data when you run RetroPay. Although you recalculate all periods that have retroactive changes whenever you run a RetroPay, you never modify the stored results for these periods. Instead, you create one or more RetroPay entries to receive the process results.

Think of the RetroPay process as a calculator holding results in memory so that it can process a final set of results. The RetroPay process uses your historical results to calculate the changes for the current period. The results for your current period change, but your historical records remain unchanged.

Process RetroPay with Overlapping Periods

The RetroPay process recalculates payroll runs, balance adjustments and reversals from a particular date onwards, the start date of the recalculations. When you have retroactive changes overlapping another retroactive change, the application resets the start date to the earliest start date of the RetroPay processes and recalculates.

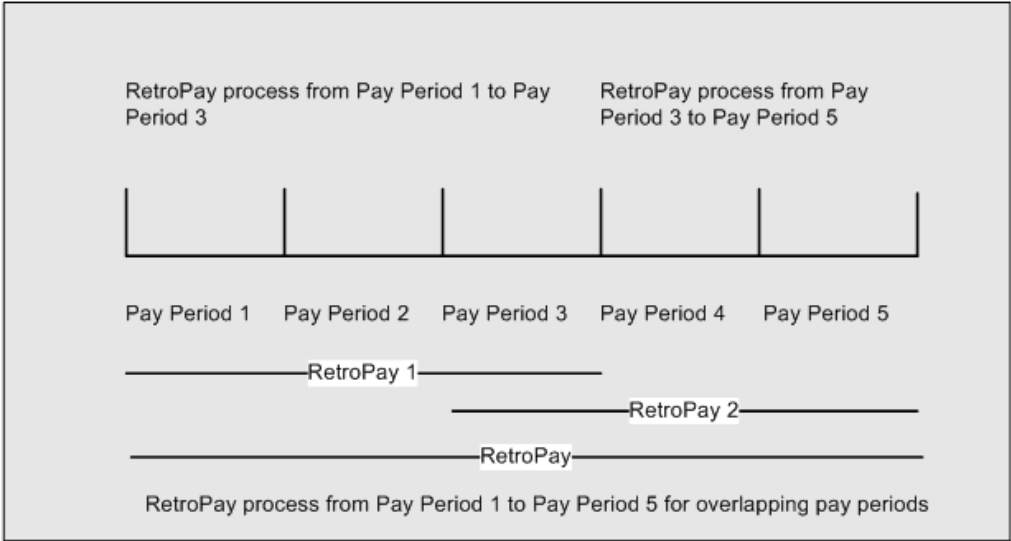
For example, you perform a RetroPay (RetroPay 1) for an assignment in period 3, with Payroll Runs being recalculated from a start date of period 1. In period 5, you perform another RetroPay (RetroPay 2) for the assignment with a start date of Period 3. The second RetroPay detects an overlap of RetroPays and sets the start date to the earliest start date.

In this case, the application sets the start date as Period 1. An overlapping override occurs to ensure that the balances are correct for the RetroPay process.

The processing of overlapping RetroPay results in an overall increase in time to process the RetroPay. If there are multiple overlaps, the increase in time is excessive.

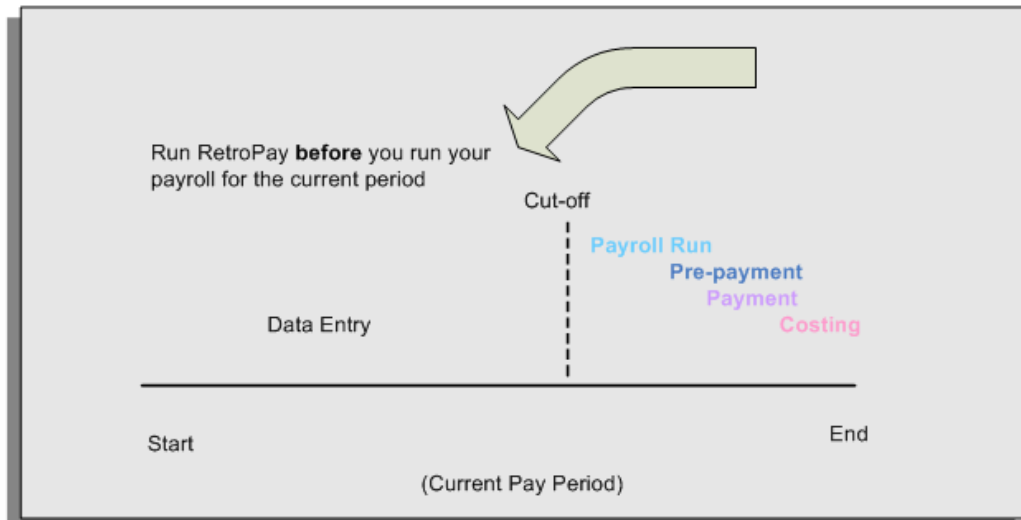
Additional Information: RetroPay Overlap is not available by default for all localizations. To use this feature, localizations must need to enabled it.

For more information on RetroPay Overlap , refer to RetroPay Overlap - A Technical White Paper Note ID 842307.1 on My Oracle Support



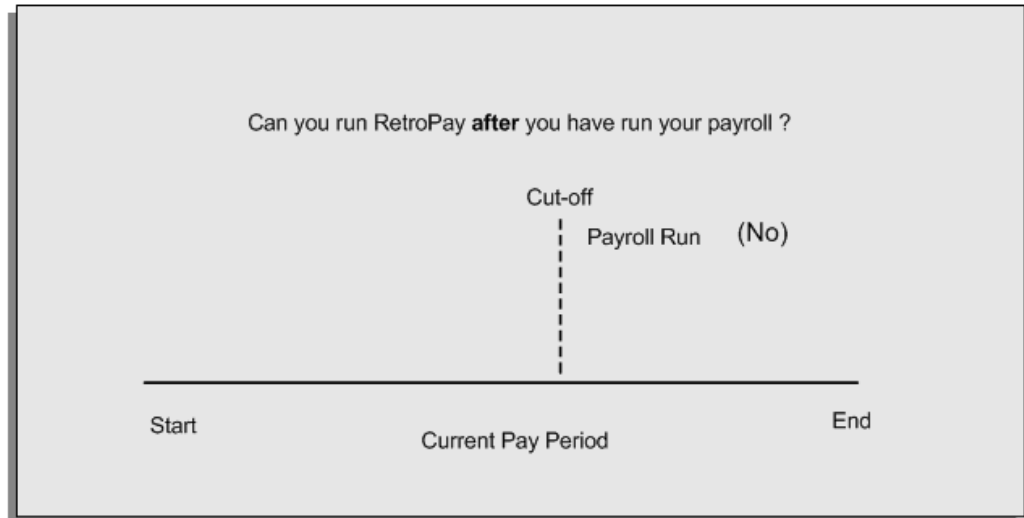
When to Run the RetroPay Process

The RetroPay Process and the Payroll Cycle



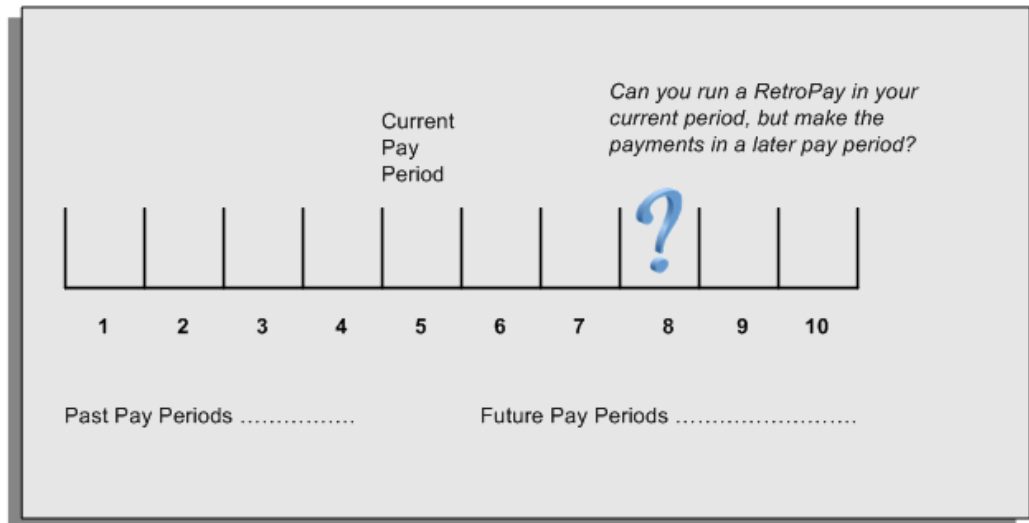
It is important to run your RetroPay process at the correct point in the payroll cycle. Always run RetroPay immediately before you run a payroll, and, for greatest accuracy, as close to the cut-off date as possible. The cut-off date is the point at which all data entry for the payroll is complete.

The RetroPay Process Always Precedes a Payroll Run



The RetroPay process cannot occur after your payroll run. If you run your payroll and then discover further backdated adjustments you must hold them over until a later payroll period and run the RetroPay process in that subsequent payroll period.

Backdated Adjustments Are Always Paid in the First Open Payroll Period



When you run a RetroPay process in your current payroll period, any backdated adjustments are always paid in your current payroll period. So, a RetroPay process in period 5 calculates any backdated adjustments from periods 1 to 4, and marks them for payment in period 5.

You cannot stipulate that a RetroPay process in period 5 should withhold any resulting payments until a future pay period. For example, you cannot stipulate that a RetroPay run in period 5 should withhold payments until period 8.

If you want to use a future payroll period such as period 8 to make payments of backdated amounts for periods 1 to 4, then you must wait until period 8 before you run your RetroPay process.

Troubleshooting RetroPay

The most common RetroPay problems occur when the RetroPay process completes, but produces unexpected results.

Consult these tables for quick reference on common RetroPay difficulties and their solutions. The problem description links or refers to extra information where you need more details to solve a problem.

- Troubleshooting Enhanced RetroPay and Retro-Notification, page 4-42

Troubleshooting Enhanced RetroPay and Retro-Notification

Problem Description	What to Do
View RetroPay Status does not display some of my expected choices	<p>Contact your System Administrator. The configuration of View RetroPay Status is determined at setup.</p> <p>If the legislation rule RETRO_STATUS_USER_UPD is set to Y, then you have a choice when you view RetroPay status. You can either exclude the assignment from RetroPay processing (you select Deferred), or include it (you select Confirmed Awaiting Processing).</p> <p>However, if RETRO_STATUS_USER_UPD is set to N, then the assignment is automatically included in the next RetroPay run (it displays in View RetroPay Status as Included Awaiting Processing).</p>

Problem Description	What to Do
<p>After setting up Enhanced RetroPay, the Enhanced RetroPay run does not produce any results.</p> <p>US only :the Retro-Notification report (Enhanced) does not record a salary change for an employee unless you add the changed details from View RetroPay Status.</p>	<p>In both cases:</p> <p>Navigate to the Element window and ensure that the Default Component check box is checked.</p> <p>The United States has one component only (RetroPay) and one reprocess type (Reprocess) - you must check the Default Component check box for the element.</p>
<p>RetroPay Element field is missing when Enhanced RetroPay is enabled.</p>	<p>This is intended behavior.</p> <p>The RetroPay Element field is hidden when Enhanced RetroPay is enabled.</p> <p>You now add your RetroPay elements from the Retro Components button available from the Recalculation tab of the Elements window.</p>

Troubleshooting RetroPay

Problem Description	What To Do
<p>RetroPay process element entry not generated for one or more assignments.</p>	<p>Check that the element links exist, then check your RetroPay setup., page 4-44</p>
<p>Unexpected value returned.</p>	<p>Check your RetroPay setup., page 4-45</p>
<p>Start and end times ignored.</p>	<p>Check for a previous RetroPay run that overlaps with your current run. If there is an overlap, rerun a new RetroPay with dates that fully include the period processed by the earlier RetroPay.</p>
<p><i>RetroPay Warning: Process Log shows zero employees in error - did not create element entries for processed employees.</i></p>	<p>Check that you are using the correct balance in the RetroPay set. If you are processing RetroPay within a single calendar year, choose a balance that represents gross pay for year to date. If your RetroPay spans two years, do not select a balance with the _YTD dimension.</p>

Problem Description	What To Do
Cannot use the Element Entries window to delete RetroPay generated elements.	Roll back the RetroPay process, remove the unwanted assignments from the assignment set and then rerun RetroPay. Note: The RetroPay process does not permit use of the Element Entries window to make these changes. This is expected behavior rather than an error.
RetroPay Error: <i>APP-6370 Cannot create an entry past the termination rule date.</i>	The setup of your RetroPay element (specifically, the termination rule) does not enable you to process terminated employees. Remove the assignments of terminated employees from your assignment set and then rerun RetroPay.

Detailed Problem Resolutions

This section provides step-by-step solutions for more complex problems.

Check that the Element Links Exist, and then Check Your RetroPay Setup

If the RetroPay process does not generate a RetroPay element for one or more assignments, follow this sequence to correct the problem,;

1. Check that there is a valid, current element link for each assignment in the RetroPay set. If the links do not exist, the RetroPay process can still calculate a retro-payment but cannot attribute the calculation results to an assignment.
2. Check that RetroPay entries exist for this assignment. Do this by inspecting the log file for the HR_HRPROC_EE_NOT_CRE message and searching for the text *Warning RetroPay has detected no change*. This text indicates that RetroPay entries do not exist. There are no differences between the original payroll run and the RetroPay run.
3. Check that your RetroPay setup correctly defines all the required balances. The RetroPay process always uses a balance to track the difference between an original entry and a retro entry. If retro-payments do not specifically feed your RetroPay balances, then the RetroPay process cannot identify that a retro-payment has occurred.

Example (from U.K. Payroll)

If you specify an NI balance in your RetroPay setup and then make changes to element entries that are not subject to tax or NI, your run results will be different when you compare the original run and the retro-paid run. However, the RetroPay element does not include these changes because it can only report on those differences that affect the NI balance.

4. Confirm that your RetroPay element has a classification of Earnings. The Earnings classification ensures that you can pay the amounts identified by the RetroPay process. Other classifications, such as Information, do not allow you to make payments.
5. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you could see unexpected results if you are using _YTD balances. Errors occur because the payroll run clears the _YTD balance at the end of year in preparation for the next year.
6. Check that there is a correct end date for the payment of RetroPay entries. Do this by View | Lists | Employees by Element to see whether the entry was created for an unexpected period. If this is the case, set the end date to the first date of the payroll period in which the RetroPay entry should be paid. For example, if you run RetroPay for June to September 2004 to pay back pay in October 2004, your start date should be 01-JUN-2005 and your end date 01-OCT-2005.

Check Your RetroPay Setup

If the RetroPay process returns an unexpected value follow this sequence to correct the problem,:

1. Check the logic of the RetroPay setup to determine that you are feeding the correct balance and confirm that you are not feeding the correct balance more than once.
2. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you may see unexpected results if you are using _YTD balances. Errors occur because the payroll run clears the _YTD balance at the end of year in preparation for the next year.
3. Establish whether there are changes elsewhere in the application that might impact the value of a balance. This can be a difficult area to identify because anything that feeds the balance specified in the RetroPay definition can potentially affect the RetroPay.

In particular:

- Balances like Gross Pay can reflect multiple changes to an assignment. These changes can affect the recalculated value of that assignment.
- Generic changes such as updates to a formula can affect the results of associated elements, and introduce balance value changes that subsequently

affect RetroPay values.

Setting Up the Retro-Notifications Report

You use the Retro-Notifications report to identify any changes that have a retrospective effect for payrolls that you have already run. You can define the relevant types of change by setting up an event group to specify the changes. Follow these steps to set up the Retro-Notifications report:

To enable dynamic triggers:

1. Navigate to the Dynamic Triggers window.
2. Enable any dynamic triggers that the application generates. It is important to enable these triggers to ensure your payroll processing updates each database table correctly. The recommended minimum list of triggers to enable for the Retro-Notifications report is as follows:

Table Name	Trigger Type
PAY_ELEMENT_ENTRY_VALUES_F	Update
PAY_ELEMENT_ENTRIES_F	Update
PAY_ELEMENT_ENTRIES_F	Insert
PAY_ELEMENT_ENTRIES_F	Delete

To define an event group:

1. Navigate to the Table Event Group window.
2. Enter a name for your Event Group, for example, Retro-Notification Events.
3. Select Retro as your event groups type.
4. Save your entries.
5. Select the events that will produce notification if retrospective changes occur. Specify the following information to identify the type of update and the database table to which it applies:
 - Update Type

- Base Table Name
- Column Name

For example:

Update Type	Table	Column Name
DateTrack Correction	PAY_ELEMENT_ENTRY_V ALUES_F	SCREEN_ENTRY_VALUE
DateTrack Update	PAY_ELEMENT_ENTRIES_ F	EFFECTIVE_START_DATE
DateTrack Update	PAY_ELEMENT_ENTRIES_ F	EFFECTIVE_END_DATE
DateTrack End Date	PAY_ELEMENT_ENTRIES_ F	
DateTrack Insert	PAY_ELEMENT_ENTRIES_ F	
DateTrack Delete	PAY_ELEMENT_ENTRIES_ F	

To enable the Incident Register:

1. Navigate to the Functional Area Maintenance window.
2. Query the Incident Register and ensure that you have triggers defined.
3. Decide whether to capture the triggers by legislation, business group, or payroll. Navigate to each tab to make your selection.

Setting Up Enhanced RetroPay with Component Usages and Element Time Spans

You can decide whether each retrospective payment requires:

A full reprocessing in which you recalculate all amounts for the current payroll. This option is typical when you are processing backdated payments, or when you want to deduct tax for backdated amounts in the period when it was earned, rather than in the current payroll period.

A limited reprocessing in which you recalculate only some of the amounts for the current payroll. This option is typical when you are processing corrections, or when you want to deduct tax for retrospective changes in the current payroll period rather than in the period when it was earned.

Components for RetroPay

Oracle Payroll describes each different type of RetroPay run as a component. You set up RetroPay component usages to define how RetroPay will process the component. For example, you could set up a component Earnings Correction for the element Basic Salary. A component always has:

- A name (for example, Earnings Correction)
- A reprocess type (Static, Partial, Reprocess) to determine how to process the component

Element Time Spans for RetroPay

For each of these components, you define an element time span to specify the start and end dates of the retro processing, and which RetroPay element applies for each time span. If you are creating RetroPay elements manually, you must follow the process given below to set up retro components and element spans to process RetroPay correctly.

Tip: Check if your Localization has components and time spans predefined that you can use to process retro pay.

Additional Information: Check if your localization has any upgrade processes enabled if you are upgrading your current elements.

Setting Up RetroPay Component Usages:

RetroPay component usages assign the components to the elements you created, ensuring all the elements recalculate with the latest values.

1. Query your defined element, in the Element window.
2. Select the Recalculation tab, and check the Retro Components button.

Note: South African users: Select the predefined ZA Statutory Updates event group from the list of values in the Recalculation Events field. Alternatively, you can create and attach an event group of your choice

3. In the RetroPay Components region of the RetroPay Element window, choose the component field, and an appropriate component from the list of values.

Note: Do not enable the Retro Component of the elements that are themselves being used to process retro pay for another element.

4. Select the Reprocess Type. If you select Static, then Retro pay will not process any changes to the element when running the relevant component. Opting for the Reprocess Type ensures the element changes process.
5. Save your work.
6. You can now enter the element time spans.

Setting Up Element Span Usages for Elements:

The element time span usages defines the start and end dates for retro pay processing. Most elements have the standard time span of Start of Current Year to End of Time already assigned, to cover any changes made in the current year. For each earnings element, or imputed earnings element with a defined retro pay component usage, you must define two element span usages. These element span usages cover the earnings for both the current and the previous year, defining not only how far back processing should cover, but also up to where a particular retro pay element carries forward the retro changes. You must define your retro pay elements and components before defining the element time spans.

Set up the Element Span Usages in the Retro pay Elements window.

1. Query your defined element in the Element window.
2. Select the Recalculation tab, and check the Retro Components button.
3. In the Retro pay Elements region, select the appropriate time spans from the From and To fields, to define the time period the retro pay element is covering.
4. Select the retro pay elements you created from the Retro pay Element field.
5. Save your work.

Setting Up Overlapping Retro Pay Using Balance Adjustments

If you have overlapping periods for making retro payments, ensure that the Retro Overlap feature is enabled. This process recalculates from the latest reprocess date and uses Balance Adjustments. Follow these steps to set up the Retro Overlap feature :

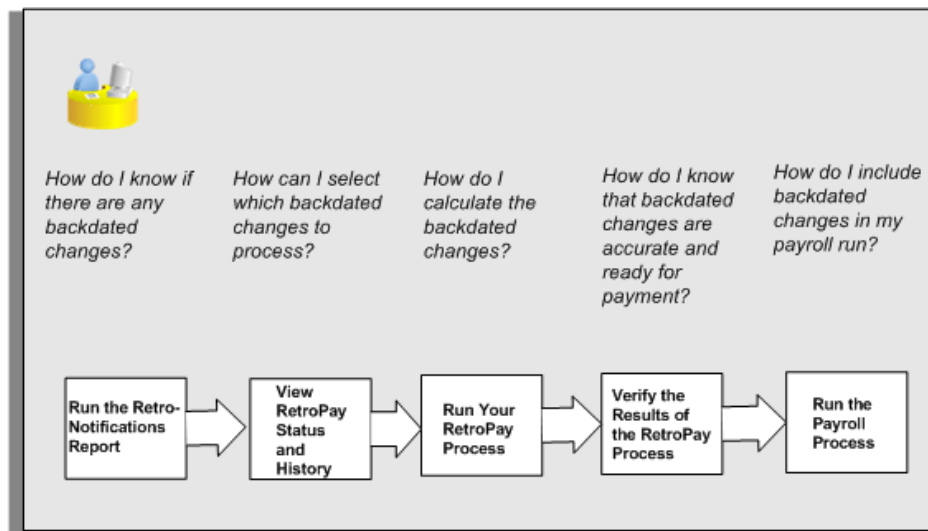
To set up Retro Overlap using Balance Adjustments:

1. Run the corresponding concurrent program to enable the retro overlap feature for your localization, for e.g. Enable Retro Overlap for all UK Business Group.

2. Set up all the Retro Element Types and associate them with their corresponding elements.
3. Define a retro element for every element that feeds a balance. The Balance Adjustment process uses the retro entries created in future periods to do adjustments.
4. Enable the 'Do Not Process' check box for any new retro elements used for retro balance adjustments.

Understanding the Sequence of Your RetroPay Activities

Given below is the sequence of retro pay activities.



Follow this sequence to:

1. Identify outstanding backdated adjustments
2. Monitor and control the processing of backdated adjustments
3. Include backdated adjustments in your next payroll run.

1. Run the Retro-Notifications Report

Run the Retro-Notifications report to identify any backdated changes that have not been included in a payroll run.

You can save your summary of backdated changes into an event group.

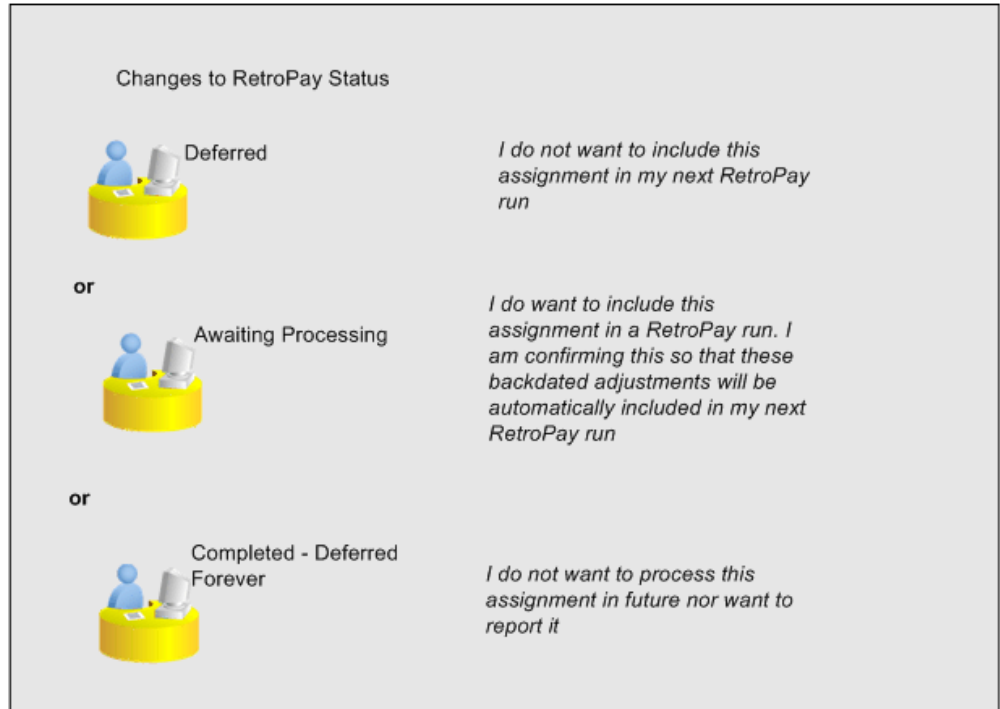
Once you have identified the retrospective changes, you can then decide whether to include them in your RetroPay process.

The Enhanced Retro-Notifications report uses the Payroll Events Model to identify

what changes have occurred to your underlying data. If these changes correspond to the retrospective types of change that you want to be notified about, then these changes appear on the Retro-Notifications report.

2. View RetroPay Status and History

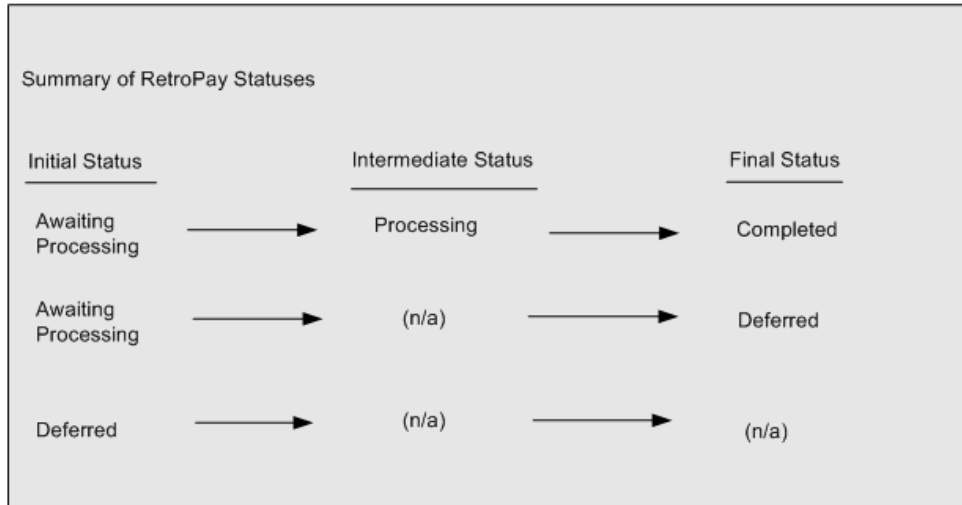
Once you have identified unprocessed retrospective payments, you can determine how you want to process these changes.



The Retro-Notifications report identifies the assignments with backdated adjustments. If you defer, then the assignment is not included when you next run RetroPay.

You can also include additional assignments that the Retro-Notifications report did not identify. This typically occurs when you discover additional backdated adjustments that were not known about when you ran the Retro-Notifications report.

The following diagram shows the sequence of statuses for each RetroPay status:



Once RetroPay processing begins, the initial status changes to an intermediate status of Processing.

You can query all retro assignments that are at the initial (outstanding) status, and all retro assignments at the final (completed) status.

The following diagram shows what statuses are included when your query All Outstanding, and All Completed:



See: Viewing RetroPay Status and History, page 4-53

3. Run the RetroPay Process

You enable Oracle Payroll to make retrospective adjustments for the combination of changes identified on the Retro-Notifications report, and subsequently modified when viewing RetroPay status.

4. **Verify Your RetroPay Results**

When you have run the RetroPay process, verify your results and correct any errors.

5. **Run Your Payroll**

Finally, run your payroll to reflect the adjustments that you have made for the retrospective payments.

Viewing RetroPay Status and History

You use the RetroPay Status window to control how you want to process changes that have a retrospective impact. You typically find outstanding retrospective changes where changes are entered in Self-Service HRMS independently of Oracle Payroll.

Use the RetroPay Status window to:

- Identify any assignments that have changes implying retrospective processing.
- Specify how you would like to process any outstanding retrospective changes.
- Confirm that your application has processed the specified requests.
- Create or update multiple retro assignments for status as Awaiting Processing or Deferred.

You can still use the Retro-Notifications report to identify all outstanding retrospective changes that have not been applied, and group them into an assignment set ready for processing.

However, the advantage of using the RetroPay Status window is that you can identify what you want to process, or exclude from processing, and then mark your selections for completion.

To search for assignments that have retrospective changes:

1. Select the search criteria for assignments that you want to view. If you do not select any criteria, then your search returns all assignments that have retrospective changes. You can search for any of these criteria:

Name: Specify a name, or search for all names.

Assignment Number: Specify an assignment or search for all assignments.

Recalculation Date: Use this start date and end date to determine the period for retrospective changes.

Status: Select the status that you want to identify.

- All Completed. This status displays all assignments with retrospective implications that are already processed.

- All Outstanding. This status displays all assignments with retrospective implications that are not yet processed.
- Awaiting Processing. This status indicates that this assignment has cleared for processing and that the processing will occur in the next payroll run.
- Completed. This status indicates that this assignment has now been processed.
- Completed – Deferred Forever. This status indicates that the retro assignments created by the system are deferred forever. The action of the retro assignment (RETRO_ASSIGNMENT_ACTION_ID) is to be changed to -1. The retro assignments are not processed in the future nor reported with the new status.
- Deferred. This status indicates that an assignment was scheduled for processing, but that the processing was deferred and will not occur until you change the status.
- Processing. This status indicates that an assignment is being processed.

Recalculation Reason: This criterion indicates why retrospective processing is necessary and enables you to search particular categories of retrospective change to process them independently of other retrospective changes.

2. Click Go when you have selected all your search criteria.

To change the status of an assignment:

You typically change the status of an assignment when you want to defer processing that was previously scheduled, or to indicate that you have already processed this change even though it was automatically scheduled.

1. Select the assignment that you want to change.
2. Select the new status for the assignment from the Change Status list of values.
3. Click Change Status.

To view the elements included on each assignment:

1. Select the assignment name in the Name column.
2. View the elements for this assignment, and the Recalculation Reason for each element.

To update or delete elements for each assignment:

1. Select the assignment name.

2. Click Update to add an element to the assignment.
3. Click Delete to remove an element from the assignment.

To confirm that your specified requests have been processed:

1. Query the individual assignment, but leave the status field blank.
2. Alternatively, query all assignments with a status of All Completed or All Outstanding and check the details for your individual assignment.

To create multiple retro lines:

1. Select the Create Retro Lines button.
2. A spreadsheet opens.
3. In the spreadsheet that appears, enter new records with a status of Awaiting Processing or Deferred.
4. Click on Upload. You can select Commit All Rows or Each Row option, if you want the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

To update the multiple retro lines:

1. Query the assignments with Awaiting Processing or Deferred.
2. Click on Download to Spreadsheet check box and click Go.
3. In the spreadsheet that opens, you can update the status. You cannot modify any employee or assignment information but can only change the status of the assignment or you can delete the retro entry or update the reprocess date of the retro entry.

Note: In the Entry Delete/ Update column, ensure to select the applicable value if there are any entry changes made. If you do not select any value the application does not make any changes to the database.

4. Click on Upload. You can select Commit All Rows or Each Row option, if you want

the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select the Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

Viewing RetroPay Enhanced Results

You can query the assignment actions of the RetroPay Enhanced process and review the corresponding retro entries created.

Note: Oracle Payroll delivers the "RetroPay Enhanced Results" (PAY_WS_RETRO_RESULTS) function to view the RetroPay enhanced results and this function is also associated with the global View menu (GLB_HRMS_VIEW_INFO). By default, this function is available in the US (US_HRMS_VIEW_INFO) and Canada (CA_HRMS_VIEW_INFO) menus. For the Mexico localization, the seeded "MX HRMS Navigator" menu includes the global GLB_HRMS_VIEW_INFO menu. Therefore, the "RetroPay Enhanced Results" function will be available to all responsibilities associated with the seeded "MX HRMS Navigator" menu.

If required, system administrators must add the "RetroPay Enhanced Results" function to other localization seeded menus and custom menus.

To view the RetroPay Enhanced Results:

1. Click the View Results on the Assignment Process Results window to view the results for a particular the RetroPay Enhanced assignment action.
2. Query the Assignment Actions of the RetroPay Enhanced process effective between the specified dates for a given assignment or payroll. You can enter any of the following to query the retro assignment actions
 - assignment number
 - full name
 - effective date from and effective date to
 - payroll name
 - status of the assignment action

3. Click on the following details of the Retropay Enhanced assignment actions matching the search criteria to display the appropriate information:
 - Full Name – Click on the Full Name to get the list of Retro Entries created by the selected action.
 - Assignment Number
 - Action Status - If the action is in Error status, then click on the status to review the error messages.
 - Effective Date – View the effective date of the Retropay Enhanced assignment action.
 - Reprocess Date – Date provided by the Retropay Notification Report or the Retro Status Page.
 - Overlap Date – Overlap Date calculated by the Retropay Enhanced process internally. During the process, the run actions are rolled back and re-run from this date for the assignment.

4. In the Retropay Entries section, you can view the following information:
 - retro element
 - effective start date
 - effective end date
 - retro component
 - base element - the element for which the retro element is created
 - original date earned
 - Details – Click on the icon in the Details column to display the input values of the retro element created with a comparison of the run result values from the original period. The table also displays the retro element entries with their input values from the same source in previous periods. The comparison assumes that the base element and retro element have the same set of input values with the same order of display sequence.

Running the Retro-Notifications Report (Enhanced and Enhanced PDF)

After you have defined the components and element time spans, you can check the retrospective changes occurred. Oracle Payroll provides two types of retro notification reports that you can use report to identify all retrospective changes that have occurred

since the last payroll run. This information is particularly useful when changes with retrospective impact are entered in Self Service HRMS independently of the Payroll department.

Oracle Payroll enables you to produce the report either in a text format or as PDF format. You can choose to run the report depending on your requirement:

- Retro -Notifications (Enhanced) Report – run this report to generate the output in text format
- Retro -Notifications (Enhanced PDF) Report - run this report to generate the output in PDF format that you can further customize to meet your requirements.

The Retro-Notifications report does not perform any RetroPay processing. It only identifies element entries that have changed. You must still run your RetroPay process separately to process these changes. After you have run the Retro-Notifications report, you can

- Run your RetroPay process on all assignments
- Edit the event group to remove or add assignments and then run your RetroPay process.
- Take no retrospective action on any of the assignments.

You can use the RetroPay Status window to schedule processing.

You run the Retro-Notifications (Enhanced) or the Retro-Notifications (Enhanced PDF) report from the Submit Processes and Reports window.

To run the Retro-Notifications (Enhanced) report:

1. Select the payroll. You can only run this report for a single payroll
2. If you want to see the retro-notifications for a particular event group, select an overriding event group.
3. If you want a report, select Yes in the Generate Report parameter.
4. Click OK, and submit.

To run the Retro-Notifications (Enhanced PDF) report:

1. Select the payroll. You can only run this report for a single payroll
2. If you want to see the retro-notifications for a particular event group, select an overriding event group.
3. If you are running the PDF-enabled version of this report, select a template for your

PDF output.

4. If you want a report, select Yes in the Generate Report parameter.
5. Click OK and submit.

Running Enhanced RetroPay

Use the Enhanced RetroPay process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

You run the Enhanced RetroPay process from the Submit Requests window.

To run the Enhanced RetroPay process:

1. Enter an effective date to indicate the date from which you want to create the retrospective elements for Enhanced RetroPay process.
2. Select the payroll.
3. If you want to create retrospective entries in a different pay period other than effective date, enter an entry creation date. The application creates retrospective entries in the pay period in which the Entry Creation Date occurs.

If you leave this field blank, the application creates the default retrospective entries as of Effective Date.

4. Click Submit

Running Quick RetroPay

Run Quick RetroPay to process any retrospective payments for a single assignment. You run the Quick RetroPay process from the Submit Requests window.

Note: It is not mandatory to run the Retro-Notifications Report for QuickRetroPay process.

To run the Quick RetroPay process:

1. Enter a date on which you want to create the derived retro element entries. This is mandatory.
2. Select the assignment number of the assignment for which you want to run the backdated change. This is mandatory.
3. If you want the retro entries to get created in a different payroll period than that of

Effective Date, then you specify an Entry Creation Date. This is optional.

4. Enter an earliest date from which you want to reprocess the assignment backdated changes. If you do not specify any date, then the application calculates it internally. This is optional.
5. If you want the retro-notifications for a particular event group, select an overriding event group.
6. Click Submit.

HR Information Systems

Deploy SSHR Capability

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.

Implementing Oracle HRMS

Additional Implementation Steps for UAE

If you are implementing Oracle HRMS for UAE, then you must also complete the following additional implementation steps.

Additional Implementation Steps

Step 1: Set up the Social Insurance Calculations *Required Step*

To record and process the GPSSA social insurance schemes for employees, you must complete the setup for social insurance calculations. See: Calculating Social Insurance, page 4-27

Step 2: Set up the Statement of Earnings *Required Step*

You need to set up the online statement of earnings before you can see the values correctly. See: Setting Up a Global Statement of Earnings, page 4-12

Note: When entering SOE information at the Business Group level, select the predefined element sets AE_SOE_EARNINGS_ELEMENTS and AE_SOE_DEDUCTIONS_ELEMENTS and the predefined balance attribute AE_SOE_BALANCE_ATTRIBUTES.

Step 3: Set Up Electronic File Transfer *Required Step*

To process the electronic file transfer, you must complete several tasks. See: Setting Up Electronic File Transfer, page 4-25

Step 4: Set Up Gratuity *Required Step*

To process gratuity, you must complete several tasks. See: Calculating Gratuity, page 4-30

Step 5: Set up the Loan Process *Required Step*

To run the loan process, you must complete the following tasks:

1. Add the required loan types, such as car loan or house loan, as values to the lookup AE_Loan_Type. See: *Adding Lookup Types and Values, Oracle HRMS Configuring, Reporting, and System Administration Guide*
2. Link the Loan Recovery element to the payroll. See: *Defining Element Links, Oracle HRMS Compensation and Benefits Management Guide*

Also see: *Processing Loans*, page 3-25

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