Oracle Global Human Resources Cloud
Using Global Human Resources
This guide also applies to on-premise implementations

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

Note

If you don’t see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

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**Note**

Limited content applicable to Oracle Cloud implementations.


**Other Information Sources**

**My Oracle Support**


Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.
Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides details on service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes.

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
Plan Workforce Deployment

Plan Workforce Deployment: Overview

Use the plan workforce deployment process to review workforce structures, and to revise your initial setup as your organization changes over time. For example, you may need to add new departments, create new jobs, or revise rates for grades. Using the tasks in this activity, you can review, revise, and create new:

- Departments
- Divisions
- Disability organizations
- Organization trees
- Department trees
- Locations
- Jobs
- Positions
- Grades
- Grade rates
- Grade ladders

You can also use this activity to revise payroll statutory units, legal employers, and tax reporting units, but to create new ones, you must access the Manage Legal Entity task in the Setup and Maintenance work area to first create a legal entity.

Manage Departments, Divisions, and Other Organizations

Enterprise Structures: Overview

Oracle Fusion Applications have been designed to ensure your enterprise can be modeled to meet legal and management objectives. The decisions about your implementation of Oracle Fusion Applications are affected by your:

- Industry
- Business unit requirements for autonomy
- Business and accounting policies
Business functions performed by business units and optionally, centralized in shared service centers
Locations of facilities

Every enterprise has three fundamental structures, legal, managerial, and functional, that are used to describe its operations and provide a basis for reporting. In Oracle Fusion, these structures are implemented using the chart of accounts and organizations. Although many alternative hierarchies can be implemented and used for reporting, you are likely to have one primary structure that organizes your business into divisions, business units, and departments aligned by your strategic objectives.

Legal Structure

The figure above shows a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is a distinct legal entity from its owners and managers. The corporation is owned by its shareholders, who may be individuals or other corporations. There are many other kinds of legal entities, such as sole proprietorships, partnerships, and government agencies.

A legally recognized entity can own and trade assets and employ people in the jurisdiction in which it is registered. When granted these privileges, legal entities are also assigned responsibilities to:

- Account for themselves to the public through statutory and external reporting
- Comply with legislation and regulations
- Pay income and transaction taxes
- Process value added tax (VAT) collection on behalf of the taxing authority

Many large enterprises isolate risk and optimize taxes by incorporating subsidiaries. They create legal entities to facilitate legal compliance, segregate operations, optimize taxes, complete contractual relationships, and isolate risk. Enterprises use legal entities to establish their enterprise’s identity under the laws of each country in which their enterprise operates.

In the figure above, a separate card represents a series of registered companies. Each company, including the public holding company, InFusion America, must be registered in the countries where they do business. Each company consists of various divisions created for purposes of management reporting. These are shown as vertical columns on each card.
separate company for each business in the United States (US), but have their United Kingdom (UK) legal entity represent all businesses in that country. The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis. Each company’s card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

**Management Structure**

Successfully managing multiple businesses requires that you segregate them by their strategic objectives, and measure their results. Although related to your legal structure, the business organizational hierarchies do not need to be reflected directly in the legal structure of the enterprise. The management structure can include divisions, subdivisions, lines of business, strategic business units, and cost centers. In the figure above, the management structure is shown on the Business Axis. In Oracle Fusion Applications, the management structure is implemented using divisions and business units.

**Functional Structure**

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure above. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development (R&D) and selling, general, and administrative (SG&A) expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

**Designing an Enterprise Configuration: Example**

This example illustrates how to set up an enterprise based on a global company operating mainly in the US and the UK with a single primary industry.

**Scenario**

InFusion Corporation is a multinational enterprise in the high technology industry with product lines that include all the components that are required to build and maintain air quality monitoring (AQM) systems for homes and businesses. Its primary locations are in the US and the UK, but it has smaller outlets in France, Saudi Arabia, and the United Arab Emirates (UAE).

**Enterprise Details**

In the US, InFusion employs 400 people and has a company revenue of $120 million. Outside the US, InFusion employs 200 people and has revenue of $60 million.
Analysis
InFusion requires three divisions. The US division will cover the US locations. The Europe division will cover the UK and France. Saudi Arabia and the UAE will be covered by the Middle East division.
InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, in order to employ and pay its workers in those countries. InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.
InFusion requires business units for human capital management (HCM) purposes. Infusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration
Based on this analysis, InFusion requires an enterprise with multiple divisions, ledgers, legal employers, payroll statutory units, tax reporting units, legislative data groups, departments, cost centers, and business units. This figure illustrates the enterprise configuration that results from the analysis of InFusion Corporation.
Enterprise: Explained

An enterprise consists of legal entities under common control and management.

Enterprise Defined

When implementing Oracle Fusion Applications you operate within the context of an enterprise that has already been created in the application for you. This is either a predefined enterprise or an enterprise that has been created in the application by a system administrator.

An enterprise organization captures the name of the deploying enterprise and the location of the headquarters. There is normally a single enterprise organization in a production environment. Multiple enterprises are defined when the system is used to administer multiple customer companies, for example, multiple tenants, or when a customer chooses to set up additional enterprises for testing or development.

Oracle Fusion Applications offers capabilities for multiple tenants to share the same applications instance for some human resources processes. If you offer business process outsourcing services to a set of clients, each of those clients may be represented as an enterprise within an Oracle Fusion Application instance. To support this functionality, system owned reference data such as sequences, sets, and flexfields are also defined within an enterprise.

In Oracle Fusion Applications, an organization classified as an enterprise is defined before defining any other organizations in the HCM Common Organization Model. All other organizations are defined as belonging to an enterprise.

Division: Explained

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results. Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies do not need to reflect directly the legal structure of the enterprise. The management entities and structure can include divisions and subdivisions, lines of business, and other strategic business units, and include their own revenue and cost centers. These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

A division refers to a business oriented subdivision within an enterprise, in which each division organizes itself differently to deliver products and services or address different markets. A division can operate in one or more countries, and can be comprised of many companies or parts of different companies that are represented by business units.

A division is a profit center or grouping of profit and cost centers, where the division manager is responsible for attaining business goals including profit goals. A division can be responsible for a share of the company’s existing
product lines or for a separate business. Managers of divisions may also have return on investment goals requiring tracking of the assets and liabilities of the division. The division manager reports to a top corporate executive.

By definition a division can be represented in the chart of accounts. Companies may choose to represent product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise. This may coincide with the management segment used in segment reporting.

Oracle Fusion Applications supports a qualified management segment and recommends that you use this segment to represent your hierarchy of business units and divisions. If managers of divisions have return on investment goals, make the management segment a balancing segment. Oracle Fusion applications allows up to three balancing segments. The values of the management segment can be comprised of business units that roll up in a hierarchy to report by division.

Historically, divisions were implemented as a node in a hierarchy of segment values. For example, Oracle E-Business Suite has only one balancing segment, and often the division and legal entity are combined into a single segment where each value stands for both division and legal entity.

**Use of Divisions in Oracle Fusion Human Capital Management (HCM)**

Divisions are used in HCM to define the management organization hierarchy, using the generic organization hierarchy. This hierarchy can be used to create organization based security profiles.

**Cost Centers and Departments: Explained**

A cost center represents the smallest segment of an organization for which costs are collected and reported. A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager and has one or more workers assigned to it.

The following two components need to be considered in designing your enterprise structure:

- Cost centers
- Departments

**Cost Centers**

A cost center also represents the destination or function of an expense as opposed to the nature of the expense which is represented by the natural account. For example, a sales cost center indicates that the expense goes to the sales department.

A cost center is generally attached to a single legal entity. To identify the cost centers within a chart of accounts structure use one of these two methods:

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach will require defining more cost center values.
• Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values.

The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

**Departments**

A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager. For example, although the manager may change, the objectives do not change. Departments have one or more workers assigned to them.

A manager of a department is typically responsible for:

• Controlling costs within their budget
• Tracking assets used by their department
• Managing employees, their assignments, and compensation

**Note**

The manager of a sales department may also be responsible for meeting the revenue targets.

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Applications, departments are defined and classified as Department organizations. Oracle Fusion Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

The granularity of cost centers and their relationship to departments varies across implementations. Cost center and department configuration may be unrelated, identical, or consist of many cost centers tracking the costs of one department.

**Disability Organizations: Explained**

Set up disability organizations to identify the external organizations with which workers with disabilities are registered. Disability organizations provide information and support to people with disabilities. The Royal National Institute of Blind People is an example of a disability organization. Disability organizations can also assess the degree to which a person is affected by the disability.

**Disability Organizations and Person Records**

When you create person records for workers with disabilities, you select the disability organization with which the worker is registered, identify the
registration and expiration dates, and enter any other descriptive or legislative information that pertains to the disability.

To create disability organizations as TCA parties, use the Manage Third Parties task from the Setup and Maintenance work area, and select the disability organization party usage code.

**Using Single or Multiple Classifications for an Organization: Points to Consider**

Organization classifications define the purpose of the organization, whether it’s a department, a division, or a legal entity. In some enterprises, organization classifications overlap, which means that the same organization can be assigned multiple classifications. For example, one organization within an enterprise might be both a project organization and a department. The classifications of organizations vary according to business objectives, legal structure, industry, company culture, size and type of growth. You can create organizations in Oracle Fusion with one or more classifications to reflect your enterprise structure.

**Defining an Organization with One Classification**

Define each organization in your enterprise as a separate organization with a single classification to reflect your enterprise structure and provide flexibility for growth and expansion. The advantage of setting up separate organizations is the ability to add further organizations to expand the enterprise easily. For example, if your enterprise acquires another company which has a different line of business in a country in which you employ people, then you can create a division to represent the new company, a legal entity (classified as a legal employer and payroll statutory unit) for the company’s payroll tax and social insurance, and any additional departments for workers.

**Defining an Organization with Multiple Classifications**

Define an organization with multiple classifications if the organization has multiple purposes. For example, if you want to use an organization within the Oracle Sales Cloud applications as a department that employs sales people, you can classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, you can create a legal entity for each country using the Oracle Fusion Legal Entity Configurator and then use the Manage Departments task to classify them as a department as well.

**Legal Entities: Explained**

A legal entity is a recognized party with rights and responsibilities given by legislation.

Legal entities have the right to own property, the right to trade, the responsibility to repay debt, and the responsibility to account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation. Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity
recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

- Facilitating local compliance
- Taking advantage of lower corporation taxation in some jurisdictions
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

**The Role of Your Legal Entities**

In configuring your enterprise structure in Oracle Fusion Applications, you need to understand that the contracting party on any transaction is always the legal entity. Individual legal entities own the assets of the enterprise, record sales and pay taxes on those sales, make purchases and incur expenses, and perform other transactions.

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities’ operations based on different jurisdictions’ requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), who enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies do not have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise’s reporting requirements in different currency.

A legal entity can represent all or part of your enterprise’s management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

**Legal Entity in Oracle Fusion: Points to Consider**

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers, which are part of the Oracle Fusion Trading Community Architecture. When your legal entities are
trading with each other, you represent both of them as legal entities and also as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

There are several decisions that need to be considered in creating your legal entities.

- The importance of legal entity in transactions
- Legal entity and its relationship to business units
- Legal entity and its relationship to divisions
- Legal entity and its relationship to ledgers
- Legal entity and its relationship to balancing segments
- Legal entity and its relationship to consolidation rules
- Legal entity and its relationship to intercompany transactions
- Legal entity and its relationship to worker assignments and legal employer
- Legal entity and payroll reporting
- Legal reporting units

**The Importance of Legal Entity in Transactions**

All of the assets of the enterprise are owned by individual legal entities. Oracle Fusion Financials allow your users to enter legal entities on transactions that represent a movement in value or obligation.

For example, the creation of a sales order creates an obligation for the legal entity that books the order to deliver the goods on the acknowledged date, and an obligation of the purchaser to receive and pay for those goods. Under contract law in most countries, damages can be sought for both actual losses, putting the injured party in the same state as if they had not entered into the contract, and what is called loss of bargain, or the profit that would have made on a transaction.

In another example, if you revalued your inventory in a warehouse to account for raw material price increases, the revaluation and revaluation reserves must be reflected in your legal entity’s accounts. In Oracle Fusion Applications, your inventory within an inventory organization is managed by a single business unit and belongs to one legal entity.

**Legal Entity and Its Relationship to Business Units**

A business unit can process transactions on behalf of many legal entities. Frequently, a business unit is part of a single legal entity. In most cases the legal entity is explicit on your transactions. For example, a payables invoice has an explicit legal entity field. Your accounts payables department can process supplier invoices on behalf of one or many business units.

In some cases, your legal entity is inferred from your business unit that is processing the transaction. For example, your business unit A agrees on terms for the transfer of inventory to your business unit B. This transaction is binding on your default legal entities assigned to each business unit. Oracle Fusion Procurement, Oracle Fusion Projects, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.
Legal Entity and Its Relationship to Divisions

The division is an area of management responsibility that can correspond to a collection of legal entities. If desired, you can aggregate the results for your divisions by legal entity or by combining parts of other legal entities. Define date-effective hierarchies for your cost center or legal entity segment in your chart of accounts to facilitate the aggregation and reporting by division. Divisions and legal entities are independent concepts.

Legal Entity and Its Relationship to Ledgers

One of your major responsibilities is to file financial statements for your legal entities. Map legal entities to specific ledgers using the Oracle Fusion General Ledger Accounting Configuration Manager. Within a ledger, you can optionally map a legal entity to one or more balancing segment values.

Legal Entity and Its Relationship to Balancing Segments

Oracle Fusion General Ledger supports up to three balancing segments. Best practices recommend that one of these segments represents your legal entity to ease your requirement to account for your operations to regulatory agencies, tax authorities, and investors. Accounting for your operations means you must produce a balanced trial balance sheet by legal entity. If you account for many legal entities in a single ledger, you must:

1. Identify the legal entities within the ledger.
2. Balance transactions that cross legal entity boundaries through intercompany transactions.
3. Decide which balancing segments correspond to each legal entity and assign them in Oracle Fusion General Ledger Accounting Configuration Manager. Once you assign one balancing segment value in a ledger, then all your balancing segment values must be assigned. This recommended best practice facilitates reporting on assets, liabilities, and income by legal entity.

Represent your legal entities by at least one balancing segment value. You may represent it by two or three balancing segment values if more granular reporting is required. For example, if your legal entity operates in multiple jurisdictions in Europe, you might define balancing segment values and map them to legal reporting units. You can represent a legal entity by more than one balancing segment value, do not use a single balancing segment value to represent more than one legal entity.

In Oracle Fusion General Ledger, there are three balancing segments. You can use separate balancing segments to represent your divisions or strategic business units to enable management reporting at the balance sheet level for each division or business unit. For example, use this solution to empower your business unit and divisional managers to track and assume responsibility for their asset utilization or return on investment. Using multiple balancing segments is also useful when you know at the time of implementation that you are disposing of a part of a legal entity and need to isolate the assets and liabilities for that entity.

Note
Implementing multiple balancing segments requires every journal entry that is not balanced by division or business unit, to generate balancing lines. Also, you cannot change to multiple balancing segments easily after you have begun to use the ledger because your historical data is not balanced by the new multiple balancing segments. Restating historical data must be done at that point. To use this feature for disposal of a part of a legal entity, implement multiple balancing segments at the beginning of the legal entity's corporate life or on conversion to Oracle Fusion.

If you decided to account for each legal entity in a separate ledger, there is no requirement to identify the legal entity with a balancing segment value within the ledger.

**Note**
While transactions that cross balancing segments don’t necessarily cross legal entity boundaries, all transactions that cross legal entity boundaries must cross balancing segments. If you make an acquisition or are preparing to dispose of a portion of your enterprise, you may want to account for that part of the enterprise in its own balancing segment even if it is not a separate legal entity. If you do not map legal entities sharing the same ledger to balancing segments, you will not be able to distinguish them using the intercompany functionality or track their individual equity.

**Legal Entity and Its Relationship to Consolidation Rules**

In Oracle Fusion Applications you can map legal entities to balancing segments and then define consolidation rules using your balancing segments. You are creating a relationship between the definition of your legal entities and their role in your consolidation.

**Legal Entity and its Relationship to Intercompany Transactions**

Use Oracle Fusion Intercompany functionality for automatic creation of intercompany entries across your balancing segments. Intercompany processing updates legal ownership within the enterprise’s groups of legal entities. Invoices or journals are created as needed. To limit the number of trading pairs for your enterprise, set up intercompany organizations and assign them to your authorized legal entities. Define processing options and intercompany accounts to use when creating intercompany transactions and to assist in consolidation elimination entries. These accounts are derived and automatically entered on your intercompany transactions based on legal entities assigned to your intercompany organizations. Intracompany trading, in which legal ownership isn’t changed but other organizational responsibilities are, is also supported. For example, you can track assets and liabilities that move between your departments within your legal entities by creating departmental level intercompany organizations.

**Note**
In the Oracle Fusion Supply Chain applications, model intercompany relationships using business units, from which legal entities are inferred.

**Legal Entity and Its Relationship to Worker Assignments and Legal Employer**

Legal entities that employ people are called legal employers in the Oracle Fusion Legal Entity Configurator. You must enter legal employers on worker assignments in Oracle Fusion HCM.
Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance on behalf of many of your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together

When you set up legal entities, you can identify them as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). A tax reporting unit is created automatically when you add a legal entity and identify it as a payroll statutory unit. Depending on how your organization is structured, you may have only one legal entity that is also a payroll statutory unit and a legal employer, or you may have multiple legal entities, payroll statutory units, and legal employers.

Legal Employers and Payroll Statutory Unit

Payroll statutory units enable you to group legal employers so that you can perform statutory calculations at a higher level, such as for court orders or for United Kingdom (UK) statutory sick pay. In some cases, a legal employer is also a payroll statutory unit. However, your organization may have several legal employers under one payroll statutory unit. A legal employer can belong to only one payroll statutory unit.

Payroll Statutory Units and Tax Reporting Units

Payroll statutory units and tax reporting units have a parent-child relationship, with the payroll statutory unit being the parent.

Tax Reporting Units and Legal Employers

Tax reporting units are indirectly associated with a legal employer through the payroll statutory unit. One or more tax reporting units can be used by a single legal employer, and a tax reporting unit can be used by one or more legal employers. For example, assume that a single tax reporting unit is linked to a payroll statutory unit. Assume also that two legal employers are associated with this payroll statutory unit. In this example, both legal employers are associated with the single tax reporting unit.

Legislative Data Groups: Explained

Legislative data groups are a means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise
Oracle Global Human Resources Cloud operates. Each legislative data group is associated with one or more payroll statutory units.

**Legislative Data Groups**

Oracle Fusion Payroll is organized by legislative data groups. Each legislative data group marks a legislation in which payroll is processed, and is associated with a legislative code, currency and its own cost key flexfield structure. A legislative data group is a boundary that can share the same set up and still comply with the local laws. It can span many jurisdictions as long as they are within one country, and contain many legal entities that act as payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

**HCM Organization Models: Examples**

These examples illustrate different models for human capital management (HCM) organizations. Each example includes a legislative data group (LDG). LDGs are not an organization classification, but they are included in the example to show how you associate them with a payroll statutory unit to partition payroll data.

**Simple Configuration**

This example illustrates a simple configuration that does not include any tax reporting units. The legal employer and payroll statutory units are the same, sharing the same boundaries. Reporting can only be done at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as reporting in these countries is done at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity that is both a payroll statutory unit and a legal employer.
Multiple Legal Employers and Tax Reporting Units Under One Payroll Statutory Unit

This example illustrates a more complex configuration. In this enterprise, one legal entity, InFusion US, is defined as a payroll statutory unit and has two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit, and how tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit. The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and the balances can be categorized separately by either payroll statutory unit, legal employer, or tax reporting unit. This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US.

This figure illustrates an enterprise that has one payroll statutory unit and multiple legal employers and tax reporting units.

One Payroll Statutory Unit and Two Tax Reporting Units That Are Subsidiaries of the Legal Entity

This model makes no distinction between a legal employer and a payroll statutory unit. Tax reporting units are defined as subsidiaries to the legal entity. In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting, and statutory reporting boundaries are assumed to be the same for both payroll and HR management. An example of a country that might use this model is France.

This figure illustrates an example of an organization with one legal entity that is both a legal employer and a payroll statutory unit and that has two tax reporting units.
One Payroll Statutory Unit with Several Tax Reporting Units That Are Independent from the Legal Employer

In this model, the enterprise has one legal entity, and legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently. Using this model, you would not typically need to report on tax reporting unit balances within a legal employer, and balances can be categorized by either or both organizations, as required. An example of a country that might use this model is India.

This figure illustrates an enterprise with one legal entity that is a payroll statutory unit and a legal employer, and the tax reporting units are independent from the legal employer.
Multiple Payroll Statutory Units with Several Tax Reporting Units that are Independent from the Legal Employer

In this model, the enterprise has two legal entities, and legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently. Using this model, you would not typically need to report on tax reporting unit balances within a legal employer, and balances can be categorized by either or both organizations, as required. An example of a country that might use this model is the United Kingdom (UK).

This figure illustrates an enterprise with two legal entities, and legal employers and tax reporting units are independent from each other.
Oracle Fusion HCM Trees: Explained

Oracle Fusion trees are graphical representations of hierarchical data such as the structure of your organization. Oracle Fusion Human Capital Management (HCM) provides predefined tree structures for department, organization, position, and geography trees. You cannot change the predefined HCM tree structures. With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree. For all HCM tree types, however, only one version of each tree can be active at one time.

Department Trees

Using the predefined tree structure for a department tree, you can create multiple department trees and then create multiple versions of each tree to build hierarchical representations of the departments within your organization. The top node of the tree is a department, and all of the child nodes are also departments. You can have only one top-level node for a department tree, and you cannot add a department as a node more than one time in the same tree version.

You can use department trees for the following purposes:

- Secure data by using a department tree in an organization security profile.
- Create custom gallery messages to appear in the portraits of workers assigned to departments within a department tree. For example, you may create a gallery message notifying workers of a server outage or a public holiday in a particular location.

**Organization Trees**

If you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise structure, a default organization tree is created automatically for you, with the ultimate holding company as the first node, divisions and country holding companies as the second level, and legal employers as the third level. You can modify the organization tree as needed, and you can create additional organization trees. If you do not use the Enterprise Structures Configurator, then you can create organization trees based on the predefined organization tree structure. In an organization tree, you can select any type of organization for the top node and for the child nodes, but you can have only one top-level node.

You can secure HCM data by using an organization tree to identify organizations in an organization security profile.

**Position Trees**

Using the predefined tree structure for a position tree, you can create multiple position trees and then create multiple versions of each tree to establish reporting relationships among positions. You can have only one top-level node for a position tree.

You can use position trees for the following purposes:

- Review position hierarchies for budgeting and organizational planning.
- Secure access to positions by identifying a position hierarchy in a position security profile. For example, you can create a position security profile that includes all positions in a position hierarchy below a specified top position. You can also include the position security profile in a person security profile to secure access to person records. In this case, the person security profile includes the person records of the people who occupy the positions in the position security profile.

The following figure illustrates a position hierarchy that you can establish using a position tree.

![Position Hierarchy Diagram]

**Geography Trees**

Using the predefined tree structure for a geography tree, you create a version of a geography tree to represent the countries in which your organization operates.
Although you can create multiple versions, you can create only one geography tree, and the tree can have only two levels in the hierarchy. You can have only one top-level node for a geography tree.

You can use the geography tree to specify the locations to which calendar events apply. If an event applies to your entire enterprise, then you can attach it to the top-level node in the tree. If an event applies only to specific countries or territories in your enterprise, then you can attach it to the nodes for those specific countries.

This figure illustrates the geographical hierarchy that you can establish using a geography tree.

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**FAQs for Manage Departments, Divisions, and Other Organizations**

**What's a tax reporting unit?**

Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications. To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage Legal Reporting Unit HCM Information task.

If you identify a legal entity as a legal employer only, and not as a payroll statutory unit, you must enter a parent payroll statutory unit. The resulting legal reporting units are transferred to Oracle Fusion HCM as tax reporting units, but as children of the parent payroll statutory unit that you entered, and not the legal entity that you identified as a legal employer.

**What's a payroll statutory unit?**

Payroll statutory units are legal entities that are responsible for paying workers, including the payment of payroll tax and social insurance. A payroll statutory unit can pay and report on payroll tax and social insurance on behalf of one or many legal entities, depending on the structure of your enterprise. For example, if you are a multinational, multicompany enterprise, then you register a payroll statutory unit in each country where you employ and pay people. You can optionally register a consolidated payroll statutory unit to pay and report on workers across multiple legal employers within the same country. You associate
a legislative data group with a payroll statutory unit to provide the correct payroll information for workers.

**What's a legal employer?**

A legal employer is a legal entity that employs workers. You define a legal entity as a legal employer in the Oracle Fusion Legal Entity Configurator. The legal employer is captured at the work relationship level, and all employment terms and assignments within that relationship are automatically associated with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

**What's a reporting establishment?**

A reporting establishment is an organization that is used for statutory reporting other than tax and social insurance reporting. A reporting establishment has a parent-child relationship with a legal employer, with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments.

In some countries, such as France, a reporting establishment can also be a tax reporting unit.

**Can I delete an organization?**

No. However, you can disable an organization if it is no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.

**How can I identify my organization in a report?**

Use the organization manager information to enter a reporting name to help you identify an organization in a report. You use organization hierarchies for statutory, legal and management reporting.

**Manage Locations**

**Locations: Explained**

A location identifies physical addresses of a workforce structure, such as a department or a job. You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

The locations that you create exist as separate structures that you can use for reporting purposes, and also in rules that determine employee eligibility for various types of compensation and benefits. You enter information about a location only once. Subsequently, when you set up other workforce structures you select the location from a list.
**Location Sets**

When you create a location, you must associate it with a set. Only those users who have access to the set’s business unit can access the location set and other associated workforce structure sets, such as those that contain departments and jobs.

You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit. When users search for locations, they can see the locations that they have access to along with the locations in the common set.

The following figure shows how locations sets restrict access to users.

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**Uploading Locations Using a Spreadsheet**

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, add your location information to the spreadsheet, and then upload directly to your enterprise configuration. You can upload the spreadsheet multiple times to accommodate revisions.

---

**FAQs for Manage Locations**

**Why can’t I see my location in the search results?**

You can search for approved locations only. Also, if you created a location in Oracle Fusion Trading Community Model, then you can’t access that location from Oracle Fusion Global Human Resources. For use in Oracle Fusion HCM, you must recreate the location from the Manage Locations page.

**How can I associate a location with an inventory organization?**

From the Manage Locations page in Oracle Fusion Global Human Resources. To appear on the Create or Edit Location pages, your inventory organization must be effective on today’s date and must exist in the location set that you selected.
What happens if I select an inventory organization when I'm creating or editing a location?

The location is available for selection in purchase documents of that inventory organization in Oracle Fusion Inventory Management. If you don’t select an inventory organization, then the location is available in purchase documents across all inventory organizations.

What happens if I select a geographic hierarchy node when I'm creating or editing a location?

The calendar events that were created for the geographical node start to apply for the location and may impact the availability of worker assignments at that location. The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

What happens if I inactivate a location?

Starting from the effective date that you entered, you can no longer associate the location with other workforce structures, assignments, or applications. If the location is already in use, it will continue to be available to the components that currently use it.

Manage Jobs and Positions

Jobs and Positions: Critical Choices

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks. The key to whether to use jobs or positions is how each is used. Positions offer a well-defined space independent of the person performing the job. Jobs are a space defined by the person. A job can be defined globally in the Common Set, whereas a position is defined within one business unit.

You can update the job and department of a position at any time. This is useful if you hire someone into a new role and want to transfer the position to another department.

During implementation, one of the earliest decisions you will make is whether to use jobs or a combination of jobs and positions. The determinants for this decision are:

- The primary industry of your enterprise
- How you manage your people

Primary Industry of Your Enterprise

Primary industries and how they usually set up their workforce are listed in the table below.

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Workforce Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>Positions</td>
</tr>
</tbody>
</table>
Management of People

The following table displays suggestions of whether to use jobs or a combination of jobs and positions based on your industry and how you manage your employees when there is turnover.

<table>
<thead>
<tr>
<th>Industry</th>
<th>We always replace employees by rehiring to same role</th>
<th>We replace the head count, but the manager can use the head count in a different job</th>
<th>We rehire to the same position, but the manager can request a reallocation of budget to a different post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)</td>
<td>Positions</td>
<td>Jobs</td>
<td>Jobs</td>
</tr>
<tr>
<td>Controlled (An industry that is highly structured in which all aspects of work and remuneration are well organized and regulated.)</td>
<td>Positions</td>
<td>Positions</td>
<td>Positions</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Positions</td>
<td>Jobs</td>
<td>Positions</td>
</tr>
<tr>
<td>Retail</td>
<td>Positions</td>
<td>Jobs</td>
<td>Positions</td>
</tr>
<tr>
<td>Education</td>
<td>Positions</td>
<td>Jobs</td>
<td>Positions</td>
</tr>
</tbody>
</table>
**Jobs: Example**

Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

**Software Industry**
For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers. Recently, three developers have left the company. The director decides to redirect the head count to other areas. Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

In software industries, the organization is fluid. Using jobs gives an enterprise the flexibility to determine where to use head count, because the job only exists through the person performing it. In this example, when the three developers leave XYZ Corporation, their jobs no longer exist, therefore the corporation has the flexibility to move the headcount to other areas.

This figure illustrates the software industry job setup.

**Positions: Examples**

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain head counts, or have high turnover rates.

**Retail Industry**
ABC Corporation has high turnover. It loses approximately 5% of their cashiers monthly. The job of cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross trained to take over another cashier position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC must replace each cashier lost to turnover.

Since turnover is high in retail it is better for this industry to use positions. There is an automatic vacancy when an employee terminates employment.
The position exists even when there are no holders. This is important if the person who leaves the company is a manager or supervisor with direct reports. All direct reports continue reporting to the position even if it is empty. You do not need to reassign these employees to another manager or supervisor; the replacement manager is assigned to the existing position.

Also, an advantage to using positions is that when you hire somebody new many of the attributes are defaulted in from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.

Health Care Industry
The hospital has a structured head count and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions need to be filled in order for the hospital to run smoothly. Use jobs and positions if you need to apply detailed head count rules.

Health care is an industry that needs to regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

This figure illustrates the hospital position setup.
Manage Grades, Grade Rates, and Grade Ladders

**Grades: Explained**

Create grades to record the level of compensation for workers. You can create grades for multiple pay components, such as salary, bonus, and overtime rates. You can define one or more grades that are applicable for jobs and positions. This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments or employment terms for a worker.

**Grades and Sets**

You assign each grade to a set. If you assign a grade to the common set, then the grade is available for use in all business units. To limit a grade to a single business unit, you can assign it to a set that is specific to that business unit.

**Grade Steps**

Grade steps are distinct increments of progression within a grade. You can set up grades with or without grade steps.

The following figure illustrates the difference between grades with and without steps.

**Grade Rates**

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up
independently from grades. For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

**Grade Ladders**

You can combine grades into grade ladders to group your grades or grades with steps in the sequence in which your workers typically progress. For example, you might create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

**Grade Rates: Explained**

Grade rates contain the pay values that are related to each grade. Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay, such as salary, overtime, and bonuses.

Grade rates for some jobs or positions might include an hourly salary rate and an overtime rate. Grade rates for other jobs or positions might contain a salary rate type with a range of amounts and a bonus rate type with a fixed amount. Grade rates typically serve only as a guideline to validate that the salary you propose during the compensation process for a worker on a certain grade is appropriate for that grade.

This figure illustrates a grade that has two rate types associated with it. One is a salary rate type that has a range of values, and the other is a bonus rate type with a fixed amount.

![Diagram of Grade Rates](image)

This figure illustrates a different grade that has two rate types associated with it. One is a salary rate type that has a fixed amount, and the other is an overtime rate type that also has a fixed amount.
Rate Types
The types of rates that you can set up depend on the values for lookup type GRADE_PAY_RATE_TYPE. Examples of rate types are: salary, bonus, and overtime pay.

Grade Rates and Legislative Data Groups
You assign a legislative data group to each grade rate. Depending on how your enterprise is configured, you may have several legislative data groups. You can set up grades that are shared across different areas of your business, and then enter rates that are specific to each legislative data group.

Grade Rates and Grades
You can set up grade rates when you set up grades, or you can set them up independently from grades. For grades with steps, you enter rates when you attach the grades to a grade ladder.

Grade Ladders: Explained
Create grade ladders to group grades and grades with steps in the sequence in which your workers typically progress. Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You can set up separate grade ladders for different types of jobs or positions in your enterprise. For example, you may create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades
You create ladders with grades by building a hierarchy of grades that were created without steps. When you set up this type of ladder, only grades without steps are available to add to the ladder. You cannot create a grade ladder with a combination of both grades and grades with steps.
You do not define any grade rates when you set up a ladder with grades; the rates for the grades within the ladder are inherited from the rates that were added when you set up the grades. To add or edit rates for grades, you must use the Manage Grade Rates task.

Ladders with Grade Steps
You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.
You define step rates when you set up the ladder, and the rates are unique to each ladder. You cannot share step rates between grade ladders.

Grades, Grade Rates, Sets, and Legislative Data Groups: How They Work Together
You assign grades to sets, and you assign grade rates to legislative data groups. If you have grades that are common across multiple business units, you can
assign the grades to the set that is associated with the business units, and then set up grade rates that are specific to each legislative data group.

The following figure illustrates how you can use sets to share grades across multiple business units and then change the grade rates for each legislative data group.

Grades and Sets

Sets enable you to share grades that are common across business units in your enterprise. You can assign grades to either a specific set or to the common set to each grade. If you assign the grade to the common set, then the grade is available for use in all business units.

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people. For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that is shared between the countries, but set up different grade rates for each country in the applicable currency.

Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll

To ensure that workers are compensated according to the grade structure that you create, you use grades and grade rates in the following components of Oracle Fusion HCM:

- Jobs
- Positions
• Assignments and employment terms
• Compensation
• Payroll

How Grades Work with Jobs and Positions
You can define one or more grades that are applicable for each job and position. This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments or employment terms for a worker.

If you use positions, then the grades that you assign to jobs are the default grades for the positions that you associate with each job. You can use the default grades for the position, remove ones that don’t apply, or add new ones.

How Grades Work with Assignments and Employment Terms
When you set up assignments or employment terms, you can select the applicable grade for the job or position. Two profile options determine the grades that are available for selection. The first profile option is PER_ENFORCE_VALID_GRADES. If you set this site-level profile option to Yes, then users can select a grade only from the list that you defined for the job or position.

• If users select both a job and a position for the assignment or employment terms, then they can select grades that are valid for the position only.

• If valid grades are defined for neither the job nor the position, then users can select from all grades.

If you set this profile option to No, which is the default value, then users can select from all grades.

The second profile option is PER_DEFAULT_GRADE_FROM_JOB_POSITION. If you set this site-level profile option to Yes, and there is only one valid grade for a job or position, then that grade is used by default in the assignment or employment terms. In addition, if an entry grade is defined for a position, then that grade is used by default when the user creates a new set of employment terms or a new assignment.

If you set this profile option to No, which is the default value, then users can select from all grades.

How Grades and Grade Rates Work with Compensation and Payroll
Depending on the configuration of the legal employer to which workers belong, their salary can be stored at either the assignment or employment terms level, and the grade rate can be linked to the salary basis within the salary record. If this is the case, then their salaries are validated using the grade rates. For example, assume an assignment record for a worker indicates that he is in grade A1 and has a salary of 40,000.00 USD. The grade rate range that is attached to grade A1 is 30,000.00 USD to 50,000.00 USD, therefore, his salary is within the grade rate range, and no warnings are issued. If his manager or a human resource (HR) specialist changes his salary to 55,000.00 USD, a warning is issued that the new salary is outside his salary range.

In addition, compa-ratios and salary range positions for workers are calculated using the minimum and maximum amounts that are defined in the grade rates for their grades.
Payroll elements reference grades in the eligibility criteria. For example, assume you want to process a bonus for all workers who are at grade level A2. To accomplish this, you would create an earnings element for the bonus and specify A2 for the grade in the eligibility criteria. The result of this setup, when combined with additional eligibility criteria that may be applied by the bonus plan, is that when payroll is processed, workers who are at grade level A2 and who meet the additional eligibility criteria would receive the bonus.

**Grades, Grate Rates, and Grade Ladders: Examples**

The following examples illustrate how InFusion Corporation might set up different types of grades, rates, and ladders for the different types of jobs within the company. The examples include grade structures for administrative workers, managers, senior executives, and line workers. All amounts in the examples are US dollars.

**Grades with Steps**

The grade structure for annual salary amounts for administrative workers in InFusion Corporation includes five grades, and each grade includes five steps. When workers move from one grade to another in this ladder, they do not always start at step 1 of a grade. Their next step is based on their previous salary plus two steps. For example, a worker could move from Step 5 in Grade 1 to Step 3 in Grade 2.

The following table lists the five grades, steps, and the rates associated with them for administrative workers at InFusion Corporation.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>17,803</td>
<td>18,398</td>
<td>18,990</td>
<td>19,579</td>
<td>20,171</td>
</tr>
<tr>
<td>2</td>
<td>20,017</td>
<td>20,493</td>
<td>21,155</td>
<td>21,717</td>
<td>21,961</td>
</tr>
<tr>
<td>3</td>
<td>21,840</td>
<td>22,568</td>
<td>23,296</td>
<td>24,024</td>
<td>24,752</td>
</tr>
<tr>
<td>4</td>
<td>24,518</td>
<td>25,335</td>
<td>26,152</td>
<td>26,969</td>
<td>27,786</td>
</tr>
<tr>
<td>5</td>
<td>27,431</td>
<td>28,345</td>
<td>29,259</td>
<td>30,173</td>
<td>31,087</td>
</tr>
</tbody>
</table>

To set up your grade structure to reflect this table, perform the following tasks:
- Set up five different grades and add five steps for each grade.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for annual salary amounts using the rates in the preceding table.

**Grades Without Steps**

The grade structure for annual salary amounts for level 3 managers at InFusion Corporation includes grades without steps. The grade rates are fixed amounts.

The following table lists the grades and associated rates for level 3 managers at InFusion Corporation.
Plan Workforce Deployment

<table>
<thead>
<tr>
<th>Grade</th>
<th>Annual Salary Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>103,900</td>
</tr>
<tr>
<td>2</td>
<td>111,800</td>
</tr>
<tr>
<td>3</td>
<td>119,900</td>
</tr>
<tr>
<td>4</td>
<td>127,800</td>
</tr>
<tr>
<td>5</td>
<td>135,900</td>
</tr>
<tr>
<td>6</td>
<td>143,700</td>
</tr>
<tr>
<td>7</td>
<td>151,800</td>
</tr>
<tr>
<td>8</td>
<td>155,500</td>
</tr>
</tbody>
</table>

To set up your grade structure to reflect this table, perform the following tasks:

- Set up eight separate grades.
- For each grade, enter the rates from the preceding table.
- Set up a grade ladder with the Grades type and add all eight grades to the ladder.

**Grades with Grade Rate Ranges**

The grade structure for annual salary amounts for senior executives at InFusion Corporation includes grades with no steps, and the rates are set up using ranges.

The following table lists the rate range for senior executives at InFusion Corporation.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Minimum Annual Salary Amount</th>
<th>Maximum Annual Salary Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNREXEC</td>
<td>154,300</td>
<td>243,900</td>
</tr>
</tbody>
</table>

To set up a grade structure to reflect this table, perform the following tasks:

- Create a single grade.
- Create a grade rate and enter the minimum and maximum amounts from the preceding table for the grade rate range.

**Grade Rates with Hourly Amounts**

The grade structure for line workers at InFusion Corporation includes grades with steps, and the rates are hourly amounts.

The following table lists the hourly rates for line workers at InFusion Corporation.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10.64</td>
<td>11.07</td>
<td>11.49</td>
<td>11.96</td>
<td>12.40</td>
</tr>
<tr>
<td>2</td>
<td>11.77</td>
<td>12.27</td>
<td>12.76</td>
<td>13.24</td>
<td>13.72</td>
</tr>
<tr>
<td>3</td>
<td>12.92</td>
<td>13.46</td>
<td>13.98</td>
<td>14.55</td>
<td>15.07</td>
</tr>
<tr>
<td>4</td>
<td>14.03</td>
<td>14.63</td>
<td>15.21</td>
<td>15.80</td>
<td>16.39</td>
</tr>
<tr>
<td>5</td>
<td>15.20</td>
<td>15.83</td>
<td>16.46</td>
<td>17.12</td>
<td>17.75</td>
</tr>
</tbody>
</table>
To set up your grade structure to reflect this table, perform the following tasks:

- Create five grades, each with five steps.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for hourly amounts using the rates in the table.

**Setting Up Grade Ladders for Pay Scale Requirements: Worked Example**

This example illustrates how to use a grade ladder to create a pay scale that is typical of technicians in the metal industry in Germany. The ladder includes four grades, and each grade includes four steps.

The following table summarizes key decisions for the grades, rates, and grade ladder in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are steps required for the grades?</td>
<td>Yes.</td>
</tr>
<tr>
<td>Which step in each grade should be the ceiling step?</td>
<td>The last step in each grade.</td>
</tr>
<tr>
<td>What type of rates are necessary?</td>
<td>Salary rates only.</td>
</tr>
<tr>
<td>Will the ladder be created using grades or grades with steps?</td>
<td>Grades with steps.</td>
</tr>
</tbody>
</table>

**Summary of the Tasks**

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

**Creating Grades**

1. In the Workforce Structures work area, click **Manage Grades** to open the Manage Grades page.
2. On the Manage Grades page, click **Create** to open the Create Grade: Grade Details page.
3. In the Grade Details region of the Create Grade: Grade Details page, complete the fields as shown in this table, using the defaults unless otherwise indicated.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Set</td>
<td>Common</td>
</tr>
<tr>
<td>Name</td>
<td>Technicians 03</td>
</tr>
<tr>
<td>Code</td>
<td>Tech03</td>
</tr>
</tbody>
</table>

4. Click **Next** to access the Create Grade: Grade Steps page.
5. In the Grade Steps region of the Create Grade: Grade Steps page, click Add Row.

6. Add four steps for the grade by completing the fields as shown in this table. You must click Add Row after adding each step.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step Name</td>
<td>Year 1</td>
</tr>
<tr>
<td>Step Name</td>
<td>Year 2</td>
</tr>
<tr>
<td>Step Name</td>
<td>Year 3</td>
</tr>
<tr>
<td>Step Name</td>
<td>Year 4</td>
</tr>
</tbody>
</table>

7. Verify that Year 4 is the ceiling step.

8. Click Submit. You will add the grade rates when you create the grade ladder.

9. In the Warning dialog, click Yes.

10. In the Confirmation dialog, click OK.

11. Repeat steps 2 through 9 to add three more grades with steps. Complete the information for each grade using the information in these tables. The ceiling step in each grade is Year 4.

<table>
<thead>
<tr>
<th>Field</th>
<th>Grade 2</th>
<th>Grade 3</th>
<th>Grade 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Set</td>
<td>Common</td>
<td>Common</td>
<td>Common</td>
</tr>
<tr>
<td>Name</td>
<td>Technicians 04</td>
<td>Technicians 05</td>
<td>Technicians 06</td>
</tr>
<tr>
<td>Code</td>
<td>Tech04</td>
<td>Tech05</td>
<td>Tech06</td>
</tr>
</tbody>
</table>

Creating a Grade Ladder

1. In the Workforce Structures work area, click Manage Grades Ladders to open the Manage Grade Ladders page.

2. On the Manage Grade Ladders page, click Create to access the Create Grade Ladder: Grade Ladder Details page.

3. In the Grade Ladder Details region of the Create Grade Ladder: Grade Ladder Details page, complete the fields as shown in this table, using default values unless otherwise indicated.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Set</td>
<td>Common</td>
</tr>
<tr>
<td>Name</td>
<td>Metal Technicians</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Grade Type</td>
<td>Grade with steps</td>
</tr>
</tbody>
</table>

4. Click **Next** to access the Create Grade Ladder: Grades page.
5. In the Search Grades region of the Create Grade Ladder: Grades page, enter TECH in the **Code** field and click **Search**.
6. Select Tech03 and click **Add to Grade Ladder**.
7. Select Tech04 and click **Add to Grade Ladder**.
8. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
9. Select Tech05 and click **Add to Grade Ladder**.
10. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
11. Select Tech06 and click **Add to Grade Ladder**.
12. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
13. Verify that the grades appear in numerical order, with Tech06 at the top of the ladder and Tech03 at the bottom of the ladder.
14. Click **Next** to access the Create Grade Ladder: Rate Values page.
15. On the Create Grade Ladder: Rate Values page, select the legislative data group for Germany.
16. In the Grade Step Rates region, click **Add Row**.
17. Complete the following fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Technician Ladder Rates</td>
</tr>
<tr>
<td>Rate Type</td>
<td>Salary</td>
</tr>
<tr>
<td>Frequency</td>
<td>Monthly</td>
</tr>
<tr>
<td>Annualization Factor</td>
<td>12</td>
</tr>
<tr>
<td>Currency</td>
<td>EUR</td>
</tr>
</tbody>
</table>

18. In the Step Rate Values region, enter rates for the four steps in each grade by completing the fields as shown in this table.

<table>
<thead>
<tr>
<th>Grade Name</th>
<th>Step Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technicians 03</td>
<td>Step 1</td>
<td>1,750.73</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 2</td>
<td>1,878.90</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 3</td>
<td>2,009.79</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 4</td>
<td>2,143.92</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 1</td>
<td>2,238.57</td>
</tr>
</tbody>
</table>
### Setting Up Grade Ladders for Spine Point Requirements: Example

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points.

**Scenario**

Some organizations, such as in the public sector in the United Kingdom (UK), use spine points to structure their grades. Each point corresponds to one or more steps within a grade, as grades often overlap each other.

**Grade Structure**

You can use grade ladders to meet the requirements of a grade structure with spine points. This example shows a grade structure with spine points that is similar to one for university workers in the UK.

The following figure illustrates an example of a grade structure with spine points.

<table>
<thead>
<tr>
<th>Technicians 04</th>
<th>Step 2</th>
<th>2,408.39</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technicians 04</td>
<td>Step 3</td>
<td>2,577.68</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 4</td>
<td>2,744.81</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 1</td>
<td>2,831.87</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 2</td>
<td>3,047.14</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 3</td>
<td>3,257.52</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 4</td>
<td>3,469.00</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 1</td>
<td>3,586.36</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 2</td>
<td>3,851.38</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 3</td>
<td>4,122.34</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 4</td>
<td>2,143.92</td>
</tr>
</tbody>
</table>

19. Click **Next**.

20. On the Create Grade Ladder: Review page, review the grade ladder hierarchy and the rates, and click **Submit**.

21. In the Warning dialog, click **Yes**.

22. In the Confirmation dialog, click **OK**.
To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number
- Create a grade ladder with all three grades
- Create step rates with annual salary amounts

### Resulting Grades, Rates, and Grade Ladder

To create the grades needed for the grade structure with spine points, you must create three grades with steps. You can name the steps using the spine point numbers. The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.
To create the grade ladder for the grade structure with spine points, you must create a ladder using grades with steps. When you create the rates, use annual salary amounts. The following table lists the grades, steps, and rates to add to the ladder.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Steps</th>
<th>Rates</th>
</tr>
</thead>
</table>
| Grade 1 | • Spine Point 1  
 • Spine Point 2  
 • Spine Point 3  
 • Spine Point 4  
 • Spine Point 5  
 • Spine Point 6 | • 25,674  
 • 26,631  
 • 27,068  
 • 27,796  
 • 30,394  
 • 31,778 |
| Grade 2 | • Spine Point 6  
 • Spine Point 7  
 • Spine Point 8  
 • Spine Point 9  
 • Spine Point 10  
 • Spine Point 11  
 • Spine Point 12 | • 31,778  
 • 32,648  
 • 33,542  
 • 34,466  
 • 35,425  
 • 38,441  
 • 39,510 |
FAQs for Manage Grades, Grade Rates, and Grade Ladders

What's a ceiling step?

A ceiling step is typically the highest step within a grade to which a worker may progress. When a worker reaches the ceiling step within a grade, typically any further progress must be made by moving the worker to another grade. You can override the ceiling for individual assignments.

In most cases, the ceiling step is the last step in the sequence. For example, if the grade has steps 1 through 5, step 5 is the ceiling step. However, you may have situations where you want another step to be the ceiling. For example, in a grade with steps 1 through 5, you might indicate that step 4 is the ceiling step, and workers can progress from step 1 to step 4, and then on to the next grade. You can use step 5 when a worker is not entitled to move to the next grade, perhaps because he doesn't yet have the required qualifications or certificates, but you still want to increase his pay to reward him for many years of experience and good performance. You can provide the pay increase by moving him to step 5.

How can I edit rates for a grade?

You can edit rates by accessing the Manage Grade Rates task. You cannot edit rates within the Manage Grades task, because grades and rates have separate effective dates.

How can I add rates to grade steps?

You add rates for a grade with steps when you add the grade to a grade ladder.

Can I edit the legislative data group for a grade rate?

No. If you need to change the legislative data group for a grade rate, then you must change the grade rate to inactive, and create a new grade rate with the correct legislative data group.
Manage Workforce Lifecycle

Manage Workforce Lifecycle: Overview

The Manage Workforce Lifecycle business process covers all stages of a worker's association with the enterprise, from creation of the person record through termination of work relationships.

The business activities of this process, which are performed by human resource (HR) specialists and line managers, are:

- **Add Person**
  HR specialists and line managers create new person records for employees, contingent workers, nonworkers, and pending workers. The Add Person tasks include creating the new person's first work relationship with the enterprise.

- **Manage Employment Information**
  HR specialists create and manage work relationships, employment terms, and assignments for the workers to whom they have security access.

- **Change Employment**
  Line managers edit work location, working hours, and manager details for their direct and indirect reports.

- **Promote Worker**
  HR specialists promote workers to whom they have security access. Line managers promote their direct and indirect reports.

- **Transfer Worker**
  HR specialists permanently transfer or create temporary assignments for workers to whom they have security access. Line managers permanently transfer their direct and indirect reports. Permanent transfers and temporary assignments can be within the worker's current legal employer or to a different legal employer.

- **Terminate Worker**
  HR specialists terminate the work relationships of workers to whom they have security access. Line managers terminate the work relationships of their direct and indirect reports.
• Manage Personal Information

HR specialists manage information, such as addresses, national IDs, emergency contacts, disability details, and document records for the workers to whom they have security access.

HR specialists access Add Person tasks from the New Person work area. They access all other Manage Workforce Lifecycle tasks from the Person Management work area.

Line manager tasks are accessible from gallery search results, worker portraits, and the Manager Resources Dashboard.

Add Person

Creating Person Records: Examples

You create a person record by hiring an employee, adding a contingent worker, adding a nonworker, adding a pending worker, or adding a contact to the record of another person.

Person records are global, independent of legal employers, and created once only for any person. If the person leaves the enterprise, you terminate the person’s work relationships. If the person later rejoins the enterprise, you create a new work relationship. The person record continues to exist, even when the person has no current work relationships in the enterprise and no current contact relationships with other workers.

The following scenarios illustrate when you create a person record and when you create a work relationship. In all cases, if you try to create a person record when one already exists, and the application finds the existing record, you continue by creating a work relationship for the existing person.

Adding a Person

Alex Morozov is starting a contingent worker placement with a legal employer in the enterprise. Alex has never:

• Been an employee, contingent worker, or nonworker in any legal employer in the enterprise
• Been an emergency contact, dependent, or beneficiary of another employee, contingent worker, or nonworker anywhere in the enterprise

Therefore, Alex does not have a person record. To create both his person record and his first work relationship, you add him as a contingent worker.

Rehiring an Employee

Sonia Jalla starts her employment with the enterprise in France next month. Sonia was employed by the enterprise in the United States for several years, but resigned 3 years ago. Because Sonia was employed by the enterprise before, she already has a person record. When you attempt to hire Sonia, the application finds her existing person record. When you confirm that the existing person record is Sonia’s, you continue the rehire process by creating an employee work relationship with Sonia’s new legal employer in France.
Hiring a Nonworker

Arturo Ruiz has a nonworker work relationship with a legal employer: he has been a volunteer mentor for young workers for several months. Arturo recently applied for employment with the same legal employer and was successful. Arturo will continue as a volunteer for this legal employer even after he has been hired.

When you attempt to hire Arturo, the application finds his person record. When you confirm that the person record is Arturo’s, you continue the hiring process by creating an employee work relationship with the legal employer. Arturo will then have both nonworker and employee work relationships with the same legal employer.

Hiring a Contact

Mary Wood starts her employment with the enterprise tomorrow. Mary has never been an employee, contingent worker, or nonworker in any legal employer in the enterprise.

Mary is married to Joe Wood, who is a contingent worker elsewhere in the enterprise. Joe has identified Mary as an emergency contact; therefore, Mary already has a person record. When you attempt to hire Mary, if there is enough information in her contact record to identify her, the application finds her existing person record. In this case, you continue the hiring process by creating an employee work relationship with her new legal employer. Otherwise, the hiring process creates both a person record and a work relationship for Mary.

Managing Person Work E-Mail: Explained

A person can have only one work e-mail. This e-mail is owned and maintained by Oracle Identity Manager (OIM). When you create a person record, the work e-mail that you enter is sent to OIM. OIM returns the e-mail to Oracle Fusion HCM. If you leave the work e-mail blank, then OIM creates the e-mail and returns it to Oracle Fusion HCM. Once the e-mail exists, it must be maintained in OIM.

Once a person’s work e-mail is stored in OIM, you cannot edit or delete the e-mail on the person information pages. You must edit the work e-mail in OIM or contact your administrator. The work e-mail updated in OIM is displayed on the person information pages.

Note

If a secondary work e-mail type is configured for your enterprise, you can create another work e-mail for a person. The secondary work e-mail is not maintained by OIM.

Converting a Pending Worker: Explained

You can convert a pending worker to an employee or a contingent worker through an interactive process.
The Convert option populates the hire record for the pending worker with details from the pending worker record. You can review and edit the details and add additional details during conversion. However, you cannot change the proposed worker type (employee or contingent worker).

The default start date of the work relationship for the pending worker is the date on which the transaction is submitted for approval. However, you can change the start date to the date on or after the pending worker record was created.

If you save the hire record of the pending worker for later or cancel the conversion process before completion, the pending worker record remains as is. You must complete the transaction to convert the pending worker to the proposed worker type.

The Quick Convert option (available only to human resource (HR) specialists as a menu option under Convert) converts the pending worker to the proposed worker type directly without populating the pending worker details.

All the hire records created through the pending worker conversion process require an approval by default. If the transaction is rejected, the pending worker record remains as is.

**Note**

If the pending worker record includes a payroll assignment or payroll compensation details, that information is moved to the hire record during conversion. However, other types of payroll-related information, such as personal payment method or costing are not supported for pending workers and will not be reflected in the hire record.

---

**Work Relationships: Explained**

A work relationship is a relationship between a person and a legal employer. It provides the context in which a person's assignments exist and enterprise and legal employer service is calculated. All work relationships must contain at least one assignment.

Aspects of work relationships explained here include:

- Work relationship types
- Work relationships for nonworkers
- Primary and nonprimary work relationships
- Terminating the primary work relationship
- Creating multiple work relationships for a person
- Worker types
- Worker numbers

**Work Relationship Types**

Work relationships are of three types: employee, contingent worker, and nonworker. The worker type that you select when creating the work relationship determines the relationship type.
Work Relationships for Nonworkers

To be classified as a nonworker, a person must have a nonworker work relationship with a legal employer. Having a work relationship does not mean that a person is working for a legal employer. It means only that there is an association between the person and the legal employer that is defined by the work relationship and assignment.

Primary and Nonprimary Work Relationships

A worker or nonworker must have one, and only one, primary work relationship. All other work relationships are nonprimary. A person’s first work relationship is the primary relationship, by default.

A person’s overall primary assignment belongs to the person’s primary work relationship. Regardless of how many work relationships and assignments a person has, you may need information about a person from a single assignment. For example, some government reports are based on one assignment only. In these cases, the person’s primary assignment is used. In general, a person’s primary work relationship and assignment are those that are of most significance, in terms of status, pay, benefits, and working hours, to the person.

Terminating the Primary Work Relationship

You terminate work relationships, not workers or nonworkers.

When a person has multiple current work relationships, you cannot terminate the primary work relationship without first selecting a different primary relationship. This restriction exists because a current worker or nonworker cannot be without a primary work relationship for any period of time.

Creating Multiple Work Relationships for a Person: Examples

When you create a person record, you also create that person’s first work relationship. Once a person record exists, you can create additional work relationships with the same or different legal employers. The following scenarios describe some valid combinations of work relationships.

Multiple Work Relationships of Different Types with a Single Legal Employer

These work relationships can exist at the same time with the same legal employer because they are of different types:

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Corporation A</td>
<td>17 November, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Contingent Worker</td>
<td>Corporation A</td>
<td>4 August, 2010</td>
<td>12 January, 2012</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation A</td>
<td>4 August, 2010</td>
<td>None</td>
</tr>
</tbody>
</table>
Multiple Work Relationships of the Same Type with Multiple Legal Employers

These work relationships can exist at the same time, even though they are all of the same type, because each is with a different legal employer:

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Corporation A</td>
<td>1 January, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation B</td>
<td>3 April, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>17 June, 2012</td>
<td>None</td>
</tr>
</tbody>
</table>

Multiple Work Relationships of the Same Type with a Single Legal Employer

These work relationships can exist with the same legal employer, even though they are of the same type, because they are sequential; any attempt to create the second work relationship before the first is terminated will fail.

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>11 October, 2010</td>
<td>17 March, 2011</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>19 July, 2011</td>
<td>None</td>
</tr>
</tbody>
</table>

Multiple Work Relationships of Different Types with Multiple Legal Employers

These work relationships can exist at the same time because relationships with a single legal employer are of different types:

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Corporation A</td>
<td>12 December, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation A</td>
<td>12 December, 2010</td>
<td>31 December, 2011</td>
</tr>
<tr>
<td>Contingent Worker</td>
<td>Corporation B</td>
<td>14 September, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>10 May, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation C</td>
<td>15 February, 2011</td>
<td>None</td>
</tr>
</tbody>
</table>

Worker Types: Explained

You select a worker type when you create a new person record or work relationship. Because a person can have multiple work relationships of multiple types simultaneously, a person can have multiple worker types at once.

Which worker types apply at any time depends on the legal employer context. For example, consider this summary of a single person’s work relationships with the enterprise:

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent worker</td>
<td>Corporation A</td>
<td>13 March, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation B</td>
<td>11 June, 2010</td>
<td>20 February, 2011</td>
</tr>
<tr>
<td>Worker Type</td>
<td>Corporation</td>
<td>Date</td>
<td>Status</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation C</td>
<td>10 July, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation D</td>
<td>21 February, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Contingent worker</td>
<td>Corporation D</td>
<td>21 February, 2010</td>
<td>31 December, 2010</td>
</tr>
</tbody>
</table>

On 1st March, 2011 this person is:

- A contingent worker in Corporation A
- An ex-employee in Corporation B
- A nonworker in Corporation C
- An employee and an ex-contingent worker in Corporation D

**Identifying a Single Worker Type**

When a single worker type is needed for a person, the worker type from the person’s primary work relationship applies.

**Person Names: Explained**

This topic describes name styles, name formats, and person-name languages.

**Name Styles**

The structure of a person’s name can vary among countries. For this reason, a predefined name style exists for many countries for capturing relevant components of a person’s name. The name style determines:

- Which name components appear when you create a person record.
  
  For example, one country may display first name, last name, and title while another displays first name, middle name, and last name.

- The order in which the name components appear.

- Which name components are required and which are optional.
  
  For example, in one country you may be required to enter a title and in another the title may be optional.

When a country-specific name style does not exist, a universal name style (last name, first name, and title) is used.

When you create a person record you select a legal employer, which sets the legislative context for the record. For example, if the legal employer is a Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person’s contacts have the same name style as the person for whom they are contacts.

**Name Formats**

When a person’s name is displayed to users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names last name may appear before first name, but in other contexts first
name appears before last name. A name format is a template for arranging the components of a name, such as first name, last name, and title, in a specified order for a particular purpose. Four name formats are available: display name, list name, full name, and order name.

Name formats can vary among countries; therefore, both global and local versions of names formats can exist.

Global and Local Name Formats

The profile option HR: Local or Global Name Format controls whether users see local names or global names by default.

Global names use one name format; therefore, they enable users in multinational enterprises to see person names presented consistently, regardless of their countries of origin.

Users who view or manage person records in a single country may prefer to see local names. For example, users who view or manage person records only in Japan may prefer to see Japanese rather than global formats of person names.

Person-Name Languages

Each enterprise identifies a global-name language. Person names appear in this language by default. When you create a person record, you can enter a local name in a different language from the global-name language. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the local-name language. For example, if the global-name language for the enterprise is American English and you set the local-name language in a person record to Japanese, users whose HR: Local or Global Name Format profile option is set to Japanese see the person’s name in Japanese. All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person’s name in American English.

Note

If you enter no local name in a person record, the local name is the same as the global name by default.

Users can set preferences to select the language in which they see the display-name versions of person names.

Matching Person Records: How They Are Identified

When you create a new person record, the application searches automatically for matching person records, which may be duplicates of the new record. If you are a human resource (HR) specialist, the application compares the first name, last name, date of birth, and national IDs in the new record with those in existing person records to identify matching person records.

Note

If you are a line manager, the application does not expose national IDs. How matching records are identified for line managers is described at the end of this topic.
How Matching Records Are Identified

If you are an HR specialist, the application identifies an existing person record as a match for a new person record when at least one national ID value is the same in both records.

Person records in which the national IDs do not match may still appear as matching records if they satisfy either one of these sets of criteria:

- The first name, the first character of the last name, and the date of birth are the same.
- The last name, the first character of the first name, and the date of birth are the same.

If one of the criteria is missing when the other two criteria produce a match, the application identifies the record as a matching record.

Examples of Matching Person Records

You are an HR specialist creating a new person record with the following information:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Date of Birth</th>
<th>National ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>Ward</td>
<td>25 March, 1963</td>
<td>3908-98-128</td>
</tr>
</tbody>
</table>

The application compares these details with those in existing person records. These are examples of matching person records:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Date of Birth</th>
<th>National ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer</td>
<td>Tyler</td>
<td>19 June, 1969</td>
<td>3908-98-128</td>
</tr>
<tr>
<td>John</td>
<td>White</td>
<td>25 March, 1963</td>
<td>3394-09-371</td>
</tr>
<tr>
<td>Juana</td>
<td>Ward</td>
<td>25 March, 1963</td>
<td>5587-43-776</td>
</tr>
<tr>
<td>Josie</td>
<td>Ward</td>
<td></td>
<td>8721-99-398</td>
</tr>
</tbody>
</table>

- Jennifer Tyler is a matching record because her national ID is the same as John Ward’s.
- John White is a matching record because he has the same first name and date of birth as John Ward, and their last names start with the same character.
- Juana Ward is a matching record because she has the same last name and date of birth as John Ward, and their first names start with the same character.
- Josie Ward is a matching record because she has the same last name as John Ward and their first names start with the same character. Because these two criteria match, the absence of a date of birth in Josie’s record is ignored.

If you are a line manager, then the application displays matching records to you only if the matching records contain no national identifier. Matching records satisfy one of these sets of criteria:

- The first name, the first character of the last name, and the date of birth are the same.
• The last name, the first character of the first name, and the date of birth are the same.

If one of the criteria is missing when the other two criteria produce a match, the application identifies the record as a matching record.

Using Employment Terms: Critical Choices

Employment terms are available to employee and nonworker work relationships when enabled for the legal employer. This topic discusses some of the ways in which employment terms can be used.

Reasons for Using Employment Terms

Employment terms are useful if:

• You know that a person will have multiple similar assignments in a work relationship.

Assignments automatically inherit any information that you enter in employment terms. Because you enter the information once only, using employment terms is efficient and promotes consistency among related assignments.

• You want to limit or prevent changes made directly to the assignments.

If your enterprise or legal employer has prevented override at the assignment level, then you cannot edit on the assignment any information inherited from the employment terms. Instead, you edit the employment terms, and all associated assignments inherit the changes. For example, if you set an employee's working hours on the employment terms, you can edit them on the employment terms only; you cannot edit them on each assignment.

The restriction on editing assignments applies only to information that you enter in the employment terms. If you do not enter the employee's working hours in the employment terms, you can edit them on each associated assignment and enter different values in each, if appropriate. You enter in the employment terms only the information that you want to manage at the employment-terms level.

If your enterprise or legal employer has not prevented override at the assignment level, there are no restrictions on updating assignment information directly. In some enterprises or legal employers, you can decide whether to allow override at the assignment level whenever you create a set of employment terms.

• You want to produce a formal contract that applies to all of the assignments associated with the employment terms.

• You pay workers a salary amount that is not related to the number of assignments they have.

Because the salary amount is fixed, it is more efficient to enter and maintain salary information for the employment terms.
You cannot remove employment terms or move assignments to other employment terms. However, if multiple assignments or multiple sets of employment terms are supported, you can create other assignments without employment terms in the same work relationship.

**Providing Employment Information for Nonworkers: Examples**

Some employment information is marked as required for all workers and nonworkers. The amount of additional information that you need to provide in nonworker employment terms or assignments depends on the nonworker type.

**Adding a Nonworker Who Receives No Payments**

Ellen Woods is a volunteer in your organization; a government body meets her expenses. She receives no payments from the legal employer, but does report to a manager there.

To ensure that Ellen's manager can see her as a direct report, identify Ellen's line manager and the relevant assignment, if the manager has more than one. All other information is optional.

**Adding a Nonworker Who Receives Payments**

Todd Granger is a retiree. When Todd retired, you terminated his employee work relationship with the legal employer and created a new, nonworker work relationship with the same legal employer.

As a retiree, Todd receives payments from the legal employer. Therefore, Todd's assignment must contain payroll information. The assignment status and person type values on the assignment must also allow payments to be made. All other information is optional.

**Adding a Nonworker Who Has Other Work Relationships**

A person can have multiple work relationships at once, but each relationship is always independent of the others. For the nonworker work relationship, you enter only the information required for that relationship. For example, if the person receives no payments in the nonworker assignments, then you do not provide payroll information for those assignments, even if the person receives payments in assignments of other types.

**FAQs for Add Person**

**How can I create a user account for a new worker?**

By default, when you create a person record, a user account is created automatically for that person in Oracle Identity Management (OIM).

In some enterprises, the automatic creation of user accounts for new person records is disabled. For example, you may not be using OIM to manage user accounts. Alternatively, user accounts may be required for specific users only.
In this case, you can create user accounts for individuals directly in OIM, for example.

If user accounts for your users already exist in OIM, then you can link them to person records. This option is available when you perform the Manage User Account and Manage Users tasks.

**What's a pending worker?**

A person who will be hired or start a contingent worker placement and for whom you create a person record that is effective before the hire or start date.

When the new hire or placement is finalized, you convert the new worker to the proposed worker type. For example, when a new employee's hire is completed, you convert the pending worker record to an employee record. Therefore, the pending-worker functions provide greater control of the hiring process than simply hiring an employee or adding a contingent worker with a future start date.

A person who already has a person record cannot be a pending worker.

**What's the difference between person numbers and worker numbers?**

Each person has a single person record in the enterprise. The person number is the person record's unique ID, allocated automatically or entered manually when you create the record. The person number is required and valid throughout the enterprise.

Worker numbers identify employee and contingent worker work relationships. A person with multiple such relationships has multiple worker numbers. If your enterprise or legal employer decides to use worker numbers, then they are required. Otherwise, you cannot use them. Allocation of worker numbers in a legal employer can be either automatic or manual. The number sequence for automatic allocation can be either global or specific to each legal employer. In the latter case, worker numbers may not be unique in the enterprise. If you terminate a work relationship and the person later has another work relationship of the same type with the same legal employer, then the same worker number is used.

**Can I enter more information about an emergency contact?**

Yes. To enter additional information such as an address or a national ID, update the contact's person record, which is created automatically when you submit the associated worker or nonworker record.

Workers and nonworkers can also maintain information about their own contacts.

**How can I create other types of contacts for a person?**

When you create a person's record, you can identify an emergency contact for the person. When you edit a person's record, you can create additional contacts,
any of whom you can identify as emergency contacts. To identify any of a person’s contacts as a beneficiary or dependent, you update the person’s benefits information.

**What are employment terms?**

A set of information about a nonworker’s or employee’s job, position, pay, compensation, working hours, and work location that all assignments associated with the employment terms inherit.

The enterprise or legal employer decides whether employment terms can be used. Employment terms are not available for contingent workers.

**How can I create multiple nonworker roles for a person?**

A person can have multiple nonworker roles with a single legal employer, all of which must belong to the same nonworker work relationship. For each nonworker role, you create a separate nonworker assignment. In each nonworker assignment, you select an appropriate nonworker person type. For example, a nonworker could have three assignments with a single legal employer, two as a paid volunteer and one as a retiree.

**Why can’t I see the person number for this new person record?**

Based on your enterprise settings, the person number is generated after the Add Person transaction is approved. Once the transaction is approved, you can see the person number on the Manage Person page, for example.

**Areas of Responsibility**

**Areas of Responsibility: Explained**

You can assign a responsibility to a person and define the scope of the responsibility by identifying the people for whom the person has the responsibility; the person then appears in the Work Contacts list of those people. For example, you can assign a worker as the Human Resources (HR) representative for people in a specific organization hierarchy.

**Overlapping Scope**

If you assign the same responsibility to multiple persons, overlap between scopes may occur. For example, you assign person A the HR Representative responsibility and define the scope of the responsibility using an organization hierarchy. You then assign the HR Representative responsibility to person B and define the scope using a supervisor hierarchy. The scopes overlap because some workers appear in both hierarchies. These workers then have both A and B as their HR representatives. If this is not the desired result, you may redefine the scope by specifying a different combination of information.
Integration with Checklists

You can create and assign responsibilities for use in checklists. You identify the task performers' responsibilities when you create a checklist template. During checklist allocation, the persons with the selected responsibilities are derived and designated as task performers automatically.

Integration with Sensitive Transactions

You can use responsibilities in conjunction with sensitive transactions to identify the recipients of notifications involving sensitive terminations. Certain future-dated terminations may be identified as sensitive and hidden from everyone until an appropriate time. Any conflicts involving sensitive terminations are handled by routing the actions to a person with an HR Representative responsibility.

Setting Scope of Responsibility: Examples

There are several ways that you can set the scope of a responsibility. The following examples illustrate these options.

Based on Assignment Information

Vision Corporation is a software company that has offices in the US and UK. Gail Williams is the Human Resources (HR) representative for applications developers based in Reading in the UK. You have assigned Gail the HR Representative responsibility. You must now define the scope of the responsibility to identify the people for whom Gail has the HR Representative responsibility. To define the scope, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Vision Applications Development</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>Vision UK</td>
</tr>
<tr>
<td>Country</td>
<td>UK</td>
</tr>
<tr>
<td>Location</td>
<td>Reading</td>
</tr>
<tr>
<td>Job</td>
<td>Applications Developer</td>
</tr>
</tbody>
</table>

Based on Name

Terry Smith is the benefits representative for a group of workers in Vision UK. He holds the responsibility for workers within an alphabetical range (A to L). You have assigned Terry the Benefits Representative responsibility. To define the scope of the responsibility, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Employer</td>
<td>Vision UK</td>
</tr>
<tr>
<td>From Last Name</td>
<td>A</td>
</tr>
</tbody>
</table>
Based on Payroll Information

Grace Miller is the payroll representative for the external training staff in Vision Corporation, US. You have assigned Grace the Payroll Representative responsibility; you must now define the scope of the responsibility. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statutory Unit</td>
<td>Vision Training US</td>
</tr>
<tr>
<td>Legislative Data Group</td>
<td>External Training</td>
</tr>
</tbody>
</table>

FAQs for Areas of Responsibility

What happens if I don't record a person's areas of responsibility?

The person does not appear in the Work Contacts lists of people for whom the person holds an area of responsibility.

What happens if I reassign a responsibility?

The responsibility is immediately visible in the relevant assignment record of the person to whom it is reassigned. The From Date of the responsibility is the current date, and there is no To Date. In the assignment record of the person from whom the responsibility is being removed, the current date is added to the To Date field only if there is currently no To Date. Otherwise, the existing To Date remains unaltered. The scope of the responsibility remains the same. The change is visible in the Work Contacts list of affected people when the records are next viewed.

Roles Provisioning and Deprovisioning

Role Provisioning and Deprovisioning: Explained

A user’s access to data and functions depends on the user’s roles: users have one or more roles that enable them to perform the tasks required by their jobs or positions. Roles must be provisioned to users; otherwise, users have no access to data or functions.

Role Provisioning Methods

Roles can be provisioned to users:

- Automatically
- Manually, using delegated administration:
• Users such as line managers and human resource specialists can provision roles manually to other users.
• Users can request roles for themselves.

For both automatic and manual role provisioning, you create a role mapping to identify when a user becomes eligible for a role.

Oracle Identity Management (OIM) can be configured to notify users when their roles change; notifications are not issued by default.

Role Types

Data roles, abstract roles, and job roles can be provisioned to users. Roles available for provisioning include predefined roles, HCM data roles, and roles created using OIM.

Automatic Role Provisioning

A role is provisioned to a user automatically when at least one of the user’s assignments satisfies the conditions specified in the relevant role-mapping definition. The provisioning occurs when the assignment is either created or updated. For example, when a person is promoted to a management position, the line manager role is provisioned automatically to the person if an appropriate role mapping exists. Any change to a person’s assignment causes the person’s automatically provisioned roles to be reviewed and updated as necessary.

Role Deprovisioning

Automatically provisioned roles are deprovisioned automatically as soon as a user no longer satisfies the role-mapping conditions. For example, a line manager role that is provisioned to a user automatically is deprovisioned automatically when the user ceases to be a line manager.

Automatically provisioned roles can be deprovisioned manually at any time. Manually provisioned roles are deprovisioned automatically only when all of the user’s work relationships are terminated; in all other circumstances, users retain manually provisioned roles until they are deprovisioned manually.

Changes to Assignment Managers

When a person’s line manager is changed, the roles of both new and previous line managers are updated as necessary. For example, if the person’s new line manager now satisfies the conditions in the role mapping for the line manager role, and the role is one that is eligible for autoprovisioning, then that role is provisioned automatically to the new line manager. Similarly, if the previous line manager no longer satisfies the conditions for the line manager role, then that role is deprovisioned automatically.

Roles at Termination

When a work relationship is terminated, all automatically provisioned roles for which the user does not qualify in other work relationships are deprovisioned automatically. Manually provisioned roles are deprovisioned automatically only if the user has no other work relationships; otherwise, the user retains all manually provisioned roles until they are deprovisioned manually.
Automatic deprovisioning can occur either as soon as the termination is submitted or approved or on the day after the termination date. The user who is terminating the work relationship selects the appropriate deprovisioning date.

Role mappings can provision roles to users automatically at termination. For example, the locally defined roles Retiree and Beneficiary could be provisioned to users at termination based on assignment status and person type values.

If a termination is later reversed, roles that were deprovisioned automatically at termination are reinstated and post-termination roles are deprovisioned automatically.

**Date-Effective Changes to Assignments**

Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role changes are identified and role provisioning occurs on the day the changes take effect, not when the change is entered. The process Send Pending LDAP Requests identifies future-dated transactions and manages role provisioning and deprovisioning at the appropriate time. Note that such role-provisioning changes are effective as of the system date; therefore, a delay of up to 24 hours may occur before users in other time zones acquire the access for which they now qualify.

**Role Provisioning Status Values: Explained**

The status value of a role request describes the request’s progress. This topic explains the request status values.

**Role Provisioning Status Values and Their Meanings**

The following table identifies and describes possible status values for role provisioning requests.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>The provisioning request completed successfully and the role was provisioned to the user.</td>
</tr>
<tr>
<td>Failed</td>
<td>The provisioning request failed and the role was not provisioned to the user. The associated error message provides more information.</td>
</tr>
<tr>
<td>Partially complete</td>
<td>The provisioning request is in progress.</td>
</tr>
<tr>
<td>Pending</td>
<td>Oracle Identity Management (OIM) received the provisioning request but processing has not yet started.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The provisioning request was rejected and the role was not provisioned to the user. An associated error message may provide more information.</td>
</tr>
<tr>
<td>Requested</td>
<td>The provisioning request was made but has not yet been acknowledged by OIM.</td>
</tr>
<tr>
<td>SOD checks in progress</td>
<td>Segregation-of-duties checks are in progress. The name of any conflicting role already provisioned to the user appears in the Conflicting Role column.</td>
</tr>
</tbody>
</table>
SOD checks rejected | The request failed segregation-of-duties checks and the role was not provisioned to the user. The associated error message provides more information, and the name of any conflicting role already provisioned to the user appears in the Conflicting Role column.

SOD remediation in progress | Processing to remove segregation-of-duties conflicts is in progress.

SOD remediation rejected | Attempts to remove segregation-of-duties conflicts were rejected. The associated error message provides more information, and the name of any conflicting role already provisioned to the user appears in the Conflicting Role column.

---

**FAQs for Roles Provisioning and Deprovisioning**

**What's the provisioning method?**

This value describes how the role was requested for or assigned to the user.

- If the provisioning method is **Automatic**, the user qualifies for the role automatically on the basis of his or her assignment attribute values.
- If the provisioning method is **Manual**, the role was explicitly assigned or requested by a manager or human resource specialist or the user self-requested the role.
- If the provisioning method is **External**, the role was provisioned to the user outside Oracle Fusion Human Capital Management.

**Why did some roles appear automatically?**

Some roles are provisioned to users automatically when the users' assignment attributes satisfy the conditions associated with the role in a role mapping.

For example, the Sales Manager role could be provisioned automatically to sales managers in the US Sales Department if a role mapping exists for the Sales Manager role that:

- Has the Autoprovison option selected
- Includes the conditions:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>US Sales Department</td>
</tr>
<tr>
<td>Job</td>
<td>Sales Manager</td>
</tr>
</tbody>
</table>

**What happens when I autoprovison roles?**

When you autoprovison roles to a user, the user's assignments are reviewed automatically against all current role mappings.

Roles for which the Autoprovison option is selected are:
- Provisioned to the user immediately, if the user is eligible for the role and does not currently have it
- Deprovisioned from the user immediately, if the user is no longer eligible for the role but currently has it

You are recommended to autoprovision roles to individual users if you know that new or changed role mappings exist for which those users are eligible. Otherwise, roles are not provisioned or deprovisioned automatically until the user’s assignments are next updated.

**Why can’t I see the roles that I want to request for myself?**

A role must satisfy two requirements before it appears in the list of roles that you can request:

- A role mapping must exist in which the **Self-requestable** option is selected.
- At least one of your assignments must match all of the conditions in the role mapping. For example, if the role mapping for the role Expenses Reporting includes the department UK Sales as a condition, then you must have at least one assignment in the UK Sales department; otherwise, the Expenses Reporting role does not appear among the roles that you can select.

Typically, a human capital management application administrator or IT security manager creates and maintains role mappings for the enterprise.

**What happens if I deprovision a role from a user?**

If you are managing the user account of another user, you may be able to deprovision the user’s roles. In this case, the user immediately loses the access to functions and data provided exclusively by any role that you deprovision. The user becomes aware of the change when he or she next signs in. If Oracle Identify Management (OIM) is configured to issue notifications, the user is notified of the change.

If the role was provisioned automatically, future changes to the user’s assignments could cause the role to be provisioned to the user again.

**Why are roles being deprovisioned automatically?**

These roles were provisioned to the user automatically based on the user’s assignment information. Changes made to this user’s assignments mean that the user is no longer eligible for these roles; therefore, the roles have been deprovisioned automatically.

If a deprovisioned role is one that you can provision manually to users, you can reassign the role to the user, if appropriate.

**What happens when I autoprovision roles?**

When you autoprovision roles to a user, the user’s assignments are reviewed automatically against all current role mappings.

Roles for which the **Autoprovision** option is selected are:
Manage Employment Information

Work Relationships: Explained

A work relationship is a relationship between a person and a legal employer. It provides the context in which a person’s assignments exist and enterprise and legal employer service is calculated. All work relationships must contain at least one assignment.

Aspects of work relationships explained here include:

- Work relationship types
- Work relationships for nonworkers
- Primary and nonprimary work relationships
- Terminating the primary work relationship
- Creating multiple work relationships for a person
- Worker types
- Worker numbers

Work Relationship Types

Work relationships are of three types: employee, contingent worker, and nonworker. The worker type that you select when creating the work relationship determines the relationship type.

Work Relationships for Nonworkers

To be classified as a nonworker, a person must have a nonworker work relationship with a legal employer. Having a work relationship does not mean that a person is working for a legal employer. It means only that there is an association between the person and the legal employer that is defined by the work relationship and assignment.

Primary and Nonprimary Work Relationships

A worker or nonworker must have one, and only one, primary work relationship. All other work relationships are nonprimary. A person’s first work relationship is the primary relationship, by default.
A person’s overall primary assignment belongs to the person’s primary work relationship. Regardless of how many work relationships and assignments a person has, you may need information about a person from a single assignment. For example, some government reports are based on one assignment only. In these cases, the person’s primary assignment is used. In general, a person’s primary work relationship and assignment are those that are of most significance, in terms of status, pay, benefits, and working hours, to the person.

**Terminating the Primary Work Relationship**

You terminate work relationships, not workers or nonworkers.

When a person has multiple current work relationships, you cannot terminate the primary work relationship without first selecting a different primary relationship. This restriction exists because a current worker or nonworker cannot be without a primary work relationship for any period of time.

**Manage Personal Information**

**Person Records: Explained**

All workers, nonworkers, and contacts have a single person record in the enterprise, which is identified by a person number.

You cannot create the person record in isolation because a person record requires one of the following:

- A current, past, or future work relationship with a legal employer
- A current, past, or future contact relationship with a person who has a work relationship with a legal employer

Therefore, you create the person record either when you create the person’s first work relationship in the enterprise (for example, when you first hire the person) or when you add the person as a contact (for example, as an emergency contact) in another person’s record.

You never terminate a person record: it continues to exist through all of a person’s work and contact relationships in the enterprise.

This topic describes:

- Person records compared with work relationships
- Local information in person records
- Access to person information

**Person Records Compared with Work Relationships**

Person records hold information that is personal, such as name, date of birth, and disability information, or that may apply to more than one work relationship, such as national ID. By contrast, work relationships hold employment information, such as job, payroll, and working hours, which
can vary among work relationships and be specific to a legal employer. A person’s worker type (for example, employee) derives from the person’s work relationship; it is not part of the person record. A person with multiple work relationships of different types has multiple worker types.

**Local Information in Person Records**

In a single global enterprise, all users who have access to a person see the same person record, but the person record can contain local variations of some information. For example, the person record can contain the person’s name in a local language and multiple national IDs. You can also record some information, such as marital status, using terms that are most appropriate for each country in which the person has work relationships. All local information is visible to anyone who can view the person record.

**Access to Person Information**

Having security access to a person record does not automatically allow access to all of a person’s work relationships and assignments; for example, your access may be limited to specific legal employers, which may exclude some work relationships.

**Managing Person Records: Examples**

Multiple people may be able to manage a person record, including human resource (HR) specialists in any of the person’s legal employers and the person to whom the record belongs. The first of the following examples shows how multiple people can manage the person record sequentially; the second shows how multiple people can manage the person record simultaneously.

**Updating the Person Record After a Break in Service**

Miguel is an ex-employee of legal employer A in the United States. Today, Miguel starts a contingent worker work relationship with legal employer B in Brazil, where you are the HR specialist.

When you attempt to add Miguel as a contingent worker, the application finds his existing person record; therefore, you need only to create the contingent worker work relationship. You also update his person record as follows:
• Miguel is now married. You enter his new marital status in the country information for Brazil and update his marital status in the US country information.

• Miguel has a new emergency contact who is to replace his previous emergency contact; therefore, you end date the previous contact relationship and create the new one. Contact-relationship information is date-effective, which means that you can retrieve the details of the previous contact relationship if necessary.

• You update his addresses. Address information is date-effective, which means that you can retrieve his previous addresses if necessary.

• You add his Brazilian national ID; therefore, the person record now holds two national IDs.

• As Miguel is now living and working in Brazil, you enter a local name using a Brazilian name format.

Miguel can review some of the information in his person record from his portrait; he can also correct some information, such as his address, if necessary.

You have no access to legal employer A so cannot see Miguel’s work relationship with legal employer A: if you need more information about his previous work relationship, you must ask Miguel or his previous line manager to share this information with you.

Managing the Person Record When Multiple Active Work Relationships Exist

Marie is French but lives in London, where she has an employee work relationship with legal employer A. She also has a contingent worker work relationship with legal employer B in France. Marie has two contact relationships.

As the HR specialist for legal employer A, you manage Marie’s employee work relationship. The HR specialist for legal employer B manages her contingent worker work relationship. You can both manage all components of Marie’s person record. In addition, Marie can edit the following personal information from her portrait:
• Marital status and name
• Addresses
• Contacts
• Document records
• Phone numbers
• E-mail addresses
• Other communication methods
• Communication methods order of preference

A typical selection of updates to Marie’s person record is as follows:

• Marie manages her own contacts and benefits information; she names her son as a dependent and her husband as an emergency contact.
• Marie manages her home address, which is also her primary mailing address. The enterprise has defined the address type Local Overseas, and the HR specialist for legal employer B enters a Local Overseas address for Marie in France.
• The HR specialist in legal employer B enters a local name for Marie in French.
• You enter details of Marie’s UK driver’s license. The HR specialist in France enters details of Marie’s French driver’s license and her passport. Marie can review this information, but she cannot update it.
• You enter Marie’s UK national ID, and the HR specialist in France enters her French national ID.
• Both UK and French versions of Marie’s marital status exist in her person record. When Marie’s marital status changes, she edits both versions.

Any HR specialist who manages Marie’s person record can view and edit any of this information.

**Person Names: Explained**

This topic describes name styles, name formats, and person-name languages.

**Name Styles**

The structure of a person’s name can vary among countries. For this reason, a predefined name style exists for many countries for capturing relevant components of a person’s name. The name style determines:

• Which name components appear when you create a person record.

For example, one country may display first name, last name, and title while another displays first name, middle name, and last name.

• The order in which the name components appear.
• Which name components are required and which are optional.

For example, in one country you may be required to enter a title and in another the title may be optional.

When a country-specific name style does not exist, a universal name style (last name, first name, and title) is used.

When you create a person record you select a legal employer, which sets the legislative context for the record. For example, if the legal employer is a Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person's contacts have the same name style as the person for whom they are contacts.

Name Formats

When a person's name is displayed to users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names last name may appear before first name, but in other contexts first name appears before last name. A name format is a template for arranging the components of a name, such as first name, last name, and title, in a specified order for a particular purpose. Four name formats are available: display name, list name, full name, and order name.

Name formats can vary among countries; therefore, both global and local versions of names formats can exist.

Global and Local Name Formats

The profile option HR: Local or Global Name Format controls whether users see local names or global names by default.

Global names use one name format; therefore, they enable users in multinational enterprises to see person names presented consistently, regardless of their countries of origin.

Users who view or manage person records in a single country may prefer to see local names. For example, users who view or manage person records only in Japan may prefer to see Japanese rather than global formats of person names.

Person-Name Languages

Each enterprise identifies a global-name language. Person names appear in this language by default. When you create a person record, you can enter a local name in a different language from the global-name language. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the local-name language. For example, if the global-name language for the enterprise is American English and you set the local-name language in a person record to Japanese, users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese. All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English.

Note
If you enter no local name in a person record, the local name is the same as the global name by default.

Users can set preferences to select the language in which they see the display-name versions of person names.

**Person-Record Keyword Searches: Explained**

The application searches for keyword values in these attributes of a person’s records: department, job name and code, position name and code, person name, primary e-mail, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, affiliations, areas of interest, and areas of expertise.

This topic describes:

- Access to restricted information
- Keyword indexing
- Searches using date-effective keywords

**Access to Restricted Information**

Access to information about a person’s competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations is restricted to a person’s line managers. For example, if a line manager searches for a language skill and a match is found in the language-skills information of the manager’s direct or indirect reports, that information appears in the search results. Restricted information is not searched and is never included in search results when the searcher is not a line manager. However, if the match is found in public information, such as areas of expertise, it appears in the search results for any user.

**Keyword Indexing**

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that there is no difference between the source and indexed values. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

**Searches Using Date-Effective Keywords**

In the professional user person search, you can enter an effective as-of date. When date-effective values, such as work location, are copied to the keywords table, their history is not copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results may not be as expected.

For example:

- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.
• The changed work location is copied automatically to the keywords table on 27 January, 2011.

• You search for a person on 1 February, 2011 using the keyword Headquarters and the effective as-of date 10 January, 2011.

Although the work location on 10 January, 2011 was Headquarters, assignment 12345 does not appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

Comparing Items: Explained

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile.

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items. Datasets control which attributes are displayed for each item in the comparison. For example, you must select the School Education dataset to display and compare a person’s education details. The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. Human resource (HR) specialists can perform this comparison only if they have security access to the persons’ performance information. You can change the effective date of comparison if you are either a line manager or an HR specialist.

Performance Information in Comparison Results: Explained

The comparison displays the performance data of only those persons who are evaluated using the enterprise-wide designated rating model, because you cannot compare persons who are evaluated using different rating models.

For each person, the comparison displays up to three performance documents. These performance documents include the latest document using the designated rating model plus the two most recent previous documents that use the same performance template as the latest document. However, the performance documents and performance periods for the persons being compared may be different. The comparison indicates the performance attributes’ differences only if the performance documents are the same for the persons being compared.

Changing User Names: Explained

You can change user names for both new and existing users.
Changing User Names When Creating Users

When you create a user using the Create User interface, the User Name field may be blank. If you leave it blank, then the user name is generated in the enterprise default format when you save the user.

Alternatively, you can enter a user name on the Create User page, regardless of whether the field is blank. Any name that you enter replaces the default user name.

The user is notified of the user name only if user notifications are enabled and the user has not yet been notified of any user name and password.

Changing Existing User Names

You can change an existing user name on the Manage User Account and Edit User pages. The new name is sent automatically to Oracle Identity Management. However, it becomes visible in Oracle Fusion Applications only after the user signs in for the first time using the new name.

When you change an existing user name:

- The password is unchanged.
- Roles provisioned to the user are unchanged.
- The user is not notified automatically of the new name.

You are recommended to send details of the new user name to the user.

FAQs for Manage Personal Information

Can I add additional datasets to the comparison?

No, you can only select from the list of datasets available for an item type.

Can I compare all of the person’s assignments?

No, you can compare only the primary assignments of a person.

How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon. Where the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. Also, the comparison does not display the differences for those values that lie within the range. For example, consider that you are comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison does not display the difference between the maximum
values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

**How is the risk of loss assessed?**

The risk of loss information in a person’s profile is entered manually, there is no automated risk assessment process. Line managers or human resource specialists evaluate the risk of workers changing jobs or leaving the enterprise and allocate ratings manually.

**What happens if I remove the comparison base?**

The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

**What’s the difference between global names and local names?**

Global names are in a format and language that can be understood throughout a multinational enterprise. Local names are understood by users in a single country but may not be understood throughout a multinational enterprise. You can have only one local name at a time. If you use local-names, select the local-name language that is most appropriate for your primary assignment and reporting requirements. For example, if your home country is Sweden, you may enter a local name in the Swedish language and format.

**What’s the difference between performing a best-fit analysis and comparing profiles?**

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications. Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

**What’s the effective start date?**

Person attributes such as marital status and addresses are referred to as date-effective objects because they are likely to change over time. When you change a date-effective object, you insert the new change in the object’s history. Typically, you insert the new change following the latest change, and the effective start date is today’s date; however, by setting an effective start date that is earlier or later than the current date, you can insert the new change at a different point, either to edit the object history or to create a future-dated change. For example,
you could change your marital status to Married on 25 January, 2011 and enter an effective start date of 1 January, 2011 because you were married on that date. The following person related objects are date-effective: marital status, person name, person addresses, contact relationships, and gender.

**What's the primary mailing address?**

The address used by default for correspondence.

The home address is automatically the primary mailing address. To use a different address as the primary mailing address:

1. Create the new address.
2. Edit the primary mailing address to select the new address.

The new address can be of any type; it does not have to be defined as a mailing address.

**Note**

If you create a mailing address, that address does not automatically become the primary mailing address; you must still select the new address as the primary mailing address.

**Can I delete a person record?**

No, but you may be able to cancel work relationships. If you cancel a person’s only work relationship, and the person has no contact relationships, the person record is identified as associated with a canceled work relationship and does not appear in gallery searches.

**Can I remove a contact from a person’s record?**

Yes. If you delete the contact, the contact’s own person record continues to exist, but the contact relationship between the contact and the person whose record you are updating is purged. If you end date the contact relationship, the contact no longer appears in the person record from the specified date, but the history of the contact relationship remains available.

**Can workers manage their own contacts?**

Yes. Workers can manage their contacts directly from their own portraits or while updating their marital status. They can edit existing contacts, create new contacts, and identify emergency contacts. You can view the history of all such changes made to a contact relationship. To manage dependents and beneficiaries, workers edit the benefits information in their portraits.

**What happens if I change the local-name language of a person’s name?**

A person can have only one local name at a time. If you change the language of the local name, the new local name replaces the existing local name. For
example, if you change a person's local-name language from Swedish to Greek, the Greek version of the person's name replaces the Swedish version. Thereafter, users who have chosen to see names in Swedish will see the global version of the person's name; only users who have chosen to see names in Greek will see the Greek version of the person's name. If you use local names, select the local-name language that is most appropriate for the user's primary work relationship and reporting requirements.

What happens if I reset a user's password?

A new, temporary password is generated automatically and sent to the user's primary work e-mail address.

How can I reset a user's password?

If you are a human resource specialist, an IT security manager, a human capital management application administrator, or an application implementation consultant, you can reset a user's password by selecting Actions - Reset Password on the Manage User Account page.

You must have security access to the person whose password you want to reset.

How can I notify users of their user names and passwords?

By default, users are notified automatically of their user names and passwords. However, the automatic sending of user-names and passwords can be turned off for the enterprise. In this case, you can run the process Send User Name and Password E-Mail Notifications from the Scheduled Processes work area. This process resets passwords and sends out user names and passwords for any user who has not yet been sent this information. The notification is sent to the user's primary work e-mail, if available, or the primary work e-mail of the user's line manager. It is not sent to any alternate contact e-mail that may exist for the enterprise. User-name and password notifications are sent once only.

Where do default user names come from?

By default, user names are defined by Oracle Identity Management (OIM). The user name is typically the user's first and last names, but this format can be changed in OIM.

The default format of user names can be specified for the enterprise in Oracle Fusion HCM. This setting overrides the OIM default format. Your enterprise may have selected one of the following values:

- Person number
- Party number
- Primary work e-mail

If the default user-name format for the enterprise is the person number, then primary e-mail is used instead for party users who have no person number.
Default user names may not appear for new users until the relevant value (for example, the person number) is available. The user-account request is not submitted to OIM until the value exists.

What happens when I link a user account?

The current person or party record is linked to the selected Oracle Identity Management (OIM) user account. When you click Save, the request is submitted to OIM and the account status is Requested. Once the account status is Active, the user can sign in using the account.

Any roles currently provisioned to the linked account do not appear in the Roles section of the page until the account status is Active. However, you can add roles before clicking Save.

The Link User Account action appears only for persons or party users whose records are not already linked to a user account. When you link a user account, the person or party is not notified automatically. You are recommended to notify the user when the account is linked.

How do I create a user account for an existing worker?

On the Manage User Account page, select the Create User Account action. Review any default user name that appears in the User Name field, update it if appropriate, and click Save.

The default user name may not be visible on the Manage User Account page. You can enter a user name, regardless of whether the default user name is visible. If you enter no value in the User Name field, then the user name is created automatically in the default format when you click Save.

Roles are provisioned to the user as specified by the role-provisioning rules that apply when you select the Create User Account action. These roles appear in the Roles section of the Manage User Account page. You can add or remove roles before clicking Save.

When you click Save, the user-account request is submitted to Oracle Identity Management. Once the request is processed successfully, the account becomes available to the user.

Note

If your enterprise has disabled the automatic creation of user accounts, then you must create user accounts directly in OIM, for example. In this case, you cannot create user accounts on the Manage User Account page.

What happens if I edit a user name?

The updated user name is sent to Oracle Identity Management (OIM) for processing. Once OIM has processed the request, the user can sign in using the updated name. The account status remains Active throughout. The updated name appears in Oracle Fusion Applications only after the user has signed in using it. The user's roles and password are unaffected by the name change.
When you edit a person’s user name, you must click **Save**. Otherwise, the change is not sent to OIM.

As the user is not notified automatically of the updated name, you are recommended to send the details to the user.

**What happens when I process a user-account request?**

The **Process User Account Request** action appears on the Manage User Account page when the status of the worker’s user account is **Requested** or **Failed**. These status values indicate that the account request has not completed. When you process the user-account request, it is submitted again to Oracle Identity Management (OIM). Once OIM has processed the request successfully, the account becomes available to the user. The user is notified of the user name and password if the **Send user name and password** option was enabled when the account was originally requested.

Any roles that will be provisioned to the user appear in the Roles section of the Manage User Account page. You can add or remove roles before submitting the request to OIM. To provision roles to the user, you must click **Save**.

The Process User Account Request action has the same effect as the Send Pending LDAP Requests process. If Send Pending LDAP Requests is scheduled to run regularly, then you can wait for that process to run if you prefer. Process User Account Request enables you to submit user-account requests immediately for individual workers.

**What happens when I copy personal data to LDAP?**

User accounts are created and maintained automatically in a Lightweight Directory Access Protocol (LDAP) directory by Oracle Identity Management (OIM). OIM holds some personal information about users, such as name, work phone number, and work location address. When you create or update personal information in Oracle Fusion Human Capital Management (HCM), it is copied automatically to OIM to ensure that Oracle Fusion HCM and OIM hold the same information about a user. If you make a change to a person’s information that you want to send immediately to OIM, you can copy personal data to LDAP. This action is optional.

**Why does this person have no user account?**

By default, user accounts are created automatically for new workers and associated with their person records. Your enterprise may have disabled the automatic creation of user accounts. In this case, you can create user accounts for individual workers directly in Oracle Identity Management (OIM), for example.

If the user account already exists in OIM, then you can link it to the worker’s person record on the Manage User Account page. This action may be necessary if the user account was created automatically but a problem occurred before it could be associated with the person record.

You cannot provision roles to a user until the user’s person record is linked to a user account.
Manage Work Schedule Assignment Administration

Worker Availability: How It Is Determined

The availability of a worker during a selected time period is automatically determined using:

- Absence entries during that period
- The work schedule that the worker presently follows
- Calendar events

Settings That Affect Worker Availability

You specify which work schedules assigned to the worker’s primary assignment or workforce structures are primary.

How Worker Availability Is Determined

The following figure shows how worker availability is determined.

The application searches for primary work schedules that were assigned to these workforce structure levels in the following order:

1. Primary assignment of the worker
2. Position
3. Job
4. Department
To determine availability, work schedules that were assigned to lower workforce structure levels take precedence over those defined at higher levels.

For example, you assigned a primary schedule at the enterprise level. However, since workers belonging to a particular department in that enterprise follow different work timings, you assigned a different primary schedule to that department. The department's primary schedule determines worker availability because that schedule takes precedence over the one that was defined at the enterprise level. In the same example, if you assigned a primary schedule to a worker (primary assignment) belonging to the same department, then that schedule determines the worker's availability because a schedule assigned to the primary assignment takes precedence over the ones defined at the department level and the enterprise level. The following diagram illustrates this example:

The work patterns and exceptions that exist in the primary work schedule, and any absence entries during the selected time period, impact worker availability.

If no primary schedule was assigned to any of the workforce structures, then the worker availability is based on absences, calendar events, if created for the worker's location or department, and standard working hours defined for the worker's primary assignment. If no calendar events were created, then the application determines availability only on the basis of the standard working hours and absences.

**Exceptions in Work Schedules: Points to Consider**

When you create a work schedule, you can include exceptions, such as public holidays or training sessions, and determine their impact on the availability of workers using that schedule. You can include the following types of exceptions in a work schedule:

- Calendar event
- Calendar event category
• Resource exception

Calendar Event

You can include as an exception a calendar event that you created.

Calendar Event Category

You can add an event category that you used to associate a group of calendar events, such as all voluntary holidays, as an exception in the work schedule. As a result, all calendar events under that event category automatically apply when you assign the schedule to workers.

Resource Exception

A resource exception is an event that you want to apply only for workers to whom you plan to assign the current work schedule. For example, for workers on the night-shift schedule, you want to specify that during a scheduled training event they will remain unavailable to attend support calls. When you create the work schedule, you define a resource exception for that training event and change the worker availability.

Creating and Assigning a Work Schedule: Worked Example

This example demonstrates how to create and assign a work schedule, incorporating shifts, patterns, and calendar events. The work schedule is for a support department in India, working in two shifts, and eligible for all public holidays.

The following table summarizes key decisions in this scenario:

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which calendar events must be included in the work schedule?</td>
<td>All public holidays</td>
</tr>
<tr>
<td>Which geographical location must the calendar events apply to?</td>
<td>India</td>
</tr>
<tr>
<td>What shifts must workers follow?</td>
<td>Day shift (9 a.m. to 5 p.m.). Night shift (5 p.m. to 1 a.m.).</td>
</tr>
<tr>
<td>What is the work pattern that workers must follow?</td>
<td>Day shift from Monday to Wednesday. Night shift on Thursday and Friday. Weekly holiday on Saturday and Sunday.</td>
</tr>
<tr>
<td>When must the work schedule start and end?</td>
<td>Starts on 1 January, 2011. Ends on 31 December, 2011.</td>
</tr>
<tr>
<td>Which shift must workers work first when the work schedule starts?</td>
<td>Day shift</td>
</tr>
<tr>
<td>What eligibility criteria must you associate the work schedule with so that line managers can easily find the schedule to assign to workers?</td>
<td>All employees who belong to the support department</td>
</tr>
<tr>
<td>Which department must this schedule be assigned to?</td>
<td>Support department</td>
</tr>
</tbody>
</table>
What exceptions must be made to the work schedule of Vijay Singh who works in the same department?

Vijay Singh is scheduled to attend the Advanced Communication Skills training course on 8 February, 2011 during which time, the work schedule must indicate that he is unavailable.

Create calendar events within the Public Holiday category. Create two shifts (day and night), then create a weekly work pattern that uses these shifts. Create a work schedule using this work pattern, and select the Public Holiday calendar event category as an exception. Then assign this work schedule to the support department. Assign the same schedule to Vijay Singh and add the training course as an exception and indicate that the worker is unavailable during the course.

**Prerequisites**

1. On the Manage Trees page, ensure that the geographic hierarchy that you created for your enterprise contains a country node for India.

2. Create an eligibility profile Support_Workers for all workers in your Support department.

**Creating Calendar Events**

1. On the Manage Calendar Events page, click **Create**.

2. On the Create Calendar Event page, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the public holiday.</td>
</tr>
<tr>
<td>Category</td>
<td>Public Holiday</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the date when the public holiday starts.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the date when the public holiday ends.</td>
</tr>
<tr>
<td>Short Code</td>
<td>Enter a code to identify the public holiday.</td>
</tr>
<tr>
<td>Hierarchy Type</td>
<td>Geographic</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>Select the geographic hierarchy that you created for your enterprise.</td>
</tr>
</tbody>
</table>

3. In the Coverage region that displays the geographic hierarchy you selected, select the India node, and click **Include**.

4. Click **Submit**.

5. If you want to add another calendar event, repeat steps 2 through 5.

**Creating Shifts**

1. On the Manage Work Shifts page, click **Create Time Shift** from the Actions menu.

2. In the Create Time Shift window, complete the fields for each shift, as shown in this table:
### Field | Day Shift | Night Shift
--- | --- | ---
Name | Day Shift | Night Shift
Start Time | 0900 hrs | 1700 hrs
Duration | 8 hours | 8 hours
Shift Detail Type | None | None

3. Click **Save and Close**.

#### Creating a Workday Pattern

1. On the Manage Work Workday Patterns page, click **Create Time Workday Pattern** from the Actions menu.
2. In the Create Workday Pattern window, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Weekly Work Pattern</td>
</tr>
<tr>
<td>Length in Days</td>
<td>7</td>
</tr>
</tbody>
</table>

3. In the Workday Pattern Details region, click **Add Row** from the Actions menu.
4. In the Workday Pattern Details table, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Day Shift</th>
<th>Night Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Day</td>
<td>1 (Monday)</td>
<td>4 (Thursday)</td>
</tr>
<tr>
<td>End Day</td>
<td>3 (Wednesday)</td>
<td>5 (Friday)</td>
</tr>
</tbody>
</table>

5. Click **Save and Close**.

#### Creating a Work Schedule

1. Navigate to the Manage Work Schedules page.
2. On the Manage Work Schedules page, click **Create**.
3. On the Create Work Schedule page, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Work Schedule for Support</td>
</tr>
<tr>
<td>Category</td>
<td>Work</td>
</tr>
<tr>
<td>Type</td>
<td>Time</td>
</tr>
<tr>
<td>Effective From Date</td>
<td>01 January, 2011</td>
</tr>
<tr>
<td>Effective To Date</td>
<td>31 December, 2011</td>
</tr>
<tr>
<td>Pattern</td>
<td>Weekly Work Pattern</td>
</tr>
</tbody>
</table>
Assigning the Work Schedule to a Department
1. Navigate to the Manage Work Schedule Assignment Administration page.
2. Search for the Work Schedule for Support schedule.
3. Click the schedule to open it on the Edit Work Schedule Assignment page.
4. On the Resource Assignments region, click Add Row from the Actions menu.
5. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Type</td>
<td>Department</td>
</tr>
<tr>
<td>Name</td>
<td>Support department</td>
</tr>
<tr>
<td>Start Date</td>
<td>01 January, 2011</td>
</tr>
<tr>
<td>End Date</td>
<td>31 December, 2011</td>
</tr>
<tr>
<td>Starting Shift</td>
<td>Day Shift</td>
</tr>
<tr>
<td>Primary</td>
<td>Yes</td>
</tr>
</tbody>
</table>

6. Click Submit.

Modifying the Work Schedule of a Worker
1. On the Person Search page, search for Vijay Singh, and select that record.
2. From the Actions menu, click Manage Work Schedule Assignment.
3. On the Manage Work Schedules page, click the Add Row icon on the toolbar.
4. Complete the fields in the Schedules region, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Select Work Schedule for Support.</td>
</tr>
<tr>
<td></td>
<td>In this example, when you search</td>
</tr>
<tr>
<td></td>
<td>for the schedule in the Search and</td>
</tr>
<tr>
<td></td>
<td>Select window, select the Filter Using</td>
</tr>
<tr>
<td></td>
<td>Eligibility checkbox to display all</td>
</tr>
<tr>
<td></td>
<td>work schedules created for the Support</td>
</tr>
<tr>
<td></td>
<td>department.</td>
</tr>
<tr>
<td>Start Date</td>
<td>01 January, 2011</td>
</tr>
<tr>
<td>End Date</td>
<td>31 December, 2011</td>
</tr>
<tr>
<td>Starting Shift</td>
<td>Day Shift</td>
</tr>
<tr>
<td>Primary</td>
<td>Yes</td>
</tr>
</tbody>
</table>
5. In the Exceptions region, click the **Add Row** icon on the tool bar.

6. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Resource Exception</td>
</tr>
<tr>
<td>Name</td>
<td>Click <strong>Create</strong> in the choice list to create a resource exception called Advanced Communication Skills that starts on 8 February, 2011 and ends on the same day.</td>
</tr>
<tr>
<td>Availability</td>
<td>Off Period</td>
</tr>
</tbody>
</table>

7. Click **Submit**.

**FAQs for Manage Work Schedule Assignment Administration**

**What's a primary work schedule?**

Schedule that the application uses to determine the worker's availability.

Only primary schedules determine worker availability. For example, you want to assign two schedules for different time periods to a worker's primary assignment. If you want those schedules to determine the worker's availability for those time periods, you must select both the schedules as primary.

If you assign only a single work schedule, then that schedule is automatically used to determine availability.

**When do calendar events affect workers?**

When you include that event as an exception in a work schedule and assign it as a primary work schedule to the worker's assignment. However, if no work schedule exists for the worker's assignments, then the calendar events that cover the worker's location or department apply.

**How do I change exceptions in work schedules for individual workers?**

When you assign the schedule to a worker using the Manage Work Schedule Assignment page, you can change the exceptions and their impact to that worker's availability. For example, if you added a calendar event as an exception that impacts all workers, but want a particular worker to remain available to handle critical customer queries, you can change the availability for that exception.
Promote and Transfer Workers

Simple Transfer Process: Explained

A transfer is the movement of a person within the same legal employer (a change of location from Pleasanton to San Francisco in the US, for example). As a line manager, you can initiate the transfer of people who report to you, using the simple transfer process. When you transfer a person, the work relationship remains unchanged. You make any necessary changes in the current assignment. If the worker being transferred has other active assignments in the current work relationship, they are terminated and their status is changed to Inactive-Payroll Eligible. Human resource specialists may use this process as an alternative, to initiate a simple transfer.

Transfer Actions: Explained

You can use the following predefined actions to process transfers and temporary assignments:

- Transfer
- Global Transfer
- Temporary Assignment
- End Temporary Assignment
- Global Temporary Assignment
- End Global Temporary Assignment

Transfers and Temporary Assignments

Use the Transfer or the Temporary Assignment action to initiate a transfer or create a temporary assignment in the same legal employer, respectively. Use the End Temporary Assignment action to terminate a temporary assignment in the same legal employer and reinstate the original assignments automatically on a date that you specify.

Global Transfers and Temporary Assignments

Use the Global Transfer or the Global Temporary Assignment action to initiate a transfer or create a temporary assignment in another legal employer, respectively. Use the End Global Temporary Assignment action to terminate a temporary assignment in another legal employer and reinstate the original assignments in the source legal employer automatically on a date that you specify.

Transfers and Temporary Assignments: How They are Processed

A transfer is the movement of a person within the same legal employer (a change of location from Pleasanton to San Francisco in the US, for example). A
temporary assignment is a transfer for a limited term (temporary secondment to another department in the absence of a department head, for example). You end a temporary assignment by initiating the End Temporary Assignment action and specifying a return date. The temporary assignment is terminated and the original assignments are reinstated automatically on the return date.

Settings That Affect Transfers
The type of transfer, whether permanent or temporary, determines how it is processed.

How Transfers are Processed
When you transfer a person within the same legal employer the work relationship remains unchanged. You make any necessary changes in the current assignment. If the worker being transferred has other active assignments in the current work relationship, they are terminated and their status is changed to Inactive- Payroll Eligible by default. If you use employment terms, you can either transfer within the same employment terms or create new employment terms. The existing set of employment terms and assignments in the current work relationship are terminated if you create new ones, and their status is set to Inactive- Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to terminate; these assignments retain their original statuses. You can deselect all assignments except the primary assignment and the current assignment.

How Temporary Assignments are Processed
When you create a temporary assignment for a person in the same legal employer the work relationship remains unchanged. If you use employment terms, you can either create a temporary assignment with the same employment terms or create new employment terms. The existing set of employment terms are suspended if you create new ones. The existing assignments in the current work relationship are suspended and their status is changed to Suspended- Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to suspend; these assignments retain their original statuses. The suspended objects become active again when you end the temporary assignment.

Global Transfers and Temporary Assignments: How They are Processed

A global transfer is the transfer of a person to another legal employer (transfer of an employee from a UK subsidiary to a US subsidiary, for example). A global temporary assignment is the temporary transfer of a person to another legal employer (US employee sent on a temporary secondment to the UK, for example). You end a global temporary assignment by initiating the End Global Temporary Assignment action and specifying a return date. The global temporary assignment is terminated and the assignments in the source legal employer are reinstated automatically on the return date.

Settings That Affect Global Transfers
The type of global transfer, whether permanent or temporary, determines how it is processed.
How Global Transfers are Processed

When you transfer a person to another legal employer, the source work relationship is terminated automatically using the default values. You create a new work relationship in the destination legal employer. The existing set of employment terms and assignments in the source work relationship are terminated and their status is set to Inactive- Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to terminate; these assignments retain their original statuses and the work relationship is not terminated. You can deselect all assignments except the primary assignment and the current assignment.

How Global Temporary Assignments are Processed

When you create a global temporary assignment, the existing set of employment terms and assignments in the source work relationship are suspended, and you create new objects in the destination legal employer. The status of the assignments in the source work relationship is set to Suspended-Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to suspend; these assignments retain their original statuses. The suspended objects become active again when you end the temporary assignment.

Transferring a Worker: Example

This example illustrates how to transfer a worker and shows the impact of a transfer on the employment data, depending on certain policy choices.

Scenario

Alice Walker and Gail Williams are employed by a health care company, Cook County Healthcare, in the UK. Alice works as a nurse in Archer hospital and Gail as an emergency room (ER) nurse in Butler hospital. Alice is transferring to Cook County Healthcare in the US, so Gail is working temporarily as a nurse in Archer hospital.

Employment Details

Alice and Gail have the following work relationships:

<table>
<thead>
<tr>
<th>Person</th>
<th>Work Relationship</th>
<th>Employment Terms</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alice Walker</td>
<td>Archer Hospital</td>
<td>Nurse Employment Terms</td>
<td>Nurse</td>
</tr>
<tr>
<td>Gail Williams</td>
<td>Butler Hospital</td>
<td>ER Nurse Contract</td>
<td>ER Nurse</td>
</tr>
</tbody>
</table>

This table explains the policy decisions to be followed when transferring these workers:

<table>
<thead>
<tr>
<th>Transfer Details</th>
<th>Alice Walker</th>
<th>Gail Williams</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the transfer action?</td>
<td>Global Transfer</td>
<td>Add Temporary Assignment</td>
</tr>
<tr>
<td>Who is the initiating the transfer?</td>
<td>Human resource (HR) specialist for the US legal employer</td>
<td>Current HR specialist</td>
</tr>
</tbody>
</table>
### Analysis

As the HR specialist for the current legal employer, you must do the following before transferring the workers:

- Share Alice Walker’s information with the US HR specialist.
- Reassign Alice Walker’s direct reports to Gail Williams.

#### Note

You can also perform this step after transferring the workers.

### Resulting Transfers

Alice Walker: The HR specialist for the US legal employer performs the transfer after obtaining access to Alice’s information. The Archer Hospital work relationship is terminated automatically and the HR specialist creates a new work relationship in the US legal employer. The Nurse employment terms and the Nurse assignment are ended and the HR specialist creates new objects in the US legal employer. A notification of the global transfer is sent automatically to the payroll administrator, who then completes the tasks for transferring Alice to the US payroll.

Gail Williams: The ER Nurse employment terms are suspended and a temporary assignment is created in the current legal employer with new employment terms. The Butler Hospital work relationship remains unchanged. The ER Nurse assignment is suspended without pay.

### Promoting a Worker: Worked Example

This example illustrates how to promote a worker. Kate Williams is employed by a health care company, Cook County Healthcare. Kate is currently working as an Emergency Room Nurse in the Emergency Nursing department in Archer hospital. Kate’s current grade is E4. Kate’s manager has decided to promote her to an Emergency Nurse Manager.

The following table summarizes key decisions for this scenario:

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>When is the promotion effective from?</td>
<td>June 1, 2011</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>What is the new job name?</td>
<td>Emergency Nurse Manager</td>
</tr>
<tr>
<td>Is there a department change?</td>
<td>No</td>
</tr>
<tr>
<td>What is the new grade?</td>
<td>M1</td>
</tr>
<tr>
<td>Is there a salary change?</td>
<td>Yes, the salary basis is changed from monthly to annually and the new annual salary is $85,000.</td>
</tr>
<tr>
<td>Is there a manager change?</td>
<td>Yes, the new HR manager is Pat Miller.</td>
</tr>
<tr>
<td>Is there a change in the compensation distribution?</td>
<td>No</td>
</tr>
<tr>
<td>Does the promotion involve any role change?</td>
<td>Yes, Kate has two additional roles Emergency Nurse Manager and Emergency Room Administrator.</td>
</tr>
</tbody>
</table>

Use the default values except where indicated.

**Enter Employment Details**

1. On the Person Gallery page, search for and select **Kate Williams**.

2. Select **Personal and Employment - Promote** in the Actions list to open the Promote Kate Williams: Employment Details page.

3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion Date</td>
<td>6/1/11</td>
</tr>
<tr>
<td>Job</td>
<td>Emergency Nurse Manager</td>
</tr>
<tr>
<td>Working as a Manager</td>
<td>Yes</td>
</tr>
<tr>
<td>Grade</td>
<td>M1</td>
</tr>
</tbody>
</table>

4. Complete the manager details, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Pat Miller</td>
</tr>
<tr>
<td>Type</td>
<td>HR Manager</td>
</tr>
</tbody>
</table>

**View Supporting Analytics**

The analytics provide supporting information relevant to the promotion and aid you in completing the task.

1. Select the **Performance** tab to view Kate's recent performance documents.

2. Select the **Peer Comparison** tab to compare Kate's performance and potential scores with the scores of the other reports.

3. Select the **Competency Match** tab to compare Kate's competencies with the competency requirements of her new job.

4. Select the **Promotion Analytics** tab to compare Kate's promotion information with that of workers of similar job and grade.

5. Select the **Assignment Changes** tab to view Kate's assignment history and analyze the salary changes.
6. Select the **Probability of Attrition** tab to analyze the effect of the promotion on Kate's predicted performance and attrition level.

7. Click **Next** to enter the compensation details

### Enter Compensation Details

1. On the Promote Kate Williams: Compensation Details page, complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Salary Basis</td>
<td>Annually</td>
</tr>
<tr>
<td>New Salary</td>
<td>85,000</td>
</tr>
</tbody>
</table>

### View Compensation-Related Analytics

1. Select the **Salary Range** tab to analyze whether Kate's proposed salary falls within the specified grade range.

2. Select the **History** tab to view Kate's salary changes over time.

3. Select the **Percentage Change** tab to view what percentage Kate's salary has changed over time.

4. Select the **Compa-Ratio** tab to analyze how the change in Kate's compa-ratio compares to change in salary, over time.

5. Select the **Growth Rate** tab to analyze how Kate's salary has grown over time.

### Enter Roles Information

1. On the Promote Kate Williams: Roles page, click **Add Role**.

2. Search for and select the **Emergency Room Administrator** role.

3. Click **Next** to review your choices and entries.

4. On the Promote Kate Williams: Review page, click **Submit**.

### FAQs for Promotions and Transfers

**Can I initiate a transfer if I do not have access to all of the person's assignments?**

No. Any user who has access to all of the person's assignments can initiate the transfer.

**Does a person transfer to another payroll automatically during a global transfer?**

No. If you use Oracle Fusion Global Payroll, a notification is automatically sent to the payroll administrator when you create a new work relationship in the course of initiating a global transfer or global temporary assignment. The payroll administrator then completes the relevant tasks to transfer the person to another payroll.
How can I use social networking for a promotion?

If the Promote page has a Social link, you can invite others to collaborate about a promotion. For example, a manager can initiate a conversation with the human resources (HR) specialist to ask questions about completing the promotion transaction. The conversation remains with the promotion as a historical record.

To use social networking:

- Click Social on the Promote page to collaborate about the promotion. Click the Share button, or click Join if collaboration has already been initiated.
- Click the name of the promotion transaction to access its wall, where you can start conversations and add members.
- After collaboration is initiated for a promotion, anyone at your company can be invited to participate in a conversation about it. For example, the manager invites the HR specialist.
- On the wall of the promotion transaction, everyone invited can view basic attributes of the promotion and post documents and comments that all members can see.
- Use the presence indicators to identify who is available to answer your questions.

Terminate Worker

Terminations: Explained

When workers or nonworkers leave the enterprise, you terminate their work relationships.

Terminating Work Relationships

Terminate a work relationship, either worker or nonworker, if you want to end all the assignments in the work relationship. Use the Manage Employment page to end an individual assignment within the work relationship. If the person has a single assignment, however, the only way to end the assignment is to terminate the entire work relationship. If a person has multiple work relationships and you want to terminate all of them, you must terminate one work relationship at a time, leaving the primary relationship until last.

Ending Employment

When you terminate a work relationship, any employment terms and assignments associated with the work relationship are ended automatically. The status of the work relationship and the associated employment terms and assignments are changed to inactive on the day following the termination date. The period of service, both legal employer and enterprise, ends on the termination date. The person becomes an ex-employee or ex-contingent worker for that legal employer. Rehire the employee or renew the contingent worker.
placement to create a new period of service. The person’s user access and roles are revoked by default after the termination date. You can choose to revoke user access earlier, as soon as the termination is approved. (This could mean revoking user access before the termination date.)

**Payroll Termination**

If you are using Oracle Payroll, a notification is sent to the payroll administrator informing the administrator of the termination. The payroll administrator then completes the relevant tasks required to complete the payroll termination.

**Reversing Terminations: Explained**

You may want to reverse a termination and reinstate the work relationship as it was prior to the termination, for example, because you terminated a person in error or the person decided not to leave.

**Reversing a Termination**

You can reverse a termination at any time provided the same legal employer has not rehired the employee (or started a new placement for a contingent worker). This is because a person cannot have multiple employee or contingent worker relationships with the same legal employer at the same time. For example, consider that an employee was terminated on April 15, and the same legal employer rehired the employee on May 1. You want to reverse the termination on May 15, but you cannot do so because this causes the employee to have two concurrent work relationships with the same legal employer.

**Restoring Employment Data**

When you reverse a termination, any work relationships, assignments, and employment terms previously ended are restored with the statuses prior to the termination. The payroll administrator is notified of the reversal of the termination, who then completes the relevant tasks required to reverse the payroll termination. If the termination caused reassignment of a primary work relationship or assignment, then the reversal of the termination restores their primary statuses as they were before the termination.

**Validating Employment Data**

When you reverse a termination, the elements assigned to the person prior to termination action being taken are restored. This means that any future-dated employment changes or employment actions occurring after the termination action are not restored. For example, consider that the employee’s department was end-dated after his termination and all employees were relocated to another department. The reversal of the termination restores the end-dated department and not the new department. You must manually verify the validity of the employment data after reversing a termination and make any required changes.

**User Access and Roles**

When you reverse a termination:

- Any role, such as beneficiary, that was provisioned to the person automatically at termination is automatically deprovisioned.
• Both manually and automatically provisioned roles that were deprovisioned when the work relationship was terminated are automatically restored to the person.

• If the person’s user account was disabled at termination, it is automatically re-enabled.

Sensitive Transactions: How They are Processed

Certain future-dated terminations such as involuntary layoffs may be sensitive and need to be hidden from everyone until an appropriate time. Any future-dated termination transaction having a deferred processing date is considered a sensitive transaction.

Sensitive Transactions

To identify a termination as sensitive, you must enable deferred processing and specify when to process the changes. The processing of the termination is deferred to the date you specify. If the transaction goes through an approval process, and the processing date you specified occurs prior to approval, then the processing is deferred until final approval. In either case, the termination is hidden from everyone except the initiator, approvers, and notification recipients until the time the transaction is processed and applied to the database.

Sensitive and Concurrent Transactions

Sensitive transactions affect how concurrent transactions are processed. You cannot initiate a transaction for a person if there is a concurrent transaction pending approval for the same person. If however the concurrent transaction is a sensitive termination, you can initiate a transaction for the same person because the presence of a sensitive transaction cannot be disclosed. Enabling concurrent transactions can create potential data conflicts. If the conflicts cannot be resolved automatically, the application routes the actions to a person with a Human Resources (HR) Representative responsibility. The following example illustrates some potential data conflicts and suggests ways of resolving them.

Example: Concurrent Transfer and Termination

Suppose a line manager initiated a transfer for a worker when a sensitive termination was pending for approval for the same person. The termination is now approved and applied to the database, which may give rise to the following data conflicts. As the worker’s HR Representative, you must manually apply the required changes to resolve the conflicts.

• The transfer is still pending approval and the effective date of the transfer is later than or same as the termination date. In this case, the application automatically rejects the transfer and notifies you.

• The transfer is still pending and the effective date of the transfer is earlier than the termination date. You receive a notification that you can withdraw the transfer because the worker is already terminated. If you choose not to withdraw the transfer, you receive a notification again (when the transfer is applied) that you must re-enter the transfer. You must re-enter the transfer so that the transfer details are reflected in the inactive assignment created by the termination.
• The transfer is applied to the database and the effective date of the transfer is later than or same as the termination date. The sensitive termination was hidden at the time the transfer was initiated, however, the transfer conflicts with the termination. You receive a notification that you must delete the transfer and re-enter the termination. You must re-enter the termination because of data changes that occurred after the termination was initiated.

• The transfer is applied to the database and the effective date of the transfer is earlier than or same as the termination date. You receive a notification that you must re-enter the termination. You must re-enter the termination because of data changes that occurred after the termination was initiated.

Simple Termination Process: Explained

When workers or nonworkers leave the enterprise, you terminate their work relationships. As a line manager, you can initiate the termination of people who report to you, using the simple termination process. When you terminate a work relationship, the assignments associated with the work relationship are ended automatically. The status of the work relationship and the associated assignments are changed to inactive on the day following the termination date. The period of service, both legal employer and enterprise, ends on the termination date. The person becomes an ex-employee or ex-contingent worker for that legal employer. Rehire the employee or renew the contingent worker to create a new period of service. The person's user access and roles are revoked by default after the termination date. You can choose to revoke user access earlier, as soon as the termination is approved. (This could mean revoking user access before the termination date). Human resource specialists may use this process as an alternative, to initiate a simple termination.

Hiding Terminations: Critical Choices

When entering sensitive terminations, you can decide to hide the termination for a specified period. There are two options available for hiding terminations:

• Termination display
• Deferred processing

Termination Display

You can choose to hide the termination when entering the termination details, before submitting the termination. The termination display option controls whether the termination appears in the gallery portrait. When you enter mass terminations, for example, you may want to terminate the persons immediately, but postpone displaying the terminations in the gallery portrait for a certain period of time. Use the termination display option to hide the terminations for a specified period after the termination dates. During this period, the terminations are visible only to those users who have access to the terminated persons' records.
Deferred Processing

As part of submitting the termination, you can choose to defer the processing of the termination transaction. The deferred processing option is typically useful to hide terminations with a future-effective date. For example, consider that you want to enter involuntary future-dated terminations. You want to submit the terminations but defer processing them until the termination dates because the persons you are terminating have access to functionality that exposes their terminations to them. Use the Deferred Processing option to postpone processing the terminations until the termination dates. This hides the terminations from everyone except the initiator, approvers, and notification recipients until the time the transactions are processed.

Terminating a Work Relationship: Example

This example illustrates how to terminate a work relationship when the person has multiple assignments, direct reports, and future-dated transfer actions. The example also shows the impact of a termination on the employment data, depending on certain policy choices.

Scenario
Samantha Green and John Smith are employed by a health care company, Cook County Healthcare. Samantha works primarily as a nurse in Archer hospital and as a volunteer nurse in Butler hospital. John works under a contract as a radiologist in Kent hospital. The enterprise has decided to terminate John whereas Samantha's termination is voluntary.

Employment and Termination Details
Samantha and John have the following work relationships:

<table>
<thead>
<tr>
<th>Person</th>
<th>Work Relationship</th>
<th>Worker Type</th>
<th>Employment Terms</th>
<th>Assignment</th>
<th>Future-Dated Transfer Actions</th>
<th>Direct Reports Existing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samantha Green</td>
<td>Archer Hospital</td>
<td>Employee</td>
<td>None</td>
<td>Nurse</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Samantha Green</td>
<td>Butler Hospital</td>
<td>Nonworker</td>
<td>Volunteer Nurse</td>
<td>Nurse</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Samantha Green</td>
<td></td>
<td></td>
<td>Employment Terms</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John Smith</td>
<td>Kent Hospital</td>
<td>Contingent Worker</td>
<td>Radiologist Contract</td>
<td>Radiologist</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

This table explains the policy decisions to be followed when terminating these work relationships:

<table>
<thead>
<tr>
<th>Termination Details</th>
<th>Samantha Green</th>
<th>John Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can the termination be made public?</td>
<td>Yes</td>
<td>No. Postpone displaying the termination in the gallery portrait for a week since other involuntary terminations have to be entered.</td>
</tr>
<tr>
<td>When should the user access be revoked?</td>
<td>After the termination date</td>
<td>Immediately after termination is approved and saved, not waiting until the termination date</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Is the person recommended for rehire?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Is payment processing required after termination?</td>
<td>Not required for Butler Hospital since this is a nonworker relationship and payment for this relationship is not via payroll</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Analysis**

Before terminating these work relationships, you must:

- Reassign Samantha Green’s direct reports to another manager using the Change Manager page.
- Delete John Smith’s future-dated global transfer and cancel the new work relationship created for the transfer.

You cannot terminate the primary work relationship when there are other nonprimary work relationships existing for the person. So, terminate Samantha’s nonworker relationship to Butler Hospital first.

**Resulting Terminations**

Samantha Green: When you terminate the two work relationships, the associated employment terms and assignments are also ended. The status of these objects is changed to inactive on the day following the termination date. Samantha’s roles and user accounts are revoked after the termination date. Her period of service with the legal employers Archer Hospital and Butler Hospital and the enterprise Cook County Healthcare is ended on the termination date. She becomes an ex-employee for the legal employer Archer Hospital and ex-nonworker for Butler Hospital. A notification of the Archer Hospital work relationship termination is sent automatically to the payroll administrator, who then completes the tasks for terminating the payroll.

John Smith: John’s roles and user accounts are revoked before the termination date, as soon as the termination is approved. The termination causes the work relationship, contract, employment terms, and the assignment to end. The status of these objects is changed to inactive on the day following the termination date. His period of service with the legal employer Kent hospital and the enterprise Cook County Healthcare is ended on the termination date. He becomes an ex-contingentworker for the legal employer. A notification of the termination is sent automatically to the payroll administrator, who then completes the tasks for terminating the payroll.

**FAQs for Terminate Worker**

**Can I terminate a work relationship if there are future-dated employment changes?**

You can terminate a work relationship if there are any future-dated employment changes except transfers. All future-dated changes are lost when you terminate the work relationship. If any future-dated transfer actions exist, you must
manually delete them and cancel any new work relationship before you terminate the work relationship.

**How can line managers reassign persons' direct reports?**

Line managers can use the Change Manager page to reassign persons' direct reports, for example, when persons are transferred, promoted, or terminated.

**What happens if there are data conflicts after terminating a person?**

It is not possible to automatically identify and resolve every conflict scenario resulting from terminating a person. You must make any required changes to the data manually. For example, you must manually reassign any checklist tasks assigned to the terminated person or cancel any training scheduled for the person.

**What happens if I revoke user access from a person with multiple work relationships?**

The person loses any automatically provisioned role that was provisioned for assignments in this work relationship only. However, the person retains automatically provisioned roles for which he or she is eligible in other work relationships. The person also retains all manually provisioned roles. If any manually provisioned role is no longer required, it must be deprovisioned manually.

If the person has other, current work relationships or roles provisioned automatically at termination, such as beneficiary or retiree, then the person's user account remains active and available to the person.

**What's the impact of entering a rehire recommendation?**

You enter a rehire recommendation to indicate whether the person can be rehired in the future. However, this is for information purposes only. This data is not used to determine whether a person can be rehired.

### Manage Direct Reports

**Managing Direct Reports: Explained**

You can reassign existing line reports to new managers, as of the same effective date. When you reassign direct reports, changes occur at the assignment level for each direct.

**Reassigning Direct Reports**

You can reassign all or selected direct reports to new managers. However, if the current manager is being terminated, you must reassign all the reports. You can select the same new manager for all the reports or a different new manager for each report. For example, John Smith has been transferred to another department.
and his line reports need to be reassigned. John has four line reports and you want to reassign them to new line managers. You can reassign three of his reports to the same new line manager and the fourth report to a different line manager. Some of John’s existing reports may still be reporting to him in his new department.

If a majority of directs are being reassigned to the same new manager, you can select this manager as the proposed manager by default for all the reports, and later reassign selected directs to different managers.

When reassigning reports, you cannot change the manager type. For example, if the direct is a line report for the current manager, you can reassign the direct only as a line report to a new manager, but not as a direct of other type, such as a project report or a mentee.

The Manage Direct Reports task does not assign new roles to managers during the reassign process. You must manage the assignment of roles through the role mapping functionality. For persons who did not have reports before the reassign process, you must assign manager roles.

Areas of Responsibility

Areas of responsibility associated with the manager's role are not affected by the Manage Direct Reports task. For example, if a line manager also has an area of responsibility as an HR representative, the HR reports cannot be managed from this task.

FAQs for Manage Direct Reports

What's the difference between the Change Manager and Manage Direct Reports functionalities?

The Change Manager functionality enables you to change managers of all types, but for only one worker at a time. The Manage Direct Reports functionality enables you to reassign all the line reports of a manager to new managers in a single process.

Can I reassign indirect reports of the manager from the same Manage Direct Reports task?

No, you can reassign only direct reports of the manager.

Manage Mass Updates

Mass Updates: Explained

You may need to update multiple records at one time, for example, transfer all workers in a department together as part of a company reorganization. Mass update enables you to update multiple records using a single update request.
Mass Assignment Change

Create a mass assignment change to update multiple worker assignments at once. The action categorizes the type of assignment change. For a mass assignment change, you can select from a list of employment-related actions such as Assignment Change, Transfer, or Promotion.

Mass Assignment Change Using Spreadsheet

You can download your data from the Verification page into a spreadsheet if there are too many rows and if it is easier to make the changes in a spreadsheet format. Before you can do this, you must have installed the desktop client Oracle ADF 11g Desktop Integration and enabled the Trust Center setting Trust access to the VBA project object in Microsoft Excel. You could make the changes offline, check in the data, and verify the changes from within the spreadsheet. Using personalization, you can add additional attributes on the Changes page; however, these attributes are hidden when you download the data into a spreadsheet. To display the hidden attributes in the spreadsheet, use the Unhide feature in Microsoft Excel. You can check in and verify the data in the spreadsheet multiple times to accommodate revisions. After the final check in, you must navigate to the Review page of the mass assignment change (in the application) to submit the changes.

Note

The mass update transaction is automatically saved when you navigate to the Verification page. This means the earlier mass update is overwritten with the current changes and cannot be restored by cancelling the current transaction.

Assignments With Future Changes

You can either include or exclude assignments with future changes in the mass update. If you include assignments with future changes, you must manually adjust those records whose effective date of change is later than the mass update date, to resolve any conflicts. For those assignments with changes existing on the same date of the mass assignment change, the mass update is applied as the last change and previous assignment changes are retained.

Assignments and Employment Terms

You can include assignments associated with employment terms in the mass assignment change. If override at assignment level is permitted, you can update the assignments but the employment terms are unaffected. If override at assignment level is not permitted, you cannot update the associated assignments in the mass assignment change, even if you include them. However, this restriction applies only to the attribute values specified on the employment terms; you can still update the attribute values specified on the assignment. The attributes that you are not permitted to update appear disabled in the mass assignment change.

Mass Update Statuses: Explained

The mass update status is an indicator of what actions have been completed in the mass update process and what actions are yet to complete.
The following table summarizes the mass update statuses and their meanings:

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiated</td>
<td>The status is automatically set to Initiated when you create a mass update</td>
</tr>
<tr>
<td>Awaiting user verification</td>
<td>Mass update changes are awaiting verification</td>
</tr>
<tr>
<td>Awaiting user verification - exported</td>
<td>You have exported the mass update rows to a spreadsheet</td>
</tr>
<tr>
<td>Awaiting user verification - imported</td>
<td>Changes in the checked-in spreadsheet are awaiting verification</td>
</tr>
<tr>
<td>Completed</td>
<td>Mass update is complete</td>
</tr>
</tbody>
</table>

**Creating a Mass Transfer: Worked Example**

This example illustrates how to update multiple assignments at one time using mass update. As part of the company reorganization, all workers in the Applications Support business unit must be transferred to the Global Support business unit. The transfer involves a change in department and work location.

The following table summarizes key decisions for this scenario:

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include assignments with future changes?</td>
<td>No, transfer these assignments separately and not as a part of this mass update</td>
</tr>
<tr>
<td>Are any assignments associated with employment terms?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>You can include employment terms in the mass transfer but update only the associated assignments and not the employment terms themselves.</td>
</tr>
<tr>
<td>Department and location changes applicable to all workers?</td>
<td>No, the location change does not apply to persons working at home</td>
</tr>
</tbody>
</table>

**Creating a Mass Transfer**

1. On the Manage Mass Updates page, click **Create** to open the Create Mass Assignment Change: Basic Details page.

2. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Reorganization September 2011</td>
</tr>
<tr>
<td>Action</td>
<td>Transfer</td>
</tr>
<tr>
<td>Assignments with Future Changes</td>
<td>Show errors and exclude assignments</td>
</tr>
</tbody>
</table>
3. Click Next.

**Selecting the Population**
2. Click Advanced to open the Advanced Search page.
3. Select the Applications Support department and click Search.
4. Select all the rows in the search results.
5. Click OK to display the search results in the Selected Persons region.
6. Click Next.

**Entering the Changes**
1. On the Create Mass Assignment Change: Changes page, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Global Support</td>
</tr>
<tr>
<td>Department</td>
<td>Global Applications Support</td>
</tr>
<tr>
<td>Building</td>
<td>New Pleasanton Campus</td>
</tr>
</tbody>
</table>

2. Click Next.

**Verifying the Changes**
1. On the Create Mass Assignment Change: Verification page, in the Proposed Changes column, delete the Building value New Pleasanton Campus for those persons working at home.
2. Click Verify Changes and review any errors and warnings.
3. Click Next.
4. In the Create Mass Assignment Change: Review page, review the current and proposed values.
5. Click Submit.

**FAQs for Manage Mass Updates**

**Can I update employment terms via mass transfer?**

No. You can include assignments associated with employment terms in a mass transfer and update the assignments but the employment terms are unaffected.

**Can I make changes in the mass update after submitting it?**

No. You can save the mass update for later, and edit or delete the mass update any time before submitting it.
Manage Workforce Records

Manage Workforce Records: Overview

The Manage Workforce Records business process enables access to the worker directory and management of worker document records and checklists. The business activities of this process are:

- Maintain Worker Directories
  All workers access public information about a person in the person’s public portrait.
  Line managers access information about their direct and indirect reports in the line manager portraits of those workers and perform manager self-service actions.
  Workers access their own information on the My Portrait tab of the gallery and perform employee self-service actions.
  Administrators display messages to portrait users in selected portraits.

- Manage Records Retention Program
  HR specialists and line managers create records of worker documents and store copies as attachments.

- Manage Checklists
  Human resource (HR) specialists and line managers create checklists for standard and repeatable tasks, such as those associated with hiring an employee, allocate the tasks to task performers, and monitor task completion.

Maintain Worker Directories

Person Gallery and Portrait: Explained

A portrait comprises personal and employment information about a person; the type and quantity of information in the portrait depend on the security access of the person viewing the portrait.
The Person Gallery is a collection of portraits that incorporates three primary functions:
Person Search
The Person Gallery supports both a keyword search and a traditional structured search for person and assignment information. The Person Gallery is equivalent to a corporate directory: users can search for any worker in the enterprise. The information available in the search results, including whether a search result appears at all, depends on the security privileges of the user. Any user can see the public data of people who have been designated as public during security implementation. For human resource specialists and line managers, more detailed access is usually available to the records of subordinates or other people for whom the user is responsible.

From the search results, the user can:
- Navigate to a person’s portrait.
- Initiate actions, such as change an address or transfer a worker. The available actions depend on the security privileges of the user. For example, a line manager can transfer a subordinate, but the transfer action is not available to a worker’s peers.

In the Keywords field, users can enter both actions and keywords. For example, a line manager could enter Promote Frank Green. If the user is authorized to perform the action for the named worker and there is only one search result, then the process is launched automatically, thereby reducing the number of steps to initiate an action. If there are multiple search results, the user makes a selection in the usual way from the search results.

Worker Self-Service
A worker’s own portrait, the My Portrait tab in the person gallery, contains the most detailed collection of information about the worker. It is also the launch point for the worker’s self-service actions, such as maintaining address details, changing marital status, and participating in social connections.

Line Manager Self-Service
When line managers view the portraits of their direct and indirect reports, they see more detailed information than is available in the public version of a worker’s portrait and can perform actions that are not available in the public portrait. For example, line managers can promote or terminate workers, provision roles to them, or share their information with third parties.

Person-Record Keyword Searches: Explained

The application searches for keyword values in these attributes of a person’s records: department, job name and code, position name and code, person name, primary e-mail, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, affiliations, areas of interest, and areas of expertise.

This topic describes:
- Access to restricted information
- Keyword indexing
- Searches using date-effective keywords
Access to Restricted Information
Access to information about a person's competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations is restricted to a person's line managers. For example, if a line manager searches for a language skill and a match is found in the language-skills information of the manager's direct or indirect reports, that information appears in the search results. Restricted information is not searched and is never included in search results when the searcher is not a line manager. However, if the match is found in public information, such as areas of expertise, it appears in the search results for any user.

Keyword Indexing
Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that there is no difference between the source and indexed values. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

Searches Using Date-Effective Keywords
In the professional user person search, you can enter an effective as-of date. When date-effective values, such as work location, are copied to the keywords table, their history is not copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results may not be as expected.

For example:
- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.
- The changed work location is copied automatically to the keywords table on 27 January, 2011.
- You search for a person on 1 February, 2011 using the keyword Headquarters and the effective as-of date 10 January, 2011.

Although the work location on 10 January, 2011 was Headquarters, assignment 12345 does not appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

Maintaining Person Keywords: Explained

Several attributes of person, employment, and profile records are used as person-search keywords. Keyword values are copied automatically from the originating records to the PER_KEYWords table, where they are indexed to improve search performance.

This topic explains:
- How person keywords are maintained
- Why you run the Update Person Search Keywords process
- How to schedule the Update Person Search Keywords process

How Person Keywords Are Maintained
Whenever the value of a keyword attribute changes (for example, if a person acquires a language skill or a different phone number), an event is raised.
In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table; therefore, most changes are made in PER_KEYWORDS immediately and automatically.

When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.

**Why You Run the Update Person Search Keywords Process**

Although most changes to the PER_KEYWORDS table are made automatically, you need to run the Update Person Search Keywords process regularly because the automatic process does not apply future-dated changes to the PER_KEYWORDS table. Running the Update Person Search Keywords process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

**How to Schedule the Update Person Search Keywords Process**

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals (for example, weekly at a specified time).

The likely volume and frequency of changes to person records in your enterprise will determine how often you run the Update Person Search Keywords process:

- If the volume and frequency are high, you need to schedule the process to run frequently.
- If the volume and frequency are low, running the process once a month is recommended.

When you run the Update Person Search Keywords process, the whole PER_KEYWORDS table is refreshed; therefore, you are recommended to run the process at times of low activity to avoid performance problems.

**Relationship Strength: Explained**

When you search for a person, you can display the results in order of their likely relevance to you to increase the chances of the search target appearing near the top of the list. The relevance of a search result is based on the strength of the relationship between you and that person.

These factors contribute to relationship strength:

- Proximity in the organization hierarchy
- Proximity in the position hierarchy
- Proximity in the manager hierarchy
- Proximity of work location
- Proximity in a social network
- Frequency of prior selection
- Your own assessment

When you order search results by relationship strength, people in the search results who have no measurable relationship with you are ordered alphabetically by name and appear following those who have a relationship with you.

**Proximity in the Organization Hierarchy**

If a person belongs to the same organization hierarchy as you, a relationship exists. The strength of the relationship depends on the number of organization
boundaries between you and that person. For example, a person in the same organization has a stronger relationship with you than a person in the organization above or below you.

**Proximity in the Position Hierarchy**

If a person’s position is in the same position hierarchy as your position, a relationship exists. The strength of the relationship depends on the number of positions that separate your position from the other person’s. For example, a person whose position is the same as yours has a stronger relationship with you than a person whose position is at a different level in the hierarchy.

**Proximity in the Manager Hierarchy**

If a person belongs to the line manager hierarchy from your primary assignment, a relationship exists. The strength of the relationship depends on how many people occur between you and that person in the hierarchy. For example, a person who reports directly to you has a stronger relationship with you than a person who reports indirectly to you.

**Proximity of Work Location**

The details of the work location on your primary assignment are compared with the work location on each assignment that appears in the search results. The closer the locations are to each other, the stronger the relationship. For example, a person on the same floor of the same building has a stronger relationship with you than someone in a different building or town. A person in a different country has no relationship with you.

**Proximity in a Social Network**

A person who belongs to the same social network as you has a relationship with you.

**Frequency of Prior Selection**

If you have previously selected a person during a specified period, which is 7 days by default, a relationship exists. The strength of the relationship depends on how often you have selected that person. For example, a person you have selected five times during the previous week has a stronger relationship with you than someone you have selected only once during the same period.

**Your Own Assessment**

You can indicate your interest in a person by increasing or decreasing the rating of a search result. If you select the maximum rating, the relationship strength is multiplied by 2 by default. If you select the minimum rating, the relationship strength is divided by 2 by default. Your enterprise can change the default multiplier to change the impact of your assessment relative to other factors. Your ratings are stored and contribute to the calculation of relationship strength in future searches.
**Relationship Strength in the Gallery Search: How It Is Calculated**

Gallery search results can be listed in order of the strength of the relationship between the person performing the search and each person whose assignment is in the search results: the stronger the relationship, the nearer to the top of the results an assignment appears. This topic describes how relationship-strength values are calculated for individual factors, such as proximity in the manager hierarchy and work location, and how those results are combined to give an overall relationship-strength value.

**How Relationship Strength Is Calculated**

The calculation of relationship strength is based on several factors.

1. When the searcher’s primary assignment is in the same organization or position hierarchy as a person’s assignment, the strength of the relationship depends on their proximity to each other in the hierarchy. To calculate the relationship strength, 100 is divided by the number of boundaries plus 1 between the searcher and the person, as shown in the following table.

<table>
<thead>
<tr>
<th>Hierarchy Boundaries</th>
<th>Calculation</th>
<th>Relationship Strength (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>100/1</td>
<td>100</td>
</tr>
<tr>
<td>1</td>
<td>100/2</td>
<td>50</td>
</tr>
<tr>
<td>2</td>
<td>100/3</td>
<td>33.3</td>
</tr>
<tr>
<td>3</td>
<td>100/4</td>
<td>25</td>
</tr>
</tbody>
</table>

The maximum number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

2. When the searcher’s primary assignment is in the same manager hierarchy as a person’s assignment, the strength of the relationship depends on their proximity to each other in any direction in the hierarchy. To calculate the relationship strength, 100 is divided by the number of people removed from the searcher the person is, as shown in the following table.

<table>
<thead>
<tr>
<th>People</th>
<th>Calculation</th>
<th>Relationship Strength (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100/1</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>100/2</td>
<td>50</td>
</tr>
<tr>
<td>3</td>
<td>100/3</td>
<td>33.3</td>
</tr>
<tr>
<td>4</td>
<td>100/4</td>
<td>25</td>
</tr>
</tbody>
</table>

Only the manager hierarchy associated with the line manager of the searcher’s primary assignment is included in the calculation.
The maximum number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

3. The location on the searcher’s primary assignment is compared with the location on the person’s assignment. Relationship strength values are allocated according to the relative locations of the searcher and the person, as shown in the following table.

<table>
<thead>
<tr>
<th>Location</th>
<th>Relationship Strength (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same floor of building</td>
<td>100</td>
</tr>
<tr>
<td>Same building</td>
<td>80</td>
</tr>
<tr>
<td>Same postal code</td>
<td>60</td>
</tr>
<tr>
<td>Same town or city</td>
<td>40</td>
</tr>
<tr>
<td>Same country</td>
<td>20</td>
</tr>
</tbody>
</table>

People in a different country from the searcher have no relationship with the searcher.

4. The number of times the searcher selects a person’s assignment from the search results is recorded automatically. This value is compared with the maximum number of times the searcher has selected any person and assignment in a specified period. For example, if the searcher selects Andrew Jones 10 times in a week and Gloria Schmidt twice in a week, then the relationship strength values are 100% for Andrew Jones and 20% for Gloria Schmidt. The period of time during which the searcher’s selection history is recorded is 7 days by default. You can set this value for the enterprise on the HR: Selection History Timeout profile option.

5. If the searcher is in the same social network as the person, then the relationship-strength value is 100%; otherwise, the relationship-strength value is 0%.

6. The relationship strength for each individual factor is multiplied by a weighting value, which is 0.5 by default, as shown in the following example.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Relationship Strength (%)</th>
<th>Weighting</th>
<th>Result (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization hierarchy proximity</td>
<td>100</td>
<td>0.5</td>
<td>50</td>
</tr>
<tr>
<td>Position hierarchy proximity</td>
<td>0</td>
<td>0.5</td>
<td>0</td>
</tr>
<tr>
<td>Manager hierarchy proximity</td>
<td>100</td>
<td>0.5</td>
<td>50</td>
</tr>
<tr>
<td>Location proximity</td>
<td>80</td>
<td>0.5</td>
<td>40</td>
</tr>
</tbody>
</table>
### Selection history

<table>
<thead>
<tr>
<th></th>
<th>40</th>
<th>0.5</th>
<th>20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social network</td>
<td>100</td>
<td>0.5</td>
<td>50</td>
</tr>
<tr>
<td>Totals</td>
<td>3</td>
<td>210</td>
<td></td>
</tr>
</tbody>
</table>

You can change the weighting values for individual factors on the relevant profile options, such as HR: Manager Hierarchy Weight and HR: Location Proximity Weight, to change the relative importance of those factors.

7. Each search result has a default searcher rating of 3, which has no effect on the relationship strength. However, the searcher can set this rating for individual results to a value between 1 and 5; values above 3 increase the relationship strength and values below 3 decrease it.

Each rating value is associated with a multiplying factor. The highest multiplying factor (the one used when the searcher sets the rating for a search result to 5) is specified on the profile option HR: Relationship Priority Factor, which is set to 2 by default. This table shows the default multiplying factors:

<table>
<thead>
<tr>
<th>Searcher Rating</th>
<th>Multiplying Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1/2</td>
</tr>
<tr>
<td>2</td>
<td>1/1.5</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>4</td>
<td>1.5</td>
</tr>
<tr>
<td>5</td>
<td>2</td>
</tr>
</tbody>
</table>

The total of the individual relationship-strength percentages is multiplied by the multiplying factor associated with the searcher’s rating. For example, if the default rating (3) applies, then 210*1 =210. The searcher can double the multiplying factor by setting a search result’s rating to 5 or halve it by setting the rating to 1.

If you change the setting of HR: Relationship Priority Factor, then you automatically change the associated multiplying factors. This table shows the multiplying factors for HR: Relationship Priority Factors from 3 through 6:

<table>
<thead>
<tr>
<th>Searcher Rating:</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: Relationship Priority Factor 3</td>
<td>1/3</td>
<td>1/2</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>HR: Relationship Priority Factor 4</td>
<td>1/4</td>
<td>1/2.5</td>
<td>1</td>
<td>2.5</td>
<td>4</td>
</tr>
</tbody>
</table>
If you increase the HR: Relationship Priority Factor value, you increase the effect of the searcher’s ratings relative to the other factors.

8. The result of multiplying the total of the individual percentages by the factor associated with the searcher's rating is divided by the sum of the individual weighting values. The result of this calculation is the relationship strength between the searcher and the person in the search result. For example: \( \frac{210}{3} = 70\% \)

Results that are greater than 100 are set to 100%.

Because the factors that contribute to this calculation are likely to change often, the calculation runs daily by default and the results are stored. However, you can schedule the Calculate Relationship Strength process to suit local requirements.

**Calculating Relationship Strength: Examples**

In the gallery, you search for the name "Rossi." Three assignments are found, and two of those belong to the same person. This topic shows how the order of the search results is calculated.

This table shows the profile-option settings used in these examples.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: Organization Hierarchy Weight</td>
<td>1.0</td>
</tr>
<tr>
<td>HR: Position Hierarchy Weight</td>
<td>1.0</td>
</tr>
<tr>
<td>HR: Manager Hierarchy Weight</td>
<td>1.0</td>
</tr>
<tr>
<td>HR: Location Proximity Weight</td>
<td>0.75</td>
</tr>
<tr>
<td>HR: Selection History Weight</td>
<td>0.75</td>
</tr>
<tr>
<td>HR: Social Network Weight</td>
<td>0.5</td>
</tr>
<tr>
<td>HR: Selection History Timeout</td>
<td>30 days</td>
</tr>
<tr>
<td>HR: Maximum Hierarchy Proximity</td>
<td>5</td>
</tr>
<tr>
<td>HR: Relationship Priority Factor</td>
<td>3</td>
</tr>
</tbody>
</table>

**John Rossi, Assignment 1**

In this assignment, John Rossi

- Is not in the same organization, position, or manager hierarchy as you
- Works in the same postal-code area as you
•Belongs to your social network

You have not selected John Rossi in the selection-history period, nor have you ever set a rating for him. This table shows the relationship-strength values for the individual factors.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Relationship Strength (%)</th>
<th>Weighting</th>
<th>Result (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization hierarchy</td>
<td>0</td>
<td>1.0</td>
<td>0</td>
</tr>
<tr>
<td>proximity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position hierarchy</td>
<td>0</td>
<td>1.0</td>
<td>0</td>
</tr>
<tr>
<td>proximity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager hierarchy</td>
<td>0</td>
<td>1.0</td>
<td>0</td>
</tr>
<tr>
<td>proximity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location proximity</td>
<td>60</td>
<td>0.75</td>
<td>45</td>
</tr>
<tr>
<td>Selection history</td>
<td>0</td>
<td>0.75</td>
<td>0</td>
</tr>
<tr>
<td>Social network</td>
<td>100</td>
<td>0.5</td>
<td>50</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>5</td>
<td>95</td>
</tr>
</tbody>
</table>

When the multiplying factor (1) for the default rating (3) is applied to the total of the individual results (95), the result is 95. The overall relationship strength is 19%, which the result of dividing 95 by the sum of the weighting factors (5).

**John Rossi, Assignment 2**

In this assignment, all factors are the same as for assignment 1, except that John Rossi is on the same floor of the building as you. The relationship strength for the location factor is therefore 75% (100/0.75), and the overall relationship strength is 25%.

**Donna Rossi**

Donna Rossi is in the same organization hierarchy as you. Donna’s assignment is in organization E, and your primary assignment is in organization B. The number of organization boundaries is 3 (organizations A, D, and E).

Donna Rossi is also in the same manager hierarchy as you.
Donna is two people removed from you in the hierarchy (T. Sahay and Donna Rossi).

Other relationship-strength factors for Donna:
- She works in the same town as you.
- She does not belong to your social network.
- You have selected her assignment twice before during the selection-history period. The maximum number of times you have selected any single result in this period is 4, which means that the selection-history relationship strength for Donna is 50%.
- When you last searched for her, you set her rating to the maximum value, giving a multiplying factor of 3.

This table shows the relationship-strength values for Donna.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Relationship Strength (%)</th>
<th>Weighting</th>
<th>Result (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization hierarchy</td>
<td>25</td>
<td>1.0</td>
<td>25</td>
</tr>
<tr>
<td>Position hierarchy</td>
<td>0</td>
<td>1.0</td>
<td>0</td>
</tr>
<tr>
<td>Manager hierarchy</td>
<td>50</td>
<td>1.0</td>
<td>50</td>
</tr>
<tr>
<td>Location proximity</td>
<td>40</td>
<td>0.75</td>
<td>30</td>
</tr>
<tr>
<td>Selection history</td>
<td>50</td>
<td>0.75</td>
<td>37.5</td>
</tr>
<tr>
<td>Social network</td>
<td>0</td>
<td>0.5</td>
<td>0</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>5</td>
<td>142.5</td>
</tr>
</tbody>
</table>

When the multiplying factor (3) for the maximum rating (5) is applied to the total of the individual results (142.5), the result is 427.5. The overall relationship strength is 427.5/5, which is 85.5%.

Therefore, the order of the search results is:

<table>
<thead>
<tr>
<th>Order</th>
<th>Name</th>
<th>Assignment</th>
<th>Relationship Strength (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Donna Rossi</td>
<td>1</td>
<td>85.5</td>
</tr>
</tbody>
</table>
Search Relevance Profile Options: Explained

The strength of the relationship between the person performing a gallery search and each person whose assignment appears in the search results can determine the order of the results: the stronger the relationship, the closer to the top of the results an assignment appears. The search relevance profile options control how the strength of the relationship between the searcher and the search result is calculated.

Weighting Profile Options

Using the following profile options, you can change the weighting applied to the relevant factors.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: Organization Hierarchy Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the organization hierarchy proximity factor.</td>
</tr>
<tr>
<td>HR: Position Hierarchy Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the position hierarchy proximity factor.</td>
</tr>
<tr>
<td>HR: Manager Hierarchy Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the manager hierarchy proximity factor.</td>
</tr>
<tr>
<td>HR: Location Proximity Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the location proximity factor.</td>
</tr>
<tr>
<td>HR: Selection History Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the selection history factor.</td>
</tr>
<tr>
<td>HR: Social Network Weight</td>
<td>Specifies the weighting applied to the relationship strength value for the social network factor.</td>
</tr>
</tbody>
</table>

The default value of each weighting profile option is 0.5. To increase the relevance of a factor relative to other factors, you increase its weighting; to decrease its relevance, you reduce its weighting.

HR: Selection History Timeout

The number of times the searcher selects a person’s assignment from the search results during a specified period, which is 7 days by default, is recorded automatically. You can specify this period for the enterprise on the HR: Selection History Timeout profile option.

HR: Maximum Hierarchy Proximity

When the searcher’s primary assignment is in the same organization, position, or manager hierarchy as a person’s assignment, the strength of the relationship depends on their proximity to each other in the hierarchy. The maximum
number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

HR: Relationship Priority Factor

The searcher can specify a rating for a search result, and each rating is associated with a multiplying factor. On this profile option, you can specify the highest possible multiplying factor that can be applied to a search result. By default, the multiplying factor is 2. If you increase its value, you increase the significance of the searcher’s own ratings relative to other factors.

Including Gallery Messages in Portraits: Examples

Using gallery messages, you can publish information about the availability of the workforce to portrait users. The following scenarios explain how calendar event and custom gallery messages are used.

Including Calendar Event Messages in Portraits

When you select a calendar event category, such as Public holiday, a message for each calendar event in that category appears in relevant portraits for the duration of the event. How relevant portraits are identified depends on whether you use work schedules:

• If you use work schedules, relevant portraits belong to people who have a primary schedule or schedule assignment that includes the calendar event as an exception.

• If you do not use work schedules, relevant portraits belong to people who are in the locations or organizations associated with the calendar event.

For example, St. Stephen’s Day is a public holiday in Germany but not in France or India. If you select the public-holiday event category, this message would appear on St. Stephen’s Day in the portraits of workers in your German locations:

Public holiday St. Stephen’s Day

The calendar event category precedes the calendar event name. The message does not appear:

• For workers in the German locations whose primary schedule or schedule assignment does not include this calendar event as an exception

• For workers in the French or Indian locations

Calendar event messages precede any custom messages in the same portrait. Messages do not appear for categories that you do not select.

Including Custom Gallery Messages in Portraits

Custom gallery messages typically warn portrait users of situations that may affect workforce availability. For example, assume that your sales team has relocated for two weeks while building works are completed. You want the following message to appear in the portraits of the sales team for that period:

The sales team is currently working from building 370. Use mail stop 209. Phones are unaffected.
When you create the message, you select the target department (sales) and the target location (building 350). The message appears in the portraits of all workers who have at least one active assignment in the sales department in building 350 during the specified period. At the end of that period, the message disappears from portraits; however, you can edit any component of the message at any time. For example, if the building work takes longer than expected, or if it resumes later in the year, you can edit the message.

If the message applies to a hierarchy of departments, you select the target organization hierarchy and, if appropriate, the top organization when creating the message. The target organization hierarchy always identifies a department hierarchy.

The priority value, which is unique for the specified period, determines where the message appears relative to other custom messages in the same portrait. Custom gallery messages always follow calendar event messages in the same portrait.

Public-Portrait Settings: Explained

You can specify, for the enterprise, which portrait users can see some types of portrait information by default. For example, you could allow all portrait users to see the social network portrait card but only a person’s managers to see the person’s skills and qualifications information. The portrait user’s role determines the actions that the user can take in a person’s portrait.

You can share each type of portrait information by default with:

- **My Managers**
  Anyone above the worker in the manager hierarchy can see the specified portrait information.
- **Connections**
  The worker’s social connections can see the specified portrait information.
- **Everyone**
  Anyone who can view the portrait can see the specified portrait information.

Allowing User Control of Portrait Settings

If you allow user control of any setting, then workers can update the setting from their own portraits. For example, if you allow user control of the skills and qualifications entry, then a person can prevent portrait users from seeing that information, regardless of your default setting. To ensure that some portrait users, such as a person’s managers, always have access to particular information, do not allow user control of the portrait setting for that information.

Pending Transactions: Explained

Transactions may go through an approval process before being applied to the database. A transaction typically passes through a chain of approvers, and
remains in pending status until the final approver in the approval chain has approved the transaction.

**Viewing Pending Transactions**

You can view a list of your pending transactions, including transactions that you:

- Initiated
- Approved, but the transactions are still pending because one or more approvers in the approval chain have not approved yet
- Returned to the previous approver
- Reviewed as a notification recipient

This list also includes transactions routed to any approval groups that you belong to, even though you may not have approved the transactions. You can edit a pending transaction and perform the same actions as those available in your worklist or notification summary. You can approve, reject, or return a transaction to the previous approver. Also, you can withdraw transactions that you have initiated. For example, you may want to withdraw a new hire transaction after initiating it, because of budget constraints.

**Viewing Nonpending Transactions**

You can view transactions that you saved for later, and transactions that are not pending with you anymore, for example your approved and rejected transactions. You can suspend transactions that you have initiated or approved. For example, you may want to suspend a new hire transaction that you have approved, until the hiring policy changes are finalized. A suspended transaction remains inactive until you resume the transaction. However, the ability to suspend transactions is controlled by the workflow role BPMWorkflowSuspend. The suspend and resume actions are available only to users having this role.

**FAQs for Maintain Worker Directories**

**What are the portrait settings?**

The portrait settings control who can see each item of information in the public version of your portrait. For example, you could allow all portrait users to see your message board, only people in your social network to see your network activity stream, and only your direct and indirect managers to see information about your experience and qualifications.

For some items of information, you may not be able to change the current setting. These settings are fixed for the enterprise and are outside your control.

**Why can't I see the roles that I want to request for myself?**

A role must satisfy two requirements before it appears in the list of roles that you can request:

- A role mapping must exist in which the **Self-requestable** option is selected.
• At least one of your assignments must match all of the conditions in the role mapping. For example, if the role mapping for the role Expenses Reporting includes the department UK Sales as a condition, then you must have at least one assignment in the UK Sales department; otherwise, the Expenses Reporting role does not appear among the roles that you can select.

Typically, a human capital management application administrator or IT security manager creates and maintains role mappings for the enterprise.

**What happens if I share information?**

You can share personal information with both internal recipients (people within the enterprise) and external recipients (people outside the enterprise) who otherwise have no access to this information.

Internal recipients receive a notification with a link to the line manager version of your portrait, which includes contact details, biographical information, and employment information. The shared version does not include benefits, payroll, compensation, or user account details. A recipient's access to the information does not expire, but you can revoke it.

External recipients see only the information that you select for sharing. Each external recipient receives an e-mail with a link to the shared information. Their access to this information expires at a time that you specify.

If you are a line manager, you can share the information of people who report to you with both internal and external recipients. The approval of the people whose information you are sharing is required.

**Do recipients of shared information have unlimited access to it?**

No. Internal recipients retain access to the line manager version of your portrait until you revoke their access. External recipients’ access to the shared information is controlled by the expiration date but you can revoke access explicitly. For example, you may want to revoke access because you entered the recipient e-mail address incorrectly.

**What happens if the information changes after I share it with an external recipient?**

Any changes to the information are also available to the external recipient. For example, if you share your information with an external recipient on June 1 and the recipient views it on June 5, they see the information effective as of June 5. If the worker was terminated on June 3, for example, no information is available to the recipient.

**Why did my keyword search not return the results I expected?**

Keywords are indexed attributes: they are copied automatically from real-time person records to a keywords table and organized for efficient searching. In some cases, keywords are copied only when your enterprise runs the keyword-refresh process. Depending on how frequently your enterprise runs this process, some recent changes to person records may not appear in keyword-search results.
Keyword searches return a result only if you have security access to the information in which the keyword is found. For example, if your search keyword is "procurement" and a match occurs in a person's competencies, the person appears in the search results only if you have security access to the person's competencies information.

You may be able to include an effective as-of date in the search criteria. When date-effective values, such as work location, are copied to the keywords table, their history is not copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results include only those assignments for which the keyword value in the keywords table matches the keyword value on the effective as-of date.

**Why do some people appear more than once in the search results?**

Each search result relates to an assignment; therefore, any person who has multiple assignments can appear more than once in the search results. If the search criteria include assignment attributes, such as department or job, only those assignments that satisfy all the search criteria appear in the search results.

**What's the difference between rejecting and withdrawing a transaction?**

The effect of these actions is the same: the transaction is not applied to the database. However, the persons performing the actions are different.

Only the initiator of a transaction can withdraw the transaction. Only the current approver in the approval chain can reject the transaction.

For example, suppose you submitted a transfer request for approval. Following a change in the transfer policy, the transfer request is now invalid. Either you can withdraw the transaction or the current approver in the approval chain can reject the transaction. In either case, the transaction is not applied to the database.

**Why was my saved transaction deleted?**

Because an identical transaction initiated for the person by another user was applied to the database.

**What's a calendar event message?**

Calendar events identify dates, such as public holidays, on which the standard work patterns of a workforce are likely to be disrupted. Calendar event messages appear in the portraits of people affected by a calendar event. For example, a message about a Spanish public holiday could appear in the portraits of workers in Spain. Portrait users will then understand why workers in Spain are unavailable on that date.

**What's a custom gallery message?**

Custom gallery messages alert portrait users to events other than calendar events that could affect worker availability. For example, a custom gallery message
could inform portrait users that people in a particular location are temporarily working in a different building or that weather conditions are restricting travel to the workplace. The message appears in relevant portraits for the period that you specify.

**Why did a calendar event message not appear in all portraits in an organization or location?**

If you use work schedules and a person is affected by a calendar event, the calendar event must be included in the person’s primary schedule or schedule assignment as an exception to the schedule. Otherwise, even though the person belongs to the organization or location affected by the calendar event, no calendar event message will appear.

**FAQs for Manage Records Retention Program**

**What's the purpose of creating a document record?**

Create document records to store information about documents such as work permits, and visas, and upload electronic versions of the documents as attachments. Document records store necessary document details such as the period for which the document is valid. This information can then be used for reporting purposes. For example, HR specialists can see the reports of documents that are near expiration in their dashboard.

**Why are some approvers already appearing for the document record?**

The document type you select determines whether the document record requires approval. The list of approvers is predefined for the document type, however, you can add additional approvers. You receive a notification once the document record is approved. Following approval, the document record is then accessible and available for use in reports and analytics, for example.

**Manage Checklists**

**Checklist Components: How They Fit Together**

Use checklists for actions that require the completion of standard tasks, such as creating users or reassigning resources. For example, employee hire and termination actions typically require a number of people to complete standard tasks. You create and maintain tasks within a checklist template. You can create checklist templates that can be allocated to persons either automatically or manually.
The figure shows the components of a checklist template and their major relationships.

**HR Specialist Creates Checklist Template**

- Checklist Template
  - May be associated with Action
  - Contains Tasks
    - Are associated with Areas of Responsibility
      - May be associated with Eligibility Profile

This figure shows the components of the checklist allocation process and how they relate to each other.

**Checklist Is Allocated to Worker**

- Worker
  - Experiences
    - Is allocated a checklist manually
      - Automatically triggers Action
        - Contains Tasks
          - May be associated with Eligibility Profile
            - Are allocated to worker
              - Determined

- Task Owner
  - Includes Task Performer Derived Based on Area of Responsibility
Action

Actions track changes in personal circumstances, for example, new hire, transfer, or termination. Link an action to a checklist template to allocate the checklist to persons automatically when they experience the action. Note that, the checklist template is still available for manual allocation, even if it is linked to an action.

Task

You create tasks within a checklist template, however, managers can also create and maintain tasks within an allocated checklist. You can enter a task duration and specify if a task is required. When the task appears in an allocated checklist, the date in the target end date field reflects this duration. You can set the checklist status to completed only if all the required tasks are complete.

Eligibility Profile

Link an eligibility profile to a checklist task to control whether that task appears in a specific allocated checklist. The task appears in the allocated checklist of a worker only if the worker matches the eligibility criteria.

Task Performer

Performer is the person carrying out the task. You select the task performers’ areas of responsibility when you create a checklist template. During checklist allocation, the persons with the selected responsibilities are automatically assigned as performers for the tasks and notified of the assignment. You can view, but not update, the task performers in the allocated checklist.

Allocated Checklist

Allocated checklists are those that have been allocated to workers and contain the tasks relevant to them.

Task Owner

Task owner, generally synonymous with a manager, is the person responsible for ensuring task completion. Managers can display the tasks within an allocated checklist and monitor the status themselves or assign alternative owners for the tasks.

Checklist and Task Statuses: Explained

Managers can display the allocated checklists for their workers and update the checklist and task statuses as necessary. Performers and owners can view the checklist tasks assigned to them in their worklist and update the task status. Note that these statuses are not used to determine the checklist or task availability, they are for information purposes only.

The checklist and task statuses are:

- Initiated
- Completed
- Rejected
- Outstanding
- In Progress
• Suspended

Initiated
The status of the checklist and the tasks in the checklist is automatically set to initiated when you allocate the checklist.

Completed
Use this status to indicate that the checklist or task is complete. You can set the checklist status to completed only if all the required tasks are complete. The checklist status is automatically set to completed when you set the status of the last required task to completed. Note that the task does not disappear from the allocated checklist or the worklist when you set the status to completed. You must delete it yourself if required.

Rejected
Use this status to reject a checklist, for example, because it was wrongly allocated to a person. Task owners or performers can use this status to decline ownership of a task, for example, if the task has been wrongly assigned to them.

Outstanding
Use this status to indicate that the checklist or task is not complete by the target date.

Other Task Statuses
Use the other statuses to record progress made against the checklist or tasks, for example, to indicate that tasks are in progress or the checklist is suspended because of unavailability of resources.

Creating a Checklist Template: Worked Example

This example demonstrates how to create a checklist template that is allocated automatically to all newly hired workers to track certain tasks involved in hiring a worker. The tasks in the checklist vary according to eligibility rules.

The following table summarizes key decisions for this scenario:

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocate checklist automatically?</td>
<td>Yes, checklist is allocated automatically to persons experiencing new hire action.</td>
</tr>
<tr>
<td>Which tasks to include in the checklist?</td>
<td>• Plan and Schedule Training</td>
</tr>
<tr>
<td></td>
<td>• Issue Laptop</td>
</tr>
<tr>
<td></td>
<td>• Procure Meal Vouchers</td>
</tr>
<tr>
<td>What are the task performers’ responsibilities?</td>
<td>• The worker’s line manager is the performer of the task Plan and Schedule Training</td>
</tr>
<tr>
<td></td>
<td>• Performer for the task Issue Laptop has the responsibility type IT Support Representative.</td>
</tr>
<tr>
<td></td>
<td>• The worker himself is the performer of the task Procure Meal Vouchers.</td>
</tr>
</tbody>
</table>
Create a checklist template, associate it with the Hire action, and create three tasks for the template.

**Prerequisites**
1. Create an eligibility profile **Manager_Users** for all manager users.
2. Create an eligibility profile **Work_Location_India** for work location India.
3. Create a responsibility **IT Support Representative** and assign persons to this responsibility.

**Creating a Checklist Template**
1. On the Person Management Overview page, click **Manage Checklist Templates** to open the Manage Checklist Templates page.
2. Click **Create**.
3. On the Create Checklist Templates page, complete the fields, as shown in this table:

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>New Hire</td>
</tr>
<tr>
<td>Category</td>
<td>On Boarding</td>
</tr>
<tr>
<td>Action</td>
<td>Hire</td>
</tr>
</tbody>
</table>
```

**Creating Checklist Tasks**
1. In the Tasks region, click **Create**.
2. For each task, complete the fields, as shown in this table:

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Plan and Schedule Training Task</th>
<th>Issue Laptop Task</th>
<th>Procure Meal Vouchers Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Eligibility Profile</td>
<td>Manager_Users</td>
<td>India_Work_Location</td>
<td></td>
</tr>
<tr>
<td>Performer</td>
<td>Line Manager</td>
<td>Responsibility Type</td>
<td></td>
</tr>
<tr>
<td>Responsibility Type</td>
<td>IT Support Representative</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

3. Click **Submit**.
FAQs for Manage Checklists

Can managers make changes in the checklist template after creating it?

No. Managers cannot edit or delete the checklist template that they create using the save as template option. However, they can allocate the checklist template to workers and edit the checklist and task attributes within the allocated checklists. The HR specialist can make changes in the checklist template if required and make the revised template available for allocation to all users.

Can workers view the checklist tasks allocated to them?

No. Only task owners and performers can view and update checklist tasks. You can, however, designate workers as task owners or performers if you want workers to track the progress of their tasks or perform the task actions.

How do changes in the checklist template affect allocated checklists?

Each allocated checklist is a specific instance of the checklist template. Therefore, changes in the checklist template do not affect the allocated checklists. Similarly, the checklist template is unaffected by changes in the allocated checklists.

What happens when I allocate a checklist template?

The allocated checklist contains the tasks relevant to the person to whom the checklist is allocated; For example, tasks associated with eligibility profiles appear in the allocated checklist only if the person meets the eligibility criteria. During allocation, performers are derived for the tasks based on the option selected in the checklist template. Both task performers and owners are notified of the assignment; they can access and take action on the notification either from the Recent Notifications Alert or from the My Tasks section in their BPM worklist. They can optionally create a user view to filter the tasks in their worklist, for example, task owners may create a user view to only display those tasks that they own and not display tasks for which they are performers.

Where there are multiple performers for a task, a performer can claim a task by accessing the notification; Once a performer claims the task, the task assignment notification disappears from the other performers’ worklists.
Manage Absences: Overview

Human resource (HR) specialists, workers, and their managers use the Manage Absences business process to provide accurate records of absences for reporting and payroll calculations.

The following figure illustrates that the Human Resource Specialist maintains absence enrollments, manages processing, and analyzes report data for absences scheduled and recorded by workers and managers.

**Maintain Absence Enrollments**

HR specialists use the Maintain Absence Records and Entitlements page to record absences and review entitlements and balances for the absence period. They can also review plans that the worker is currently enrolled in, calculate accruals, adjust plan balances, and enroll workers in new plans.

**Schedule and Record Absences**

Workers, or their managers, record absences and review the daily breakdown for the absence period. They can also create absence cases to group related absences,
such as absences resulting from the same cause. HR specialists can analyze absence cases to make informed decisions to review existing absence policies.

Manage Absence Processing

HR specialists run the following processes using the Schedule and Monitor Absence Processes task in the Absence Administration work area:

- Evaluate Absences process, to calculate entitlements for unprocessed absences based on absence plan rules
- Update Accrual Plan Enrollments process, to update enrollments based on the new hire and transfer events for multiple workers
- Calculate Accruals and Balances process, to calculate the accrual balances for multiple workers under an accrual absence plan
- Evaluate Certification Updates process, to check whether certification requirements for multiple workers are past their due dates

Report and Analyze Absence Data

HR specialists can review lists of workers for various parameters such as absence category or type. They can also review workers' absence history to investigate issues.

To manage absences, start from the following pages:

- HR specialists can select Navigator - Workforce Management - Person Management Overview
- Managers can select Navigator - Manage Resources - Manager Resources Dashboard
- Workers can select Navigator - My Information - My Portrait

Absence Recording Statuses: Explained

When an absence is recorded, the status of the absence record changes based on time and events.

Absence Statuses

An absence record displays any of the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saved</td>
<td>Indicates that the absence request is yet to be submitted.</td>
</tr>
<tr>
<td>Awaiting Approval</td>
<td>Indicates that the submitted absence is waiting to be approved. On approval, the status changes to Scheduled or Completed.</td>
</tr>
<tr>
<td>Approval Denied</td>
<td>Indicates that the submitted absence was not approved. A rejected absence record does not display any longer in the Absence Records section.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Indicates an approved absence request for a period in the future.</td>
</tr>
<tr>
<td>In progress</td>
<td>Indicates that the absence period of the approved absence has started.</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Completed</td>
<td>Indicates an approved absence for a period in the past.</td>
</tr>
</tbody>
</table>

### FAQs for Manage Absences

**How can I enroll and disenroll workers in accrual plans?**

To update enrollments based on the new hire and transfer events for multiple workers, schedule the Update Accrual Plan Enrollments process. You can also use this process to update enrollments of multiple workers for a specific accrual plan. This process is available on the Schedule and Monitor Absence Processes page in the Absence Administration work area.

To update enrollments for a specific worker, search for the worker on the Person Management page. Then, use the enrollment actions on the Maintain Absence Records and Entitlements task.

**Why can't I see my absence type in the Record Absence page?**

You might not be eligible to record an absence belonging to that absence type, or the absence type might not be effective as of today.

**Can I cancel or update an absence partially?**

Yes. Use the **Advanced** button on the Add Absence page to manage an absence period that contains noncontinuous dates.

**Where does the absence duration value come from?**

From the worker's primary work schedule, by default. However, if the absence plan rules were set up to calculate the duration differently, then that calculation takes precedence over the work schedule.

**What happens if I delete an absence in the past?**

Payment information and band entitlements for that absence period are revised automatically based on the rules that were defined in the corresponding absence plan.
What happens if I create an open-ended absence?

Until you enter the actual end date, the absence duration and accrual balance is not updated. For a qualification absence, such as long term sickness, payment information is calculated based on the estimated end date that you enter.

How can I check whether certification requirements for multiple persons are past their due dates?

Use the Evaluate Certification Updates process using the Schedule and Monitor Absence Processes task in the Absence Administration work area.

How can I calculate time accruals and update accrual balances of workers?

To calculate the accrual balances for multiple workers associated with a specific accrual plan, use the Calculate Accruals and Balances process. This process is available on the Schedule and Monitor Absence Processes page in the Absence Administration work area.

To calculate accrual balances for a specific worker, search for the worker on the Person Management page. Then, use the accrual actions on the Maintain Absence Records and Entitlements task. You can calculate accruals for a specific plan or all plans in which the worker is currently enrolled.
Report and Transfer Time

Reporting Time: Points to Consider

Workers report time by creating a time card. A Time and Labor administrator can report time for all workers in an enterprise. The reported time is both validated and approved before retrieval by time consumers.

Time Work Area for Workers

You can report time using different views in the Time work area. Open the Time work area by clicking Time in My Information from the Navigator.

- Manage Time Cards: Using tasks in the task pane and toolbars, you can search, edit, create, and delete time cards. Create a time card by selecting a date for the time. The application selects the time card period that intersects with that date. View time cards in the descending order, from most recent time card period to the oldest time card period.

- Create Time Cards: Create a time card for any time card period as allowed by the worker time entry profile.

Simplified Calendar for Workers

To enter time, click Time on the home page. Enter time with payroll time and absence types by dragging and dropping them or by clicking the calendar. Absence, public holidays, and time cards are represented in the calendar using different color bars. View rejected time cards, manage time cards, and maintain absence records.

Time Management Work Area for Administrators

You can create, edit, or submit time cards for all the workers by using the Manage Time Cards task in the Time Management work area opened from the Navigator. Search for a person and select an existing time card to edit, or create a time card for the person.
Monitoring and Troubleshooting Time Transfer: Explained

Time consumers control the retrieval of time based on their scheduling needs. The Time and Labor Administrator can monitor time cards that were not transferred successfully and resolve their errors. When the retrieving process fails, the administrator resets the failed time entries for retransfer to the time consumer.

Transfer Time Information

Only approved time cards with no errors from validations, time entry, or time calculation rules are transferred to either Oracle Fusion Global Payroll or Oracle Fusion Project Costing.

- The payroll administrator initiates the retrieval of time using the Load Time Card Batches process.
- The project administrator initiates the retrieval of time using the Import and Process Cost Transaction process.

The time and labor administrator monitors process completion and troubleshoots time transfers on the Overview page in the Time Management work area.

Resolve Time Cards with Transfer Failures

View the time entries that failed during the transfer process in the Resolve Time Cards with Transfer Failures section of the Time Management work area. Click the time card period to correct the erroneous time entries and resubmit the time card for approval and transfer.

Review Incomplete Time Transfer Processes

Monitor time transfer processes that are still in progress, failed, or were terminated abruptly on the Incomplete Time Transfer Processes section of the Time Management work area.

Whenever the time transfer process fails and returns an error, the time consumer administrator provides the time and labor administrator with the job number of the failed process.

1. For the failed process job, click the **Reset** button to reset the status to **Unprocessed** for the time entries that were not transferred successfully.
2. The transfer process retrieves these unprocessed time entries the next time it runs.
Analyze Workforce Deployment

Analyze Workforce Deployment: Overview

The Analyze Workforce Deployment business process enables line managers and human resource (HR) specialists to view statistical and employment-related information for individual workers and the workforce. HR specialists and line managers can perform actions for individual workers.

The business activities of this process are:

- **Generate Workforce Deployment Intelligence**
  
  In the Manager Resources Dashboard and the Worker Predictions work area, line managers view system-generated predictions of high performance and voluntary termination for their direct and indirect reports. In the Worker Predictions work area, line managers perform what-if analyses.

- **Evaluate Workforce Deployment Performance**

  In the Manager Resources Dashboard, line managers view information, such as promotion potential and worker availability, for their direct and indirect reports.

  In the Human Resources Dashboard, HR specialists view information, such as service anniversaries and onboarding progress, for the workers to whom they have security access.

Generate Workforce Deployment Intelligence

High Performance: How It Is Predicted

System-generated performance predictions can help you to validate your own assessments of employees. Performance predictions, in conjunction with
voluntary-termination predictions, can enable you to avert the voluntary terminations that are the most damaging to the enterprise.

**Settings That Affect Performance Predictions**

Performance predictions are based on data from all employees. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining (ODM) and also predicts voluntary termination.

You can perform data collection either for the enterprise or for a specified manager assignment; however, the data-mining stage of the process is always performed on all of the latest available data.

The process has no default schedule. You are recommended to run the process weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high; otherwise, run the process at least monthly. Schedule the process at a time of low system activity to avoid performance impacts.

**How Performance Is Predicted**

Performance is predicted as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes, such as time in grade, current job, latest salary increase, performance rating, and number of sickness absences in the previous year. The attributes of interest include those most likely to show a correlation with high performance. In some cases, simple values, such as manager name are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

   Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a model for predicting employee performance.

3. ODM makes performance predictions for current employees according to the predictive model. For example, if performance is high in a particular job and grade, current employees with that job and grade may have a greater likelihood of high performance than workers in other jobs and grades.

   Each prediction relates to an employee assignment. For employees with multiple assignments, multiple performance predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

Performance predictions are available for both teams and individual assignments.

- Team predictions show the average predicted performance for the team. They also show, for each factor, such as current performance rating or
length of service, the percentage of employee assignments for which the factor is the main contributory factor.

- Individual predictions show the predicted performance for the employee assignment. The values of relevant factors, such as previous performance, and the relative contribution that each factor makes to the prediction, also appear.

Voluntary Termination: How It Is Predicted

People are often the enterprise’s greatest asset, and their loss can be expensive on many fronts. System predictions can make you aware of potential issues and their likely causes so that you can address them. For example, if an employee whose performance is predicted to be high is also identified as likely to leave voluntarily, you can consider changes to relevant factors, such as grade or location, to reduce the risk.

Settings That Affect Prediction of Voluntary Termination

Predictions of voluntary termination are based on existing data from all work relationships. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining (ODM) and also predicts performance.

You can perform data collection either for the enterprise or for a specified manager assignment; however, the data-mining stage of the process is always performed on all of the latest available data.

The process has no default schedule. You are recommended to run the process weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high; otherwise, run the process at least monthly. Schedule the process at a time of low system activity to avoid performance impacts.

How Voluntary Termination Is Predicted

Each prediction is a percentage value, which is the predicted probability of voluntary termination. It is calculated as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes, such as time in grade, current job, latest salary increase, performance rating, and number of sickness absences in the previous year. The attributes of interest include those most likely to show a correlation with voluntary termination. In some cases, simple values, such as manager name, are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a predictive model that captures the
differences between employees who have terminated voluntarily and all other employees.

3. ODM makes predictions of voluntary termination for current employees according to the predictive model. For example, if voluntary termination is high in a particular job and department, current employees with that job in that department may have a greater risk of voluntary termination than workers in other jobs or departments.

Each prediction relates to an employee assignment. For employees with multiple assignments, multiple voluntary-termination predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

These predictions enable you to identify employees at highest risk of voluntary termination. The absolute risk of voluntary termination for the high-risk group may still be low in percentage terms, but relative to that for other groups of employees, the risk is high.

Voluntary-termination predictions are available for both teams and individual assignments.

- Team predictions show the average risk for the team. They also show, for each factor, such as current salary or grade, the percentage of employee assignments for which the factor is the main risk factor.
- Individual predictions show the predicted risk for the employee assignment. The values of relevant factors, such as current salary, and the relative contribution that each factor makes to the prediction, also appear.

**Predictive Attributes: Explained**

Voluntary-termination and performance predictions are based on specific attributes from a worker’s personal, employment, absence, compensation, and talent management information, most of which are held at the assignment level. This topic identifies the relevant attributes by their factor names, as they appear in predictive analytics, and explains how each attribute value is calculated or derived.

**Person Attributes**

Person attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker is an employee</td>
<td>Worker has a current employee work relationship</td>
</tr>
<tr>
<td>Home city</td>
<td>City from the worker’s current home address</td>
</tr>
<tr>
<td>Home country</td>
<td>Country from the worker’s current home address</td>
</tr>
<tr>
<td>Time until work permit or visa expiration</td>
<td>Number of weeks until the worker’s next visa or work-permit expiration</td>
</tr>
<tr>
<td>Has a second passport</td>
<td>Worker has a second passport</td>
</tr>
<tr>
<td>Worker is a rehire</td>
<td>Worker was previously employed by the enterprise</td>
</tr>
<tr>
<td>Tobacco user</td>
<td>Worker uses tobacco</td>
</tr>
</tbody>
</table>
Time until contract expiration | Number of months until expiration of the worker's contract
--- | ---
Willing to relocate domestically | Worker is willing to move to a different location in the same country
Willing to relocate internationally | Worker is willing to move to a different country

**Employment Attributes**

Employment attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current legal employer</td>
<td>Legal employer from the assignment</td>
</tr>
<tr>
<td>Current enterprise</td>
<td>Current enterprise</td>
</tr>
<tr>
<td>Worker category</td>
<td>Worker category from the assignment</td>
</tr>
<tr>
<td>Length of service</td>
<td>Worker's enterprise service in years</td>
</tr>
<tr>
<td>Time since last probation ended</td>
<td>Number of months since completion of the worker's latest probation period</td>
</tr>
<tr>
<td>Current assignment status</td>
<td>Status of the assignment</td>
</tr>
<tr>
<td>Legislation</td>
<td>Legislation of the legal employer</td>
</tr>
<tr>
<td>Current or most recent manager</td>
<td>Line manager of the assignment</td>
</tr>
<tr>
<td>Time with current manager</td>
<td>Number of months the worker has been reporting to the current manager</td>
</tr>
<tr>
<td>Average time with each manager</td>
<td>Average number of months the worker has reported to each manager in all employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of manager changes in the last 5 years</td>
<td>Number of manager changes in all of the worker's employee assignments in the last 5 years</td>
</tr>
<tr>
<td>Normal start time</td>
<td>Work start time from the assignment</td>
</tr>
<tr>
<td>Normal end time</td>
<td>Work end time from the assignment</td>
</tr>
<tr>
<td>Normal working hours</td>
<td>Expected number of hours worked each day</td>
</tr>
<tr>
<td>FTE</td>
<td>Sum of the FTE values from the worker's current employee assignments</td>
</tr>
<tr>
<td>Current grade</td>
<td>Grade from the assignment</td>
</tr>
<tr>
<td>Time in current grade</td>
<td>Number of months between the last grade change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Average time in each grade</td>
<td>Average number of months between grade changes for all of the worker's past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of different grades</td>
<td>Number of different grades for this worker in all past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of grade changes in the last 2 years</td>
<td>Number of different grades for this worker in all employee assignments in the last 2 years</td>
</tr>
<tr>
<td>Current department</td>
<td>Department from the assignment</td>
</tr>
<tr>
<td>Time in current department</td>
<td>Number of months between the last department change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Factor Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Number of different departments</td>
<td>Number of different departments for this worker in all past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Average time in each department</td>
<td>Average number of months between department changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Current job</td>
<td>Job from the assignment</td>
</tr>
<tr>
<td>Time in current job</td>
<td>Number of months between the last job change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Average time in each job</td>
<td>Average number of months between job changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Current position</td>
<td>Position from the assignment</td>
</tr>
<tr>
<td>Time in current position</td>
<td>Number of months between the last position change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Average time in each position</td>
<td>Average number of months between position changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Current location</td>
<td>Location from the assignment</td>
</tr>
</tbody>
</table>

**Absence Attributes**

Absence attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of leave taken in the previous year</td>
<td>Number of days’ leave taken in the previous year</td>
</tr>
<tr>
<td>Total enterprise leave</td>
<td>Number of days’ leave taken since the start of the worker’s enterprise service</td>
</tr>
<tr>
<td>Time since last leave</td>
<td>Number of months between the latest leave and the current date</td>
</tr>
<tr>
<td>Amount of sickness in the current year</td>
<td>Number of sickness days taken in the current year</td>
</tr>
<tr>
<td>Amount of sickness in the previous year</td>
<td>Number of sickness days taken in the previous year</td>
</tr>
<tr>
<td>Increase in sickness over previous year</td>
<td>Percentage change in the number of sickness days for the year to date compared with the previous year</td>
</tr>
<tr>
<td>Time since last sickness</td>
<td>Number of months between the latest sickness day and the current date</td>
</tr>
<tr>
<td>Number of sickness absences in the previous year</td>
<td>Number of distinct periods of sickness in the previous year</td>
</tr>
<tr>
<td>Increase in sickness absences over previous year</td>
<td>Percentage change in the number of sickness absences for the year to date compared with the previous year</td>
</tr>
</tbody>
</table>

**Compensation Attributes**

Compensation attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latest salary change</td>
<td>Latest salary change as a percentage of the annualized salary before the change</td>
</tr>
<tr>
<td>Factor Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Current performance self rating</td>
<td>Worker’s current self-assessment for the assignment</td>
</tr>
<tr>
<td>Current manager performance rating</td>
<td>Manager’s current overall performance rating for the worker’s assignment</td>
</tr>
<tr>
<td>Difference between manager rating and self rating</td>
<td>Difference between the manager’s overall rating of the worker and the worker’s self-assessment</td>
</tr>
<tr>
<td>Current appraising manager</td>
<td>Name of the manager performing the evaluation of the worker</td>
</tr>
<tr>
<td>Previous manager performance rating</td>
<td>Manager’s previous overall performance rating for the assignment</td>
</tr>
<tr>
<td>Current performance rating</td>
<td>Current overall performance rating for the assignment</td>
</tr>
<tr>
<td>Change in current performance</td>
<td>Current overall performance rating for the assignment expressed as a percentage of the rating for the previous year</td>
</tr>
</tbody>
</table>

**Talent Management Attributes**

Talent management attributes are described in the following table.

All performance predictions appear as percentages. To arrive at the percentage value, the predicted numeric rating from the rating model is expressed as a percentage of the maximum numeric rating in that rating model.

For example, if the predicted performance for an employee assignment is numeric rating 4, the employee’s predicted performance is presented as:

- 57.14%, if the maximum numeric rating is 7
- 80%, if the maximum numeric rating is 5

**Mapping Performance Predictions to Rating Levels**

In performance documents, you rate employee performance using rating levels from a rating model. To map a predicted performance percentage to a rating
level, you must first map it to the numeric rating in the relevant rating model. Once you have the numeric rating, you can identify the associated rating level.

In the following example, a predicted performance of 71.5% is between numeric ratings 3 and 4, and between Good and Very Good in the rating levels.

<table>
<thead>
<tr>
<th>Performance Percentage</th>
<th>Numeric Rating</th>
<th>Rating Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>1</td>
<td>Poor</td>
</tr>
<tr>
<td>40%</td>
<td>2</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>60%</td>
<td>3</td>
<td>Good</td>
</tr>
<tr>
<td>80%</td>
<td>4</td>
<td>Very Good</td>
</tr>
<tr>
<td>100%</td>
<td>5</td>
<td>Outstanding</td>
</tr>
</tbody>
</table>

In the following example, a predicted performance of 71.5% is between numeric ratings 5 and 6, and between 10 and 14 in the rating levels.

<table>
<thead>
<tr>
<th>Performance Percentage</th>
<th>Numeric Rating</th>
<th>Rating Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.5%</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>25%</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>37.5%</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>50%</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>62.5%</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>75%</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>87.5%</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>100%</td>
<td>8</td>
<td>20</td>
</tr>
</tbody>
</table>

**Predictive Model Accuracy: How It Is Measured**

You can view latest accuracy information for the voluntary-termination and performance predictive models on the Manage Predictive Models page.

**How Predictive Model Accuracy Is Measured**

The predictive models for both voluntary termination and performance are built using a subset (approximately 70%) of the available historical data. Oracle Data Mining (ODM) tests the accuracy of the models by making voluntary-termination and performance predictions for the remaining held-aside data (the 30% not used in building the predictive models). ODM then compares its predictions with actual outcomes.

The percentage accuracy of the predictive model:

- For voluntary-termination predictions, derives from the percentage of correct predictions made for all employees, both those who leave the enterprise and those who remain.
- For performance predictions, is a measure of how closely the predicted values match the actual values.
FAQs for Generate Workforce Deployment Intelligence

What happens if I save a what-if analysis?

The attribute values that you change for a worker while performing a what-if analysis are saved as a worker plan using a plan name that you supply. To view the associated predictions later or rerun a saved scenario, you can select the plan from the list of saved worker plans for a worker on the What-if Analysis tab. You can also select a worker plan from the list of all worker plans for all workers.

Note
The voluntary termination and performance predictions in a worker plan are those that applied when you last saved the what-if analysis. To update the predictions, you must rerun the scenario.

When you select a worker plan, only the attributes in the saved what-if analysis appear; attributes that you did not change in the original what-if analysis are not saved. To make further changes to the scenario (for example, to include different attributes), you must reset the scenario and then perform the what-if analysis. Saving a what-if analysis has no effect on the worker’s records. If you want to make any of the changes permanent (for example, if you want to promote a worker), then you must do so explicitly.

What happens if I apply a what-if analysis?

The effect of any changes made to the what-if-analysis attributes on current performance and voluntary termination predictions is calculated, and new predictions appear. The attribute changes are not applied to the worker’s records; however, you can save the what-if analysis as a worker plan for later retrieval.

What’s a worker plan?

A worker plan is a saved what-if analysis for a worker. When you view worker plans, you display a list of all saved what-if analyses for all workers. Each worker plan is identified by the name you supplied when you saved the what-if analysis. The predicted performance and voluntary termination values for each scenario are those that applied when you last saved the what-if analysis; to update the predictions, you must rerun the what-if scenario.

If you have never saved a what-if analysis for a worker, then the list of worker plans includes no entry for that worker.

FAQs for Evaluate Workforce Deployment Performance

When do changes to my organization hierarchy appear?

The hierarchy is based on completed transactions. Incomplete transactions, such as transfers or new hires awaiting approval, do not appear. However,
terminations that are withheld from publication until a specified date are evident in your organization hierarchy from the termination date rather than the publication date.

Where do promotion-readiness values come from?

A person’s readiness for promotion is based on the time since the person’s last promotion relative to the average time between promotions for people in the same job or position and grade. For example, if the average time between promotions for people in the same job and grade is 5 years, a promotion appears due if the time since a person’s last promotion is within range of 5 years. If the gap is outside this range, the promotion appears as either not due or overdue. Additional factors, such as performance and length of service, will determine whether you decide to promote a person whose promotion appears due or overdue.

Why do some people appear more than once in my organization hierarchy?

Each entry in the hierarchy is an assignment. If a person has more than one assignment, and each assignment reports to a manager in the hierarchy, then the hierarchy contains an entry for each of the person’s assignments.
The attributes of most business objects are likely to change over time. For example, grade rates may increase or a location’s address may change. For some types of objects, such as payrolls, assignments, and organizations, a history of changes is maintained. Professional users can retrieve and edit the version of an object that was current on a specified date. Such objects are referred to as date-effective objects.

Logical and Physical Records

Date-effective objects are made up of one or more physical or change records, each of which has an effective start date and may have an effective end date. One physical record is current and available to transactions; others are past or take effect in the future. Together, these physical records constitute the logical record or object instance.

The following table shows changes made to a single attribute (department manager) in a department business object. Each row represents a single physical record. (Note that the physical record number does not appear in the record.)

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Department Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>18 January, 2011</td>
<td></td>
<td>C. Woods</td>
</tr>
<tr>
<td>3</td>
<td>15 October, 2010</td>
<td>17 January, 2011</td>
<td>A. Chan</td>
</tr>
<tr>
<td>2</td>
<td>13 June, 2009</td>
<td>14 October, 2010</td>
<td>T. Romero</td>
</tr>
<tr>
<td>1</td>
<td>22 March, 2007</td>
<td>12 June, 2009</td>
<td>G. Martin</td>
</tr>
</tbody>
</table>

Effective End Dates in Physical Records

Effective end dates are required for all but the most recent physical record in the object history. They are added automatically whenever you update a date-effective object: the effective end date of a physical record is the day before the effective start date of the next physical record in the sequence.

End Dating Objects

You can explicitly enter an effective end date for some date-effective objects. For example, when you terminate an assignment, a final effective end date is added.
to the assignment history. Alternatively, the **End Date** action may be available. When you explicitly enter an effective end date for a date-effective object, it ceases to be available to transactions after that date, although the object's history is retrievable.

### Status Values in Date-Effective Objects

Some date-effective objects, such as grades and jobs, have both effective dates and status values. When the status of such objects is set to inactive, they are unavailable to transactions, even though their effective dates may indicate that they are current. Setting the status to inactive is a way of temporarily or permanently removing objects that would otherwise be available. If you cannot enter an effective end date for an object, changing its status allows you to achieve the same effect.

### Future-Dated Changes

For date-effective objects, you can enter changes to take effect on a specified future date. For example, the following promotion for a person is entered on 25 October, 2011 to take effect on 18 January, 2012.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>18 January, 2012</td>
<td></td>
<td>IC2</td>
</tr>
<tr>
<td>1</td>
<td>14 October, 2010</td>
<td>17 January, 2012</td>
<td>IC1</td>
</tr>
</tbody>
</table>

In this example, physical record 2 becomes the current record on 18 January, 2012. From 14 October, 2010 until 17 January, 2012 physical record 1 is the current record and is available to transactions by default. Only those users with access to the object history can see physical record 2 before it takes effect.

When future-dated changes exist, additional actions may be limited. For example, if you attempt to end this worker’s assignment before the promotion takes effect, you may have to delete the promotion before terminating the assignment.

### Multiple Updates per Day

For most date-effective objects, only one physical record exists per day, which means that only the latest update to each attribute in any one day is maintained in the object history. For example, if you update the phone number of a location three times in one day, only the last update is visible in the physical record for that date; the previous two updates are overwritten. However, for some objects, such as assignments, more than one update per day is maintained by creating a physical record for each update. Such objects include an effective sequence number in each physical record to show the order in which updates made to an object on a single day were applied. Such changes are cumulative, and the physical record with the highest effective sequence number is available to transactions for that date.

For example, the following table shows multiple updates made to a person’s assignment working hours and job on 14 October, 2010 and 30 April, 2012.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Working Hours</th>
<th>Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>2</td>
<td>30 April, 2012</td>
<td>40</td>
<td>Lead Technician</td>
</tr>
</tbody>
</table>
Effective sequence numbers apply only when you update an object. If you correct the object (for example, if each change to the assignment working hours is a correction of the previous value), then the new value overwrites the previous value, and a separate physical record is not created for each change.

HCM Date-Effective Objects

Many Human Capital Management (HCM) objects are date-effective. The list of HCM date-effective objects includes but is not limited to: assignments, benefits plans and plan types, element definitions, eligibility profiles, employment terms, grades, grade rates, grade ladders, jobs, job families, locations, organizations, payrolls, personal payment methods, and positions. The following objects related to person records are also date-effective: contact relationships, disabilities, gender, marital status, person name, person addresses, visas, and work permits.

Note

Some objects are date-enabled rather than date-effective. Date-enabled objects, such as work relationships, have start and end dates that define when they are available to transactions, but they have no history of changes: new attribute values overwrite existing attribute values.

Correcting Date-Effective Objects: Examples

You can correct most attributes of date-effective objects, regardless of whether they occur in current, past, or future physical records. If you correct the effective start date of the first physical record in an object, the new date must be earlier than the current effective start date. For records other than the first physical record, the new date must be between the record’s current effective start and end dates.

Correcting a Current Error

On 11 March, 2011 you create a location definition for a branch office. On 21 March, 2011 you learn that you entered the location phone number incorrectly. To correct this error, you search for the location definition, which has only one physical record, and select the Correct action. Before the correction, the object history is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Location Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11 March, 2011</td>
<td></td>
<td>650.555.0175</td>
</tr>
</tbody>
</table>
After correction, the object history is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Location Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11 March, 2011</td>
<td></td>
<td>650.555.0176</td>
</tr>
</tbody>
</table>

Because this is a correction operation, no history of the change is maintained.

**Correcting a Past Error**

On 10 May, 2009 you set a worker’s job to Senior Administrator. On 20 January, 2011 you learn that the worker’s job should have been Project Leader; therefore, you need to correct this information. Before correction, relevant parts of the assignment history are as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Job</th>
<th>Working at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>20 October, 2010</td>
<td></td>
<td>Line Manager</td>
<td>No</td>
</tr>
<tr>
<td>3</td>
<td>18 August, 2010</td>
<td>19 October, 2010</td>
<td>Senior Administrator</td>
<td>No</td>
</tr>
<tr>
<td>2</td>
<td>10 May, 2010</td>
<td>17 August, 2010</td>
<td>Senior Administrator</td>
<td>Yes</td>
</tr>
<tr>
<td>1</td>
<td>25 July, 2009</td>
<td>9 May, 2010</td>
<td>Administrator</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To change the worker’s job from Senior Administrator to Project Leader, you need to correct physical records 2 and 3. To retrieve physical record 2, you can set the effective as-of date in the person search to any date between 10 May, 2010 and 17 August, 2010 and select the assignment from the search results. Alternatively, you can select physical record 2 from the assignment history. Having retrieved the physical record, you make the correction. You then retrieve physical record 3 and make the same correction. After correction, the assignment history is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Job</th>
<th>Working at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>20 October, 2010</td>
<td></td>
<td>Line Manager</td>
<td>No</td>
</tr>
<tr>
<td>3</td>
<td>18 August, 2010</td>
<td>19 October, 2010</td>
<td>Project Leader</td>
<td>No</td>
</tr>
<tr>
<td>2</td>
<td>10 May, 2010</td>
<td>17 August, 2010</td>
<td>Project Leader</td>
<td>Yes</td>
</tr>
<tr>
<td>1</td>
<td>25 July, 2009</td>
<td>9 May, 2010</td>
<td>Administrator</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Before you made the correction, the worker’s job was Senior Administrator from 10 May, 2010 until 19 October, 2010; after correction, the worker’s job is Project Leader for the same period, which spans two physical records in the assignment history and therefore requires two correction operations. Each correction operation applies to a single physical record.

**Updating Date-Effective Objects: Examples**

When you update a date-effective object, you insert a new physical record in the object’s history. In most cases, the new record follows the current physical record; however, you can also insert a record between two existing records.
**Updating the Current Physical Record**

The name of the sales headquarters location is changing today, 1 October, 2011 from Sales Headquarters to Sales Headquarters - US. You update the location definition to capture this change, and leave the effective start date as today’s date. The following table shows the physical records of the location definition after the update.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Location Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1 October, 2011</td>
<td></td>
<td>Sales Headquarters - US</td>
</tr>
<tr>
<td>1</td>
<td>13 April, 2008</td>
<td>30 September, 2011</td>
<td>Sales Headquarters</td>
</tr>
</tbody>
</table>

A new physical record is inserted automatically in the object’s definition following the current physical record. The effective end date of the first physical record is set automatically to the day before the effective start date of the new physical record.

**Entering Future-Dated Changes**

You created the definition of grade EC3 on 17 June, 2009. The ceiling step for grade EC3 is changing from step 3 to step 4 on 1 January, 2012. When you update the definition of grade EC3 on 30 November, 2011 to change its ceiling step, you enter an effective start date of 1 January, 2012. This change creates a new physical record in the grade definition, as shown in the following table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Ceiling Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1 January, 2012</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>1</td>
<td>17 June, 2009</td>
<td>31 December, 2011</td>
<td>3</td>
</tr>
</tbody>
</table>

Between 17 June, 2009 and 31 December, 2011, physical record 1 is in effect. From 1 January, 2012 physical record 2 is in effect.

**Updating an Object’s History**

UK employee Jackson Smith was divorced on 12 May, 2011. The record of his marital status is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Marital Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>12 May, 2011</td>
<td></td>
<td>Divorced</td>
</tr>
<tr>
<td>1</td>
<td>17 July, 2004</td>
<td>9 December, 2010</td>
<td>Married</td>
</tr>
</tbody>
</table>

After you update Jackson’s marital status, you learn that he was legally separated from 10 December, 2010 until his divorce. To capture this period of legal separation, you update Jackson’s marital status record and enter an effective start date of 10 December, 2010. After this update, Jackson’s marital status record is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Marital Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>12 May, 2011</td>
<td></td>
<td>Divorced</td>
</tr>
<tr>
<td>2</td>
<td>10 December, 2010</td>
<td>11 May, 2011</td>
<td>Legally separated</td>
</tr>
<tr>
<td>1</td>
<td>17 July, 2004</td>
<td>9 December, 2010</td>
<td>Married</td>
</tr>
</tbody>
</table>
By setting the effective start date to 10 December, 2010, you insert the record of Jackson’s legal separation between existing physical records 1 and 2. The effective end date of:

- Physical record 1 is set automatically to the day before the effective start date of the inserted record
- The inserted record is set automatically to the day before the effective start date of the following record, physical record 3

**Applying Historical Updates to Later Records**

Jennifer Watts has one assignment, as follows:

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>18 September, 2010</td>
<td></td>
<td>A1</td>
<td>Area Office</td>
</tr>
<tr>
<td>1</td>
<td>10 April, 2010</td>
<td>17 September, 2010</td>
<td>A1</td>
<td>HQ</td>
</tr>
</tbody>
</table>

You granted Jennifer a retrospective promotion to grade A2 from 1 July, 2010. To make this change in her assignment history, you:

- Update her assignment, enter an effective start date of 1 July, 2010, and enter grade A2.
  This update creates a new physical record between existing physical records 1 and 2. It also sets the effective end date of physical record 1 to 30 June, 2010 and the effective end date of the inserted record to 17 September, 2010.
- Correct existing physical record 2, and change the grade from A1 to A2.

After you make these changes, Jennifer’s assignment history is as follows:

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>18 September, 2010</td>
<td></td>
<td>A2</td>
<td>Area Office</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>1 July, 2010</td>
<td>17 September, 2010</td>
<td>A2</td>
<td>HQ</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>10 April, 2010</td>
<td>30 June, 2010</td>
<td>A1</td>
<td>HQ</td>
</tr>
</tbody>
</table>

**Effective Sequencing: Examples**

Some date-effective objects, such as assignments, maintain a history of updates made on a single day by creating a physical record for each update. Physical records with the same effective start date have effective sequence numbers. This topic provides examples of effective sequencing in assignment histories.

**Changing the Assignment Working Hours**

You create an assignment for a worker on 28 June, 2011. Later that day, you update the working hours for the assignment; this change is not a correction of the original information but new information for which you want to retain a history. After you update the assignment, the assignment history is as follows:

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Working Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>28 June, 2011</td>
<td></td>
<td>42</td>
</tr>
</tbody>
</table>
On 12 December, 2011, you update the assignment working hours again. After the update, the assignment history is as follows.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Working Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>12 December, 2011</td>
<td>38</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>28 June, 2011</td>
<td>11 December, 2011</td>
<td>42</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>28 June, 2011</td>
<td>11 December, 2011</td>
<td>40</td>
</tr>
</tbody>
</table>

**Changing the Assignment Manager**

You update a worker’s assignment twice on 14 March, 2010. The first time, you change the assignment manager from S. Taylor to J. Miles; the second time, you change the grade from C14 to C15 and the assignment manager from J. Miles to M. Singh.

Effective sequencing applies to all assignment attributes, except assignment manager and work measures. Because effective sequencing applies to grades but not assignment managers, the assignment history is as follows after you make both updates.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Assignment Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>14 March, 2010</td>
<td>C15</td>
<td>M. Singh</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>14 March, 2010</td>
<td>C14</td>
<td>M. Singh</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>30 May, 2009</td>
<td>13 March, 2010</td>
<td>C13</td>
<td>S. Taylor</td>
</tr>
</tbody>
</table>

Changes to assignment managers (and also work measures) are treated as corrections rather than updates, and only the last change made on any particular day is maintained in the object history. In this example, the change of manager from S. Taylor to J. Miles is overwritten by the subsequent change to M. Singh.

You can insert a new physical record in this assignment history if you select the previous physical record before making the update. For example, you could select physical record 2 in this assignment history and insert a record following it. The new record has effective sequence number 2 on 14 March, 2010, and the existing effective sequence number 2 becomes number 3.

**FAQs for Date Effectivity**

**What’s the difference between updating and correcting a date-effective object?**

When you update a date-effective object, you insert a new physical record in the object’s history. Typically, you insert the new physical record following the latest physical record in the object, and the effective start date is today’s date; however,
by setting an effective start date that is earlier or later than the current date, you can insert the new physical record at a different point, either to edit the object history or to create a future-dated change.

When you correct a date-effective object, you edit the information in an existing physical record: no new physical record is created.

**What's the effective as-of date?**

A date value used to filter the search results. For any date-effective object that matches the other search criteria, the search results include the physical record that is in effect on the specified effective as-of date. The effective as-of date is itself one of the search criteria; therefore, objects with effective dates that do not include the specified effective as-of date do not appear in the search results.

If you search for date-effective objects without specifying an effective as-of date, search behavior depends on the object type. For some objects, such as jobs, positions, and grades, the search results include matching physical records in effect on today's date and any with future effective start dates. For other objects, only matching physical records in effect on today's date are returned.

**How can I see future-dated or past records for a date-effective object?**

When you search for a date-effective object, you can enter an effective as-of date. For example, if you search for a specific payroll and enter a future or past effective as-of date, then the search returns the matching payroll physical record in which the effective date range includes the specified effective as-of date.

While viewing or editing an object, such as an assignment or location, you can see the object's history, which includes all current, past, and future physical records belonging to the object. You can navigate to any of these records by selecting it from the object history.

**Can I delete a date-effective object?**

In most cases, yes. If you can delete a date-effective object, then the Delete icon appears in the search results table when you search for the object, and the Delete menu item appears in relevant menus. When you delete a date-effective object, you purge all of the object's physical records. After deletion, the object's history is no longer available. This action is not reversible.

Alternative approaches are to enter an effective end date for the object or change its status to make it unavailable to transactions. With these approaches, the object's history remains available.

The Delete Record menu item may be available when you edit an object. Delete Record differs from Delete because it deletes only the currently selected physical record rather than the entire object. If there is only one physical record, then you may not be able to delete it; however, if you can delete the only physical record, then deleting it is equivalent to deleting the object.
What happens when I end date an object?

The effective end date that you enter becomes the final effective end date for the object. If physical records exist for the object with dates later than the effective end date, either they are deleted automatically or you are asked to delete them. The object’s history remains available. For example, the object appears in search results if the search criteria include an effective as-of date that is within the object’s effective dates and the object matches all other search criteria.

What happens if I delete a record?

If you delete a physical record from a date-effective object, the effect of the deletion depends on the position of the physical record in the object’s history.

Consider the following date-effective object made up of 3 physical records.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>15 August, 2011</td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>2</td>
<td>30 October, 2010</td>
<td>14 August, 2011</td>
<td>B</td>
</tr>
<tr>
<td>1</td>
<td>10 June, 2009</td>
<td>29 October, 2010</td>
<td>A</td>
</tr>
</tbody>
</table>

If you delete physical record 2, where the attribute value is B, the object is as follows after the deletion.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>15 August, 2011</td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>1</td>
<td>10 June, 2009</td>
<td>14 August, 2011</td>
<td>A</td>
</tr>
</tbody>
</table>

Where physical records exist both before and after the deleted record, as in this example, then the effective end date of the previous record is set automatically to the day before the effective start date of the following record to close the gap in the object’s effective dates.

In most cases, you cannot delete the first or only physical record. If you can delete the first physical record, then the object exists from the effective start date of the next physical record (30 October, 2010 in this example). If there is only one physical record, deleting that record is the same as deleting the object.

If you delete the final physical record, then the effective end date is removed automatically from the previous physical record (14 August, 2011, in this example).

What's an effective sequence number?

An effective sequence number is added automatically to physical records in a single date-effective object that have the same effective start date. The effective
sequence number differentiates such records, and identifies the sequence in which updates were applied to the object. Effective sequence numbers appear in date-effective objects, such as assignments, that have a separate physical record for each update made to the object on a single date. The physical record with the highest effective sequence number is the record available to transactions for the relevant date.
absence plan
A benefit that entitles workers to accrue time for the purpose of taking leave and receiving payments during absence periods.

abstract role
A description of a person’s function in the enterprise that is unrelated to the person’s job (position), such as employee, contingent worker, or line manager. A type of enterprise role.

accrual absence plan
A benefit that entitles workers to accrue time for the purpose of taking leave.

assignment
A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker’s or nonworker’s role in a legal employer.

balancing segment
A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

beneficiary
A person or organization designated to receive benefits from a compensation plan on the death of the plan participant.

business unit
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

calendar event
A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

ceiling step
Highest step within a grade that a worker may progress to.

chart of accounts
The account structure your organization uses to record transactions and maintain account balances.

compa-ratio
Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.
**competency**
Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

**concurrent transaction**
Another transaction (of any type) existing for the same data item at the same time.

**condition**
An XML filter or SQL predicate WHERE clause in a data security policy that specifies what portions of a database resource are secured.

**contact relationship**
A relationship between an employee, a contingent worker, or a nonworker and another person, who may be an emergency contact, a dependent, or a beneficiary.

**contingent worker**
A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.

**cost center**
A unit of activity or group of employees used to assign costs for accounting purposes.

**country holding company**
A legal entity that acts on behalf of several divisions within an enterprise, and is the legal employer in a country.

**data dimension**
A stripe of data accessed by a data role, such as the data controlled by a business unit.

**data role**
A role for a defined set of data describing the job a user does within that defined set of data. A data role inherits job or abstract roles and grants entitlement to access data within a specific dimension of data based on data security policies. A type of enterprise role.

**data security policy**
A grant of entitlement to a role on an object or attribute group for a given condition.
**database resource**

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

**date-effective object**

An object, such as an organization, position, person name, or worker assignment, for which a history of changes is maintained. Professional users can retrieve the object as of a current, past, or future date.

**department**

A division of a business enterprise dealing with a particular area of activity.

**dependent**

A person who has a personal relationship with a participant in a compensation plan whom the participant designates to receive coverage through the plan.

**disability organization**

An organization with which employee disabilities are registered.

**division**

A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

**document record**

Stores information about person documents such as visas, licences, and medical certificates, and can include electronic versions of the documents as attachments.

**effective as-of date**

A date value used for filtering the search results in searches for date-effective objects. For any object that matches the search criteria, the search results include the physical record that is in effect on the specified effective as-of date.

**effective end date**

For a date-effective object, such as a location or grade, the end date of a particular physical record in the object's history. Each physical record has effective start and end dates, between which the physical record is available to transactions.

**effective sequence number**

A number that identifies the order of changes made to a date-effective object on a single date. The physical record with the highest effective sequence number is the current record for the date in question.
**effective start date**
For a date-effective object, such as a location or grade, the start date of a particular physical record in the object’s history. Each physical record has effective start and end dates, between which the physical record is available to transactions.

**emergency contact**
Any of a person’s contacts whom the enterprise can call in an emergency.

**employment terms**
A set of information about a nonworker’s or employee's job, position, pay, compensation, working hours, and work location that all assignments associated with the employment terms inherit.

**enterprise**
An organization with one or more legal entities under common control.

**enterprise role**
Abstract, job, and data roles are shared across the enterprise. An enterprise role is an LDAP group. An enterprise role is propagated and synchronized across Oracle Fusion Middleware, where it is considered to be an external role or role not specifically defined within applications.

**entitlement**
Grants of access to functions and data. Oracle Fusion Middleware term for privilege.

**gallery**
A searchable collection of portraits that combines the functions of the person directory with corporate social networking and self-service applications for both workers and managers.

**global name**
A person’s name in a format and language that can be understood throughout a multinational enterprise.

**grade**
A component of the employment model that defines the level of compensation for a worker.

**grade ladder**
A hierarchy used to group grades and define their sequence.

**grade rate**
Used to define pay values for grades in a legislative data group.
job
A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

job role
A role for a specific job consisting of duties, such as an accounts payable manager or application implementation consultant. A type of enterprise role.

key flexfield
Configurable key consisting of multiple parts or segments, each of which may be meaningful individually or in combination with the others. Key flexfields are commonly implemented to represent part numbers and account numbers.

legal employer
A legal entity that employs people.

legal entity
An entity is identified and given rights and responsibilities under commercial law, through the registration with the country’s appropriate authority.

legal reporting unit
The lowest level component of a legal structure that requires registrations. Used to group workers for the purpose of tax and social insurance reporting or represent a part of your enterprise with a specific statutory or tax reporting obligation.

legislative data group
A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

local name
A person’s name in a format and language that are readily understood by users in a single country but that may not be understood throughout a multinational enterprise.

natural account
Categorizes account segment values by account type, asset, liability, expense, revenue, or equity, and sets posting, budgeting, and other options.

node
A logical term that refers to the actual data in a specific data source such as a product-specific table or a storage entity that has been established by the tree management solution.
nonworker
A person, such as a volunteer or retiree, who is not engaged in the core businesses of the enterprise or legal employer but who may receive payments from a legal employer. Any person who has a nonworker work relationship with a legal employer is a nonworker.

party
A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

payroll statutory unit
A legal entity registered to report payroll tax and social insurance. A legal employer can also be a payroll statutory unit, but a payroll statutory unit can represent multiple legal employers.

pending worker
A person who will be hired or start a contingent worker placement and for whom you create a person record that is effective before the hire or start date.

performance document
The online document used to evaluate a worker for a specific time period. The document contains the content on which the worker can be evaluated, which could include goals and competencies. Workers and managers can provide ratings and comments if the document is configured to allow them to do so.

person number
A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person’s work and person-to-person relationships.

person type
A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the employment-terms or assignment level.

physical record
In date-effective objects, such as assignments, a single record, with effective start and end dates, in the history of the object. Each physical record is a row in a database table.

portrait
A selection of information about a worker or nonworker, including contact details, social connections, and activities and interests, that can be viewed and edited. Both the amount and type of information and the available actions depend on the role of the portrait user.
position
A specific occurrence of one job, fixed within one department, also often one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

primary work schedule
Schedule that the application uses to determine the worker’s availability.

rating model
A scale used to measure the performance and proficiency of workers.

role
Controls access to application functions and data.

role mapping
A relationship between one or more job roles, abstract roles, and data roles and one or more conditions. Depending on role-mapping options, the role can be provisioned to or by users with at least one assignment that matches the conditions in the role mapping.

role provisioning
The automatic or manual allocation of an abstract role, a job role, or a data role to a user.

salary basis
A set of characteristics associated with a worker’s base pay that identifies the payroll details used to pay base earnings, the period of time in which base pay is quoted, the factor used to annualize base pay, any components used to attribute base pay adjustments to different reasons, and any associated grade rate for salary validation.

segregation of duties
An internal control to prevent a single individual from performing two or more phases of a business transaction or operation that could result in fraud.

set
Reference data that is organized into groups appropriate to organizational entities, to enable reference data sharing.

SQL predicate
A type of condition using SQL to constrain the data secured by a data security policy.
**temporary assignment**

The transfer of a person for a limited term. You terminate the temporary assignment at the end of a term, facilitating the person’s return to the source assignment.

**transfer**

The movement of a person within the same legal employer.

**tree**

Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

**tree structure**

Characteristics applied to trees, such as what data to include or how the tree is versioned and accessed.

**work relationship**

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

**work schedule exception**

An event that impacts the normal working pattern in a work schedule.

**worker number**

An optional ID for employee and contingent worker work relationships. The decision to use worker numbers is made for the enterprise and inherited by all legal employers.

**worker type**

A classification selected on a person’s work relationship, which can be employee, contingent worker, pending worker, or nonworker.

**XML filter**

A type of condition using XML to constrain the data secured by a data security policy.