

Oracle® US Federal Human Resources

Workforce Sourcing, Deployment, and Talent Management Guide

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HRMS Glossary

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Oracle US Federal Human Resources Workforce Sourcing, Deployment, and Talent Management Guide, Release 12.2

Part No. E48886-01

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle US Federal Human Resources Workforce Sourcing, Deployment, and Talent Management Guide*.

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

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

If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.

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

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

Documentation Accessibility

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Structure

- 1 Recruitment and Hiring**
- 2 People Management**
- 3 Request for Personnel Actions**
- 4 Workforce Management Mass Actions**
- 5 Talent Management**
- HRMS Glossary**

Related Information Sources

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

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

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

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

Oracle Application Framework Personalization Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting

new workers, developing their careers, managing contingent workers, and reporting on your workforce.

[Oracle Human Resources Management Systems Payroll Processing Management Guide](#)

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

[Oracle Human Resources Management Systems Compensation and Benefits Management Guide](#)

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

[Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide](#)

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

[Oracle Human Resources Management Systems Implementation Guide](#)

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

[Oracle Human Resources Management Systems FastFormula User Guide](#)

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

[Oracle Self-Service Human Resources Deploy Self-Service Capability Guide](#)

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

[Oracle Performance Management Implementation and User Guide](#)

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

[Oracle Succession Planning Implementation and User Guide](#)

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

[Oracle Human Resources Management Systems Deploy Strategic Reporting \(HRMSi\)](#)

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

[Oracle Human Resources Management Systems Strategic Reporting \(HRMSi\) User](#)

Guide

Learn about the workforce intelligence Discoverer workbooks.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

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

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management User Guide

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

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

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

Other Implementation Documentation

Oracle E-Business Suite Maintenance Guide

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

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and

auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

[Oracle E-Business Suite Setup Guide](#)

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

[Oracle E-Business Suite Flexfields Guide](#)

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

[Oracle eTechnical Reference Manuals](#)

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

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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

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

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

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

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

Recruitment and Hiring

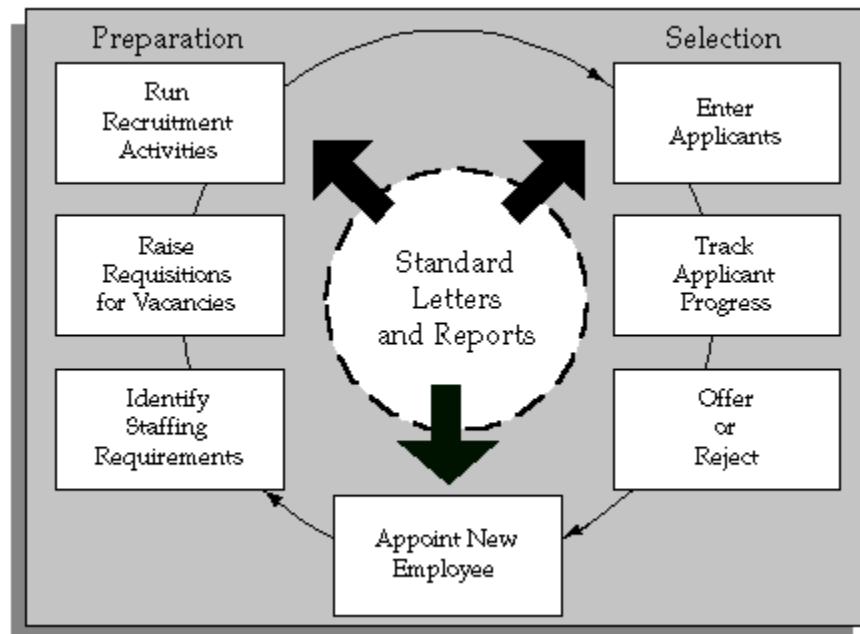
Recruitment and Hiring Overview

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

Oracle HRMS and the Recruitment Cycle

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

The Recruitment Cycle



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

Using Oracle HRMS, you can manage the phases of the recruitment cycle:

- **Recruitment Preparation:** Identify vacancies in your agency and create recruitment activities such as posting the positions.
- **Selection Process :** Receive and process applications and issue offer or reject letters. You can define your own stages of the selection process and track applicants' progress.

Recruitment Using Oracle iRecruitment

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

Reporting on Recruitment

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

- Oracle HRMS offers the Full Applicant Details report, listing the listing the person's applications and interviews.
- Oracle iRecruitment offers the Applicant Efficiency report to show the average amount of time it takes to fill a vacancy.

For more information, see: Reports and Processes in Oracle HRMS, *Configuring, Reporting, and System Administration Guide*

Key Concepts

To effectively use Oracle HRMS for recruitment management, see:

- Applications and Assignments, page 1-8
- Applicant Assignment Statuses, page 1-10

Recruitment and Hiring

Oracle Human Resources gives you flexible control over the generation of standard letters to applicants at different stages of the recruitment process.

How can you match applicants to vacancies?

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

How can you manage the interview process?

You can use Oracle HRMS to both schedule your interviews and to update the assignment status of applicants. You can also produce a report on applicants and their interview schedules.

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

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

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

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

How can you manage the hiring process?

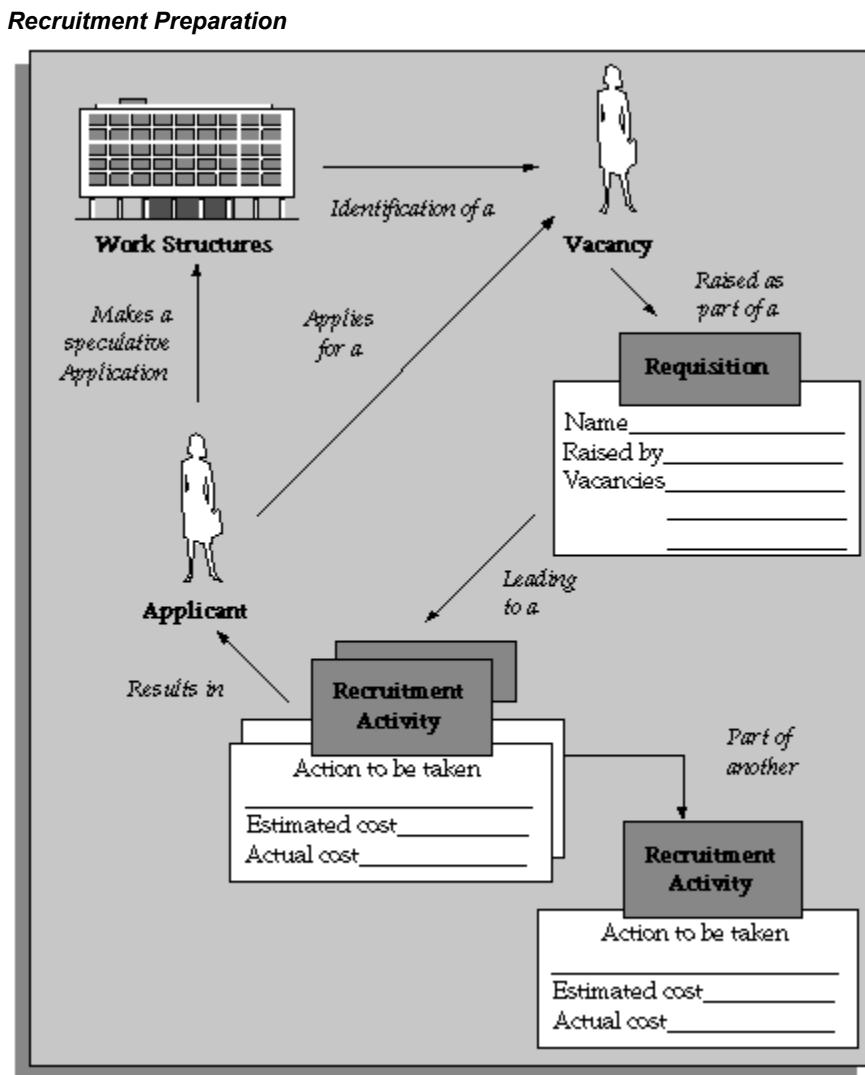
By processing a Request for Personnel Action, you can convert your applicants or ex-employees to new employees with the minimum of effort.

In addition, the hiring process provides you with validation. For example, you cannot rehire an ex-employee if the final process date for the previous employment is still blank. This validation ensures that the information held in the database is always correct and datetracked.

Recruitment Preparation

Recruitment Preparation

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



Identification of Staff Requirements

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

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

Vacancy Requisitions

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

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

Raising a Requisition for a Vacancy

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

To raise a requisition for a vacancy:

1. Enter the requisition and save it before beginning to define the vacancy.
2. Enter a name and number of openings for the vacancy.
3. Optionally enter a description and select a status.
4. You can select one or more assignment components to define the vacancy.
5. Optionally enter the name of the recruiter.

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

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

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

You need to set up the budget measurement information if you want to use

workbooks.

Defining a Recruitment Activity

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

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

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

To define recruitment activities:

1. Enter the details of the recruitment activity.

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

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

Viewing Vacancies

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

To view vacancies:

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

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

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

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

The **Applicant** field displays the number of applicants with the status Active Applicant, First Interview, or Second Interview (or your user status equivalents).

The **First Interview, Second Interview, Offers, and Accepts** fields show the number of applicants with these (or equivalent user) statuses. The **Hires** field shows the

number of employees hired to fill the openings of this vacancy at your effective date.

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

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

Selection Processing

Selection Processing

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

The tasks involved in selection processing include:

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

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

Applications and Assignments

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

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

Additional Application Information

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

- Enter qualifications, deployment choices, and a personal competency profile for applicants. You can then perform suitability matches on these people using the Oracle Self-Service Human Resources (SSHR) Suitability Match option.

See: Competency Profiles, page 5-28

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

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

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

See: The Special Information Approach to Skills Matching, page 5-46

Application Entry Methods

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

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

Back-to-Back Applications

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

Suitability Matching

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

See: Suitability Matching, page 5-30

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

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

Applicant Assignment Group Updates

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

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

Updating Vacancies

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

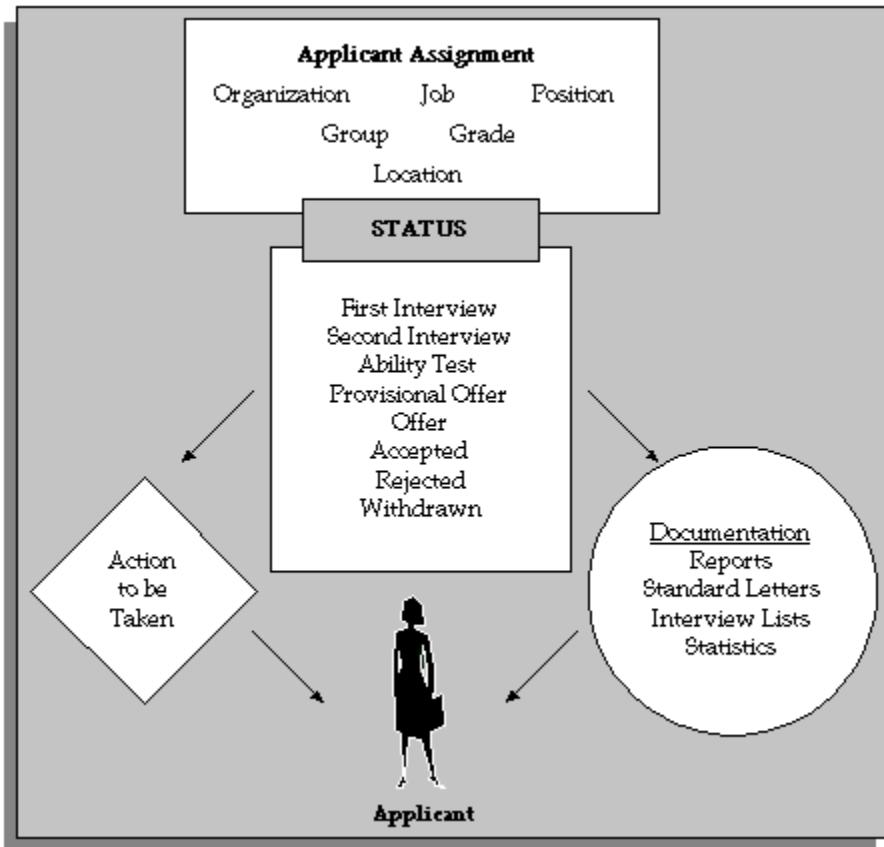
Full Applicant Details Report

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

Applicant Assignment Statuses

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

The Applicant Assignment and Its Status



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

- *Active Application*: This is the normal status of an application as it progresses through the selection stages.
- *Offer*: Use this status for your preferred candidate when an offer has been made.
- *Accepted*: Update the preferred candidate's assignment to Accepted status when you are ready to hire him or her in the People window.

Note: To use the RPA to process an Appointment action for an applicant, the applicant must have an Accepted status.

- *Terminate Application*: Use this status to end an applicant's assignment. You can only do this if the applicant has one or more other assignments in progress.

Note: The Terminate Application status is not recorded on the applicant assignment; it causes the assignment to end.

On your system, you can give these statuses different names (called User Statuses), appropriate to your enterprise.

See: Defining Assignment Statuses, page 2-79

Primary Applicant Assignment Statuses

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

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

- Application
- Applicant Interview
- Terminate Applicant

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

Secondary Applicant Assignment Statuses

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

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

Interviews and Other Recruitment Events

Interviews

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

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

See: Scheduling an Interview, page 1-16

Recruitment Events

You can also manage events attended by multiple applicants, such as tests or presentations. You define types of applicant event as values for the Lookup Type

APL_EVENT_TYPE. You create the events and book applicants onto them using the Event Bookings window.

See: Event and Attendance Administration, page 5-49

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

Applicant and Interview Reports

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

See: Running the Requisition Summary Report, page 1-19

Application Termination

If you have rejected an applicant assignment, you can simply update its status to Terminate Application. However, an applicant must be left with one active assignment. To reject an applicant's last assignment, you must terminate the applicant. Terminating the applicant updates their person type to Ex-applicant. See: Workforce and Applicant Termination, page 2-94

Recording an Application Quickly

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

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

To record an application quickly:

1. Select a title and a gender for the applicant.
2. Select the person type you want to use for this applicant. The list of available person types shows all the user person types that can be used to identify applicants.
3. Enter the applicant's name and an identifying number recognized by the system.

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

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

5. To enter an address, select a US address style.
A window opens with the address format for the country you select. Enter the address lines and choose OK.
6. The Date Received defaults to your effective date, but you can change it. This is the date the applicant's record will begin.
7. You can enter the name of the applicant's current employer.
8. You can select a recruitment activity. If there is only one vacancy for the activity, the vacancy details appear automatically.
9. If you select a vacancy, applicant assignment information is displayed from the vacancy record. You can add to this information or change it. However, if you change it, the vacancy field clears.
10. If you do not select a vacancy, you can enter assignment information in the Vacancy Applied For region. If you do not enter an organization, it defaults to the Business Group.
11. Select a status for the application. By default a new application has the status Active Application (or an equivalent user status defined on your system).
12. Save your work.

If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: *Multiple Person Records*, page 2-28

Entering Full Application Information

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

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

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

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

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

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

To enter an application in full:

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

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

See: Entering a New Person, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

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

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

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

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

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

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

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

Scheduling an Interview

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

You perform this task using the Applicant Interview window.

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

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

To schedule applicant interviews:

1. Select an interview type, and enter the date of the interview in the Start Date field. You can also select a location and enter times and an end date. If you select a location that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.
2. If you want to associate an applicant assignment status change with the interview, enter it in the New Status field. This creates a datetracked update to the applicant assignment.

You cannot enter a status when:

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

Cancelling an Applicant Record

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

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

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

To cancel an application in the Application window:

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

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

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

To cancel an application in the People window:

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

Updating Applicant Assignments by Group

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

To update a group of applicant assignments:

1. Select Find from the Query menu to open the Find Applications window. Enter selection criteria for the group of applicants you want to update and choose the Find button.
2. Do one of the following:
 - If you want to update all or most of these applicant assignments, choose the Select All button. Then uncheck the Mark check box for any assignments that you do not want to update.

- If you want to update less than half of this group of assignments, check the Mark check box for each assignment you want to update.

3. Choose the Update button.
4. In the Update window:
 - If you want to update the status of the selected assignments, select the new status.
 - If you want to refer these applicants to a new recruiter, select the name of the Recruiter.
5. Choose OK to effect the update.

Rejecting an Application

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

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

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

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

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

See: Canceling an Applicant Record, page 1-16

To terminate an applicant:

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

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

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

Note: This status is not recorded on the applicant assignment, so it

is not displayed if you re-query the termination.

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

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

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

Canceling a Termination

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

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

Running the Requisition Summary Report

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

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

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

You run reports from the Submit Requests window.

To run the Requisition Summary Report:

1. In the Name field, select Requisition Summary.
2. Enter the Parameters field to open the Parameters window.

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

Appointment

Appointments and the Hiring Process

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

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

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

Hire Dates and Future-Dated Changes

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

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

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

Back-to-Back Employment and Placements

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

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

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

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

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

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

Earliest Hire Dates

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

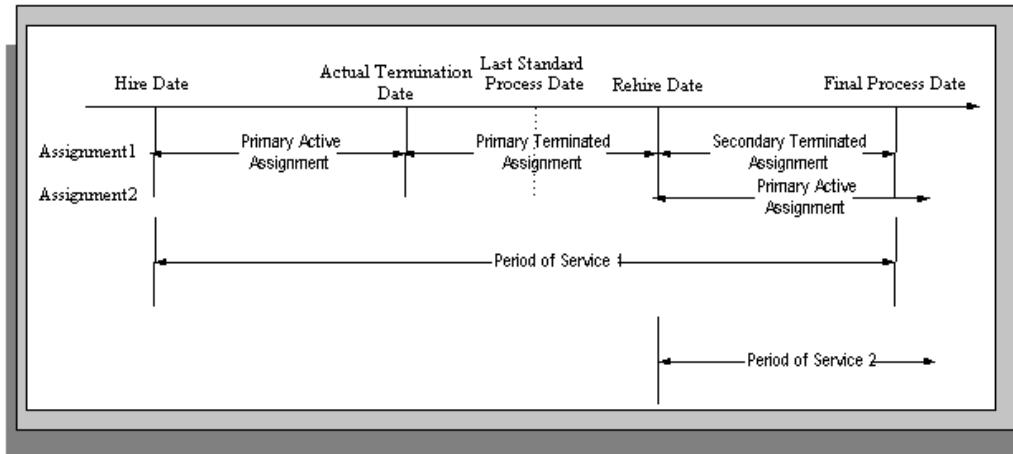
Note: Australia, Hong Kong, India, Korea, Singapore, US, Russia, and South Africa Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 1-22

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

Rehire before Final Process Date

Australia, Hong Kong, India, Korea, Singapore, US, Russia and South Africa Payroll Only: To provide greater flexibility in the hiring process, Oracle HRMS enables you to rehire a terminated employee before the Final Process (and after the Last Standard Process) date for their previous period of service.

Rehire before Final Process Date



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

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

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

Valid Person Types for Applicants

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

Hiring an Applicant (People and RPA Windows)

You perform all hiring-related actions with an RPA, such as Appointment, Transfer, and Promotion personnel actions.

To hire an applicant:

1. Update the applicant assignment status to Accepted in the Application window.

Note: You cannot appoint someone on the same day that you update that person's applicant record.

2. Use the Mass Update of Applicants window to update the assignment status of multiple applicants.

Note: Do not enter or update an employee's hire date in the Hire Date field. The application automatically enters the Hire Date field based on the effective date of the Appointment action.

3. Appoint the person with a Request for Personnel Action.

Upon update to HR, the application enters the information captured in the RPA and RPA extra information to the appropriate Person, Assignment, and Position windows and extra information types.

The application creates elements in the Element window. You can also enter other non-RPA compensation information in the Element window. The application assigns the employee the default payroll (biweekly), unless you specified another payroll when appointing that person in the US Federal Payroll Type RPA Extra Information.

Rehiring an Ex-Employee

The ex-employee's and ex-contingent's records remain in the database. If you decide to rehire an ex-employee, you can process an Appointment or Conversion personnel action for that person.

You can hire the person to the same position or to a different one. For example, if you're transferring employees between agencies within the same business group, you can transfer the employees into the new positions with an effective date that begins the day after the transfer's effective date.

If you decide to rehire an ex-contingent worker as an employee, you make that person an applicant and process an Appointment action. If you decide to rehire an ex-contingent worker as a contingent worker, you create a placement for that person.

See: US Federal Contingent Workers, page 2-68

To rehire an ex-employee:

1. Process an Appointment action with an effective date that begins at least one day after the termination's effective date.

When the application updates the new Appointment action, the person's assignment record consists of two Appointments: the former end-dated assignment and the current assignment. (You can only view the current one.)

Conversion of Ex-Employees and Element Entries

When you process a Conversion action for an ex-employee, the number of calendar days between the effective date of the Separation and the Conversion must be equal to or less than three days.

When you convert an ex-employee, the application only updates those elements processed as part of the Conversion RPA.

If the employee had federal employee health benefits under the previous end-dated assignment, and the application had processed the Termination Life Event de-enrolling the ex-employee from FEHB, upon rehire, the initiates an Initial Opportunity to Enroll life event that permits the employee to choose a plan.

If you rehire the employee before processing the Termination of Life Event, the application detects this life event and creates a Change in Employment Status life event. Before the employee can make their new elections, you must process the previous Termination Life Event.

See: Terminating Employee Assignment, page 2-95

Use the Element Entries window.

To reinstate elements:

1. In the Element Entries window, add each element, entering the Start Date for the element that is equal to the Conversion's Effective Date.

Note: You must enter health benefits through an RPA, self-service, or the professional user interface.

Filling a Position

You appoint someone to a position with an RPA. You can appoint someone to a:

- Vacant position
- Encumbered position

Note: In encumbered positions, current occupants retain the right to return to their positions.

- Future end-dated position

To fill a vacant position:

1. Process an RPA, such as an Appointment or Reassignment.

If you separate an employee, you can appoint someone else to that position with an Effective Date that begins the day after the separation's Effective Date.

To appoint a person to an encumbered position:

1. Process an RPA with a future effective date that falls after the effective date of the action that moves the current occupant from the position.

For example, if you want to fill a position on the day following someone's temporary reassignment, you can process an Appointment action with an Effective Date of the day after the separation.

If someone still occupies the position when the system updates the Appointment action, the system returns the action to the person who updated it where it can be Canceled or Corrected.

To assign a person to a future end-dated position:

1. Process an RPA with an effective date that falls between the start and the end date of the position (the date when the hiring status changes to Deleted or Eliminated).

You may not process an RPA with an Effective Date that occurs later than the end date of the position. For example, if a Position's end date is December 31 but an employee occupying that position remains beyond that date, the system display an error message when you update any RPA with an effective date later than December 31.

Note: If you process an RPA for an employee who is on a Not-to-Exceed (NTE) assignment, you must also manually change the Position end date if the NTE date exceeds the Position end date.

Recruitment Using People Management

Recruitment Using People Management Templates

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

The template enables you to:

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

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

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

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

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

Entering a New Applicant

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

To enter a new applicant:

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

The Personal tab is displayed for you to start entering information about the applicant.

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

See: Entering Application Information, page 1-29.

8. Your localization team may have setup other tabs for you to complete.
9. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Recording an Application

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

To enter an applicant who is not yet recorded on your system, see: Entering a New Applicant, page 1-27.

To record an application:

1. In the Summary window, use the Data Organizer to select the person. Use the Find window if you need to search for the person.
2. Set your effective date to the start date for the new application.
3. Choose the Actions button.
4. Select one of the following and choose Next:
 - Apply for Internal Vacancy (if the person is an employee)
 - New Application (if the person is already an applicant)
 - Apply for Job (if the person is external - neither an employee nor applicant)
5. For employees and external people, select the correct person type and choose Next. For example, for an employee you might select Employee and Applicant.
6. Choose Finish.

A new default application is created for the person.

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

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

For information about the fields on the Application, Compensation, and Schedule tabs, see: Entering Application Information, page 1-29.

Entering Application Information

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

To enter or update application information:

1. In the Summary window, use the Data Organizer to select the application and choose Show Details.
2. If you are updating an application, set your effective date to the date the information should change.

3. Choose the All Assignments tab.
4. Enter the date the application was received.
5. Select an Application Status and the reason for giving this status.
6. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.
7. Optionally, you can enter information about the following:
 - The recruiter who is responsible for handling the application
 - The source of the application, such as the type of recruitment activity, or the source organization that recommended the applicant, or the employee who referred the application.
8. Choose the Compensation tab if you need to enter a payroll, salary basis, or proposed salary. The salary basis is the duration for which salary is quoted, such as per month or per year.
9. Choose the Schedule tab to enter information about normal working hours or probation period for the assignment.
10. Enter information in any other tabs that may have been created for your localization. For example, many localization teams will include an Extra Information tab to enable you to enter country-specific information.
11. Choose Correction or Update. Remember to choose Correction if you are correcting information that was created by default.
12. Save your work. If you have missed any mandatory information, you are prompted to enter it before the new record is saved.

Making an Offer to an Applicant

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

To make an offer to an applicant:

1. In the Summary window, use the Data Organizer to select the applicant. Use the Find window if you need to search for the person.
2. Set your effective date to the date of the offer.
3. Choose the Actions button.

4. Select Make an Offer and choose Next.
5. Select the assignment status and choose Finish.
6. Choose the Checklist tab and update the Send Offer checklist item to reflect that the offer has been made, if required.
7. Save your work.

Changing an Applicant's Status to Accepted Offer

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

To change the applicant's status to Accepted Offer:

1. In the Summary window, use the Data Organizer to select the person you want to update. Use the Find window if you need to search for the person.
2. Choose the Actions button.
3. Select Applicant Accepted and choose Next.
4. Choose Next to view a summary of what you have done or choose Finish to save your changes.

Hiring an Applicant

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

To hire an applicant:

1. In the Summary window, use the Data Organizer to select the person you want to hire. Use the Find window if you need to search for the person. If you want to hire the person into one specific application then select this.
2. Choose the Actions button.
3. Select one of the following actions and choose the Next button:
 - **Hire Applicant into all accepted assignments.** Select this action if you want to hire the applicant into all the applications that have been accepted, and to delete all other applications for this person.

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

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

A list of accepted applications is displayed.

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

- Yes. Make existing assignment secondary:
The application makes the new applicant assignment the employee primary assignment. The existing employee primary assignment becomes the secondary assignment.
- Yes. Merge with existing primary assignment:
The application copies information from the applicant assignment to the employee primary assignment, but does not copy empty fields. For example, if you have defined London as the location for the employee primary assignment but not entered a location in the applicant assignment, then London remains the location for the new employee assignment.
- Yes: Replace existing primary assignment:
The application overwrites all fields in the existing employee primary assignment with equivalent fields from the new applicant assignment, even if those fields are empty. For example, if Employee A is a supervisor for the existing employee assignment, but the applicant assignment includes no supervisor information, then the new employee assignment contains no supervisor information.
- No. Create new secondary assignment:
The application makes the applicant assignment the employee's secondary assignment. The application makes no change to the existing employee primary assignment.

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

Ending an Application

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

To end an application:

1. In the Summary window, use the Data Organizer to select the person whose application you want to end. Use the Find window if you need to search for the person.
2. Set your effective date to the date for ending the application.
3. Expand the person's node and select the application.
4. Choose the Actions button.
5. Select End Application and choose Next.
6. If the applicant has more than one application, go to step 8, page 1-33. Otherwise, select a new person type, such as ex-applicant and choose Next.
7. If you want to record reasons for rejecting applicants, select a reason and choose Next.
8. Choose Finish.

Reactivating an Application

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

To reactivate an application:

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

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

Terminating an Applicant

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

To terminate an applicant:

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

People Management

People Management Overview

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

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

Managing Workforce Details

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

- **Identify Workforce:** Enter, track, inquire, and report on people daily using the People window where you can enter information about your employees as well as the Request for Personnel Action window where you can process actions concerning these employees.

You can use the Employee Information Views in self-service to display consolidated information about an employee, such as personal data, assignment and position details, pay and benefits, and performance ratings.

- **Person Types:** Record information related to different groups of people such as applicants, employees, and contingent workers and restrict access of the records of different groups of people.
- **Assignments:** To enable you to view the details about the different work an employee does for your agency and relate your employees to the overall work structure, Oracle HRMS provides you with employee assignments.
- **Workforce and Assignment Identification:** Use unique numbers to distinguish your workforce and their roles:
 - Person number: Identifies every employee, contingent worker, or applicant in your business group.
 - Assignment number: Identifies every assignment in your business group.
- **Assignment Statuses:** Record changes in the work status of an employee or contingent worker such as Active, Suspended, Terminated or Ended. To provide you with further flexibility, you can expand the statuses by defining different user statuses for each system status. For example, the product has predefined user statuses for Active, including Active Appointment, Detail NTE, and Temporary Appointment NTE.

Recording Addition Information

In addition to the workforce information you enter, you can set up flexfields to capture information unique to your enterprise.

- **Special and Extra Information Types:** Define fields to hold information that is unique to your agency about jobs, positions, assignments, and people.
- **Extra Information Types:** Add fields that capture additional information that your business practices require.

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

Workforce Management Using Oracle Self-Service Human Resources

Oracle Self-Service Human Resources (SSHR) enables line managers, employees, and contingent workers to update their personal and professional information through interfaces personalized to their roles, work content, and information needs. To work with Oracle SSHR, you must purchase the license from Oracle. For information on licenses, contact your Oracle sales representative.

See: Using SSHR for Workforce Sourcing and Deployment, *Oracle HRMS Deploy*

People Management

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

Using Oracle HRMS you can hold, inquire about, and track a wide range of personal information, such as contact information, employee addresses, work schedules, preferred language for correspondence.

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

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

Can you enter information specific to your enterprise?

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

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

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

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

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

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

People

People in a Global Enterprise

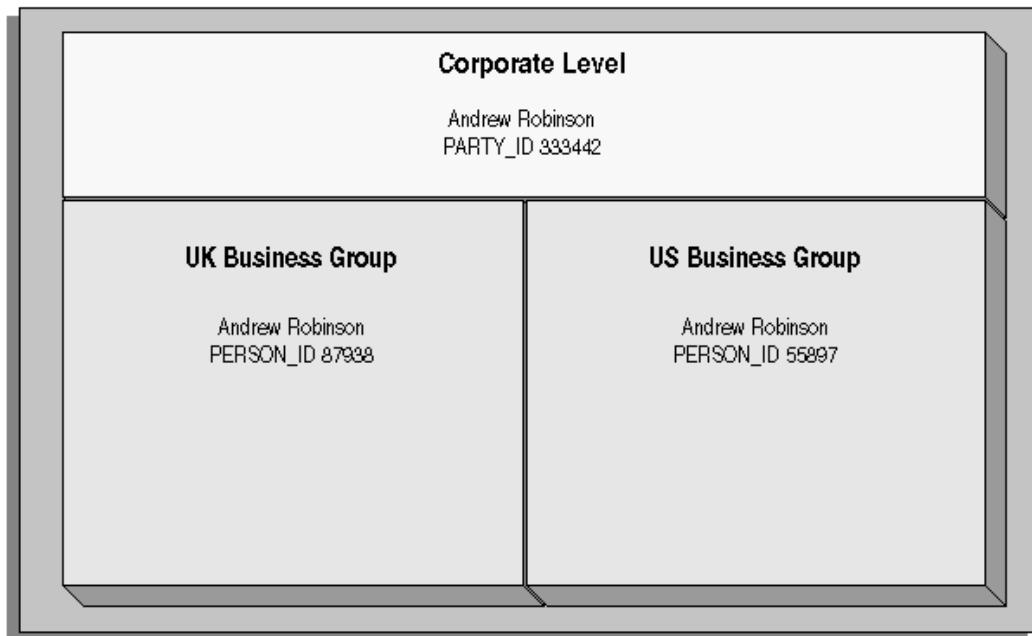
Based on a common core application for all countries, Oracle HRMS provides you with the ability to support both local and corporate requirements for global enterprises.

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

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

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

A Multi-Organization Person Record



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

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

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

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

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

To ensure the records in the corporate and local levels are synchronized it is important that lookup types that relate to global person information contain exactly the same lookup codes in TCA and HRMS. For example, if you add a new code to the TITLE

lookup type, you must ensure the same code is added to the equivalent TCA lookup type. If the codes do not match identically then the field is cleared in TCA when an update is made in HRMS.

Benefits of Linked Person Records

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

- Qualifications
- Establishments attended
- Competencies

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

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

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

See: Person Record Synchronization, page 2-16

Duplicate Person Search

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

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

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

For information about the global name format (Global List Name), see:
Person-Name Formats, page 2-21

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

Validating People in Multiple Business Groups

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

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

- Employees, applicants, and contingent workers have both corporate and legislative records.
- Ex-employees, ex-applicants, and ex-contingent workers retain both corporate and legislative records.
- People whose system person type is Other have a legislative record only.

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

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

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

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

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

Transferring Employees Between Business Groups

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

See: Employee Transfers and Secondments, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Person Numbering

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

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

Person Names

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

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

See: Person-Name Formats, page 2-21

Tracking People's Roles and Activities

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

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

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

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

Tracking peoples roles and activities table:

Window	Purpose	See
Application	Describes the vacancy for which an applicant has applied	Applications and Assignments, page 1-8
Book Events	Records that an employee or applicant will attend an event. The event must already be defined in the Event Bookings window. If you use Oracle Learning Management, see: <i>Introduction to Oracle Learning Management, Using Oracle Learning Management</i>	Event and Attendance Administration, page 5-49
Employee Review	Schedules and records details of an employee's review or other interview type	Employee Reviews, page 5-51
Applicant Interview	Schedules and records details of an applicant's interviews	Interviews and Other Recruitment Events, page 1-12
Assignment	Records details of an employee's assignment	<i>The Employee Assignment, Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide</i>
Contract	Records details of an employee's contract	Entering Contracts, page 2-48

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

Windows for Maintaining Personal Information

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information for all person types in the People window. You can enter information about:

- Applicants
- Further names
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts
- Supplementary role
- Office location
- Previous Employment
- Documents of Record
- Allocated Checklists

Note: The system administrator can create customized versions of the People window by person type or function, and then through responsibilities, profiles, and menu structures determine which records the user can access.

Displaying Personal Information

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

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Person Summary window to view information about your employees.
- Use an inquiry window to view specific information about a person, such as employment or absence history.

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

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

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

Identifying Employees, Contingent Workers, and Assignments

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

- Employee number
- Contingent worker number
- Assignment number

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

See Finding a Person Using the Find Person Window, page 2-27 or Finding a Person or Group of People, page 2-116

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

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

Employee Number

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

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

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

If you choose automatic or national identifier number generation, the employee number, by default, remains the same for an employee who has multiple periods of service. If you choose manual number entry, you can update the number at any time.

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

Contingent Worker Number

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

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

Changing the Number Generation Method

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

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

Global Person Numbering

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

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

See: Employee Transfers and Secondments, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

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

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

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

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

The Assignment Number

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

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

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

Employee Name: Samantha Green

Employee Number 1012

1st Assignment Number 1012

2nd Assignment Number 1012-02

Person Extra Information Types

You can define as many Extra Information Types (EITs) as you require to hold information about people. The product also comes with predefined person EITs.

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

See: *Setting Up Extra Information Types Against a Responsibility, Configuring, Reporting, and System Administration Guide*

The predefined US Federal person EITs include:

- US Federal Conversions - records information captured on a Conversion to Appointment RPA actions, such as the date the conversion career begins and the date on which it was recommended to begin.
- US Federal Ethnicity and Race- stores one or more ethnic and racial category for an employee
- US Federal IPA Benefits Continuation - stores EHRI data, such as Federal Employee Life Insurance, Federal Employee Health Benefit, retirement election, and Continuation Termination Insufficient Pay data
- US Federal Mass Actions - stores information as part of the employee's record that results from a Mass Salary or Mass Transfer action.
- US Federal Person Benefits - captures Federal Employee Health Benefits, Federal Employee Retirement System, Thrift Savings Plans, and Federal Employee Group Life Insurance dates such as eligibility and expiration dates.
- US Federal Person Group 1 - stores information about the employee entered before processing an RPA, such as citizenship code, as well as those values entered in the RPA extra information when the action is updated to the HR database, such as promotion date, or a change to the person's FEHB benefits. It also stores information about the current appointment and the appointment description.

- US Federal Person Group 2 - records obligated position information, the expiration dates such as for overseas tour and return rights, duty station contingency location, and draw-down action ID.
- US Federal Person Leave Information - captures annual leave, sick leave, and leave earnings status information.
- US Federal Person RPA - stores citizenship and veteran's preference and status.
- US Federal Probations - captures information about probations, such as the trial period dates and when probation ends.
- US Federal Retained Grade - stores information for each retained grade record that the employee has been placed on, such as the grade, step, pay table ID, and pay basis.
- US Federal SCD Information - stores relevant information about the Service Computation date, such as the date used as the basis for Thrift Savings Plan, Reduction in Force, and the employee's leave, and the amount of creditable service for annual leave.
- US Federal Security - captures information resulting from a federal security check, such as the basis and type of investigation, the date the investigation was completed, and the clearance.
- US Federal Separation and Retirement - stores information about the user's separation or retirement package such as the FERS coverage, NAF retirement indicator, and projected retirement date.
- US Federal Service Obligation - stores service obligation type and start and end dates
- US Federal Uniformed Services - captures information about the user's military status, such as the retirement date and retirement grade and reserve category.
- US Federal User Information - specifies which restricted RPA the user accesses.
- US Federal Workflow Routing Groups - associates the user to a routing group and sets the default roles for that user's routing group membership.

Other global predefined EITs that you can use include:

- Alien Income Forecast - the type of income a visa holder receives, as well as the amount and the year in which the income was received.
- Global Work Permit - information about the work permit an employee holds.
- Passport Details - information about the visa holder's passport, such as country of

issue, passport number, issue date and expiry date.

- Visa Details - information about the visa an employee holds, such as visa type, visa number, issue date and expiry date.
- Visa Payroll Details - information about the amount of income and benefit a visa holder receives.
- Visa Residency Details - information about a visa holder's residency, such as residency status, the residency status date, the first entry date and tax residence country.
- Visa Visit History - records a visa holder's visits to a country. The EIT stores information such as the purpose of the visit, the start and end dates of the visit, and whether the visa holder was accompanied by a spouse or children.

Person Record Synchronization

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

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

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

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

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

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

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

New Record Synchronization

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

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

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

Person Record Table

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

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

Field	UK Business Group
First Name	John
Middle Name	

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

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

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

Restrictions of Synchronization

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

Legislative Lookups

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

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

Character Sets

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

Future Dated Changes

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

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

Maintaining Synchronization

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

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

column of the report.

Automatic Transfer of Employees Between Business Groups

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

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

Person-Name Formats

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

Format Types

HRMS identifies the following format types:

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

Full Name

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

Display Name

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

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

List Name

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

Order Name

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

User-Defined Format Types

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

Stored Person Names

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

Local and Global Format Masks

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

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation. For example, users in a Japanese enterprise would typically select a local format to see names displayed in a Japanese character set.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

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

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

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

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

The Supplied Format Masks

HRMS supplies the following format masks:

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

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

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

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

Creating or Editing Format Masks

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

For a new format mask, you specify the:

- Format Type

- User Format Choice (local or global)

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

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

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

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

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

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

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

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

For information about the circumstances in which HRMS uses your new or updated format mask, see [How HRMS Selects a Format Mask](#), page 2-25.

Understanding Component Names

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

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

Determining Whether a Localization Stores Names in Global Formats

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

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

Migrating Stored Names to New and Revised Formats

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

See: Running the Update Person Names Program, page 2-44

How HRMS Selects a Format Mask

HRMS selects a format mask whenever you:

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

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

Full Name

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

2. PL/SQL procedure (PER_legcode_UNTILITY.PER_legcode_FULL_NAME)
3. Supplied, null-legislation Full Name format mask

Global List Name

1. Global List Name format mask for the business-group legislation
2. Supplied, null-legislation, global List Name format mask

Local List Name

1. Local List Name format mask for the business-group legislation
2. Supplied, null-legislation, local List Name format mask

Global Display Name

1. Global Display Name format mask for the business-group legislation
2. Supplied, null-legislation, global Display Name format mask

Local Display Name

1. Local Display Name format mask for the business-group legislation
2. Supplied, null-legislation, local Display Name format mask

Order Name

1. Order Name format mask for the business-group legislation
2. PL/SQL procedure (PER_legcode_UNTILITY.PER_legcode_ORDER_NAME)

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

Special Information Types

You use the *Personal Analysis key flexfield* to define any special information not provided by the main system that you want to hold about people, jobs and positions, and training

activities.

During implementation, the application pre-configures the Personal Analysis key flexfield to store government-related information and associates it to the People window. These flexfields store information for:

- Education
- Conditions of employment
- Conduct performance
- Language proficiencies
- Performance appraisal
- Special consideration.

Note: The application uses these Special Information Types. You may extend them and create new ones, but do not delete the seeded ones.

See: Running the Federal Special Information Types Process, page 2-42, Enabling Special Information Types, page 2-43

The application associates this information to the People window.

When you enable Special Information Types for your Business Group, you select how you plan to use each type. You can use Special Information Types for job and position requirements, personal information, and skills provided by training activities.

You can use each Special Information Type for one or more of these purposes. The options you select control the windows in which each Special Information Type appears.

Finding a Person Using the Find Person Window

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

To query a person using the Find Person window:

1. Do one or a combination of the following:
 - Enter a full or partial query on the person's name. Where a prefix has been defined for the person, a full name query must be in the format 'Maddox, Miss Julie'.
 - Enter a full or partial query on the person's national identifier (such as social

security number).

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

2. Choose the Find button.

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

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

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

Entering a New Person

Use the People window to enter and maintain basic personal information for all person types, including:

- Applicant information
- Employee information that does not require a Request for Personnel Action (RPA) form
- Information about external people such as contractors or volunteers, or about contingent workers

Note: If you are entering information for a contingent worker, you can also use the Entering Contingent Workers template.

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

Your localization may require additional mandatory information for a person. See: Entering Additional Personal Information, page 2-33

To enter a new applicant:

1. If the Find Person window opens, choose New.
2. Set your effective date to the appropriate date for adding the person to the system. If you are entering an applicant, this should be the date the application was received.

Note: By setting the effective date, you also ensure that Special Information and Extra Information required to process an Appointment action is in the database when you process the action.

3. Enter the person's name and other details in the Name region.

Only the last name is required.

- Use the Last Name field to enter all the parts of a person's last name that you want to appear in the Last Name field of an RPA. You can include names separated by a space or an apostrophe, such as de Rosa or D'Angelo.
- If an applicant's last name includes a prefix and suffix, enter this information in the Last Name field.

The RPA and NPA display the person's last name in the appropriate sequence: prefix, last name, and suffix. The last name and suffix are separated by a comma; for example, Van Wood Jr.

Note: When you enter the person's suffix in the first name field, make sure you include a comma and a space before the suffix.

- Last names are listed alphabetically and by case. For example, the last name 'Young' precedes the last name 'de Rosa.'
- You use the Title field to enter a title such as Mrs. or Doctor for the person.

4. Select the gender, Male, Female or Unknown Gender, from the list.
5. Select an action type, for example Create Applicant, in the Action field and select a person type from the list of values. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, a list of values is not displayed and the user person type displays automatically in the Person Type for Action field.

Note: When you appoint someone with an RPA, the system changes the person type Applicant to Employee.Ex-Applicant. If

you terminate that person with an RPA, the person type changes to Ex-Employee.Ex-Applicant.

Note: If you enter a person as a contingent worker who has a previous person type, you can choose to revert the contingent worker back to the previous person type by using the Cancel Placement action.

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

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

You must now save the action type you selected before you can view it in the Person Types field.

6. Do not enter or update an employee's hire date in the Latest Hire Date or Date First Hired fields.

Caution: When you update an Appointment RPA, the application automatically enters the Hire Date fields based on the appointment's effective date. If you change an employee's hire date using the Hire Date fields you risk corrupting that employee's record.

Entering Identification Information

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

Note: If you query a person who has a combination of employee, applicant and contingent worker numbers the employee number is displayed in the Number field. If the person does not have an employee number but has a contingent worker number and an applicant number the contingent worker number is displayed. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

8. Enter the person's social security number in the Identification region.

If your organization uses manual number entry, enter an employee or applicant number. If your organization uses automatic number generation, the employee or applicant number automatically displays when you save your entries in this window.

Entering Personal Details

Enter details for the person as required in the Personal tabbed region:

9. If the person is an Applicant and you are going to appoint that person to a position, you must enter his or her date of birth.
10. Enter additional birth information into the Town of Birth, Region of Birth and Country of Birth fields.
11. If the Work Telephone field is displayed, enter the person's work telephone number. Otherwise, use the Phone Numbers window to enter this information.
12. In the Status field, select the person's marital status.

Multiple Person Records

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

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

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

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

Do one of the following four tasks:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person is copied across to existing records in other business groups. If existing records have values for fields that the new record leaves blank, then these values appear in the new record. See: Person Record Synchronization, page 2-16

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

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

- If the person already exists in TCA, but not in HRMS, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS. See: People in a Global Enterprise, page 2-4
- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

14. For employees and applicants, choose the Employment tabbed region. Your Oracle localization team may have created extra fields in the protected descriptive flexfield in this region.
15. For employees and applicants, choose the Address tabbed region and enter a primary address. (All employees must have a primary address.)

Note: The start date of the employee's primary address should be the same as or earlier than the new hire date. This preserves the integrity of the employee's records.

See: Entering People's Addresses at Sites without Oracle Payroll, page 2-102,
Entering People's Addresses at Sites with Oracle Payroll, page 2-103

16. Enter Special Information details as required.

Click Special Information, select the Special Information type from the list, click the Details field and complete the requested fields.

17. Enter Extra Information details as required.

The application defaults person Extra Information to minimize data entry, such as the citizenship code, handicap code, veterans information, and so on. To enter additional information, choose the Others button, select the Extra Information type from the list, click the Details field and complete the requested fields.

18. Save your work.

What's Next?:

Optionally, you can enter additional information for people in the tabbed regions. See: Entering Additional Personal Information, page 2-33

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

Entering Additional Personal Information (People Window)

You enter additional information for applicants, employees, and external persons in the Extra Information and Special Information flexfields, and in the tabbed regions. After you appoint someone to a position, the application restricts data entry in those fields that you can complete only with an RPA.

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

You can enter additional information for people in the tabbed regions described in the following steps.

To enter employment information:

1. Choose the Employment tabbed region.

See: New Hire Reporting, page 2-129

2. Check the Opted for Medicare check box if the employee has chosen medicare.
3. Select the status of the Employment Eligibility Form 1-9. Under the US Immigration and Control Act of 1986, this must occur within three days of hire, or within 90 days for employees who have applied for the necessary documentation and are awaiting its receipt.

Note: By signing Form I-9, employees attest they are eligible for employment in the US. The employer also must sign the form, listing documents presented to verify the employee's eligibility as a US citizen, a lawful permanent resident alien, or an alien otherwise authorized to work in the US.

4. Enter an I-9 Expiration Date if the employee's eligibility to work in the US ends at a certain date, given in his or her documents.

5. To enter data for the New Hire report:
 - The New Hire Status field defaults to Include in New Hire Report, so that the next run of the New Hire report for the employee's GRE will include this employee.
 - If the New Hire report should not cover this employee, select Exclude from New Hire Reporting. Optionally, select a reason for this exclusion in the Exception Reason field.

You can enter exception reasons in the lookup type:
US_NEW_HIRE_EXCEPTIONS.

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

 - If this employee is currently obliged to pay child support, check the Child Support Obligation box.

Note: After a run of the New Hire report that includes the employee, the entry in the New Hire Status field automatically changes to Already Reported.

See: New Hire Reporting, page 2-129

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

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

To enter information for an applicant:

1. Choose the Applicant Information tabbed region.
2. If the applicant's resume is on file, check the Exists check box.
3. If the applicant's resume is on file, select the date indicating when the resume was

last updated.

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

To enter further name information:

1. Choose the Further Name Information tabbed region.
2. Enter one or more honors/degrees (BA, MBA, or JD, for example) which the person has earned.
3. Enter the name (perhaps a nickname) by which the person prefers to be known.
4. If the person previously was known by a different last name, enter the previous last name.

To enter other information for a person:

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

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

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

If you enter the termination reason of deceased and the actual termination date on the Terminate window and date of death has not been entered, it is set to the person's termination date.

7. Select the current status of the student, if the person is a student.
8. In the Date Last Verified field, you can enter the date the person last checked this

personal information for accuracy.

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

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

1. Choose the Rehire tabbed region.
2. Check whether the former manager has recommended the applicant for rehire.
3. Select the reason for this recommendation.
4. Select the date the background check was performed.

To enter medical information for a person:

1. Choose the Medical tabbed region.
2. Select the person's blood type.
3. Select the date of this person's last medical test.

To enter information concerning the background check for person:

1. Choose the Background tabbed region.
2. Check whether the person background check has been performed.
3. Select the date the background check was performed.
4. Enter the name of the physician who performed this test.

To enter benefits information:

1. Choose the Benefits tabbed region.

Note: If necessary, you can add the Benefits Tab to the People window. Query the BEN_MANAGER menu in the Menus window and add the HR View Benefits function to the menu.
2. Enter a benefit group for your employee or applicant. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated, or assist in grandfathering a person into an old plan

3. Enter what kind of tobacco your employee uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.
4. Enter medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.
5. Enter the adoption date, if the person has adopted a child. This information, with the date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.
6. Enter an adjusted service date for your employee. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grand-fathered benefits or in the case of mergers and acquisitions.
7. Change the date first hired for your employee. For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
8. Check the Other Coverage check box, if your employee or applicant has externally provided coverage. This determines a person eligibility for certain plans.
9. Check the Voluntary Service check box, if your employee or applicant is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

Entering Pictures

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

- BMP
- CALS
- GIF
- JFIF

- JPEG
- PICT
- RAS
- TIFF
- TPIC

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

You enter pictures in Oracle HRMS in the Picture page.

To enter a person's picture in Oracle HRMS:

1. In the Picture page, enter the file path or click Browse to locate the directory in which you saved the graphic file
2. Highlight the filename and click Open. The selected file is loaded and displayed in the Picture page.

Entering and Maintaining Documents of Record

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

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

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

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

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

To search for documents of record:

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

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

3. Click Go to perform the search.

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

To create or maintain documents of record for an individual:

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

See: Finding a Person Using the Find Person Window, page 2-27

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

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

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

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

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

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

The Create Document of Record page appears.

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

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

5. Close the window.

Running the Person Synchronization Report

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

Run the Person Synchronization report in the Submit Requests window.

To run the Person Synchronization report:

1. Select the Person Synchronization report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Enter the date upon which you want to run the report. The default is the current system date.
4. Select a person for whom to run the report or leave blank to run for all people in your business groups who are also in another business group.
5. Choose OK to run the report. You can view the results from the Requests window.

Summarizing Personnel Data

The Person Summary consolidates information about an employee or contingent worker that you frequently view. For example, before processing a promotion action you might want to see a summary of the employee's performance ratings.

The Person Summary displays data that you enter manually in windows such as the Person and Special Information windows. It also displays data that the application enters automatically when it updates a personnel action to the HR database. The window contains several tabbed regions where you can view (not change) information, such as:

- Personal data
- Assignment and position details
- Pay, benefits, and awards
- Performance ratings
- Personnel actions that have been updated to the database

You can also view similar summaries using self-service. Employees can view their personal data, benefits, and employment-related data from the My Information menu. With the exception of benefits information, managers can view this information from the My Employee menu.

See: Information Overview, *Oracle HRMS Deploy Self-Service Capability Guide*

Use the Person Summary window

To view personnel data:

1. Set the effective date to view a summary of the personnel data as of that date.

Note: For elements, the effective date is the date of the RPA action that last updated the element. If the element contains a segment that you manually updated, the effective date is the date of the last manual update.

2. Tab to the information that you want to view.

Deleting a Person from the System

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

You can use the People window to delete applicant or external records, such as those for volunteers or contractors.

If there is a contact for the person you are deleting, the system automatically deletes a contact if:

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

If the contact is used by another person or has other information such as applicant information, the contact is not deleted. However, Oracle HRMS removes all records of that contact and any relationships.

To delete all records of a person:

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

Deleting incorrect records

If you incorrectly enter an *applicant* into the system, you can change the information contained in the People window, or delete the record in the People window.

If you incorrectly enter an *employee* into the system, for example by processing an Appointment action, you must process a Cancellation personnel action, and then delete the employee record in the People window.

Setting Up Special Information

To set up Special Information Types:

1. Define each Special Information Type as an instance of the Personal Analysis key flexfield.
2. Enable the Special Information Types you want to use in your Business Group and select how you want to use them.

See: Enabling Special Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Oracle HR Only

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

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

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

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

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

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

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

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

See: Skills Matching Report, page 5-48

Running the Federal Special Information Types Process

Create Federal Special Info Types is a Concurrent Manager process that supplies the

Federal Person Special Information. The system administrator runs this process during implementation.

Use the Submit Request window.

To run the Special Information Types process:

1. Select Create Federal Special Info Types from the Name field
2. Position your cursor in the Parameters field. In the Parameters window, select the Business Group ID from the list of values.
3. Choose the Submit button.

Enabling Special Information Types

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

To enable Special Information Types:

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

Entering Special Information

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

You set up each area of information that you want to handle separately as a *Special Information Type*. The product includes Special Information Types that store commonly recorded information about employees, such as performance and education data.

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

You enter information for the person in the Special Information window.

To enter special information for a person:

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

Running the Update Person Names Program

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

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

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

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

To run the Update Person Names program:

1. In the Name field, select Update Person Names.
The Parameters window opens.
2. Select a Format Type value.
3. Select a legislation. HRMS updates person names of the specified format type defined in business groups that have this legislation code. If you select no legislation, HRMS updates person names in all business groups.
4. Set Disable WHO Trigger to Yes or No.

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

Person Names program is running:

- LAST_UPDATE_DATE
- LAST_UPDATED_BY
- LAST_UPDATE_LOGIN

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

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

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

5. Click Submit.

HRMS reformats all names of the specified type in the selected legislation. For information about how HRMS selects an appropriate format mask, see Person-Name Formats, page 2-21.

Contracts

Contracts

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

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

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

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

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

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

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

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

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

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

Creating Contract Statuses

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

To create contract statuses:

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

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

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

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

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

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

Defining Contract Letter Types

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

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

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

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

To define a contract letter type:

1. Enter a name for the letter.
2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.
3. Save your contract letter type.

Entering Contracts

You enter and maintain contracts in the Contracts window.

To enter a new contract:

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

For Romanian users: Enter the contract number in this field.

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

See: Creating Contract Statuses, page 2-47

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

Note: The document status is not DateTracked.

6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.
7. Enter further information about this contract if your Oracle localization team has set

up the Further Contract Information window.

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

8. Save your changes.

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

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

Maintaining Contracts

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

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

Deleting Contracts

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

Note: Contracts cannot be date effectively end dated.

To delete a contract:

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

Managing Contracts

The Manage Contracts folder enables you to:

- search for different groups of people using a wide variety of criteria
- view basic person information and comprehensive contract information

- initiate a mail merge to produce written contracts
- mass update the document status of contracts
- navigate to the Person, Assignment and Contracts windows.

Find Contracts

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

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

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

To find contracts:

1. Enter a full or partial query on one, a selection, or all of the available person information:
2. Select whether to find people either with or without a contract. Leave blank to find people with and without contracts.
3. Enter full or partial queries on contract and assignment details using the tabbed regions.

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

Note: You can generate contracts for a person's assignment that is not covered by a contract. See: Generating and Printing Contracts, page 2-51

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

Manage Contracts

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

choose the fields to view.

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

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

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

To mass update the document status of contracts:

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

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

4. Choose OK.

The selected contracts are updated with the new document status.

Generating and Printing Contracts

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

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

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

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

For example, you might want to record detailed information against the assignment that is covered by a contract, but include more general information on the printed contract. On the assignment covered by a contract you could set up a location of

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

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

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

To select an assignment:

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

To generate a contract:

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

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

4. Choose OK.

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

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

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

6. If your letters are produced by Oracle Reports, they are ready for printing. If you

use your word processor's mail merge facility you are ready to merge the data.

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

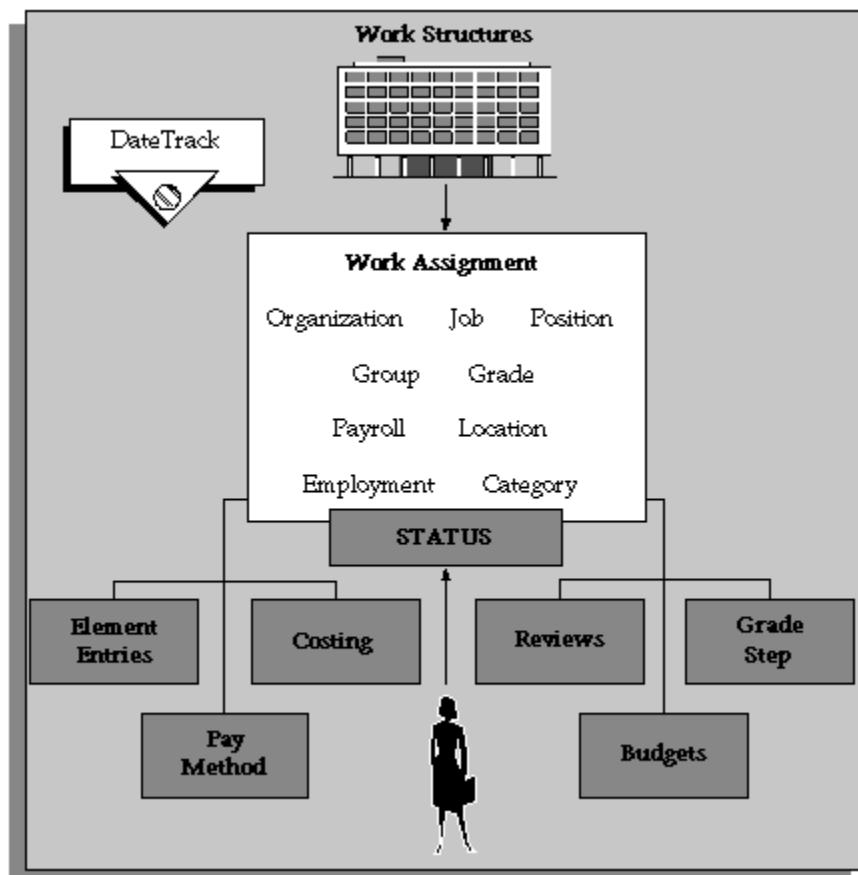
Employees

Employee Assignment

The assignment is the central concept that relates employees to the structures in which they work, and the compensation and benefits for which they are eligible.

Many of the activities you undertake in human resource management, such as vacancy management and budget planning, are based around assignments and not people. In particular, you enter many benefit-related elements for the employee assignment, rather than the employee.

Employee Assignment



An employee must have a current assignment at all times. You record changes to existing assignments with the Request for Personnel Action (RPA). For example you use the RPA to appoint someone to a position, promote that person, and terminate the person's assignment. You can also process mass actions such as realignments and transfers that affect employee assignments using the RPA. These changes are

datetracked so that you can view the history of changes to an assignment and also make future-dated changes to an employee's assignment.

Components of the Assignment

At a minimum, an assignment defines the Business Group for which an employee works, the date the assignment began, and its current status, such as active or suspended. You can use the assignment to define more precisely the place employees occupy in the agency, including their position, grade, organization, location, and so on.

Ending Assignments and Terminating Employees

Oarcle HRMS does not permit an employee to exist in the system without an assignment. That is, an employee must always have at least one assignment at any point in time. You end an employee's assignment by processing an RPA.

See: Workforce and Applicant Termination, page 2-94

Employment Information

Every agency needs to track the changes in employment information for each employee over the lifetime of their employment.

You appoint and manage most changes to employee appointments with the Request for Personnel Action (RPA) and manage other changes, such as most changes to the benefits assigned an employee, through the *employee assignment*:

- The assignment connects employees to your agency's work structures and policies. Changes to the structures and policies are reflected in the employee's records.
- You can query groups of employees with similar assignments (such as all assignments on Grade GS-12) and make changes for each employee in these groups.
- The assignment is datetracked to maintain a work history of the employee as he or she moves through the agency.

The table below summarizes the information typically held for an employee, and how you can hold this information.

Employee Information

Information	How to set it up
Job	Enter job, position, and organization information in the Position window. You associate locations with organizations in the Organizations window. Complete a Request for Personnel Action to process the employee assignment.
Position	
Organization	
Location	
Grade	
Name of manager or position to report to	Use a position hierarchy or enter the supervisor's name using the Assignment window.
Benefits	Define and link elements; enter values in the Element Entries window.
Full time/part time status	View the employee's work schedule hours under Assignment Standard Conditions
Standard Work Day	Enter an RPA or accept the default from the organization or position to which the employee is assigned. The date is stored in the Extra Information type associated with this action.
Work Schedule	Enter in the Miscellaneous tabbed region of the Assignment window, or accept the default schedule of the organization the employee is assigned to.
Accrual of Paid Time Off for Vacation or Illness	Enroll employee in appropriate accrual plans.
Vacation Entitlement	Define Absence Types and set up increasing or decreasing balances for the employee; enroll employee in appropriate accrual plans.
Sickness Entitlement	
Maternity Entitlement	
Notice Period	You should hold full text procedures and regulations outside the system, perhaps using Oracle Book to hold the information online.

Information	How to set it up
Disciplinary procedure	You can associate groups of people with different rules or procedures using the People Group key flexfield.

Employment History

An employment history is a record of a person's previous periods of service for a different employer. Employers sometimes use these previous periods of employment to calculate an employee's current benefits, for example, leave or sick pay entitlement. You can also record employment history for applicants as part of your recruitment process.

The previous employment information functionality enables you to store information about previous employers and also enter information regarding a person's previous periods of employment. You are also able to specify that a particular employment period is relevant for all assignments or cross-reference previous jobs with the appropriate assignment for the same period.

Entering Payment Methods for an Employee Assignment

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

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

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

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

To enter payment methods you must:

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

To enter a personal payment method for remuneration:

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

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

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

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

To enter a third party payment method:

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

Third party payment methods automatically receive priority 1 (the highest priority) and you cannot change this. You cannot split a third party payment between different payment methods; the Percentage field always displays 100%.
3. In the Payee region, select an organization or a person.
4. Save your work.

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

Entering Previous Employment Details

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

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

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

To enter previous employment details:

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

For Hungarian users only If the employee joined your enterprise mid-year, specify the number of sickness days they have already taken with their previous employer. You can use this information in an accrual plan to calculate their sickness entitlement for the rest of the year.

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

Note: The All Assignments check box can only be selected if there

are no further previous job usages defined in the Assignment region. Once the All Assignments check box is selected no further previous job usages can be defined.

11. Save your work.
12. **Mexico only:** Specify the employee's previous employment details in the Person EIT.

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

To enter previous job details:

1. Select an empty row in the Previous Job region or place your cursor within an existing row and choose the New button to add a new row.
2. Enter start and end dates for the previous job. The job entered must be associated with the employer and period of service entered at steps 1 to 11. The dates entered automatically calculate the period of service in years, months and days.
3. Enter a job title.
4. Select an employee category.
5. You can override the period of service calculation by entering your own period of service in the Years, Months and Days fields.
6. Enter a description for the previous job.
7. Select the All Assignments check box to specify that the previous job period is taken into account for all assignments.

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

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

See: Entering Further Previous Job Information.

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

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

10. Save your work.

To map previous jobs to an assignment:

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

Contingent Workers

Contingent Workers

A *contingent worker* is a worker who does not have a direct employment relationship with your enterprise and is typically a self-employed individual or an agency supplied worker.

A contingent worker may perform a role for your enterprise as part of a commercial agreement that exists between the business and the individual or supplier.

Alternatively, a contingent worker may perform a role as an intern or a volunteer for your enterprise and have no relationship with a supplier. Additional criteria may apply to the definition of a contingent worker in your localization.

Contingent workers can perform many of the roles that you usually assign to employees (such as Manager or Supervisor), provided that you set the HR: Expand Role of Contingent Worker profile option to Yes.

You do not pay contingent workers via your payroll. Instead, they submit payment invoices to your accounts payable department. Alternatively, you can manage the procurement of contingent workers using Oracle Services Procurement. In this case, contingent workers or their managers can enter time cards using Oracle Time and Labor (OTL) and generate payment invoices automatically.

Note that contingent workers exist as a separate category of worker from short-term or fixed-term contractors who are hired directly by your enterprise and are paid via your payroll.

Entering Contingent Workers

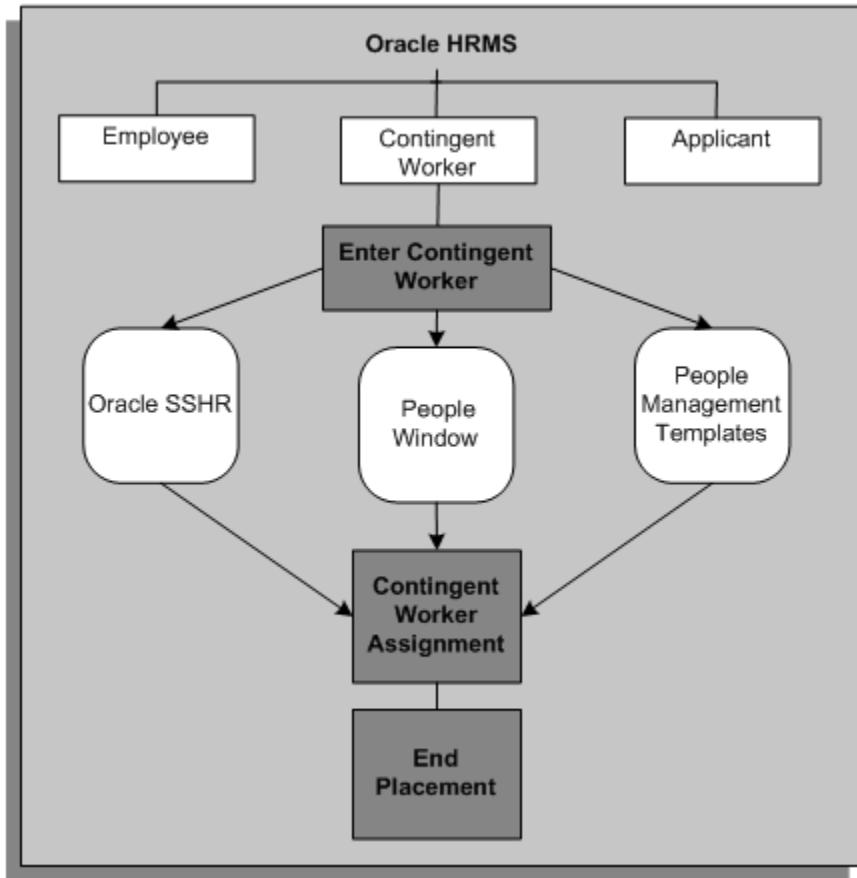
Every enterprise must be able to enter and hold personal information for its workforce. You can enter personal information for contingent workers using the People window or the People Management templates.

You can use the predefined templates without making changes, modify the templates, or create entirely new templates to suit your needs. Oracle HR Foundation also provides contingent worker templates.

Contingent Worker Support in Oracle SSHR

You can manage the entry, assignment, and termination of contingent workers using Oracle Self Service HR (SSHR). SSHR provides two modules that are specific to contingent workers (Assignment Rate and End Placement), in addition to the Place Contingent Worker workflow process. Contingent workers can maintain their own personal and professional details using SSHR.

Contingent Worker



The Contingent Worker Assignment

The contingent worker assignment relates contingent workers to their work structures (such as organization and job). Much of the work structures information you enter for a contingent worker is entered against the contingent worker assignment and not the person. For example, you can enter standard conditions or supplier details against the contingent worker assignment.

When you create a new contingent worker, a default contingent worker assignment is created. Oracle HRMS stores personal information for all workers separately from their assignment information.

Period of Placement

A contingent worker period of placement relates to the period of time a contingent worker spends with your enterprise. A contingent worker can have a number of concurrent assignments during a period of placement, but there must be one primary assignment at any time during the period. No assignments can start before the period of placement start date or end after the period of placement end date.

Assignment Rate Types and Assignment Rates

If you install and license Oracle Services Procurement, you can obtain purchase order information, including assignment rates, directly from the purchase order.

Note: Oracle Services Procurement enables you to associate more than one purchase order or purchase order line to a contingent worker. If the task flow to use the PO_CWK_ASSOCIATIONS function is enabled, then you can use the Associate Purchase Order with Contingent Worker page to associate more than one purchase order or purchase order line to a contingent worker. For more information, see: *Oracle Procurement - Services Procurement White Paper* on My Oracle Support, Note ID 567411.1

If you are not using Oracle Services Procurement, you can record the rates you pay for the services of a contingent worker. You can use this information to reconcile contingent worker invoices from a supplier or self-employed worker. Although you can record this information, you cannot process payments for contingent workers using Oracle Payroll.

The information is held against the contingent worker's assignment and you can record different rates for a single assignment. For example, you could enter a standard overtime rate and a weekend rate for one assignment.

If you install and license Oracle Services Procurement at a later date, any rate information recorded in Oracle HRMS is no longer visible.

Ending a Placement or Assignment

When a contingent worker leaves your enterprise you end the placement.

You can also terminate individual contingent worker assignments, provided there remains a primary assignment. You terminate an assignment by selecting the assignment status End in the Assignment window.

If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected end date of the assignment. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record a projected assignment end date at any time during an assignment.

Canceling a Placement

You can revert a contingent worker to a previous person type by using the action type Cancel Placement. For example, you enter a person as a contingent worker who has a previous person type of ex-employee. Using the Cancel Placement action type you can revert this person back to being an ex-employee. You cannot use this action type to revert a contingent worker who does not have a previous person type.

Separating Contingent Workers from Employees Using Oracle HRMS

Oracle HRMS enables you to keep your contingent worker transactions entirely separate from employee transactions.

Contingent Worker Person Types

So you can identify contingent workers as a separate category of worker from employees, Oracle HRMS provides you with the two system person types *Contingent worker* and *Ex-contingent worker*, to which you can add your own user types as required.

Contingent Workers and Oracle HRMS Security

Oracle HRMS enables you to limit access to the records of employees, applicants, and contingent workers when you set up a user's security. Using security profiles you can give users access to contingent worker records only. You can also restrict user access to contingent worker records by giving them access to work structures or other criteria in the application to which contingent workers are attached. For example, you could give users access to the contingent worker records in a single organization.

CustomForm

Many of the windows used in Oracle HRMS are multipurpose windows. For example, the People window can be used to enter and maintain personal details for employees, contingent workers, and applicants. You can create a separate version of some Oracle HRMS windows to cater specifically for contingent workers using *CustomForm*. For example, you could create your own version of the People window to cater solely for contingent workers.

Task Flow

You can also use *task flow* to limit the access your users have to individual windows. You can link together the windows you want your users to use for a particular task including versions of windows you have created using *CustomForm*. For example, you might include your own version of the People window and include this in a task flow for entering personal information for a contingent worker.

Combining Security Profiles, CustomForm, and Task Flow

The following example combines the concepts of security profiles, *CustomForm*, and task flow to show how you can give users access to contingent workers records only:

Firstly you could establish a security profile stipulating that your users only have access to contingent worker records. You do this by selecting an access level of 'none' for the records of employees or applicants and an access level of 'all' for contingent workers. You then link your new security profile to a new responsibility. You could then create a new version of the People window using *CustomForm*. Your new People window could restrict the actions the user can perform, for example, creating a placement. When you have created the new version of the window you assign it to a menu. Next you remove the windows that are no longer required from the menu and assign the menu to the same responsibility as your security profile. Finally you could create a new task flow and attach it to the window.

The Contingent Worker Assignment

The contingent worker assignment defines the commercial relationship between your enterprise and the supplier. It also defines how the contingent worker is deployed by the business and the conditions of work assigned to them.

The contingent worker assignment relates contingent workers to their work structures. Much of the work structures information you enter for a contingent worker is entered against the contingent worker assignment and not the person. For example, you can enter standard conditions or supplier details against the contingent worker assignment.

Note: The assignment is datetracked to maintain a work history as the contingent worker moves through your enterprise.

When you enter a contingent worker, Oracle HRMS automatically creates a default assignment for that contingent worker. This is because a contingent worker must have a current assignment at all times. Any change you make, such as a change of working location, or change in working role, is added to the existing assignment. These changes are datetracked so that you can make future-dated changes in advance and view the history of changes to an assignment.

Components of the Assignment

At a minimum, an assignment defines the HR organization within the business group (which may be the business group itself) for which a person works, the date the assignment began, and its current status, such as active or suspended.

More specifically, you can use the assignment to define the role of the contingent worker in the enterprise, including their job, position, organization, and location. You can also assign contingent workers to contingent worker groups you set up using the People Group key flexfield.

You can assign contingent workers to an assignment category, such as Part Time or Full Time. You set up these categories using the Lookup Type CWK_ASG_CATEGORY. Further examples of assignment categories could be Part Time Fixed Hours or Part Time Shift Pattern.

Multiple Assignments

If your enterprise permits contingent workers to work in two or more different capacities at once you can enter multiple assignments for them. A contingent worker can have multiple assignments, but only one is the primary assignment. Any others are *secondary*.

Relocations, changes in job role, and so on go on record as datetracked changes to contingent worker existing assignments. You do not enter new assignments for such changes.

Managing Multiple Assignments

Oracle HRMS separately manages each assignment. When a contingent worker has more than one assignment, one assignment is designated the primary assignment. When you enter a contingent worker (by entering a person as a contingent worker, or by changing the person type to contingent worker), Oracle HRMS automatically creates a primary assignment for that person. (The Primary box is automatically checked in the Miscellaneous tabbed region of the Assignment window).

If you then enter an additional assignment, the Primary box is automatically unchecked for that secondary assignment.

You can end all assignments except the primary assignment by entering a status change of End in the Assignment window. To end a contingent worker's primary assignment, you must terminate the placement.

Alternatively, if a contingent worker has more than one assignment you can change the primary assignment to become a secondary assignment and change one of the other secondary assignments to become the primary assignment. You can then enter a status change of End for the former primary assignment in the Assignment window.

Managing Changes in Assignment Information

When a contingent worker experiences changes such as a change in job role, or moves from full time to part time, you change a component of the assignment. A change to any of the assignment components produces the DateTrack prompt.

- If you choose *Correction*, Oracle HRMS overwrites the existing assignment information back to the last effective from date.
- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

By changing your effective date, you can see the contingent worker assignment at any point in time. You can also view the changes made to the assignment over time using DateTrack History.

DateTrack History shows the changes made to one assignment. Use the Assignment History window to view the history of the contingent worker's assignments, both current and in any previous periods of service.

Ending Assignments and Terminating Contingent Workers

In Oracle HRMS, a contingent worker must always have at least one assignment. If a contingent worker has a single assignment, the only way to end the assignment is to end the placement.

If a contingent worker has more than one assignment, you can end all but one of their assignments by selecting the assignment status End in the Assignment window. If you

use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record the projected assignment end date at any time during the assignment.

Contingent Worker Suppliers

Contingent workers are workers who do not have a direct employment relationship with your enterprise. Instead, the enterprise usually obtains its contingent workforce by agreement with preferred suppliers. Typically, when roles suitable for contingent workers arise and there is no existing agreement with a supplier, the enterprise:

- Creates a formal definition of the roles
- Supplies specifications to potential suppliers
- Evaluates supplier responses to requests for quotation (RFQs)
- Negotiates contracts with selected suppliers
- Awards contracts to suppliers when agreement is reached

Defining Suppliers

If you use Oracle Services Procurement to manage the procurement of contingent workers, you record information about suppliers, sites, and purchase orders using Oracle Services Procurement. This information is available automatically to Oracle HRMS users in the Supplier and Site fields on the Supplier tab page of the Assignment window for contingent workers.

If you do not use Oracle Services Procurement, you can record information about suppliers and supplier sites using the Customer and Supplier Setup menu in Oracle HRMS. To access this menu, you can use the supplied Customer and Supplier Maintenance responsibility. Alternatively, you can add the Customer and Supplier Setup menu, or individual functions from the menu, to an existing menu that users can access using their standard responsibilities.

Supplier and site information that you enter using the Customer and Supplier Setup menu functions is available to Oracle HRMS users in the Supplier and Site fields on the Supplier tab page of the Assignment window for contingent workers.

US Federal Contingent Workers

Contingent workers occupy agency positions, supervise federal employees, approve Requests for Personnel Actions (RPAs), and participate in complaint tracking processes. When you assign and manage contingent workers, you do not use RPAs as you would

for employees. Instead you assign and manage contingent workers by entering and updating information directly in the Person, Assignment, and Position windows. To expedite data entry, you can also enter information using the contingent worker People Management templates.

To record pay-related information, you can enter the rates that suppliers charge you for contingent worker services using the Assignment Rates window. (Contingent workers are not paid using payroll, so you do not use the element entries window.)

If you decide to hire a contingent worker, you can enter the worker as an applicant and when the person's period of placement ends, appoint that person. As soon as you create the applicant entry, the product applies the standard protections in the Person and Assignment window, allowing you to view but not change protected data you previously entered in protected fields. Later when you appoint the ex-contingent worker, the application updates this protected data with the values entered in the Appointment RPA.

See: Processing US Federal Contingent Worker Information, page 2-69

Processing US Federal Contingent Worker Information

When you perform tasks to create, update, or end a contingent worker placement, you enter information directly in the Person and Assignment window or the People Management templates. The following list identifies common processes, notes exceptions to the global processing, and refers you to topics for specific instructions.

Note: Where cross-referenced topics include instructions for employees and contingent workers, refer to these topics for contingent worker information only.

1. Common Contingent Worker Processes

- Entering people

You can enter and maintain personal information about a contingent worker using the People window or the People Management templates.

If you use the People window, the application protects the Prefix and Suffix fields but allows data entry in normally protected fields, such as Registered Disabled, Ethnic Origin, and Veteran Status. When you end the contingent worker's placement and make that person an applicant, the application displays but protects these fields from update. After you appoint the employee, the application replaces this data with the data entered in the Appointment RPA.

Like employees, contingent workers have an identifying number. You define how the application generates this number when you set up your business group.

If the contingent worker's responsibilities in the agency include supervising

other employees, you can also designate the contingent worker as a supervisor.

See: Entering a New Person, page 2-28, Entering Additional Personal Information, page 2-33, Entering Contingent Worker Information, page 2-118, Running the Change Person Numbering to Automatic Process, *Enterprise and Workforce Management Guide*

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

- **Assigning positions**

You do not use an RPA to assign contingent workers positions within the agency. When you create a placement for a contingent worker, you can use the People Management templates to quickly record the essential assignment information, or the Assignment window and Assignment Extra Information types to enter and update a full range of assignment details.

Note: Although the topics for contingent worker describe multiple assignments, as of this release Oracle US Federal HR supports single assignments.

See: Entering an Assignment, page 2-86, Entering Additional Assignment Details, page 2-81, Entering Contingent Worker Information, page 2-118, Maintaining Contingent Workers, page 2-119

- **Updating position information**

Unlike positions assigned to employees, after you assign the position, you can continue to update position information and position extra information. You can also enter information in two fields that are normally protected, Location and Position Availability Status (Hiring Status).

See: Defining a Position, *Enterprise and Workforce Management Guide*, Updating a Position, *Enterprise and Workforce Management Guide*

- **Entering pay-related information**

You do not enter element entries or payroll information for contingent workers. Instead you capture the rates charged by suppliers in the Assignment Rates window.

See: Entering Assignment Rates for Contingent Worker Assignments, page 2-72

- **Routing Position Descriptions and RPAs**

If the contingent worker's responsibilities include routing or approving position descriptions or RPAs, you can add their user names to routing groups, groupboxes, and routing lists.

Note: If a contingent worker approves an RPA, the NPA displays that person's name, but not the title unless you have entered the position's title in the US Federal Position Group 1 Position Extra Information.

See: Setting up Routing Groups, Groupboxes, and Routing Lists, *Configuring, Reporting, and System Administration Guide*

- Securing data

Federal security adds support for contingent worker security. For example, the Security Profiles window includes a View Contingent Workers option. A user profile option enables you to restrict the level of security users have at Site level.

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

- Viewing data for contingent workers

You can query and view information about a contingent worker using the Person Summary window.

See: Summarizing Employee Data, page 2-40

- Tracking complaints

You can record information about contingent workers who are involved in the complaint process. For example, contingent workers can become complainants, class agents, or other persons involved in a complaint such as a witness or administrative judge.

See: Complaint Tracking Overview, *Enterprise and Workforce Management Guide*

- Terminating a Placement

After a period of placement concludes, you can end the contingent worker's assignment. If you mistakenly terminate the assignment, you can use the same window to reverse the termination.

See: Ending a Placement, page 2-97

- Appointing an ex-contingent worker

You can appoint ex-contingent workers after ending their period of placement. If you want to begin that process while the person is still a contingent worker, you can create an applicant entry for that person. Later when the placement ends, you can process the Appointment action.

See: Hiring an Applicant, page 1-24, Earliest Hire Dates , page 1-21

Defining a Combination of Assignment Rate Type and Basis

Use the Assignment Rate Types window to associate an assignment rate type with a rate basis for contingent workers.

Note: If you use Oracle Services Procurement to provide purchase order information for contingent workers, you do not need to perform this task.

To define a combination of assignment rate type and basis:

1. Enter a name for this combination of assignment rate type and basis.
2. Select a rate basis for the rate type. The basis (for example, Hourly Rate or Weekly Rate) identifies the period to which the rate type relates.
3. Select a rate type (for example, Standard Rate or Weekend Rate).

Note: The combination of name and rate type must be unique.

4. Save your work.

To define a contingent worker's assignment rate, you associate this combination of assignment rate type and basis with a currency and monetary value.

See: Entering Assignment Rates for Contingent Worker Assignments, page 2-72

Entering Assignment Rates for Contingent Worker Assignments

Note: This procedure applies only if you are **not** using Oracle Services Procurement to provide purchase order information for contingent workers.

If you use Oracle Services Procurement, the Assignment Rates window displays information from the purchase order line for this assignment. You cannot update this information in the Assignment Rates window.

Although you cannot pay contingent workers using Oracle Payroll, you can record their rates in Oracle HRMS. For each contingent worker assignment, you select a predefined combination of rate type and basis and associate it with a currency and monetary value, known as an **assignment rate**.

Use the Assignment Rates window.

To enter a rate for a contingent worker assignment:

1. Set your effective date to a date early enough for any historical information you want to enter.
2. Select the name that identifies the required combination of rate type and basis.
See: Defining a Combination of Assignment Rate Type and Basis, page 2-72
The Rate Type and Rate Basis fields are completed automatically.
3. Select a currency for the assignment rate.
4. Enter a monetary value for the assignment rate. For example, if the rate type is Weekend Rate and the basis is Hourly Rate, enter the hourly rate for weekend assignments.
5. Repeat steps 2 through 4 for additional assignment rates.
6. Save your work.

If you install and license Oracle Services Procurement at a later date, any rate information recorded in Oracle HRMS is no longer visible.

Starting a Placement for an Ex-Employee or Ex-Contingent Worker

Use the People window to start a new contingent worker placement for an ex-contingent worker or an ex-employee.

Note: To hire the ex-employee as a contingent work, you start a placement. To rehire an ex-employee, you use an RPA as explained in Rehiring an Ex-Employee, page 1-24. .

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

- Ex-contingent workers can begin a new placement on the day following the end of their latest placement.
- Ex-employees can begin a contingent worker placement on the day following the termination of their employment.

To start a placement for an ex-contingent worker or ex-employee:

1. Set your effective date to the placement start date.
2. Query the ex-contingent worker or ex-employee in the People window.

3. In the Action field, select Create Placement.
4. In the Person Type for Action field, select a person type. If only one person type is valid for the action, it appears automatically.
5. Save your work.

Workforce Information Management

Assignment Statuses

Statuses enable you to track the progress of your applicants, employees, and contingent workers through your enterprise. If you use Oracle Payroll, they also control how employee assignments are used during a payroll run. Oracle HRMS is installed with a number of predefined system statuses, for which you can set up multiple user statuses

Note: You do not process contingent workers in a payroll run.

When you approve and update to the database a Request for Personnel Action (RPA) for an employee, the application updates the assignment status. For example, when you approve an employee for a furlough, the status changes from active to suspend.

When you install the application, you install a set of predefined system statuses and associated user statuses.

System Statuses

There are four system statuses for employee assignments:

- **Active Assignment:** For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.
- **Suspend Assignment:** For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly, for contingent workers the suspend assignment indicates that a contingent worker is not currently working on the assignment. For example, the contingent worker may have taken an unauthorized absence or the results of an internal review placed the worker on suspended assignment.
- **Terminate Assignment:** Use this status to show that your agency no longer employs the person in that assignment. You can make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.
- **End:** If you use multiple assignments, use this status to end all but the primary assignment. This status causes the assignment to end but is not recorded. For employees, this status indicates that all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: Applicant Assignment Statuses, page 1-10.

User Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments. When you use Oracle HRMS, you only see the user statuses. There are 14 predefined user statuses for employee assignments:

Note: Do not change these user statuses. The application uses these values to update the Assignment status after you update an RPA to the HR database.

- **Active status:** Active Appointment, Detail NTE, Temporary Appointment NTE, and Temporary Promotion NTE.
- **Suspend status:** Furlough, Furlough NTE, Leave Without Pay NTE, Leave Without Pay Military, Non Pay/Non Duty Status, Sabbatical NTE, Suspension NTE, and Suspension Indefinite.
- **Terminate status:** Terminated Appointment and Separated.

As with employee assignment statuses, there is a set of system statuses for applicants:

- **Active Application:** Use this status as an application progresses through the selection stages.
- **Offer:** Use this status for your preferred candidate when you make an offer
- **Accepted:** Use this status when you have update the preferred candidate's assignment to Accepted and are ready to appoint an employee or hire a contingent worker..

Using Assignment Statuses to Control Compensation

When you define user statuses, consider how you will use them in reports, inquiries, and processing.

When you use a validation formula to validate entries to element input values, you can make the valid values for an entry dependent on the assignment status.

To use the statuses to control whether the payroll run processes an employee assignment, you choose a Payroll user status of Process or Do not Process for each user status. Additionally, in Oracle Payroll you can set up your pay calculation formulas so that a status change also changes the formula used to calculate the employee's pay.

Secondary Assignment Statuses

For analysis and reporting purposes, you can set up and use *secondary* assignment statuses, for both employee and applicant assignments. These statuses have no effect on assignment processing.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses for an employee assignment or an applicant assignment in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments), CWK_SEC_ASSIGN_REASON (for contingent workers), and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

To enable payroll processing for employees after they leave your enterprise, in your system setup you must do the following:

- Set the Termination Rule to *Final* on the element definition of all elements you want to process after the actual leaving date.

If you use Oracle Payroll and have a Payroll responsibility, you can set the Termination Rule to *Last Standard Process* for elements whose entries should close down after the last normal payroll run. Set the Termination Rule to *Final* for elements you want to process as late payments after the last normal payroll run

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:
 - the HR system status of *Terminate Assignment*
 - the Payroll system status of *Process*

Your startup data includes the user status *Terminate Process Assignment*, which matches this definition. Use this status when you terminate employment or end an assignment.

Assignment Status Types

The system has four Assignment System Status types that it maintains: Active Assign, Suspend Assign, Terminate Assign, and End Assign. Oracle Federal HR has defined other *user* assignment statuses to reflect the different nature of actions processed, which

are described in the table below:

Assignment Statuses

Assignment Status	Oracle System Status	Nature of Action Codes
Active Appointment	Active	100, 101, 107, 120, 124, 130, 132, 140-147, 150, 151, 155-157, 170, 198, 199, 500, 501, 507, 520, 524, 540-543, 546, 550, 551, 555, 570
Furlough	Suspend	471
Furlough NTE	Suspend	472
Leave With Pay NTE	Suspend	462
Leave Without Pay NTE	Suspend	460
Leave Without Pay Mil	Suspend	473
Non Pay / Non Duty Status	Suspend	430
Sabbatical NTE	Suspend	480
Separated	Terminate	300, 301, 303, 304, 312, 317, 330, 350, 356, 390
Suspension NTE	Suspend	450
Suspension Indefinite	Suspend	452
Temporary Appointment NTE	Active	108, 112, 115, 122, 148, 149, 153, 154, 171, 190, 508, 512, 515, 522, 548, 549, 553, 554, 571, 590, 703, 741, 750, 760, 762, 765, 769, 770, 772, 773
Temporary Promotion NTE	Active	703
Terminated Appointment	Terminate	351-353, 355, 357, 385

Assignment Extra Information Types

You can define as many Extra Information Types (EITs) as you require to hold information about assignments. There are also some predefined assignment EITs.

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

See: Setting Up Extra Information Types Against a Responsibility, *Configuring, Reporting, and System Administration Guide*

The predefined US Federal person EITs include:

- US Federal Assignment NTE Dates - captures Not to Exceed information, such as start dates for an NTE assignment, leave without pay, furlough, suspension, sabbatical.
- US Federal Assignment Non RPA - records information about the assignment not required to process an RPA, such as part-time indicator, whether the assignment requires key emergency personnel or a non-disclosure agreement.

You can modify values in the US Federal Assignment Non RPA and the application captures the effective dates of these manual changes. The application prevents you from deleting EIT records created by an RPA.

- US Federal Assignment RPA - stores information about the assignment when you update an appointment RPA or assignment-related RPA, such as step, tenure, pay rate determinant, and work schedule.

Defining Assignment Statuses (Assignment Window)

You define both primary and secondary user statuses. In the Assignment Statuses window you can define these statuses for both employee and applicant assignments.

Defining Primary User Statuses

To rename a user status:

1. Delete the contents of the User Status field and type in your preferred name.

To supply additional user statuses for a system status:

1. Insert a new record.
2. Type in your user status, and select a Human Resource system status.

3. If you are using iRecruitment, you can enter an external status for your applicant assignment user statuses. This status is displayed to candidates in iRecruitment. For example, you may want to create an external status of 'Interview' for applicant assignment user statuses of 'Pending Interview' and 'Interview Passed'. The candidate in iRecruitment would see the external status and the manager would see the user status names.
4. Select a Human Resource system status.
5. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.

Note: If you select a payroll system status of Do Not Process, payroll will still create assignment actions for assignments with this status. It is these assignment actions that will not be processed.

6. Save the new status.

Note: For each system status, you must have one default user status. The system automatically uses the default in certain situations. For example, when you create a new employee assignment, it automatically has the default user status corresponding to the system status Active Assignment.

When you update the assignment statuses, the application saves the changes in the PER_ASS_STATUS_TYPE_AMENDS table instead of the PER_ASSIGNMENT_STATUS_TYPES table.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate agency-defined user statuses, deselect the Active check box.

Caution: Do not deactivate user statuses predefined and used by the US Federal HR application.

Defining Secondary Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments.

To create a secondary status:

1. Insert a new record.
2. Type in a user status and do not select a system status.

The Type field displays *Secondary*.

Entering Additional Assignment Details (Assignment Window)

Once you have set up your employee's basic assignment details, you can enter additional information in the tabbed regions of the Assignment window, for example, supervisor details.

When assignment information is not applicable for contingent workers, the application hides the corresponding tabbed regions.

To change information in the GReS and Other Data window:

When an RPA is updated to the HR database, the application enters the GRE of the To Organization in the GReS and Other Data tabbed region. If a GRE is not available, the application enters the GRE of the Business Group.

1. Select the GRE (Government Reporting Entity) for the assignment from the list of values.

The GRE is the federal Employer Identification Number (EIN) that you entered for the position's organization when you set up the organization.

To enter salary information:

1. Choose the Salary Information tabbed region.
2. Enter the frequency of salary and performance reviews.

To enter supplier information for a contingent worker:

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

If you are not using Oracle Services Procurement:

1. Choose the Supplier tabbed region.

Note: The Supplier tabbed region does not display for employees.

2. Select the names of the supplier and the supplier site for the contingent worker.
3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement:

1. Choose the Supplier tabbed region.
2. Select a purchase order number for this assignment.
3. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
4. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.
5. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

To enter supervisory information:

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

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

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

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

The supervisor field is required if:

- You are using Self-Service Human Resources
- You indicated during implementation that the application send Within-Grade-Increase requests to the supervisor

Note: This information is not updated by the system. Use organization and position hierarchies to show management reporting lines.

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

To enter schedule information for a person, you can:

- Set up extensive availability information such as, shifts, schedules, and calendar events using integrated features from HRMS and Common Application Components (CAC).

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

- Set up holiday calendars, shifts, and work plans in OTL.

See: Time Management Structures, *Oracle Time and Labor Implementation and User Guide*

Alternatively, you can enter basic schedule information in various areas of Oracle HRMS, such as here in the Assignment window.

Important: The application does not use the schedule information that you can enter here to determine a worker's availability. This is for information purposes only.

The decision for which method to set up is based on knowledge of which applications use which information.

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

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

Note: If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay

Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

To enter primary assignment and miscellaneous information:

1. Choose the Miscellaneous tabbed region.
2. Enter the internal address details (such as the floor or office number), if required. The application adds the details to the location address.
3. If you are changing a contingent worker's assignment, select a reason for adding or changing the assignment. You define valid reasons as values for the Lookup Type CWK_ASSIGN_REASON (for contingent workers).
4. Select the Manager box if the assignment is at manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.).
5. By default, the first assignment entered is the primary assignment, and the Primary box is automatically checked.
6. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

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

1. Choose the Project Information tabbed region.

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

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

To enter bargaining unit and union membership information:

1. Choose the Bargaining Unit tabbed region.
2. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized collective negotiating organization.

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

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

To enter employment terms:

1. Choose the Employment Terms tabbed region.
2. Select the contract that is to be referenced by the assignment. The list of contracts is limited to those entered for the employee that have start dates on or before the assignment start date.
3. Select the agreement grade structure for the collective agreement. A window is displayed showing the grade factors for that grade structure.
4. Enter values for the grade factors. Or, choose the Combinations button and enter search criteria for one or more grade factors to display the reference grades that meet that criteria.

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

Note: Any new combinations of values that you enter will not be available for reuse with other assignments. In order to reuse a combination, you must define it as a reference grade in the Agreement Grades window.

Entering Additional Employment Information

Just as you can record additional information about people, such as their addresses, contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

1. You can make non-RPA entries to the earnings, deductions, benefits and other

elements for which the employee is eligible in the Element Entries window.

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

2. You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

See Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

3. You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

See Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

4. You can enter Extra Information about your employee's assignment using the Assignment Extra Information window.

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

5. You can enter previous employment information for your employee's using the Previous Employment window.

See Entering Previous Employment Details, page 2-59

Entering a New Assignment

You can *view* an employee's new assignments in the Assignment window.

1. **Use an RPA to enter an assignment**

You use the Request for Personnel Action (RPA) to:

- Appoint an employee
- Update the assignment information
- Assign basic compensation and benefits

2. **Use the Assignment window to complete non-RPA information**

The application prevents you from updating information in the Assignment window that requires an RPA. Protected fields also include tabbed regions that store information entered elsewhere in the application, and information that is not applicable for the product, such as Special Ceilings.

When you appoint someone, you complete extra information that stores relevant assignment information.

See: Assignment Extra Information Types, page 2-79

3. You can enter non-RPA information, such as supervisor details.

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

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

4. The Assignment window also contains a taskflow button for the Element Entries window. Here you can view the compensation and benefit elements assigned by previous actions, and assign non-RPA based benefits and pay.

Changing Assignment Information

When you process an RPA that changes an employee's assignment, such as a promotion, transfer, or move from full-time to part-time position, the application keeps a history of these changes.

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the application automatically ends any unprocessed element entries for which the employee is no longer eligible.
- The employee may have a different level of access to the application since security is based on assignment to work structures.

Note: If an assignment change causes the application to change element entries, you may not be able to save the change if a current or future pay period is closed. You must reopen the period or change your effective date to make the change.

To view changes to the assignment:

1. Change the effective date in the Assignment window to the date you want to view.

Note: Use the Assignment History window to view the history of all the employee's assignments, both currently and in any previous periods of service.

Removing Title from Person Search Lists

To remove the title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process. This concurrent process enables you to remove the title so that it does not appear in Person Search lists, such as the Find window on the Person window.

You run the Remove Title from Person's Full Name concurrent process from the Submit Requests window.

To remove title from person's full name:

1. Select Remove Title from Person's Full Name in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a legislation.
4. Choose the OK button.
5. Choose the Submit button.

Using Mass Applicant Assignment Update

Business developments, such as reorganization and relocation, often mean that you must update many records at once. The Oracle HRMS mass assignment update function enables you to update the assignment records of multiple workers or applicants in a business group using a single update request.

Process Overview

To perform a mass assignment update, you:

1. Identify the records you need to update.
2. Retrieve the identified records.
3. Specify the changes you want to make.
4. Apply your changes and submit the updated records to the database.

Status Messages

During the mass assignment update process, status messages inform you of the progress of the update. The following table describes each status message:

Status	Description
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Completed	Commit successful.
Concurrent Request Submitted	Commit being attempted.
Error Dependent Record(s)	Commit successful, but with dependent errors.
Error New Record(s)	Displayed when one or more of the new records creates an error.
Error Original Record(s)	Error while creating source.
Pending New Record(s)	Target successfully created, not validated or committed.
Pending Query	Query criteria in place, query not yet performed.
Retrieved Original Record(s)	Records retrieved successfully.
Validated New Record(s)	Target validated successfully.

Performing a Mass Applicant Assignment Update

To make mass assignment updates for applicants, use the Mass Applicant Assignment Update window.

To identify the records you need to update:

1. Enter a unique name for the mass assignment update.
2. Set your effective date (the date from which the changes will apply)..
3. If the People Group Flexfield window is not already open, click in the People Group field.
4. Specify any people group search criteria.
5. To exclude records from the result set defined by the people group search criteria,

choose Combinations.

The Enter Reduction Criteria for Long-List window appears. Values you enter or select in this window identify applicants to be removed from the group of applicants identified by the people group search criteria. For example, if you select a particular professional organization in the People Group Flexfield window, and a geographical region in the Enter Reduction Criteria for Long-List window, the result set comprises all members of the selected professional organization, minus those in the selected geographical region.

6. If the Criteria window is not already open, click in the Other Criteria field.
7. Enter or select recruitment and work structures values. In the Job Like, Position Like, Grade Like, and Grade Ladder Like fields you can enter a partial value with the wildcard character. For example, if you enter MGR% in the Job Like field, the application includes in the result set all applicants for jobs that begin "MGR".
8. Choose OK.

To retrieve the identified records

9. Choose Query. A message may appear showing how many records match your selection criteria. In this case, if the number is too high, you can cancel the query and specify further criteria to retrieve fewer records. Otherwise, choose Continue.

The application displays assignment records that meet the selection criteria.

10. To sort the results in ascending or descending alphabetical order, choose the Full Name column heading. To remove a record from the result set, deselect it. You can also use the Selection list to identify the records you want to update. For example, to deselect all currently selected records and select all currently deselected records, select Invert.

To specify the changes you want to make

11. Choose the New tab.
12. Click in the Change List field.

The Change List window appears.

13. Select or enter values in fields you want to update. Choose OK.
14. In the People Group Flexfield window, select or enter values in fields you want to update. Choose OK.
15. Select a DateTrack mode.

To apply your changes and submit them to the database

16. Choose Create New.

The updated assignment records appear.

17. To make further general changes to these records before you submit them to the database, repeat from Step 12.
18. To update information for an individual applicant, update the relevant record on the New tab.

Note: Changing the effective date means restarting the update: the application clears both the Original and the New tabs so you can enter new selection criteria.

19. To commit the updated records to the Oracle HRMS database, choose Submit.

The application creates a concurrent request and displays its identifier. View the results in the View Requests window.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

See Reviewing and Correcting Mass Assignment Update Errors, page 2-91

Reviewing and Correcting Mass Assignment Update Errors

When you submit a mass assignment update to the Oracle HRMS database, the application creates a concurrent request and displays its identifier. For each concurrent request, the application creates an error log file containing details of any errors. Note that Oracle HRMS does not apply invalid changes to records.

To view the results of a mass assignment update, use the Requests window.

To review the error log:

1. In the Find Requests window, enter the concurrent request ID of the mass assignment update.
2. In the Requests window, select the request and choose View Log.

The error log appears, showing mass assignment update errors grouped by assignment number. For each error, the log includes a description of the cause and a suggested action.

To correct the error:

Use the Mass Assignment Update window (for employees and contingent workers) or the Mass Applicant Assignment Update window.

1. Retrieve the relevant mass assignment update. Records in error have the status Error New Record(s).
2. Select the records you are correcting and deselect all other records.
3. Correct the requested changes or the DateTrack mode (as suggested in the error log) for relevant records.

Note: You cannot update records whose status is Completed.

4. Choose Submit.

Once you have successfully submitted all updated records, you cannot change this mass assignment update. To make further changes to these records, you create a new mass assignment update.

If an attempted update fails repeatedly, edit the assignment record directly.

Purging Transaction Data

Transactions such as mass updates, position transactions, and budget worksheets all store temporary data in transactions tables in your database. Once the transaction has been completed, the data in these tables is applied to permanent tables. However, a duplicate version of this data also remains in the temporary tables, taking up unnecessary space.

To clear this data once a transaction is completed, you can use one of the purge processes, depending on the type of transaction you have completed.

Note: These processes do not affect any applied data. All applied information is still available to edit in the normal windows.

Use the Submit Request window.

To run the Purge Budget Worksheets, Purge Position Transaction, or the Purge Mass Processes process:

1. Select either Purge Budget Worksheets, Purge Position Transaction, or Purge Mass Processes in the Name field.
2. Click in the Parameters field to display the Parameters window, if it does not open automatically.

3. If you are running the Purge Mass Processes process, select the type of transaction you want to purge, for example, Mass Applicant Assignment Update, or Position Copy.
4. Select the status of the transactions you want to purge. This limits the transactions purged to only those with the selected status.
5. Enter the dates between which you want transactions cleared.
6. Click OK. You can view a log file containing details of the purge from the Requests window.

Workforce and Applicant Termination

Workforce and Applicant Termination

You can terminate employees, contingent workers, and applicants and record the reasons for termination. If circumstances change, you can also reverse terminations.

Terminating an Employee or Contingent Worker

You terminate an employee or contingent worker's assignment when that person leaves your agency. When you terminate an employee assignment, you process a Separation RPA.

See: Terminating an Assignment, page 2-95

When you terminate a contingent worker's assignment, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments. If a contingent worker remains, you can continue that person's assignment by cancelling the end placement action.

See: Ending a Placement, page 2-97

If you use the Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the projected assignment end date is copied automatically from the purchase order line to the assignment. Otherwise, you can record the projected assignment end date at any time during the assignment.

Terminating an Application

When you reject an application for employment you terminate the application. Oracle HRMS enables you to terminate a single application from an applicant with multiple applications or terminate all outstanding applications for an applicant.

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

If you want to terminate all applications for an applicant you can do this by entering a termination date. This is the minimum amount of information required for this type of applicant termination. You can choose to record further information including:

- Reason for rejecting the application
- Terminated user person type
- Terminated applicant status

See: Rejecting an Application, page 1-18

You can also use Oracle HRMS to generate a formal rejection letter.

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

Canceling a Termination

If the employee decides not to leave, or the date of leaving changes, you can process a Cancellation or Correction on a termination action provided that you have not rehired that person.

The application does not end date the People Extra Information or Special Information. If you change this information after the termination and then rehire the person, the information entered in the interim is in effect as part of the person's record.

See: Canceling a Termination, page 2-97

Terminating an Assignment

In Oracle HRMS, an employee must have at least one assignment. You can end this assignment by processing a Separation RPA. When you terminate an employee, you can grant a Separation incentive as a secondary nature of action to the termination action.

See: Processing Separation Incentive Actions, *Oracle HRMS Compensation and Benefits Management Guide*

Use the RPA window.

To terminate an employee:

1. Initiate an RPA action that terminates the employee's assignment.
2. On the Requesting Info tab, enter the effective date, the employee's name, the nature of action code and the legal authority code.
3. Complete, route, approve, and update the action according to your agency's practices.

See: Processing a Request for Personnel Action, page 3-18

When the application updates a termination or Separation action to the database, it:

- Changes the person type to ex-employee
- End-dates the ex-employee's elements and removes that person from payroll
- Replaces that person's primary address in the Person window with the forwarding address entered on the RPA
- Initiates a Termination Life Event for the employee's health benefits

Note: As of the current release, the application creates this life event for HR only implementations (HR:User Type system profile set to HR User) and not for HR with Oracle Payroll implementations.

- Updates the Terminate window

If Oracle payroll is not installed (HR: User Type system profile option set to HR User), the application updates the Terminate window with the Actual and Final Process dates based on the effective date of the termination action.

If Oracle payroll is installed (HR: User Type system profile option set to HR with Payroll), the application updates the Terminate window with the Actual Process date based on the effective date of the termination action. The Final Process date is left blank, so that you can make corrections to the final payment or make other payments to the employee in the future if this is necessary.

The Final Process date is the last date on which you can process payments for a terminated employee, if you are using Oracle Payroll. To process unanticipated late payments or to make corrections, you can change the Final Process date, provided the new date does not conflict with other information held for the employee.

See: Updating an Employee's Final Process Date, page 2-98

- Routes future-dated actions back to the Personnelist

If the employee has future-dated actions, when the termination is updated to the database, the application automatically routes the future dated actions back to the Personnelist or Approver who submitted the actions for update. The Personnelist or Approver can then correct, cancel, or resubmit the actions.

Viewing Termination Records

You can only access the information stored in the Assignment window for someone who has an Active Assignment status. After you terminate an employee, you can no longer view that person's Assignment or element information unless you change the effective date in the People window to the ex-employee's period of service.

Terminating Health Benefits

When you update a Separation action, the application initiates a Termination life event. When the concurrent manager program for processing life events runs, the application de-enrolls the ex-employee from FEHB. If your system administrator has not set the concurrent program Participation Process: Life Event to run periodically, you can use the Submit Request window to run the process.

The Termination life event ends the person's health benefits as of the effective date of the Separation action.

See: Running the Participation Batch Process, *Oracle HRMS Compensation and Benefits Management Guide*

Ending a Placement

When a contingent worker leaves your enterprise, you end the period of placement in the End Placement window. This action changes the person type to Ex-contingent Worker and ends all assignments.

The ex-contingent worker's record remains in the database. You can reinstate the person to create a new period of placement.

To terminate a contingent worker:

1. Select the termination reason.

Note: If you select the termination reason Deceased but have not completed the Date of Death field in the Other tabbed region of the People window, that field is set to the actual termination date.

2. Enter the actual termination date.

3. Select a termination person type value.

Note: You enable the Termination Person Type field only when you enter the actual termination date. When you enable the field, it contains the value Ex-contingent Worker (or your enterprise's user name for this person type) by default.

4. Choose the Terminate button to complete the termination.

You can reverse a termination for a contingent worker.

See: Canceling a Termination, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

If you mistakenly add someone to the database or you want to remove all records for an ex-contingent worker, you can delete the person in the Delete Person window.

See: Deleting a Person from the System, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Canceling a Termination

If the *employee* decides not to leave, or the date of leaving changes, you can process a Cancellation or Correction on a termination action provided that you have not rehired

that person. Processing a Cancellation restores that person's active assignment status and element entries.

You can only cancel a Separation action if you have not appointed someone else to that person's position. If you have appointed someone else to the position, move the current occupant to a different position. Use the same effective date that you did when appointing the occupant to the ex-employee's position.

See: Canceling or Correcting an RPA, page 3-41

If a *contingent worker* decides not to leave, or the date of leaving changes, you can cancel a termination. You can cancel a termination at any time provided you have not rehired or started a new placement for the contingent worker.

Oracle HRMS reopens the assignments previously closed down and gives each assignment the status it had before termination. It also restores other information to its state before termination. For example, it removes the end date put on recurring element entries for the assignment. Also, when you terminate a contingent worker, future-dated changes on the assignment are not removed. This means that when you reverse a termination, Oracle HRMS reinstates the elements assigned to the employee or contingent worker prior to termination action being taken.

To cancel a termination for a contingent worker:

1. Choose the Reverse Termination button in the End Employment or End Placement window.

Note: The application clears and disables the Type and Status fields in the End Employment window and the Termination Person Type field in the End Placement window.

To change the termination date for a contingent worker:

1. Cancel the termination by choosing the Reverse Termination button in the End Employment or End Placement window.
2. Enter a new actual termination date and choose the Terminate button.

Updating an Employee's Final Process Date

You can change an employee's Final Process date, subject to the following conditions:

- The Final Process date must be later than the Actual and the Last Standard Process dates.
- You cannot change the Final Process date to earlier than completed payroll actions.

- You must specify a value for the Final Process date if the employee has a later period of service.
- If you previously entered a Final Process date equal to the Actual date, you cannot change the Final Process date to later than the Actual date.
- If you previously entered a Final Process date later than the Actual date, you cannot set the Final Process date equal to the Actual date.

Note: If you must set the Final Process date equal to the Actual date since the employee has no activity or assignment between the two dates, the best practice is to reverse terminate the employee and terminate with the new dates. You can follow the same practice to change the Final Process date to later than the Actual or the Last Standard Process date (after previously entering them equal).

You can change the final process date even when it is equal to the last standard process date. The application applies the following rules when you enter the final process date:

- The final process date cannot be earlier than the last standard process date.
- The final process date can be equal to the last standard process date.

If you increase the Final Process date, the end date of the terminated assignment is automatically extended. If you make changes to the terminated assignment between the Actual and the Final Process dates, the latest date to which you can decrease the Final Process date is one day after the last change. For example, if the Actual date is April 10 and the Final Process date is April 15, and you make a change to the assignment on April 12, the latest date to which you can decrease the Final Process date is April 13.

US and Russian Payroll Only: If you rehire an employee before the Final Process date for their previous period of service, the employee has overlapping periods of service between the rehire date and the Final Process date. You cannot change the Final Process date to earlier than or equal to the Hire date for the next period of service since this causes a gap between the overlapping periods of service. Similarly, for non-overlapping periods of service, you cannot change the Final Process date to later than or equal to the Hire date of the next period of service since this causes the periods of service to overlap.

Use the Terminate window to update an employee's Final Process date.

To update an employee's Final Process date:

1. **US and Russian Payroll Only:** If you rehired the employee before the Final Process date for their previous period of service, the Terminate window displays the service dates for all the overlapping periods of service. The dates for the latest period of service appear by default. Scroll down for the earlier periods of service.
2. Enter a new Final Process date.

3. Click Save to apply the changes

Entering Contact Information

Contact Information Overview

Oracle HRMS enables you to record the ways in which you communicate with the people in your enterprise and the people whom they have a relationship with, such as an employee's partner.

Entering People as Contacts

You enter people as contact records to identify:

- People to contact in an emergency
- Dependents of the employed person
- Beneficiaries of certain benefits, such as insurance policies or stock purchase plans
- Individuals who receive a wage attachment payment

Entering Contact Information

Entering contact information includes entering contact details for the people in your enterprise, such as their home address. As an employer, you need to record contact details so that you can contact people either by email, phone, fax or post, and for reporting purposes. For example, in the Netherlands you must record a person's house number for social insurance reporting.

Adding a City to the Database

If you are entering the address of someone living in a city or town not in the database, you must add the city or town using the Cities window. You are likely to find that cities or towns with a population of less than 250 do not exist in HRMS unless your enterprise has added them already.

US Only:

After applying the Vertex update and before applying the Oracle Quarterly Statutory Update, you use the Cities window to enter data that creates new Geocode and JIT data. Examples of the data you enter include cities, counties, school districts and zip codes. Oracle Payroll creates user-defined cities with a city code of Uxxx for geocodes with no tax implications, and creates user-defined cities with the state, county and city codes defined by Vertex for geocodes with tax implications.

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

See:Adding New Tax Information for an Existing Geocode,

Note: For US Federal HR, if your agency uses the National Finance Center (NFC) as a provider, do not add cities. NFC implementations use predefined values for cities based on duty stations.

To add a city for an address:

1. In the State Name field, select the name of the state or territory in which the city is located. For Canadian cities, select Canada in this field.
2. In the County name field, select the county in which the city is located. For Canadian cities, select the province in which the city is located.
3. Enter the city name in the City Name field.
4. If there is a single zip or post code for the city, enter it in the Zip Start field and leave the Zip End field blank.
5. If a range of zip or post codes applies to the city, enter the first code of the range in the Zip Start field, and the last code of the range in the Zip End field.
6. Save your work.

Entering People's Addresses at Sites without Oracle Payroll

All employees must have one (and only one) primary address on record at any point in time, but can have an unlimited number of secondary addresses (such as Summer or Weekend).

If Oracle payroll is not installed (HR: User Type system profile option set to HR User), the application displays the default United States International Style Address window. You use this window to enter all primary and secondary addresses for employees and their contacts at Oracle HR sites. You can also enter addresses for all the US contiguous states, Military or US Territories, as well as international addresses. The application performs standard validation of field entries, for example, for zip code length and duty station codes and names.

The application uses the US International address style for the forwarding address in a Separation action. When you update the Separation action to the database, the application updates the person's primary address with the forwarding address you indicated in the Separation action. If you have selected a non-US International address style, the complete forwarding address may not appear on the RPA.

If your agency uses the National Finance Center (NFC) as a provider, you must configure the default United States International Style Address window.

See: Defining the Personal Address Flexfield for NFC, *Oracle HRMS Configuring*,

Use the Address window to enter addresses. You can enter address information either by choosing the taskflow button on the Person form or from the RPA.

To enter an address:

1. The Style is preset to United States (International). Click the Address field to open the Personal Address window.
2. Enter address information in this window and click OK.
3. Select an address type, such as home or business.
4. To identify the person's main address, select Primary.

By default, the first address you enter is the primary address. You can only have one primary address.

Note: If your agency uses NFC as a provider, ensure that the employees primary address corresponds to the employee's primary home address. NFC uses this address for taxation purposes.

5. Save your work.

To change an address:

1. Query the address record you want to change.
2. Enter the last date the address is effective in the Date To field.
3. Make the appropriate changes.

For example, select a new address type, or click in the Address field and make the appropriate changes in the Personal Address Information window and click OK.

4. Save your work.

Entering People's Addresses at Sites with Oracle Payroll

All employees must have one (and only one) primary address on record at any point in time, but can have an unlimited number of secondary addresses (such as Summer or Weekend).

If Oracle payroll is installed (HR: User Type system profile option set to HR with Payroll), the application uses the default US Style address for the primary address and the forwarding address in a separation action. When the separation action is updated to the database, the application updates the person's primary address with the forwarding

address. If you have selected a non-US address style, the complete forwarding address may not appear on the RPA.

For cities or towns with populations of 200 or less, you may need to enter them in the database. To check whether a city or town name is in the database, query it in the Cities window.

See: Adding a City for Addresses, page 2-101

Use the Address window to enter addresses. You can enter address information either by choosing the taskflow button on the Person form or from the RPA.

To enter a US or Canadian address with full validation:

1. Set the effective date to the date the address takes effect.

The start date of the employee's primary address should be the same as or earlier than the new hire date. This preserves the integrity of the employee's records.

2. In the Address lines, enter the street name and number, and any related information such as building name or apartment number.
3. If you know the US zip code or Canadian post code, enter it in the Zip Code field. For US addresses, this restricts the listing of cities, states, and counties to those valid for the zip code. For Canadian addresses, this restricts the listing of cities and provinces to those valid for the post code. You can then select this additional address information from short lists.

Note: For Canadian addresses, CN (for Canada) always appears in the State field, the province name appears in the County field, and the post code appears in the Zip Code field.

4. If you are unsure of the zip or post code, enter the city name. For US addresses, this restricts the lists of states, counties and zip codes to those valid for the city. For Canadian addresses, this restricts the lists of provinces and post codes to those valid for the city. You can then select this additional address information from short lists.

Note: Use the Phone Numbers window instead of this window to record telephone numbers otherwise you will be maintaining two lists of numbers.

See: Adding Telephone Information, page 2-105

5. Select an address type, such as home, or weekend, or business. You can only have one address of each type at any time.
6. Check the Primary checkbox to identify the person's main address. Otherwise, leave blank. By default, the first address you enter is the Primary address.

Only one address at any time can be a person's Primary address.

7. If you know the last date this address will be effective for the person, enter it in the Date To field.
8. Save your work.

Updating Addresses

Use the Address window.

To update the primary address:

1. Enter an end date for the existing primary address.
Do not save.
2. Create the new primary address starting the next day and check the Primary check box.

Note: An employee must always have a primary address, but you cannot enter more than one primary address for the same time period.

3. Save the new primary address.

Adding Telephone Information (Phone Numbers Window)

You can enter multiple telephone numbers for people in the HRMS database. To enter telephone information for a person, use the Phone Numbers window.

Note: You cannot enter or update telephone information in the Phone Numbers window for a contact who is also an employee or contingent worker. Instead, update the relevant employee or contingent worker record.

To enter a telephone number:

1. In the Type field, select the type of the telephone device. For example, Office, Home or Fax.
2. In the Phone Number field, enter the telephone number. You can use any format for the telephone number unless specific instructions are listed below for your legislation.

US Users: You must enter telephone numbers in one of the following formats to

ensure they are included correctly on the US Magnetic Reports (for example, the State Quarterly Wage Listing).

- 222-333-4444X55
- 222-333-4444Ext555
- 222-333-4444-555

Any format is allowed.

3. In the From field, select the start date for the telephone number.
4. In the To field, optionally select the date when the telephone number is no longer valid.
5. In North America, optionally add the extension number in the last field.
6. Save your work.

If you want to maintain a history of telephone numbers for this person, be sure to add a new entry for the new telephone number and enter an end date for the existing telephone number. If you do not want to maintain such a history, simply change the information for the existing telephone number.

Note: You can only have one active record for numbers with the types Home or Work. To add a new record for these types you must end date the existing record and begin a new record on the following day.

Entering Communication Delivery Methods

Within your enterprise you can contact your employees and applicants in a number of ways. For example, you could use E-Mail, Voice Mail, Fax or Post. Using the Communications Delivery Method window you can enter the different methods of contacting a person and indicate the method they prefer.

To enter a communication delivery method for a person:

1. Enter the methods of delivering information in the Delivery Method field. You can enter as many communication delivery methods as necessary.
2. Optionally, enter the period the delivery method is valid using the start and end dates. Otherwise, the start date is the effective date and the end date is not set.
3. Select a preferred communication delivery method, if your employee or enterprise

prefers a particular form of communication. Each employee or applicant can only have one preferred communication delivery method.

4. Save the communication delivery methods for your employee or applicant.

Entering Next of Kin and Other Contacts

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

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

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

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

Creating The Same Contact Relationship More Than Once

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

Updating a Contact Relationship Start Date to Make it Earlier

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

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

To enter a contact:

1. Do one of the following:
 - Enter the name of a new person.

- Select from a list of people already entered on the system.

2. If you enter a new person:

- Enter their gender and date of birth.

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

For Romanian users only: Enter the Numerical Person Code (NPC/FRN) as the identification information.

- Select the user person type.

You can only select user person types which are set up for the system person type of Other, for example contact.

3. Enter details about the different contacts for your employee in the Contact Relationship fields.

To enter contact relationships:

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

Note: For Dutch users only, if you set up a spouse as a contact for an employee, whose full name format includes partner's prefix and surname, the full name of the employee changes automatically based on the spouse's name, if the contact relationship covers the employee's full period of employment. If it does not cover the full period the changes to the full name of the employee must be set manually on all datetrack records.

3. If you use Oracle Advanced Benefits or Standard Benefits, select a start and end reason for the relationship.
4. Select whether the contact:
 - Is the primary contact.
 - Is the recipient of a third party payment (for example, from a court-ordered deduction/wage attachment).

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

- Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependent and/or beneficiary.
- Is a beneficiary or dependent. You can only enter these fields if you do not use Standard or Advanced benefits.

5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

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

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

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

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

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

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

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

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

For Spanish users only: Record if the contact (disabled dependant or a dependant) is financially dependent on the employee. The application uses this information to

calculate the tax reductions the employee may be eligible for. You can also record if the employee is a single parent as this affects the employee's the tax-withholding rate.

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

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

8. Save your work. If a person already exists on your application with the same surname and a first name that is either the same or not entered, then a list of values is displayed that shows all the people who share the details. See: Multiple Person Records, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

What Next?

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

Using People Management Templates

Folders for Saved Search Criteria or Results

You can save a query or the results from a query to folders so that you can quickly access the people you need to work with in future work sessions. The Find window in a template form enables you to do this. The folders are added to the Data Organizer on the Summary window. You can view the people in the Data Organizer by opening the correct folder. There are two types of folder you can use.

Search Criteria Folder

This type of folder contains the search criteria for your query, such as "find all employees assigned to the Northern Sales organization". The actual results are not saved in the folder. This type of folder is dynamic because each time you open it, the query is performed again. So you always get the most up-to-date results displayed in the folder.

You can save folders into the Personal Folders branch and they will appear on the Data Organizer when you open the Summary window. You can also make these folders public so that other users can access them.

Group Folder

When you perform a query using the Find window and the results are returned, you can save that set of results or a selection of the results in a group folder. When you open that folder in future, you will always see the same set of people even though some of the people may not meet the original search criteria when you look at the folder again.

You can build upon lists of people in group folders by copying and pasting people from one folder into another. For example, suppose you have two group folders containing a fixed list of people you regularly work with. You could cut the people from one folder and paste them into the other folder leaving you with just one folder to open. You can delete folders so you could remove the empty one.

Note: You cannot make group folders public.

See: Saving Search Criteria or Search Results to a Folder, page 2-124.

Template Windows User Interface

The topics in this section describe how to use the people management templates to process workforce information for contingent workers and employees. US Federal HR specialists can use people management templates to process contingent worker

information. For employee appointments and other employee-related actions, use the Request for Personnel Action functionality. See: Request for Personnel Action Overview, page 3-1.

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

Find Window

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

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

To edit a person's details, select the record and choose the Show Details button. You can save the query, results, or a selection of the results into folders so that you can access those people again without performing the search again. See: Saving Search Criteria or Search Results to a Folder, page 2-124 for more information.

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

Important: The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

See: Finding a Person or Group of People, page 2-116.

Summary Window

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

Data Organizer

There are three root nodes in the Data Organizer:

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

People By Name, Job or Organization

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

Personal Folders

There are two types of Personal folders:

- Search Criteria

Search Criteria folders contain a query. They are dynamic. When you open the folder, the query is performed. This saves you re-entering commonly used queries in the Find window each time you need to use them.

- Group

Group folders are static. They contain the groups of people you most commonly need to work with. You can create a Group folder by saving search results or pasting people in from other folders. People in a Group folder are sorted by name.

See: Saving Search Criteria or Search Results to a Folders, page 2-124

See: Managing Your Group Folders, page 2-118.

Public Folders

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

Checklist Tab

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

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

Actions Button

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

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

- Apply for Internal Vacancy
- New Assignment

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

- New Contingent Worker Assignment

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

- Make Primary Assignment
- Activate Assignment
- Suspend Assignment

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

- Terminate Secondary Employee Assignment
- End Secondary Employee Assignment

Notify Button

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

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

Workflow for more information.

Creating New Records

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

Maintenance Window

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

Correction or Update

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

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

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

Important: This interface only enables you to update or correct the latest information about a person or assignment. If there is a future change (after your effective date) to any personal information, all personal information fields are greyed out. Similarly, if there is a future change to any assignment information, all assignment fields are greyed out. To make complex retroactive changes to history, you must use the People and Assignment windows, where all the DateTrack modes are available for corrections.

Using the Timeline Bar

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

or backwards in time.

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

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

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

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

Accessing More Field Information Using the Right Mouse Menu

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

Finding a Person or Group of People

If the Find window is not automatically displayed when you navigate to a template window, choose Find from the toolbar or from the View menu.

Note: You may have a template in which there is no Find window, depending on how the people management templates are configured at your site. If the Find option is not available, you must select a person from existing folders in the Data Organizer.

This window enables you to find a person or group of people to work with. The Details tab is displayed by default to enable you to perform a basic query. For more complex queries, you can choose the Advanced tab.

To find a person or group of people:

1. In the Basic tab, enter the search criteria you want to query on. For example, enter the person's last name to find a person or enter a job title to find a group of people assigned to, or applying for, that job.

You can enter values in as many fields as you require. The search finds people who meet all the criteria you enter.

Note: The Effective Date determines the lists of values available on fields in the Find window and which records will be returned. The date you set here also sets the calendar date when you choose the Find button. So if you navigate to another window, the date is carried over to that window. If no effective date is displayed, the Find window uses the calendar date, which you can see by clicking the Calendar icon on the toolbar.

2. Optionally, choose the Advanced tab and enter more search criteria.

For example, to find a person based on their grade, enter Grade is greater than on one line and Grade is less than on a second line. This restricts the query to a grade range.

3. Choose the Find button.

If you have entered search criteria in both the Details and Advanced tabs, the search finds people who meet both sets of criteria. For example, if you entered Northern Sales in the Organization field of the Details tab and a grade range in the Advanced tab, the search finds people assigned to the Northern Sales organization within that grade range.

The window expands to display your search results. The results are displayed in a folder so you can use the tools in the Folder menu to rearrange the columns, widen fields, and so on.

Note: Choose the Clear button to clear all fields if you want to enter new search criteria.

4. To edit a person's details, select the row and choose Show Details.

Important: The Find window contains a Secure check box, which may be hidden. If your system administrator has checked this box, you cannot see information about people outside of your security profile. If the box is unchecked, people outside of your security group may be displayed in search results, but you cannot view their records in the Summary or Maintenance windows.

5. Optionally, you can save the query, the results, or a selection of the results to a folder, which you can use again See: Saving a Query or its Results to a Folder., page 2-124.

Managing Your Group Folders

You can copy people from any folder and paste them into Group folders. You can also remove people from your Group folders. You do this using the Data Organizer in the Summary window with the Cut, Copy, and Paste commands.

To cut or copy and paste people in folders:

1. In the Data Organizer, open the folder from which you want to copy or cut people.
2. Select the person or people you want to copy or cut.
3. Choose Copy or Cut from the Edit menu, toolbar, or right mouse menu.
4. If you are adding the person or people to another folder, select the group folder in which you want to paste them.
5. Choose Paste from the Edit menu, toolbar, or right mouse menu.

Note: To delete a group folder, see: Deleting a Folder, page 2-125.

Entering Contingent Worker Information

To enter information about a new contingent worker, use the Enter Contingent Workers template. When you enter a new contingent worker, the application automatically creates a default assignment for that contingent worker.

To enter a new contingent worker:

1. Complete the name and address fields.
2. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments:
 1. Select a purchase order for this assignment.
 2. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line.
 3. Information from the purchase order and purchase order line appears automatically in the Supplier Name, Supplier Site, Projected Assignment End, and Job fields.

If you do not use Oracle Services Procurement, complete the supplier fields and the Projected Assignment End field.

3. Complete the work structures and working hours fields.
4. If you use Oracle Services Procurement, information from the purchase order line appears automatically in the Rate Basis, Rate Type, Currency, and Value fields. Otherwise:
 1. Select an Assignment Rate value. The rate basis and rate type values appear automatically. See Entering Assignment Rates for Contingent Worker Assignments, page 2-72
 2. Select a currency and enter a monetary value for the assignment rate.
5. Select Correction or Update.
6. Save your work.

Maintaining Contingent Worker Information

Use the Maintain Contingent Workers template.

To update contingent worker information:

1. Select the relevant contingent worker and choose the Show Details button.
2. Choose the Personal tab to enter or update the contingent worker's name.
3. Choose the Communication tab to enter or update home or work contact details.
4. Choose the Assignment tab to enter or update information about the worker's supplier, assignment, or work structures.

Note: If you use Oracle Services Procurement to provide purchase order information, you cannot alter assignment or supplier information obtained from the purchase order or purchase order line. However, you can select a different purchase order or purchase order line.

5. Choose the Schedule tab to update the working hours information.
6. To end the placement, choose the End Placement button.
7. Select Correction or Update.
8. Save your work.

Activating an Assignment

You can activate an assignment using the Maintain Employee windows. For example, you may want to active an employee's assignment after an employee returns from maternity leave. The Active Assignment status means that the employee is working in accordance with his or her usual working conditions.

There are two methods you can use to activate an assignment.

To activate an assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to activate. Expand the node until the assignment you want to activate is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Actions button.
4. Select Activate Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

To activate an assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to activate. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to activate the assignment.
3. Choose the Assignment tab and select the assignment you want to activate from the drop-down list.
4. Choose the Actions button.
5. Select Activate Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

Suspending an Assignment

You can suspend an assignment using the Maintain Employee windows. For example, you may want to suspend an employee's assignment while they are on maternity leave.

There are two methods you can use to suspend an assignment.

To suspend an assignment in the Summary window:

1. In the Summary window, use the Data Organizer to select the employee whose assignment you want to suspend. Expand the node until the assignment you want to suspend is displayed. Select the assignment.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Actions button.
4. Select Suspend Assignment and choose Next.
5. Select the assignment status you want to apply to the assignment and choose next.
6. Choose Finish to save your changes.

To suspend an assignment in the Maintain window:

1. In the Summary window, use the Data Organizer to select the person whose assignment you want to suspend. Use the Find window if you need to search for the person. Choose the Show Details button.
2. Set the effective date to the date upon which you want to suspend the assignment.
3. Choose the Assignment tab and select the assignment you want to suspend from the drop-down list.
4. Choose the Actions button.
5. Select Suspend Assignment and choose Next.
6. Select the assignment status you want to apply to the assignment and choose next.
7. Choose Finish to save your changes.

Checking for Duplicate People

If you enter a person in the Hiring Applicants or the Maintain Employee windows, with the same first and last name as a person who already exists on the system, a caution

message will be displayed if you have the HR: Cross Business Groups profile option set to No. If you have specified a date of birth, the caution will only be displayed if another record with the same date of birth, or no date of birth exists. If you want to see more details about the existing records use the Find Duplicate button.

Note: The caution message is displayed if there are any people with the same name throughout the system, however, the Find Duplicate button only enables you to access the details of people for whom you have security access.

If you have the HR: Cross Business Groups and HR: Cross BG Duplicate Person Check profile options set to Yes, then a list of values is displayed showing the potential duplicates across business groups. You can either select one of the records shown to link the records together to show they are the same person, or cancel the save and use the Find Duplicates button to see more details if any of the records are in your business group.

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

To check for duplicate people:

1. Enter the new person or make any required changes in the Maintain window.
2. Choose the Find Duplicate button. The system now runs a query on all the people with the same first and last name, and date of birth if specified in the Maintain window, as the person you were editing, based on your security access, and displays the results in the Find window.
3. If you want to see details of any of the people retrieved in the query, select the record and choose the Details button. You will be prompted to save any changes that are pending.

Note: If you select not to save the changes, you will lose any data entered for that person. If you are entering a new person it is recommended that you do not save the changes until you have investigated any possible duplications.

The details of the person selected in the Find window are now displayed in the Maintain window.

Note: If the Security check box is not checked on the Find window it is possible that you will see records that you are not permitted to retrieve, and hence will not be able to view in the Maintain window.

Sending a Workflow Notification

You can send an email notification to other people or job roles informing them of actions you have completed or actions they need to take. You use the Summary window of the Hiring Applicants form. The notification message is made up of details relating to the person and assignment and is usually completed as part of an action such as hiring a person.

To send a workflow notification:

1. Use the Find window to search for the person you are sending the notification about, or select them from the Record navigator in the summary window.
2. Choose the Notification button.

If you select the person node and choose the Notification button, only tokens associated with the person will be used in the message such as Last_Name. If you select the assignment node, then tokens relating to the assignment details will also be used, such as Job.

3. In the Notification window, choose the message you want to send and the person or role you want to send it to. The messages are set up in Oracle Workflow Builder.
4. Choose Preview to view how the message will appear to the recipient.
5. Choose Send to send the notification message.

Entering Visa Related Data

You can enter a large amount of visa related information, such as passport information, and visit history, using the Maintain Visa windows.

To update employee information:

1. In the Summary window, use the Data Organizer to select the employee and choose Show Details.
2. Choose the Visa Administration tab to enter information relating to a person's visa into a number of extra information types. You can enter the following information:
 - Alien Income Forecast
 - Global Work Permit
 - Passport Details

- Visa Details
- Visa Payroll Details
- Visa Residency Details
- Visa Visit History

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

3. Choose the Visa Checklist tab to enter scheduled and completed task information relating to visa holders within your enterprise.

4. Choose the Address button to add further addresses, such as the employee's primary home country address.

See: Entering Addresses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

5. Choose the Contact button to enter details of the person's next of kin and other contacts.

See: Entering Next of Kin and Other Contacts, page 2-107

6. Choose the Notify button to send notification of the visa's expiry to the employee and supervisor.

7. Save your work.

Saving Search Criteria or Search Results to a Folder

When you enter a query in the people management Find window, you can save the query or its results to a folder. The system adds the folder to the Data Organizer on the Summary window. The next time you use the Summary window, you can open the folder to work with the saved list of people (if you saved the query results) or perform the query again (if you saved the query). For more information about the types of folder, see: Folders For Saved Search Criteria or Results, page 2-111.

Perform your find using the Find window before following these steps.

To save a query to a Search Criteria folder:

1. Choose the Save As button.

The Save As window is displayed.

2. Make sure Search Criteria is selected.

3. Select a folder in which to create the new folder.
4. Enter a unique name for the folder.
5. Select Public if you want the folder displayed in the Public folders list for other users to see. A folder is also created in your Personal Folders list.
6. Choose Save.

You can see the folder in the Data Organizer when you view the Summary window. Expand Private Folders to see your new folder.

Note: If you cannot see your folder on the Summary window, right-click on the Data Organizer and choose Refresh.

To save the results of a query to a Group folder:

1. In the results list, select the people you want to add to your folder.
2. Choose the Save As button.

The Save As window is displayed.

3. Make sure Only Selected Results is selected.
4. Select a folder in which to create the new folder.
5. Enter a unique name for the folder.
6. Choose Save.

You can copy people from other folders into Group folders in the Data Organizer. See: Managing Your Group Folders, page 2-118.

Deleting a Folder

You can delete Search Criteria and Group folders from the Data Organizer on the Summary window if you no longer need to use them. You cannot delete Public folders.

To remove a folder from the Data Organizer:

1. Expand Personal Folders and select the folder to be deleted.
2. Choose Delete from the Edit menu. You can also right-click and choose Delete from the right mouse menu.

A folder does not have to be empty before you can delete it.

3. Save your work.

Creating a New Group Folder

You can create a new group folder or subfolder on the Data Organizer of the Summary window. Then you can add people to your new folder by cutting (or copying) and pasting from other folders. See: Managing Your Group Folders, page 2-118.

Note: Using the Data Organizer, you can only create new folders in the Personal Folders branch. Use the Find window to create Public folders.

To create a new folder on the Data Organizer:

1. Select Personal Folders.
2. Select a folder in which to create the new folder.
3. Right-click and choose New Folder.
4. Enter a name for your folder in the New Folder window.
5. Choose OK.
6. Save your work.

Reporting on the Workforce

The Workforce Headcount Report Set

The workforce headcount report set includes the Workforce Count Report, the Workforce Count Report (Spread Sheet Version) and the Head Count Detail Report. The reports display headcount information for your organization on a local or world-wide basis for the search parameters you specify.

The Workforce Count Reports

Both of the workforce count reports enable you to access simple workforce information for all organizations within an organization hierarchy and date range you specify. The difference between the workforce count reports is that the Workforce Count Report (Spread Sheet Version) enables you to open the report in a spreadsheet format. The reports display a breakdown of the information using the following headers:

- Organization
- Rev/Non-Rev
- Start (Total)
- End (Total)
- Net Change
- Hires
- Terminations
- Other (Net)

Important: The dates you specify must fall within one version of the Organization Hierarchy on which you are reporting.

The reports display a count of defined worker types, including all types of contingent and temporary workers. The reports also display transition information, for example the number of new hires and terminations.

The reports return a headcount value for the assignment ID based on either the assignment budget value, or the supplied TEMPLATE_HEAD FastFormula. You can create custom FastFormulas on which to return the headcount values by creating a FastFormula named BUDGET_HEAD. For more information, see Running the Workforce Count Reports, page 2-136

The Head Count Detail Report

The Head Count Detail Report enables you to display detailed headcount information for an organization hierarchy. The report displays a breakdown of the information using the following headers:

- Organization
- Division
- Rev/Non-Rev
- Beginning Head Count
- Regular
- Contract
- Temp
- New Hires
- Offers
- Vacant FTE
- Termination
- Ending Headcount
- # Change
- % Change
- Attrition Rates

Three FastFormulas are supplied with the Head Count Detail Report, that are used to control the output of the report. These are:

- HR_PERSON_TYPE_TEMPLATE which maps person types and employment categories to worker types regular, temporary and contract.
- HR_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for employees.
- HR_CWK_MOVE_TYPE_TEMPLATE which maps leaving reason to voluntary or involuntary termination types for contingent workers.

If your enterprise has different requirements to those defined in the supplied formulas,

then you can create your own FastFormulas to accurately represent the setup of your enterprise. You can define worker type mappings to person type and employment category by creating a FastFormula named HR_PERSON_TYPE. Similarly, you can create your own FastFormula to define leaving reasons by creating a FastFormula named HR_MOVE_TYPE for your employees and HR_CWK_MOVE_TYPE for your contingent workers. If you define a formula with one of these names, then it overrides the corresponding supplied formula when you run the report. For more information, see: Running the Head Count Detail Report, page 2-134

New Hire Reporting

New hire reporting is the process of reporting newly hired and rehired employees to a state agency. As an employer, you are required to report on your new hires within a certain number of days after the date of hire.

A primary purpose of new hire reporting is to ensure that individuals who are legally responsible for making child support payments are in fact making these payments by means of pay garnishments. Some states also use new hire reporting to help in detecting abuse of assistance programs such as Workers Compensation and unemployment insurance.

Payroll departments are normally responsible for submitting the new hire reports for the GREs in their enterprise. In most states, they must submit these reports within a certain number of days, usually 20 days. However some states have different reporting requirements. Oracle HRMS recommend that you verify the due date with the state to which you are filing the report.

Oracle HRMS enables you to report on your newly hired and rehired employees using the New Hire State Report and the New Hire State Magnetic Media report.

Single and Multistate Employers

Single state employers, that is, an employer who hires and employs people within one state, are required to report all new hire information to the state in which all its employees work. Multistate employers, that is, an employer who hires and employs people in two or more states, can either report all the newly hired employees to each working state or report all newly hired employees to one state.

A multistate employer who reports its newly hired employees with one state must submit their report using the New Hire State Magnetic Media report. This report uses the selected state's format to produce one report for all new hire information for each state within your GRE. Oracle HRMS recommend you contact the individual state agency to which you are reporting, as some states have different reporting electronic data requirements.

Note: If you are a multistate employer who wants to report all new hire information to one state, you must register with the DHHS

(Department of Health and Human Services). Refer to the DHHS website for more information about registering with them: www.acf.hhs.gov

Data for New Hire Reports

These reports include the following information that is required for reporting your new hires:

- Employee name, address, date of hire and social security number
- Employer name, address and federal identification number (EIN)

Note: State agencies require the GRE's federal identification number (issued by the IRS), or its SUI identification number, or both, to be able to identify it. You can enter this information for your GRE in the Organization window.

Additional information may also be included in the report, depending on the requirements of the state to which you are submitting your report. This information includes:

- Employees date of birth.
- Their jobs, hours normally worked per week, full or part time employment category, salaries, rates and pay frequency.
- The availability to the employees, and their dependents, of employer-provided health care insurance plans.
- Whether employees currently have child support obligations.
- Employer MD UI number

New Hire reports must also include the name, job and telephone number of the employee serving as the GRE's contact for new hire reporting.

Running the Full Personal Details Report Set

To create printed reports of the personal information held for one person, you can run the Full Personal Details report set. It comprises four reports that meet employees' rights to view their own personal details under data protection legislation:

- Full Person Details 1 reports on addresses and information entered in the People window, such as name, date of birth, nationality, and work telephone number.

- Full Person Details 2 reports on applications and applicant interviews.
- Full Person Details 3 reports on assignment information including periods of service, payment methods, and element entries.
- Full Person Details 4 reports on miscellaneous work information, including special information, absences, recruitment activities, and contacts.

If you do not need to see all this information for the employee, you can run individual reports rather than the report set. The Full Person Details report, Full Assignment Details report, and Full Work Details report are equivalent to reports 1, 3, and 4 in the report set, respectively. The Full Applicant Details report is equivalent to report 2 in the report set, but you can only run this as a separate report for an applicant, not an employee.

You run report sets from the Submit Request Set window.

To run the Full Personal Details report set:

1. In the Request Set field, select Full Personal Details.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the reports.
4. Enter the name of the person for whom you want to print the reports.
5. Choose the Submit Request button.

Running the Employee Summary Report

This report is a current summary of information for an employee, covering addresses, contacts, period of service, assignments, special information, personal payment methods, and element entries.

Run reports from the Submit Requests window.

To run the Employee Summary Report:

1. In the Name field, select Employee Summary.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Enter the name of the employee whose summary you want to see.
5. Choose the Submit button.

Running the Worker Organization Movements Report

The Worker Organization Movements Report shows worker movements into and out of a particular organization or organization hierarchy. Worker movements include new starters, terminations, transfers in, and transfers out for employees, contingent workers, or both.

Run the Worker Organization Movements Report from the Submit Requests window.

To run the Worker Organization Movements Report:

1. In the Name field, select Worker Organization Movements Report.
2. If the Parameters window does not open automatically, click in the Parameters field.
3. Specify the organization as follows:
 - To see information for a whole organization hierarchy, select its name and version in the Organization Structure and Version fields. Leave the Parent Organization field blank.
 - To see information for one organization, select its name in the Parent Organization field. Leave the Organization Structure and Version fields blank.
 - To see information for an organization and its subordinates in a particular hierarchy, select the name of the organization in the Parent Organization field, and the name and version of the organization hierarchy to which it belongs in the Organization Structure and Version fields.
4. Specify the period for which you want to see the information.
5. In the Worker Type field, specify whether the report should include employees, contingent workers, or both.
6. In the Worker Detail field, select:
 - Summary Only, to see only the totals for each type of movement
 - Assignment Number, to see a list of worker movements in order of assignment number
 - Worker Name, to see a list of worker movements in order of worker name
7. Choose the Submit button.

Running the Assignment Status Report

This report lists people assigned to particular organizations, jobs, positions and grades, with specific assignment statuses. If you select both applicants and employees as person types, the report prints out in two sections. Otherwise it prints for the type you select.

Run reports from the Submit Requests window.

To run the Assignment Status Report:

1. In the Name field, select Assignment Status Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Leave the Organization Structure field blank to see information about all organizations. Select an organization hierarchy name to see assignment statuses in a number of subordinate organizations.
5. If there are multiple versions, select a version.

If the effective date lies between the version's start and end dates, the report is effective as of this date. If it lies outside these dates, the report is effective as of the start date of the version you select.

6. Leave the Parent Organization field blank to see information about all organizations. Select a name in this field to see information on all subordinate organizations in the hierarchy.

Note: You must enter a value in this field if you have entered a value in the Organization Structure field, and you must leave this field blank if you left that field blank.

7. Make entries in the Group, Job, Position, Grade and Payroll fields as required.

If you leave all segments of the Group flexfield blank, you see information about employees in any groups. If you leave one segment blank you see employees with any value for that segment.

8. Enter Yes in the Primary field if you want to report on primary assignments only. Leave blank to include all assignments.
9. Select Employee, Applicant or Both in the Person Type field. This determines which sections of the report are printed.
10. Select up to four assignment statuses, or leave blank to list employees and/or

applicants with any assignment status.

11. Choose the Submit button.

Running the Head Count Detail Report

You run the Head Count Detail Report from the Submit Request window.

If the dates you enter in the Date From and Date To fields fall within one version of the organization hierarchy you define, only one page of results is returned. If, for example, the dates span more than one version of the organization hierarchy, one page of results will be returned for each version.

To run the Head Count Detail Report:

1. In the Name field, select Head Count Detail Report.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins the search.
4. Set the date up until which the report searches.
5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the type of worker which you want to report. For example, you can choose to report on employees, contingent workers, or both.
8. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
9. Select the budget type for the report.
10. Select Yes, if you want to include the top organization entered at step 6.

If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

11. Select the assignment type to include in the report.
12. Enter the reporting period in the Days Prior to End Date field. The number of days you enter determines how many days the report covers, prior to the end date of the organization hierarchy version you specify in step 4.
13. Choose the OK button.

14. Choose the Submit button to run the report.

The report displays the results for the criteria you entered.

- Organization: The top organization in the selected hierarchy.
- Division: The name of the organization below the top organization.
- Rev/Non-Rev: Indicates the headcount details in the Revenue or Non-Revenue headings. The application uses the value entered in the Job Category segment in the Job Extra Information Type to display the headcount details in Rev/Non-Rev
- Beginning Head Count: The total headcount from the date entered in the Date From parameter.
- Permanent: Employee person type with the Full Time Regular or the Part Time Regular employment category status.
- Contract: The system person type of Contract
- Fixed Term: Indicates the temporary headcount. The report uses the `HR_PERSON_TYPE_TEMPLATE` formula to calculate worker type. If a worker is not assigned an Assignment Category or a value other than Fill-Time Regular in the Assignment window, then the Headcount Details report displays the worker in the Fixed Term count.

See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

- New Hires: The new hires count within the last x days as entered in the report parameter
- Transfers In: The number of employees or workers who have moved into the selected organization hierarchy.
- Transfers Out: The number of employees or workers who have moved out of the selected organization hierarchy.
- Numbers of open and accepted offers
- Vacant FTE: Number of vacant FTE for each open requisition within the division.
- Number of voluntary and involuntary terminations
- Ending Headcount: Total headcount on the date entered in the Date To parameter.

- Change: The difference between the beginning headcount and the ending headcount.
- % Change: The percentage change in the headcount over the reporting period, calculated as: $(\text{Beginning Head Count} - \text{Ending Head Count}) / \text{Beginning Headcount}$
- Attrition Rate: The total headcount of employees or workers who have separated from the selected organization during the reporting period, calculated as: $(\text{Sum of Terminations} / \text{Sum of Beginning Headcount}) * 100$.

Running the Workforce Count Reports

You run the Workforce Count Report and the Workforce Count Report (Spread Sheet Version) from the Submit Request window.

To run the workforce count reports:

1. In the Name field, select either the Workforce Count Report or the Workforce Count Report (Spread Sheet Version). Choose the spreadsheet version if you want to open the report in a spreadsheet format.
2. Enter the Parameters field to open the Parameters window.
3. Set the date from which the report begins to search.
4. Set the date until which the report searches.

Note: The Start Date and End Date you specify must fall within one version of the organization hierarchy on which you want to report.

5. Select the organization hierarchy on which you want to report.
6. Enter the top organization.
7. Select the roll up. If yes, all organization values will be rolled up to the parent organization.
8. Select the budget type for the report.
9. Select yes, if you want to include the top organization entered at step 6.

If you set the Top Organization parameter to yes, headcount information for the top organization is included in a separate row in the report.

10. Select the assignment type to include in the report.

11. Choose the OK button.
12. Choose the Submit button to run the report.

The reports display headcount information for the parent organization and all the organizations below it in the organization hierarchy. You can choose to run the Workforce Count Report for an entire hierarchy, or from a selected parent organization within the hierarchy.

Running the Duplicate Person Report

If you are upgrading from a release prior to the PER G Minipack, then, as part of your upgrade to support the global person functionality, an entry for every person record in HRMS is made in the TCA.

See: The Person Record, page 2-4 for more information on how the HRMS and TCA schemas link together.

If your enterprise has multiple business groups and you have international employees, then you may find that, after this upgrade, you have multiple TCA party records for the same person. For example, this may occur if a person has transferred from one business group to another.

To identify potential duplicate records, you run the Duplicate Person report in the Submit Requests window.

To run the Duplicate Person report:

1. Select the Duplicate Person report in the name field.
2. Click in the Parameters field to display the Parameters window, if it does not automatically open.
3. Enter the date on which you want to run the report. The default date is the current system date.
4. Select a person for whom to run the report, or leave blank to run the report for all people in your business groups who are also in another business group.
5. Choose OK to run the report. You can view the results from the Requests window.

Running the Full Person Details Report

The Full Person Details Report provides you with accurate information about an employee's history. The report features all periods of service and changes in employment history. Employee's can request the report on an ad-hoc basis.

Run reports from the Submit Request window.

To run the Full Person Details Report:

1. In the Name field, select Full Person Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter an effective date.
4. Select the employee to be reported on.
5. Choose the Submit button.

Running the Person Full History Report

Use this report to see the personal and professional details of employees and contingent workers in your enterprise. You can include an employee's applicant history and details about the current assignment such as absence, contact, and salary information in the report. You can also see the details of multiple assignments, if any, for the employee or contingent worker.

This report highlights any information that has changed over a period of time. If your enterprise uses element sets to group together similar elements, then you can select to include only those elements from a particular set.

For contingent workers, you can see supplier details such as supplier site, purchase order number, and purchase order line, details about the periods of placement and assignment rates. You cannot view the absence and termination details for contingent workers.

Run the Person Full History Report from the Submit Request window.

To run the Person Full History Report:

1. In the Name field, select the Person Full History Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the person for whom you want to see the details.
4. Select Yes to include the details held in descriptive and key flexfields attached to a person, such as job, position, and assignment. If the flexfield structure is not defined or contains no values, you do not see these details in the report.
5. Select the element set to restrict the information to a specific group of elements. If you do not select any element set, all elements present in the employee's element entries are listed. For example, if the compensation element set includes details about salary, bonus, and stock options, you can view these details for the employee

6. Select Yes in the appropriate fields to include the following details:
 - Employee's applicant record for the current assignment
 - Employee's assignments, absences, and terminations, and contingent worker's assignments
 - Employee's salary and contingent worker's assignment rates
 - Contacts, addresses and phone numbers for employees and contingent workers
 - Employee's ethnic origin, nationality, and disability status

Otherwise select No. If you enter No, or if there are no records for that parameter, you do not see the individual records in the report.

7. Choose the Submit button.

Using the People Folders

Using the People Folder window, you can enter inquiries about the people held on Oracle HRMS. You select the fields of personal information you want to see, and position them in the order you prefer. For example, you can produce an alphabetical listing of all applicants and their gender, nationality, and disability registration.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

Note: The system administrator can create configured versions of the People Folder window so that you use each version for one person type only.

To produce lists of assignments:

1. Enter and run a query in the folder. For example, you could run the query "C%" in the Full Name field to view all people whose names begin with C.
2. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Assignments Using the Assignments Folder

Using the Assignments Folder window, you can query lists of current assignments, past assignments, or both. You select the fields of assignment information you want to see, and position them in the order you prefer. For example, you can produce a listing of all current employees ordered by organization, and by grade within organization.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

Note: The system administrator can create customized versions of the Assignments Folder window so that you use each version for one person type only.

The system administrator can also link this window in a task flow so that you use it to access other windows of employment information. Notice that if you select a past assignment in the folder, you cannot open other windows of employment information.

To produce lists of assignments using the assignment folder:

1. Select whether you want to view current assignments, past assignments or both.
2. Run the query.
The folder in the lower part of the window lists the assignments that match the selection criteria you entered.
3. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
4. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Assignments Using the List Assignments Window

In this window, you can view *current* employees and applicants. To view former employees or applicants (or both current and former), see: Using the List People By Assignments Window, page 2-141

To produce lists of assignments:

1. Select values in one or more fields in the top part of the window, and choose the Find button.

If you enter the Job, Position, Grade, or Group fields, a window opens prompting you for individual segments of the flexfield. You can enter selection criteria in one or more segments. This means that you can search on *parts* of the job name, for example.

The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Using the List People by Assignment Window

In this window you can choose whether to view current or former employees, applicants, or contingent workers. However, you must search on a whole Job, Position, or Grade name, not on segments of these flexfields. To search on segments of the flexfields, use the List Assignments window, see: Listing Assignments Using the List Assignments Window, page 2-140

To produce lists of assignments:

1. Select values in one or more fields in the top part of the window, and choose the Find button.

The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about using Folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Listing Workforce by Position

There are two windows for viewing lists of workers by position:

- List Workforce by Position
- List Workforce by Position Hierarchy

List Workforce by Position Window

To view workers in a single position, or in all positions corresponding to a job or organization, use the List Workforce by Position window.

To view worker names by position:

1. Select any combination of an organization, job, or position.
2. Choose the Find button.

The folder displays the positions that match your selection criteria, together with the holder's name employee, or contingent worker number and worker type. The worker type is similar to the person type, except that the worker type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

If there is more than one holder for a position, the number of holders is displayed in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

Note: You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

List Workforce by Position Hierarchy Window

To view lists of workers in a number of positions within a hierarchy, use the List Workforce by Position Hierarchy window.

To view lists of positions within a position hierarchy:

1. Select a position hierarchy and the highest position in the hierarchy for which you want to list workers.
2. Choose the Find button.

The folder displays all positions below the one you selected in the hierarchy. It also lists the employees and contingent workers who hold these positions as well as their worker type. The worker type is similar to the person type, except the worker

type only displays the person's active worker type. For example, the person type of *Employee.ex-applicant* displays as *Employee*.

If there is more than one holder for a position, the number of holders appears in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

Note: You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further information about Folders see: Customizing the Presentation of Data , *Oracle E-Business Suite User's Guide*

Listing Workforce by Organization

In the List Workforce by Organization window, you can view lists of employees within one organization or within all organizations below a specified level in a hierarchy you select.

To list workers in several organizations:

1. Select an organization hierarchy and select the highest organization in this hierarchy for which you want to list workers. Choose the Find button.

To list workers in one organization only:

1. Leave the Organization Hierarchy field blank and select an organization. Choose the Find button.

You can enter a query in the Workforce block to further restrict the list of employees to be displayed.

Manager Field

The Manager field identifies any worker for whom the Manager check box is checked in the Miscellaneous region of the Assignment window.

If there is more than one manager in the organization you select, the Manager field displays the number of managers. You can view the names of these managers by choosing the List icon from the Toolbar.

Type Field

The Type field displays the person type related to the worker identified in the Name field.

Organization Field

If a worker belongs to more than one organization within the hierarchy you

selected, the number of organizations appears in the Organization field. You can view the names of these organizations by choosing the List icon from the Toolbar.

Listing People by Special Information

To view a list of people who match a particular profile for one Special Information Type, use the List People By Special Information window.

Note: The system administrator can create configured versions of the List People By Special Information window so that you use each version for one information type only. For example, one version could be called List People By Technical Skills.

To list people by special information:

1. Select a Special Information Type.
2. Click in the Details field. A window opens prompting you for the details you have defined for this information type.
3. Enter values in the fields against which you want to match people, then choose OK. If you leave a field blank, it is not used in the matching process.
4. Choose the Find button.

Employees and applicants who match your selection criteria are listed in the folder in the lower part of the window. You can enter a query here to further restrict the list of people. If you have access to the Folder menu you can remove, rearrange, or resize the fields displayed.

For more information about using folders see: Customizing the Presentation of Data in a Folder, *Oracle E-Business Suite User's Guide*

Viewing a Worker's Assignment History

Use the Assignment History window to view information about a worker's assignments in both current and previous periods of service and placements. If a worker has been both an employee and a contingent worker, both types of assignment appear in the assignment history.

To view a worker's assignment history:

1. In the Find Person window, select or enter the worker's full name or number. If you select the worker's name or number from a list, you can limit the list size by selecting a value in the Current field:

- Yes includes only current workers.
- No includes only ex-workers.
- All includes both current and ex-workers.

2. Choose the Find button.

In the Assignment History window:

- This Period shows complete years and months in the current period of service or placement.
- All Periods shows complete years and months in all periods of service and placements.
- Including Breaks shows total elapsed years and months since the worker's initial hire or placement start date.

By default, Assignment History displays one row of information about each assignment in the current period of service or placement.

3. To display assignments from previous periods of service or placements, click in the Work History Start Date or End Date field and press the Down Arrow key. As the dates for previous periods of service or placements appear, related assignments appear in the Assignment History box. Use the Up Arrow key to reverse the display.

Setting up New Hire Reporting

You must set up the following information for the New Hire State Report and the New Hire State Magnetic Media report.

To set up for New Hire reporting:

1. Ensure that a federal identification number (EIN) and a SUI identification number, if appropriate, is on record for each GRE that submits new hire reports.

See GREs: Entering the IRS Identification Number, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Enter new hire reporting information for a GRE.

See: Entering New Hire Report Information for a GRE, *Oracle HRMS Enterprise and Workforce Management Guide*

3. When hiring or rehiring employees, indicate whether they

- are to be included in or excluded from new hire reporting
- have a legal obligation to pay child support.

See: Entering New Hire Report Information for Employees, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

4. Ensure that the employees you want to include in the report have the following:

- A primary assignment.
- A location for the assignment.
- A GRE for the assignment.

5. Run the new hire reports:

See: Running the New Hire State Report, page 2-146

See: Running the New Hire State Magnetic Media Report, page 2-147

Running the New Hire State Report

You run the New Hire State Report to produce information on all your newly hired and rehired employees. You can print and submit the new hire information to the state in which your employees work.

Run the New Hire State Report from the Submit Request window.

To run the New Hire State Report:

1. Select New Hire State Report in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date you want the report to run on in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which to produce the report.
4. For Iowa and Texas, enter Yes in the Dependent Health Insurance field if the employer offers health care insurance coverage to employees' dependents. Enter No if coverage is not available to dependents.
5. For Iowa and Texas, if health care insurance is available to dependents, enter in the Waiting Period field the number of days after the employee's hire date that dependents must wait before obtaining coverage. This field defaults to zero.
6. Choose the Submit button.

Running the New Hire State Magnetic Media Report

You can submit your new hire reports electronically to one of the following states: CA, FL, IL, NY, TX, AR, MI, LA, OH, PA, MD, or SC using the New Hire State Magnetic Media report. The report produces employer, new hire employee and total number information that you can submit to the reporting state.

If you are a multistate employer from one of the above states, you can choose one state to which to submit your new hire reports.

You run the New Hire State Magnetic Media report from the Submit Request window.

To run the New Hire State Magnetic Media report:

1. Select New Hire State Magnetic Media in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Select the date on which you want the report to run in the As of Date field. This date defaults to the effective date, however you can change it.
3. Select the GRE and state for which you want to produce the report.
4. Select whether you want to produce an audit report.

The audit report produces two files, the .a01 and the .a03, that you can view with a spreadsheet application. The .a01 file includes information on the employer and the total number of new hires for each state. The .a03 file includes basic employee information, such as, name and address. You can use these reports to view the information that is contained in the file to be submitted to the state agency.

The audit report would produce the following two files: o<request_id>.a01 and o<request_id>.a03.

5. If you choose Florida as the reporting state and you are a multistate employer, you must select Yes in the Multistate Employer (FL) field.
6. Select the report mode. Options available are 'D' for Draft mode and 'F' for Final mode. The default is set to 'D' for Draft.
7. Choose the Submit button.

The file that is created is in the \$APPLCSF/out directory, and has the character set EBCDIC. You can submit this file to the state agency using a diskette format. The file names for each state are:

- o<request_id>.mf file - File generated in the specified format to be submitted by the states.
- o<request_id>.a03 file - Audit file listing the employees details included in the

.mf file.

- o<request_id>.a01 file - File showing GRE details and the count of employees generated for each state.

Workforce Intelligence Key Concepts for People Management

Key Concepts for People Management Intelligence

The following concepts enable you to accurately interpret the results of the People Management intelligence reports:

- Workforce Count, page 2-149
- Workforce Gains and Losses, page 2-149
- Enterprise Selection, page 2-150
- Job Categories , page 2-151

Workforce Count

One of the most powerful features of the People Management reports is that you can define how workforce is counted.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

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

Workforce Gains and Losses

To enable you to investigate the workforce in your enterprise, the reports calculate gains and losses as follows:

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.
- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.
- **Total Workforce** is the workforce at the end of the time period.

Note: Workforce is counted using active and suspended assignments.

Enterprise Selection

You can decide which area of your enterprise to report on using the parameters of the reports. There are two different methods of enterprise selection:

- Rollup Organizations
- Rollup Each Organization

Rollup Organizations

Use the Organization or Top Organization and Hierarchy parameters, together with the Organization Rollup parameter to report on one organization, an organization hierarchy, or a section of an organization hierarchy.

To report on a hierarchy, or a section of a hierarchy, enter the top organization or hierarchy you want to report on in the report parameters. You can then decide whether or not you want to rollup all the subordinate organizations in the hierarchy by entering either Yes or No in the Rollup Organizations parameter.

In some reports you can leave the Organization parameter blank to include all organizations in the hierarchy.

Rollup Each Organization

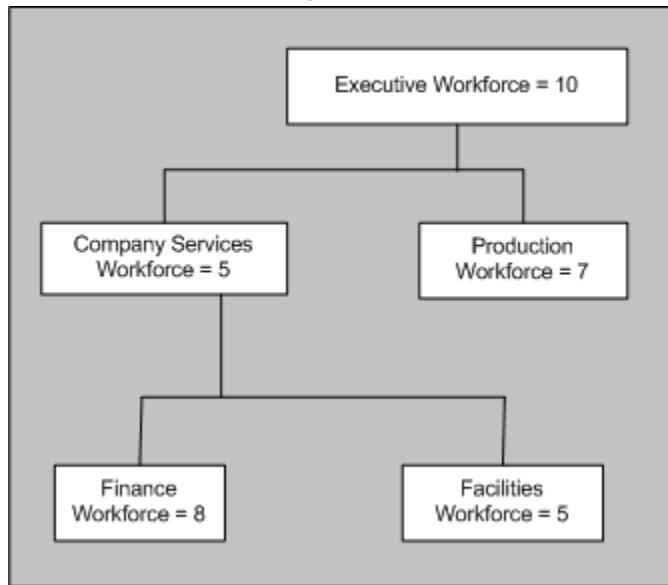
Select the area of your enterprise in the reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

You can then decide to either display information about each organization separately, or rollup information at each level of the hierarchy.

For example, consider the hierarchy for Global Industries shown in the diagram below. To select this section of the hierarchy, you enter Executive in the Organization parameter. The report automatically includes the Company Service, Production, Finance, and Facilities subsidiary organizations.

If you decide not to rollup the workforce count, the report displays each organization independently, and shows the workforce total for only that organization. The workforce total for each organization would be the same as shown in the diagram below. It shows the Executive Workforce of 10 at the top of the organization. Reporting to the Executive Workforce are the Production Workforce of 7, and the Company Services Workforce of 5. Reporting to the Company Services Workforce are the Financial Workforce of 8, and the Facilities Workforce of 5

Global Industries Hierarchy



If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

For Global Industries, the Workforce figures would be shown as in the following table:

Organization	Rolled Up Workforce
Executive (Top Organization)	35
Company Services	18
Finance	8
Facilities	5
Production	7

Job Categories

The Workforce Summary Analysis, Workforce Ratio, and Workforce Comparison HRMSi reports use job categories to investigate Workforce within your enterprise.

Note: You can also analyze how successfully you are recruiting for each job category using the Recruiting and Hiring HRMSi reports.

Oracle HRMS enables you to set up job categories for the different jobs within your enterprise. You can set up categories to classify all your jobs. So you could, for example, set up the job categories of technical, managerial, administration, and so on.

Jobs within your enterprise can fall into more than one category, and HRMS enables you to enter as many categories as you need for a job.

Use the Workforce Ratio report to analyze the percentage of workforce your enterprise has in different job categories. Use the Workforce Comparison report to analyze the absolute levels of workforce.

Both the Workforce Ratio, and the Workforce Comparison reports use assignments to calculate the workforce for each job category. For an assignment to be included it must:

- Be active or suspended.
- Have the job and job category selected.
- Fit the selection criteria entered.

For example: if you report on salaries by grade, the assignment must be for that grade.

If a job category does not have any workforce associated with it, the reports show it as a zero on the table, but do not display it in the bar chart.

Jobs may be assigned to more than one category. For example the job of Software Manager could have the job categories of technical and managerial. If you choose to report on both these categories, reports will display all assignments with the job of Software Manager in both the managerial and technical job categories.

For information on associating jobs with specific job categories, see *Defining A Job, Oracle HRMS Enterprise and Workforce Management Guide*

Workforce Intelligence for People Management

Employee Anniversary and Birthday Detail Workbook

This workbook enables you to report on employee anniversaries and birthdays by organization and supervisor hierarchy.

Worksheets

This workbook has the following worksheets

- Organization Hierarchy
- Supervisor Hierarchy

Headings and Calculations

The worksheets use the following calculations:

- **Current Service Decimal**

Calculates the employee's length of service in their latest assignment as a number of years.

- **Total Service Decimal**

Calculates the employee's length of service since their first assignment as a number of years.

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by organization. Total and current service calculations are in respect of the system date. The workbook uses the current version of the organization hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given organization hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by supervisor. Total and current service calculations are in respect of the system date. The workbook uses the current version of the supervisor hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given supervisor hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Supervisor

Employee by Supervisor Status Workbook

This workbook enables you to report on the supervisor hierarchy and salary details for your employees.

Key Concepts

See the following topics to accurately interpret this workbook:

Workforce Count, page 2-149

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

The worksheet includes employees who have an assignment on the effective date within the selected organization hierarchy.

Business Questions

Who supervises my employees in a given organization?

How many direct reports do my employees in a given organization have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

The worksheet includes employees who have an assignment on the effective date, and report directly to the selected supervisor.

Business Questions

Who supervises my employees?

How many direct reports do my employees have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date

Employee Composition Analysis Workbook

The Workforce Composition Analysis workbook investigates employee composition by assignment details, salary band, and time service band.

It enables you to:

- Compare employee assignment details across organizations.
- Analyze salary information across organizations.
- Change salary groupings.
- Report on salary and time in service bands.

Workbooks

This workbook has the following worksheets:

- By Assignment Details
- By Salary Band
- By Time In Service Band

By Assignment Details Worksheet

This worksheet enables you to analyze employee assignment details by organization, job, position, or grade.

Business Questions

What is the composition of my workforce by assignment?

Parameters

This worksheet has no parameters.

By Salary Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Business Questions

What is the composition of my employees by salary band?

Parameters

This worksheet has no parameters.

By Time In Service Band Worksheet

This worksheet enables you to analyze the distribution of employees within an

organization by length of service.

Business Questions

What is the composition of my employees by service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculations:

- **Service Band**

Populates the Service Band page item in the worksheet. This calculation creates the service bands.

Employee Hired or Terminated Detail Workbook

This workbook enables you to report on employees who terminated or were hired within two specified dates.

Basic employee primary assignment details are shown, including:

- Hire date
- Termination date
- Termination reason where applicable

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

Business Questions

Provide me with a list of employees who have been hired into or who have separated from a given organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

Related Topics

Workforce Count, page 2-149

Employee Mailing Address (United States Specific) Detail Workbook

This workbook enables you to report on employee current primary addresses in a United States legislation specific address format.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given organization and its subordinate organizations.

Business Questions

Show me the primary addresses for all employees within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given supervisor and their subordinates.

Business Questions

Show me the primary address of each employee reporting directly or indirectly to a specific supervisor.

Parameters

You must specify values for the following parameters:

- Supervisor

Employee Organization Transfer Detail Workbook

This workbook enables you to report on employee primary assignment organization transfers during a given period. The workbook output includes the employee primary assignment details before and after the transfer, including:

- Job Name
- Organization Name
- Supervisor Name

The workbook also shows the movement type (Organization Movement within Hierarchy, Organization Movement out of Hierarchy, Organization Movement into Hierarchy) for each employee transfer.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given organization and its subordinate organizations.

The worksheet output includes the employee primary assignment details before and

after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date

Supervisor Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given supervisor and their subordinates.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my supervisor hierarchy?

Parameters

You must specify values for the following parameters:

- Supervisor
- Start Date
- End Date

Employee Primary Assignment Detail Workbook

This workbook enables you to report on basic employee details by employee primary assignment.

The workbook output is grouped by location. Employee primary assignment count totals are shown for each location

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

Business Questions

Show me the primary assignment details for each employee within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Location

Supervisor Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given supervisor and their subordinates.

Business Questions

Show me the primary assignment details for each employee reporting directly or indirectly to a specific supervisor.

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date
- Location

Employee Termination Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook displays details of all terminated employees, including their basic primary assignment details at the time of termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position
- Location
- Supervisor
- Working Hours
- Termination date
- Termination reason

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

Related Topics

Workforce Count, page 2-149

Employee Termination with Comments Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook only displays terminated employees who have a salary. The workbook shows the primary assignment details at the time of employee termination, including:

- Employee Name
- Employee Number
- Organization
- Job
- Grade
- Position

- Location
- Supervisor
- Working Hours
- Salary
- Termination date
- Termination comments
- Termination reason

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Start Date
- End Date
- Budget Measurement Type

Related Topics

Workforce Count, page 2-149

Human Resource Setup Analysis Workbook

This workbook investigates specific information about your Human Resources system. The workbook enables you to:

- Analyze trends in terminations by ethnic origin
- View basic employee information
- Analyze temporary employee information
- View employee assignment information
- Report on organization hierarchy

Worksheets

This workbook has the following worksheets:

- Terminations with EEO
- Anniversary Birthdays
- HR Temp List with Tenure
- Employee Home Address
- Employee Job History
- Assignments by Organization
- Assignments by Organization Rollout

Terminations with EEO Worksheet

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

Business Questions

Why are employees separating?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type

- Termination Date Lower
- Termination Date Upper

Anniversary Birthdays Worksheet

This worksheet enables you to view birthdays and start dates of current employees. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

Business Questions

When are the birthdays and anniversaries of my employees?

Parameters

This worksheet has no parameters.

HR Temp List with Tenure Worksheet

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

Business Questions

How are my employees deployed throughout my organization?

Parameters

This worksheet has no parameters.

Employee Home Address Worksheet

This worksheet enables you to view the primary addresses of employees.

Business Questions

What are my employees' addresses?

Parameters

You must specify values for the following parameters:

- Person Name LIKE

To restrict the size of the list returned, you can enter part of the employee's name, preceded and followed by the % wildcard.

Employee Job History Worksheet

This worksheet enables you to view employee job history across your organization.

Business Questions

When were my employees assigned to a particular job?

Parameters

You must specify values for the following parameters:

- Job Name

Assignments by Organization Worksheet

This worksheet enables you to report on the assignments within your organizations.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Assignments by Organization Rollup Worksheet

This worksheet enables you emulate the rollup flexibility of HRMSi reports by using an organization hierarchy to control the information displayed.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Person/Assignment History Detail Workbook

This workbook enables you to track applicants, monitor workers' assignment history, and analyze termination history.

For a person's assignment history, you can analyze the following:

- Workforce movement within the organization

- Time between recruitment stages
- Trends via termination reasons

Worksheets

This workbook has the following worksheets:

- Person Assignment
- Application
- Employee Separation

Person Assignment Worksheet

This worksheet enables you to analyze a person's assignment history between specific dates. For each person you can examine:

- The current assignment
- Details of previous assignments

Business Questions

What has an employee been assigned to?

Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

Application Worksheet

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application.

For each employee you can examine the following:

- Total number of applications
- Number of successful applications
- Length of time between different application stages

Business Questions

Has a person previously made an application?

Parameters

You need to specify values for the following parameters:

- Start Date
- End Date

Employee Separation Worksheet

This worksheet enables you to track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can:

- Compare termination reasons to discover trends.
- Compare the length of time in an organization against time in a job.

Business Questions

Why are employees leaving the enterprise?

Parameters

This worksheet has no parameters.

Request for Personnel Actions

Requests for Personnel Action Overview

The Request for Personnel Action (RPA) automates the processing of personnel actions. The RPA resembles the familiar paper SF-52 form and is easy to use. When you process a personnel action, the application automatically generates and configures the RPA based on the Nature of Action Code (NOAC). For example, when you enter the person's name in Part B of the RPA, the application automatically populates the RPA with the applicable person, position, assignment and pay-related information.

The RPA simplifies data entry by:

- Grouping Nature of Action Codes (NOACs) into families of related actions

NOACs are grouped into families of related actions and assigned a family type that determines how the application populates data in an RPA. For example, the family type determines which fields the user must complete before updating the action to the database and which business rules run before the update occurs.

See: Nature of Action Families, *Configuring, Reporting, and System Administration Guide*

- Shading data fields to indicate where to enter data
- Automatically entering related information based on the person and position such as the pay plan, job occupation code, and grade level based on the actions' effective date
- Supplying default values for extra information
- Providing selected lists of values based on the NOAC, for example for Legal Authorities and Remarks
- Automatically entering required Remarks

- Computing pay amounts, based on the pay components such as pay table, grade, step, and PRD

See: Pay Calculation on an RPA, page 3-10

If supporting documentation is required, you can attach documents or use the Notepad for comments.

Many actions require position and person information. You can access the Person, Position, and Position Description windows from the RPA, enter data there, and return to the RPA window.

See: Request for Personnel Action Window, page 3-7

When you process an RPA, business rules ensure accurate pay calculation and validate data entry. The business rules are derived from sources such as the Guide to Processing Personnel Actions, the Guide to Personnel Data Standards, the Code of Federal Regulations, United States Code, Government Organizations and Employees, and other federal personnel pay regulatory guidelines.

Reviews and Approvals

By routing the RPA, you can ensure that you have captured and reviewed the necessary data and obtained the appropriate signatures before the final approval and update to the database. When processing the RPA, you can save the RPA to your workflow worklist or route the RPA to the next destination within your routing group.

See: RPA Signatures and Approvals, , page 3-29Refreshed Data and Data Maintenance, , page 3-29

As you route the RPA, the application maintains a history of actions. By referring to the history, you can learn what action was taken, by whom, and on what date.

See: RPA Actions Based on Roles, page 3-7

After approving an RPA, you can submit the RPA for update to the HR database. You have the flexibility of immediately updating actions with current or retroactive effective dates. If the RPA has a future effective date, the application applies the necessary checks and edits and prompts you for any missing information. When the effective date is reached, the application reapplies the edits and notifies you of any missing information. After supplying the information, you can resubmit the RPA for update. After the update, you can then process further transactions against these records, including Cancellation and Correction actions.

See: RPA Update to the Database, page 3-28, Retroactive and Future Actions, , page 3-37Correction Actions, page 3-38

Secure Transactions

Your role and responsibility assigned to your logon determine your access to the RPA and the data that you can view, enter, and change. Your assigned workflow role and

routing groups further determine which RPAs you process.

For additional security, an agency you can limit access to sensitive data fields by creating a restricted version of the RPA and associating it to a responsibility.

See: Creating a Restricted RPA, page 3-26

Reports

When you update the RPA to the database, you can have the application automatically print the Notification of Personnel Action (Standard Form-50), or you can choose to manually print the RPA or a batch of RPAs from the concurrent manager.

See: Printed Notification of Personnel Action, page 3-31

If your agency uses the National Finance Center (NFC) as an HR or payroll provider, you can generate extracts of the Notifications of Personnel Actions and submit this data to NFC.

See: National Finance Center Interface, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

To make it more convenient to view frequently accessed information about an employee, you can view information such as assignment and position details, pay and benefits, as well as the actions processed for that person in the Manager and HR Manager Views windows.

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

Key Concepts

To use the RPA, you need to understand the following key concepts and activities:

- NOACs, *Configuring, Reporting, and System Administration Guide*
- Workflow, *Configuring, Reporting, and System Administration Guide*
- Approvals, page 3-29
- Printing, page 3-31

Requests for Personnel Action

The Federal Request for Personnel Action form (RPA) automates the processing of personnel actions. The RPA resembles the familiar paper form (Standard Form 52) and is easy to use.

The application configures the RPA based on the Nature of Action family selected, the user's role and responsibility, and workflow role. Lists of values simplify data entry,

and business rules automate the form by performing calculations and validating data.

Does Oracle Federal Human Resources ensure compliance with Office of Personnel Management (OPM) regulations?

The application applies position rules, Central Personnel Data File (CPDF) rules, and business rules to ensure database integrity. The position and CPDF rules are derived from the Guide to Processing Personnel Actions, the Code of Federal Regulations, United States Code, Government Organizations and Employees, and other federal personnel regulatory guidelines such as those supporting alternative federal human resource systems.

What security measures does Oracle Federal Human Resources offer?

The user's role and responsibility as recognized by the logon restrict access to the RPA and data entered in the RPA. By selecting the user's responsibility, the administrator determines which menu the user sees and which records the user can access and modify. By assigning the user specific workflow roles and routing groups, the administrator can determine which RPAs the user processes.

For additional security, an agency can limit a user's access to sensitive data fields by creating a restricted version of the RPA and associating it to a user.

Which Nature of Action Codes does Oracle Federal Human Resources support?

The product supports the OPM-mandated Nature of Action Codes. The Nature of Action Codes (NOACs) are grouped into families of related actions. The families determine how data in the form is populated, which fields are required to update the database, what business rules run before update, and so forth.

How does the RPA automate processing personnel actions?

The application generates and configures the RPA based on the NOAC family information. The RPA form simplifies data entry by:

- Grouping Nature of Action Codes (NOACs) into families of related actions
- Shading data fields to indicate where to enter data
- Automatically entering related information based on the person and position
- Supplying default values for Extra Information
- Providing selected lists of values based on the NOAC, for example for Legal Authorities and Remarks
- Automatically entering required Remarks

- Computing pay amounts, based on the pay table, grade, step, PRD, and so forth

If supporting documentation is required, the user can attach documents or use the Notepad for comments.

Many actions require position and person information. Taskflow buttons allow users easy access to the application's person, position, and position description windows as well as the Extra Information flexfields.

Does the product support electronic signatures?

Workflow functionality enables the routing of the RPA for data entry, signature, and review before the final approval and update to the database. Based on the agency's practices, the user can route the RPA to the next destination within the routing group--an individual, groupbox, or routing list.

As the RPA is routed, the system maintains a history of actions. By referring to the history, users can learn what action was taken, by whom, and on what date.

Does the product generate printed Notifications of Personnel Action?

When the RPA is updated to the database, the user can have the system automatically print the Notification of Personnel Action (Standard Form-50) or manually print it from the Concurrent Manager.

Does the product support future and retroactive actions?

After the HR specialist approves the RPA, the HR specialist can submit the RPA for update to the HR database. For RPAs with current or retroactive effective dates, the application validates the data by applying database, position, assignment, agency, and Central Personnel Data File (CPDF) edits. If the edits pass, application immediately updates the corresponding data in the personnel records. The data is then available for further transactions, including cancellation and correction actions.

If any information is missing, error messages inform the user which data fields the user must complete or correct. After correcting the information, the user can resubmit the form for update.

If the RPA has a future effective date, the application applies the necessary checks and edits, and prompts the user if any information is missing. When the effective date is reached, the application reapplies the edits and notifies the user of any missing information. (A process the administrator sets up in the Concurrent Manager initiates the processing of future actions.)

Does the product support Cancellation and Correction actions?

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the HR specialist can

issue a Correction or Cancellation.

RPA Process

Request for Personnel Action (RPA) Window

Using the automated Request for Personnel Action standard form (RPA), supervisors and managers can process employee and position actions, and the Personnel Office can record staffing and classification actions.

The RPA online form consists of tabbed sections that correspond to the paper form. For easy reference, the RPA also includes the field numbers that appear on the paper form.

To make data entry easier, shading is used to indicate where you can enter or only view data. The following table describes the actions you can take based on the field color.

Actions based on Field Colors

Field Color	Meaning	Process Method
White	Enter or edit data	User Enterable (UE) or Auto Populate User Enterable (APUE)
Gray	View displayed data. If the field contains no data, skip the field.	Auto Populate (AP) or Non Enterable (NE)
Asterisks	Skip the field (the application hides the data)	Non display

Taskflow buttons

Taskflow buttons on the form provide easy access to related windows, such as the People and Position windows and the history of actions taken on the RPA.

You can limit users' access to taskflows when you set up responsibilities.

RPA Actions Based on Roles

The actions that you take and the amount of information that you complete on the RPA form depend on the role that you're assigned and your agency's business practices. In general, only Personnelists are assigned all roles.

You can have more than one role for a given routing group and you may belong to

more than one routing group. The following table describes the valid combinations of roles.

Valid Combination Roles

Role	Can also be assigned role(s) as
Initiator	Requester Authorizer Personnelist Approver (if assigned as Personnelist)
Requester	Initiator Authorizer Personnelist Approver (if assigned as Personnelist)
Authorizer	Initiator Requester Personnelist Approver (if assigned as Personnelist)
Personnelist	Initiator Requester Authorizer Approver
Reviewer	Initiator
Approver	Initiator Requester Authorizer Personnelist (must be assigned this role to approve actions)

Managers are often assigned the role of Initiator, Requester, Authorizer, or Reviewer. The roles of the Personnelist and Approver are usually reserved for employees in the

Human Resource Office. In general, Personnelists and Approvers are assigned all the roles so that they can fully process an RPA.

Actions Each Role Can Perform

The following table describes what actions a user can take when assigned a specific role.

Roles and Actions	
If your role is....	You can...
Initiator	Create an RPA
Requester	Sign in the Requester field, edit data, indicate interim approval
Authorizer	Sign in the Authorizer field, review and edit data, indicate interim approval
Reviewer	Review the RPA, view data only
Personnelist	Indicate interim approval, edit the RPA, complete the RPA, submit the RPA to Update to HR after the RPA has been approved.
Approver	Indicate interim approval, edit the RPA, complete the RPA, approve the RPA, submit the RPA to Update to HR

As a security precaution, if you have more than one role in a routing group, the role you have when opening an RPA from the groupbox determines the role level you have when re-routing the RPA to yourself.

For example, if you are assigned the role of Authorizer and Approver as an individual and assigned the role of Authorizer as part of a groupbox, if you route an action to yourself outside of the groupbox, you may only process the RPA as an Authorizer.

Extra Information and the RPA

The RPA form includes an Extra Information flexfield for easy entry of:

- Personnel data items that accompany the specific NOA that you're processing
- Agency data items reserved on the form for agency use (field 25 in the Employee Data section, and fields 40-44 in the Position Data section)

- Payroll, performance appraisal, and position description data items required for processing an RPA

When you initiate a Request for Personnel Action, the application displays the Extra Information fields related to the Nature of Action (NOA) family. The fields include data items required to pass the Central Personnel Data File (CPDF) edits, as well as optional data items that accompany a specific NOAC.

The application populates the RPA fields and Extra Information fields based on the effective date, or if there is none, on the current system date. The application supplies values from the database for those data items completed by earlier RPAs or by direct data entry. For example, in a promotion action to a new position, the application displays the values that you entered in the Position Extra Information flexfields when you established the position.

If you taskflow from the RPA to the Person, Position, or Assignment Extra Information, the application datetracks the Extra Information based on the RPA's effective date, or if there is none, the current system date.

Before update, the application refreshes the unchanged Extra Information with data from the database (based on the RPA's effective date). In this way, the application ensures that only new or changed data is updated to the database.

After the application updates the database, you can view the updated data in the forms, Extra Information, and Special Information fields.

See: Refreshed Data and Data Maintenance, page 3-29, Extra Information Types, *Configuring, Reporting, and System Administration Guide*

Pay Calculation on an RPA

The application automatically calculates an employee's pay when you process pay-related personnel actions. For example, calculation rules facilitate processing individual Request for Personnel Action (RPA) actions such as Appointment and Promotion actions, mass salary actions such as Annual Pay Adjustments, and automatic mass actions such as Within Grade Increases.

The pay system or pay schedule associated to the employee's position or retained grade determines the employee's compensation and sets the employee's rate of basic pay. Oracle US Federal HR includes predefined elements for pay and standard and special rate pay tables commonly used in federal agencies.

Federal Regulations and Pay Calculations

Increasingly, HR professionals must manage employees under a variety of regulatory systems. The RPA calculates the pay for an employee based on the regulatory system defined in the employee's assigned position. For example, standard and alternative HR systems have different pay cap rules for setting the total salary when the total pay exceeds the total salary cap. The application determines which system governs the

person's pay and then applies the appropriate pay calculation rules.

See: Alternative Federal HR Systems, page 3-54

Regulation updates issued by the Office of Personnel Management (OPM) affect how you compensate your employees. For example, the Federal Wage Flexibility Act (FWFA) affects how agencies apply special rate schedules. The RPA process captures the information required to calculate an employee's pay based on these regulations. When you process a salary change action or an automatic Within Grade Increases (WGI) or Quality Step Increases (QSI) for GS and equivalent pay plans, the application determines if the person's position or retained grade contains a special rate table. The pay calculation process sets the Pay Rate Determinant (PRD) based on whether locality or special rate supplement entitlements apply, and then calculates the person's pay accordingly.

Using an RPA mass process, you can update employee and position records when OPM ends a special rate table or a specific pay plan, grade and step combination.

See: Pay Table Changes, *Oracle HRMS Compensation and Benefit Management Guide*

Pay Tables and Pay Plans

You can calculate pay based on pay tables commonly used by US Federal agencies. You can also set up agency-specific pay tables and pay plans. For example, you might set up Federal Wage System (FWS) pay tables for regional pay rates.

The predefined pay tables include:

- GS and equivalent standard and special rate pay tables for national and worldwide pay plans.
- Senior Executive (ESSL) pay tables for SES equivalent pay range pay plans.
- Inspector general (IG) pay tables for inspector general pay range plan.

The application also supports FWS pay calculations and supplies FWS equivalent pay plan and grade combinations.

An Assignment extra information segment (Calculation Pay Table) stores the pay table identifier used to calculate the person's current pay.

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

Components of Total Pay

The application automatically calculates the total pay using the following elements to determine the Total Salary in an RPA:

- Basic Pay

- Locality Adjustment or Special Rate Supplement where applicable
- Adjusted Basic Pay
- Other Pay when applicable, including Availability Pay (AP), Administratively Uncontrollable Overtime (AUO), and Supervisory Differential
- Total Pay

Automatic pay calculations occur when you process an action that changes the person's:

- Position (pay table identifier or valid grade)
- Pay Rate Determinant (PRD)
- Step or Rate
- Duty Station when Locality Area and Percentage Change
- Retained Grade
- Locality Area and Locality Percentage

If you process an RPA that does not automatically calculate pay, such as an Appointment for an employee with Retained Pay, the application informs you that you must manually enter the pay information, and then opens the pay fields for direct data entry.

If you change information on an RPA that precludes automatic calculation, such as a change from non-Retained Pay to Retained Pay, the application retains the salary information and opens the pay fields for manual entry, and no further automatic changes to salary amounts occur.

Maximum Earning Calculations

The application calculates an employee's annual pay and compares it to a maximum dollar amount to determine whether the employee exceeds the maximum salary amount.

The application performs a pay cap check when it:

- Calculates the pay on an RPA or mass action such as a Mass Salary action
- Calculates the pay for awards, bonuses, and incentives

For Per Hour employees, the application calculates the Adjusted Basic Pay by multiplying the hourly rate by 2087. The resulting annualized salary is then used to check the maximum allowable amount.

- Updates a pay-related action to the HR database

When the application calculates pay, if the Adjusted Basic Pay (Basic Pay and Locality Pay) meets the pay cap limits, the application adjusts the Locality Pay. The application then compares the Total Pay to the aggregate pay limits. Different pay cap rules apply based on the regulatory system that governs the employee.

For example, for standard employees paid under Title 5, if an employee has Other Pay, such as AUO or Availability Pay, the application:

- Sets the Total Pay at the capped limit
- Displays the amount necessary to reduce the Other Pay as the Capped Other Pay on the RPA. Upon update to HR, the application stores the amount in the Other Pay element.

The application retains the actual authorized amounts for AUO, Availability Pay, and Supervisory Differential. If the pay reaches the aggregate pay limitation, then these nondiscretionary payments carryover to the following calendar year.

For information about pay caps on Adjusted Basic Pay and Total Pay for employees paid under alternative federal human resource systems, refer to *Alternative Federal HR Systems*, page 3-54

Senior Executive Service Pay

You can appoint Senior Executive Service (SES) applicants to SES pay range positions. When you process an RPA and choose an SES position, the application verifies that the resulting basic pay against the predefined Senior Executive Service (ESSL) pay table for SES equivalent pay plans and ensures that the pay falls within the minimum and maximum allowable amounts for Total Pay and Adjusted Basic Pay. For annual pay adjustments, you can process a Mass Salary action to award percentage increases.

See: *Processing a Mass Percent Pay Adjustment, Oracle HRMS Compensation and Benefits Management Guide*

If you have employees paid on SES pay tables, you must establish and then certify performance appraisal systems used as a basis for administering salary increases for these employees. When you process pay adjustment actions for SES employees, business rules apply pay cap checks based upon your agency's level of certification: full, provisional, or none.

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

If you have agency-specific pay range plans, you can define agency pay tables and pay plans and then process individual and mass salary actions for the employees on these pay plans. You define pay range tables and pay plans using the standard implementation steps.

See: *Set up Pay Plans, Grades, and Compensation, Compensation and Benefits Management Guide*

Law Enforcement Officers Pay

You can identify and appropriately pay employees serving as Law Enforcement Officers (LEO). You indicate whether a position is a Law Enforcement Officer (LEO) position by entering a 1 or 2 in the LEO Indicator field in Position Group 2 Extra Information. The pay calculation process calculates locality adjustment pay for LEO employees. The application appropriately calculates pay for LEO employees on Oracle Federal Special Rate Pay Table (GS) No. 0491 as a basic rate schedule. For example, the application uses the same rules designated for pay plan GS pay table 0000 to calculate the locality pay for employees on 0491 pay tables with GL and GG pay plans.

Inspectors General Pay

You can identify and process pay for inspector general positions. You indicate whether a position is an inspector general position by selecting the IG-00 grade. The application processes the IG type of pay plan using the Oracle Federal Standard Pay Table (AL, ES, EX, GS, GG) as a basic rate schedule. Only Pay Rate Determinant values 0 and S apply to IG Pay Plan.

Physicians and Dentists Pay

You can identify and process pay for physicians or dentists. You indicate whether a position is a physician or a dentist position by entering the Clinical Specialty, Phys and Dent Pay Range Table, and Tier fields in the US Federal Valid Grade Info Extra Information. The application processes GP (GS pay plan for physicians and dentists) and GR (GM pay plan for physicians and dentists) types of pay plan using the Oracle Federal Standard Pay Table (GP, GR) as a basic rate schedule.

Supervisory Differential Pay

When you grant an employee Supervisory Differential, you process an Other Pay action and enter the amount or percentage of differential to pay the employee. The application includes this resulting amount in the calculation of Other Pay, and stores the information in the Supervisory Differential element. If the person's basic pay changes, the application retains the amount of the Supervisory Differential.

If you process a NOAC that changes the pay (702, 703, 713, 500-599, 781, 892, 893, or 894) and the total pay exceeds the total pay cap limit, the application informs you that you must process an 810 NOAC Change in Allowance/Differential to change or terminate the percentage or amount of the authorized Supervisory Differential.

Pay Increases

As an HR manager, you compensate employees by processing individual RPA actions or mass actions, including pay increases and pay adjustments. The Date Last Equivalent Increase (DLEI) reflects the date on which employees received their latest equivalent

pay increases. The NOAC you select when processing an RPA and the regulatory system defined in the employee's assigned position determine whether the application automatically updates the DLEI data segment of the RPA extra information with the RPA effective date or whether you enter a date.

For example, the application automatically updates all appropriate Appointment actions (NOAC 100s) with the RPA effective date. With Transfer actions (NOAC 130), the DLEI does not always correspond to the RPA effective date, so you enter the DLEI date.

When you process pay increase for an employee on a standard regulatory systems, you grant pay increases based on defined waiting periods. The application updates the employee's Within Grade Increase element with the DLEI. When you process actions for employees on alternative federal HR systems, you grant discretionary pay increases based on performance. The application updates the date for the DLEI with the effective date of the RPA or with a date provided by you.

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

Restricted RPA Form

The process methods assigned to a data field on an RPA for a given NOA family initially configure the RPA form.

The product defines process methods for each Nature of Action (NOA) family based on the Office of Personnel Management (OPM) process rules. Process methods determine which fields you can enter or edit.

For security purposes, you can further restrict user access to the data on an RPA by creating restricted forms and assigning them to users. The restricted form is commonly used by the manager or the administrative staff.

Restricted forms don't change the underlying process methods, only the view of the data. You specify which fields you want to set to display only or non-display (the data is replaced by asterisks). When you restrict access to a specific field, such as data of birth, that field is restricted on all personnel actions that the user processes.

The restricted form is particularly convenient for users with roles of Initiator, Requester, and Authorizer who routinely complete selected items.

In addition to restricting the form, you can restrict the user's access to Extra Information.

Processing Methods

Changing the process method on a restricted form changes the field display attribute, but doesn't affect how the system processes data.

The following table shows what effect the display and non-display options have on the process methods.

Process Methods

Processing Method	Restricted Process Method Set to Non Display	Restricted Process Method Set to Display Only
Non enterable	No change	No change
Auto populate	Data replaced by equal number of asterisks	No change
User enterable and Auto populate user enterable	Field color is gray Data replaced by equal number of asterisks Can't update or insert data Not navigable	Field color is gray Can't update or insert data Not navigable

The RPA Routing History

The application maintains a record of each action taken on an RPA as it is processed. There are two ways to view the history:

- From the RPA, choose the History button.
- From the Workflow work list, select the RPA, choose Open to display the Workflow notification, and then choose the References button.

The Routing History contains an Action History and a Routing History. You can see the progress of a form as it's routed, including individual destinations and groupbox destinations.

Refer to the status column in the table below for an explanation of each action taken.

Statuses and Actions

Status	Action taken
Initiated	RPA is initiated
Requested	Requester signed Part A
Authorized	Authorizer signed Part A

Status	Action taken
Reviewed	Reviewer displayed the RPA
Update to HR	RPA has been submitted to the database for validation and edits
Update HR complete	RPA has successfully passed edits
Not routed	RPA was saved but not routed
No action	User did not initiate, sign, or cancel the RPA
Cancelled	RPA has been cancelled
Future action	The approved RPA is held by the system in a separate file until the effective date is reached. You can view the RPA and its history from the Approved Requests for Personnel Action window as explained in Cancelling and Correcting Future Actions, page 3-43.

Productivity Data

Productivity data permits you to assess work loads and to locate problem areas so that you can reduce conditions causing delays. The application includes functionality for entering and maintaining this data.

When you route an RPA, the application enters an RPA status in the Routing History, such as Authorized. Some actions that you take to process an RPA are external to the RPA, such as placing phone calls or obtaining confirmation from another organizations. You can record these actions using the Event History window.

When an event (action) occurs, you enter an event code and the start and end date on which the actions occurred. The application automatically supplies the event descriptions and calculates the elapsed time for you in days, skipping weekends. You can also add comments about the event in the comments field.

For example, if you make someone a job offer, you could choose an event code for that action and enter the date on which you made the job offer. When the applicant accepts, you would record the acceptance date, and the application would complete the necessary descriptions and calculate the elapsed time.

Each RPA that you initiate has an associated Event History window as does each Position that you create.

Note: Cancellations and Corrections are new actions, so the Event History for these actions is not a continuation of the original RPA.

Processing a Request for Personnel Action (RPA)

The process for completing an RPA follows the steps you usually take when processing the paper version.

If your role is an initiator, you create an RPA; otherwise you respond to an RPA routed to you. You enter the information required by your role on the RPA and when you have entered that information, you route the RPA to the Human Resource Office for regulatory data and signatures. When the action has been approved by the Personnelist and the record updated, you can print the Notification of Personnel Action, send a copy to the employee, and file it in the employee's Official Personnel Folder.

Use the Request for Personnel Action window.

To complete a Request for Personnel Action (RPA):

1. If you are an Initiator, select a Nature of Action (NOA) family from the Navigator.

The application enters the name of the NOA family in the Action Requested field and shows you which fields to enter for that NOA family. If there is only one Nature of Action code for the family, such as Change in FEGLI, the application enters the Action Requested and NOA code and description.

Note: If you are not an Initiator, open your Workflow worklist, and open an RPA routed to you or your groupbox, as described in *Querying Notifications from Your Worklist, Configuring, Reporting, and System Administration Guide*.

2. Choose a routing group, if necessary.

When you initiate an RPA, the application uses the default routing group to which you belong. If you want to route the RPA using a different routing group, choose the Routing Group icon (located on the upper left corner of the form), and select a different routing group from the Routing Groups list.

Warning: You cannot change the Routing Group after you have saved the RPA to your personal worklist or routed it to the next destination.

3. Select a person by entering his or her last name or social security number. (The application does not allow you to select your own name.)

As a shortcut, you can choose the person's name from the List of Values. Last names are listed alphabetically and by case so that, for example, the last name 'Young' precedes the last name 'de Rosa.'

The application lists any pending actions it finds for the user. Pending actions include current and future actions that haven't been updated to the database.

4. Complete the fields appropriate to the personnel action that you are processing.

Many of the fields have Lists of Values that you can choose to quickly complete the required data. If the field requires information, such as Remarks, the application displays an insertion dialog prompting you for information. Enter the requested information.

Note: Until you enter an effective date, the application date determines the information the application populates on the RPA form and the values displayed on the List of Values.

5. Use the tabs to navigate to the other RPA pages. Complete the information requested in each window.

Note: At any time, you can save the RPA to your Workflow worklist and complete it later.

6. Click the Extra Information button to save the information you have entered so far and to enter the additional data that accompanies the RPA.

Note: If you navigate to the Position or People window to change the extra information, before you begin entering data, confirm that the effective date corresponds to the action's effective date. If necessary, reset the date. See: Extra Information and the RPA, page 3-9.

7. If you are assigned the role of Requester or Authorizer, enter your signature in Part A of the RPA by choosing your name from the List of Values.
8. When you are done, save the RPA, and when presented with the choice of routing the RPA, choose Yes.

The RPA dialog presents you with the options to save the RPA to your workflow worklist. You can indicate your interim approval and continue routing the RPA to a person, groupbox, or routing list.

9. If you are assigned the role of Approver, you can choose the Approval box on the Routing dialog box.

The printed Notification of Personnel Action (SF50) includes the name, working title, and approval date of the Approver who last approved the action.

10. Update the RPA to the database.

Approvers can update the RPA to the HR database, or route the RPA to the person responsible for updating RPAs.

See: Signing, Approving, and Updating an RPA, page 3-32

11. To have the application print the Notification of Personnel Action (SF50) when it updates the RPA, choose Print Notification from the Routing dialog box.

The option to Print the Notification of Personnel Action is only available after you submit the action for update to HR. See: Printing the Notification of Personnel Action, page 3-34

Setting Effective Dates on the Request for Personnel Action (RPA)

The product supports current and future dated actions, and the processing of retroactive actions.

The application uses the effective date, or if there is none, the current system date to populate the information on the RPA form and the values displayed on the List of Values.

To set the effective date:

1. Choose a date for the Proposed Effective Date (Part A) from the List of Values calendar or enter one manually.
2. Choose a date for the Effective Date (Part B) from the List of Values calendar or enter one manually.

When the application updates the RPA to the database, it uses the Effective Date (Part B) as the record date.

Note: The application allows you to customize the view of the date format on the form; however, the printed Notification of Personnel Action displays the OPM format of month, day, year (MM_DD_YY).

RPA and the Person and Position Extra Information

The Person and Position Extra Information windows are datetracked. The effective date on the RPA determines which data the application retrieves for the RPA.

If you taskflow from the RPA to the Person or Position Extra Information to correct or supply missing information, the application automatically datetracks these windows to

the corresponding effective date.

If you are entering information *directly* in the Position and Person Extra Information windows without having first taskflowed from the RPA, then you must datetrack these windows to the appropriate effective date.

Note: To easily synchronize data entry, you can choose a baseline date for initially entering and later correcting information. For example, you might choose the date that the person was hired or the date on which you created the position.

Entering Remarks on an RPA

For Nature of Actions that require mandatory Remarks, the system supplies the Remark code and description in the Part F section of the RPA. You can't delete the mandatory Remarks.

You can enter the Remarks in any order on the RPA. When the system prints the Notification of Personnel Action, it prints the required Remarks in the order consistent with the Office of Personnel Management (OPM). It prints the non-required Remarks in the sort order indicated on the Remark Codes and Descriptions window.

If the OPM changes a Remark or authorizes a new one, you can edit the Remarks with the maintenance forms (Remark Codes and Descriptions and NOA Codes and Remarks).

See: Maintaining Remark Codes and Descriptions, *Configuring, Reporting, and System Administration Guide*.

Entering Remarks

Use the Request for Personnel Actions window.

To enter Remarks:

1. Choose a Remark from the List of Values.

If there is only one applicable Remark, the system enters it automatically.

If the Remark requires additional information, an insertion dialog box appears when you choose the Remark code. Enter the text and choose OK.

If you need to edit the text that you entered, place your cursor in the Remark code field and press the tab key to move to the description field. The dialog box appears again, and you can change the text there.

Free Form Remarks

Free form insertion of Remarks are supported for all Nature of Action Codes in Part D-Remarks by Requesting Office. You can enter up to 2000 characters and you can enter

more than one ZZZ Remark, if necessary.

Note: The Yes/No buttons in Part D are only available when processing a separation action. If you choose Yes, the system sets the Remark section to non-enterable to prevent any data entry. Attach supporting documents for the resignation or retirement using the functionality explained in Enclosing Attachments and Notes, page 3-23.

To enter your own text for a Remark:

1. Choose the ZZZ Remark to display a text entry field where you can enter the applicable text.

Removing Remarks

You remove automatically inserted Remarks by replacing them with other Remarks.

To remove Remarks:

1. Place your cursor in the Remarks field and choose the Delete icon from the toolbar.
2. Choose a different Remark from the List of Values.

Entering Legal Authority Codes (LACs) on an RPA

The product includes predefined Legal Authority Codes (LACs) and descriptions that you can choose when processing an RPA.

If the OPM changes a Legal Authority or authorizes a new code, you can edit the Legal Authority Codes with the maintenance forms.

See: Maintaining Legal Authority Codes, *Configuring, Reporting, and System Administration Guide*

Use the Request for Personnel Actions window.

To enter Legal Authority Codes:

1. Choose a Legal Authority Code from the List of Values.

If there is only one applicable code, the application enters it automatically.

The LAC codes contain multiple descriptions. Based on your requirement, you can select any one of the descriptions for a Legal Authority Code (LAC).

If the Legal Authority code requires additional information, a dialog box appears when you choose the code. Enter the text and choose OK.

To edit the text that you entered, place your cursor in the Legal Authority code field and press the tab key to move to the description field. The dialog box appears

again, and you can change the text there.

Deleting Legal Authority Codes

You delete a LAC by removing or replacing it.

To remove or replace Legal Authority Codes:

1. Position your cursor in the Legal Authority Code field and choosing the Delete icon from the toolbar.
2. Choose a different Legal Authority Code from the List of Values.

Enclosing Attachments and Notes to an RPA

When processing a RPA, you can attach a note that travels with the RPA. This note is not printed with the Notification of Personnel Action.

If you need to submit supporting documents with an RPA, you can use the attachment functionality. See: *Using Attachments, Configuring, Reporting, and System Administration Guide*.

Use the Notepad window.

To attach a note:

1. Choose the Notepad icon located on the top left corner of the RPA.
2. Choose the New button.
3. Enter the text.
4. Choose OK.

Editing a Note

Use the Notepad window.

To add or edit text:

1. Open the Notepad.
2. Choose the Append button and choose OK.

Deleting a Note

Use the Notepad window.

To delete a note:

1. Open the note.
2. Choose the Delete button and choose OK.

Processing Dual Actions

For actions that share the same effective date, the Office of Personnel Management (OPM) has authorized that agencies can process dual actions on the same RPA. For example, an agency can process a Change in Work Schedule that has the same effective date as a Reassignment.

Some actions you must process as separate actions. For example if you are processing a pay action such as a pay adjustment or a Within Grade Increase on the same effective date as a Return to Duty, Non Pay or Extension of Not To Exceed action, you must process a second action, not a dual action.

If you need to cancel or correct an RPA that contains dual actions, cancel or correct each action separately. See Cancelling or Correcting an RPA, page 3-41.

Use the Request for Personnel Actions window.

To process a dual action:

1. Follow the usual steps for initiating an RPA.

See: Processing a Request for Personnel Action, page 3-18

2. Enter a First Action Nature of Action Code.
3. Enter a First Action Legal Authority Code.
4. Enter a Second Action Nature of Action Code.
5. Enter a Second Action Legal Authority Code.
6. Continue processing, routing, and approving the RPA as usual.

Note: Certain dual actions require that you enter two Legal Authority Codes (LACs) for both Nature of Action Codes. If you receive an error message when you update a dual action to the HR database, make sure that you have entered the appropriate LACs for both actions.

See: Processing a Request for Personnel Action, page 3-18

Changing NOA Families on an RPA

If you receive an RPA that requires a different action, you can change the Nature of Action family using the Change Family button. For example, a manager may initiate a Recruit and Fill, which the Personnelist may change to an Appointment.

Because most Change of Family actions involve replacement actions based on the verbal approval of the Requestor and Authorizer, the application retains the information in Part A.

Use the Worklist window.

To change families:

1. Locate the RPA that you want to change in the worklist window and open it.
2. Choose the Change Family button.

Note: The application supports Change of Family functionality for all Nature of Action codes except Cancellation and Correction actions.

3. Choose a family of Nature of Actions from the Families list.

The application re-enters the information in Part A and clears the rest of the information.

4. Enter the Nature of Action code on the RPA.
5. Continue to enter data, following the usual process for completing and routing the RPA.

Entering Productivity Data

Each RPA that you initiate has an associated Event History window as does each Position that you create. You can enter information about actions required in processing an RPA that are external to completing an RPA, such as placing phone calls or obtaining confirmation from another organizations.

You record information about these actions using the Event History window.

To enter productivity data:

1. From the RPA or Positions window, click the Others button and select Event History in the Navigation Options window and click OK.

2. In the Event History window, choose an Event Code from the list of values. The application enters information, such as the Description and Category Code, the Start and End Date descriptions. It displays the Standard (STD) Completion Time and automatically calculates the elapsed time, skipping weekends. .
3. Enter a Start or End Date if you are beginning or ending the activity. (If the application entered a default date and that date does not reflect when you started or ended the activity, you can change the date.)
4. In the Comments field, enter information about the activity.
5. Save your information.

Creating a Restricted RPA

The product comes with a standard RPA and a restricted version, Oracle Federal Restricted Request for Personnel Action. The standard unrestricted form includes all the fields that the HR Specialist can access. The restricted form limits the data fields provided and masks commonly restricted data items, such as the social security number and date of birth.

Agencies can create their own restricted forms that limit users' access and view of specific fields and data items.

Use the Application Utilities Lookup window.

To create a restricted RPA:

1. Query GHR_US_RESTRICTED_FORM.
2. In the Code field, enter the form name that you want to appear on the US Government User Information List of Values.
3. In the Meaning field, enter the descriptive name that's listed in the List of Values for the Restricted Form Process Methods window.
4. Choose the Enabled box to enable the form.

Adding Fields to the RPA

Use the Restricted Forms Process Methods window.

To add fields to the RPA:

1. Query the Restricted Form Name field to see the list of available forms names.
2. Select a form name.

3. In the Data Field Name, choose the RPA field from the List of Values that you want to change.
4. In the Restricted Process Method, choose the field display from the List of Values. You have a choice of defining the field as:
 - Non display (data is replaced with asterisks)
 - Display only
5. Repeat steps 4 and 5 for each data field that you want to change.

RPA Approve, Update, and Print RPAs

RPA Update to the HR Database

The effective date determines when the system updates an approved action to the HR database.

- If the action is for the *current date or an earlier retroactive date*, the application updates the database and generates a Notification of Personnel Action.

The application applies the data contained in the Notification to the appropriate position and personnel records, replacing existing values with ones you entered or changed on your RPA.

- If the RPA is for a *future effective date*, the application performs edit checks at the time the action is updated and again at the effective date.

This edit check permits the application to take into account any intervening changes, such as a salary change that would affect the pay amounts.

If during the edit check, the RPA data does not pass the edits, the application routes the RPA to the Workflow Inbox of the person who submitted the RPA for update so that he or she can make the necessary corrections. Once the corrections are made, the RPA can be resubmitted for update. The application reapplies the edit checks, and if they pass, updates the data to the database.

The application holds actions with future effective dates until the date is reached. You instruct the application to process future actions by setting up a Concurrent Manager program.

Order of Processing for NOACs

If multiple actions occur on the same future effective date for an employee, for example a Mass Salary adjustment and a Within Grade Increase, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update to the database for review and possible cancellation or correction. For example, if an employee is due a Mass Salary and a promotion on the same effective date, the application would process the Mass Salary (the NOAC with the highest priority), and return the promotion to the person who updated the database.

If multiple actions occur on the same current or retroactive date for an employee, when you update the action, the application displays a message that lists actions that have been updated on that day as well as pending actions. You can then take the necessary steps to cancel or correct the other actions.

Warning: Do not change the NOAC order of processing. The order of

processing is predefined so that employee records are properly updated and maintained. Changing the NOAC order of processing may severely impact the database when you update records. For example, if you assign Pay Adjustment NOAC 894 a lower processing number than Promotion NOAC 702, the application may incorrectly calculate the employee's promotion salary.

Refreshed Data and Data Maintenance

When you open an RPA from your Worklist or route it, the application automatically refreshes the data. It lists the data that changed due to updated RPAs or manual data maintenance of person and position information.

You can also manually display new or changed data by choosing the Refresh button. You might do this after you:

- Navigate to another window, such as the Person or Position window to perform data maintenance on optional RPA data
- Enter RPA Extra Information that is also displayed in an RPA fields

For example, if you are processing a Realignment action (NOAC 790) and enter a new position's organization in the Extra Information, you can choose the Refresh button to display it on the RPA.

Inter-related Actions

When you update an RPA to the database, the application lists all RPAs updated on that date for the person or position and any pending future actions. If in reviewing this list, you decide that certain actions affect pending actions, you can cancel, correct, or resubmit these pending actions as warranted.

For example, you might wish to cancel a pending a Within Grade Increase (WGI) if you are updating a Promotion action or to correct the WGI effective date to coincide with the promotion effective date.

See: Canceling or Correcting an RPA , page 3-41

RPA Signatures and Approvals

Electronic authentication is based on system security. By basing security on roles, responsibilities, and unique logon names, the application ensures that the user's access and signature is unique to the user and under his or her control.

Electronic Authentication

The role assigned to you as a user determines your signing authority on the RPA form.

The printed RPA in Part C displays the last six Approvers and Personnelists who processed the action by saving the RPA to their Personal Inbox. The signature block includes the:

- Personnelist or approver's full name
- Personnelist or approver's office (from the Office Symbol field in the Extra Person Information flexfield)
- Date that he or she routed the action

Block C-2 of the printed RPA contains:

- Last approver's name (first name, middle initial, last name)
- Working title (from the Position Working Title field in the Extra Person Information flexfield)
- Date the approver approved the RPA

You can designate a different person to sign the RPA than the Notification of Personnel Action (NPA) by determining who approves the RPA and who updates the HR database.

The RPA displays the full name, working title, and the date of the person who last approved the action. The printed individual NPA displays the full name, working title, and the date of the person who updated the action to the HR database.

The Notifications for mass actions such as Realignments, Salary Adjustments, Transfers, and Automatic Within-Grade Increases display the name of the Approving Officer that you entered on the Personnel Office Identifier (POI) maintenance form.

RPA Approval

Only employees assigned the role of Approver can approve an RPA. Although the Approver must be assigned the role of Personnelist, in practice, the Approver is usually assigned all roles. In this way, the Approver can perform all the tasks required to process an action and update the employee's records.

The application maintains the date of approval, the data transmitted, and the name and position of the person who took the action. This information is stored as historical data and can be viewed from the Workflow worklist (References button) or from within the RPA (History button).

Printed Notification of Personnel Action

The application generates a Notification of Personnel Actions (NPA) only on appropriated positions. You can have the application print a NPA when it updates a personnel action to the HR database. You can print:

- An NPA when you submit the RPA for update on a current or retroactive action

Note: You cannot use this option to print future actions. When the effective date is reached and the application updates the database, you can print the NPA from the Concurrent Manager or the Workflow worklist.

- A single NPA from the Concurrent Manager after the application updates the database
- NPAs in batch after the application updates the database

Note: It's recommended that you do not set up a default printer for printing NPAs from the Concurrent Manager. You won't be able to override this choice when you request automatic printing.

The information you approved on the RPA is printed in the NPA. The application also:

- Prints the approving official's full name, title, and approval date
- Orders and prints the Remarks in the correct sequence
- Replaces the numeric steps for Administrative Law Judges (AL) pay plan with alphabetical designation (A-L), and numeric steps for Executive Pay (EX) plan with roman numerals.
- Prints the Name and Location of Position's Organization

The application inserts this information from the organization specified in the Position Group 1 flexfield. The organization address or hierarchy information is entered in the Organization window as the HR Organization's Extra Information US Fed Reporting Info.

See: HR Organizations: Entering US Federal Reporting Information, *Enterprise and Workforce Management Guide*

Signing an RPA

Electronic authentication is based on system security. By basing security on roles,

responsibilities, and each user's unique logon, the application ensures that the user's access and signature is unique to the user and under his or her control.

The role assigned to you as a user determines your signing authority on the RPA form.

To sign an RPA:

1. Sign Part A of the RPA by choosing your name from a List of Values in the appropriate signature block.

If your role permits you to sign as Requester and Authorizer, you can choose your name in both locations.

See: Approving an RPA, page 3-32

Approving an RPA

Only employees assigned the role of Approver can approve an RPA. If you are not an Approver, you can check the Interim Approval box.

To approve an RPA:

1. Save the RPA.
2. In the Routing window, check the Approval box.

The Approver can submit the RPA for edits and update to HR or return the RPA to the Personnelist to update HR.

Note: If you initiate and approve an action without routing it to anyone else, save the RPA to your Workflow worklist before you choose Update HR. By saving it to your worklist, you create a history of that action that is viewable later from your Workflow worklist.

To indicate interim approval:

1. Save the RPA.
2. In the Routing window, check the Interim Approval box.

Checking this box does not update the personnel records. If you do not approve the action, you can use the Notepad to explain the disapproval, and return it to the Initiator or reroute it.

Displaying Refreshed RPA Information

The RPA also contains a Refresh button so that you can:

- Refresh the information shown on the RPA that's entered from the RPA Extra Information

For example, if you are processing a Realignment action (NOAC 790) and enter a new position's organization in the RPA Extra Information, you can choose the Refresh button to display it on the RPA.

- Display data maintenance changes without having to close and then reopen the RPA to display these changes.

For example, if you notice that the year an employee attained a degree is entered incorrectly, you can taskflow to Special Information, enter the correct date, return to the RPA, and then choose Refresh to display the data change on the RPA.

To refresh the information on the RPA:

1. Choose the Refresh button.

Processing Your Own RPA

As a security measure, the system does not allow you to process your own RPA. If someone sends an RPA about you to a groupbox that you belong to, you cannot view the RPA. Similarly, the system prevents you from routing an RPA to a person whose RPA you are processing.

1. If your agency permits you to process your own RPA, you can do so by creating a dummy employee and routing the action to that person.

Printing the RPA

You can print using a postscript printer RPAs for those applicants and employees within your security profile. You can print the RPA after the RPA successfully passes the required edits and the application updates the database.

To print an RPA from the Concurrent Manager:

1. Display the Submit Requests window.
2. In the Name field, select Request for Personnel Action.
3. Enter the Employee Name in the Parameters window.

The Employee Name list of values displays applicant and employee names. You can print future-dated RPAs for applicants if the person is an applicant as of the system date, and you are using a responsibility that has a security profile set to View Applicants: ALL.

4. Choose the Submit button.

To print a current RPA:

1. Locate an RPA on the Worklist and open the Notification.
2. Open the RPA by double-clicking the Request for Personnel Action icon.
3. Print the RPA by choosing the Print icon from the toolbar.
4. Select Request for Personnel Action.
5. Select a printer, and choose the OK button.

To print an updated or cancelled RPA:

1. Locate the RPA on the Worklist.
If necessary, use the Find Notifications dialog to display all updated and cancelled actions.
2. Open the RPA by double-clicking the Request for Personnel Action icon.
3. Print the RPA by choosing the Print icon from the toolbar.
4. Select Request for Personnel Action.
5. Select a printer and choose the OK button.

Printing the Notification of Personnel Action

You print the Notification of Personnel Action for employees within your security profile using a postscript printer after the RPA successfully passes the required edits and the application updates the database.

To print the NPA automatically:

1. Select Update to HR from the Routing dialog box.
2. Select Print Notification.
3. Select a printer.

4. Choose OK.

To delay printing the NPA:

1. Select Update to HR from the Routing dialog box.
2. Deselect Print Notification.
3. Choose OK.
4. When you are ready to print the NPA, print it from the Concurrent Manager or from an updated RPA.

To print a single NPA from the Concurrent Manager:

1. Display the Submit Requests window.
2. In the Name field, select Notification of Personnel Action.
3. Enter the Employee Name in the Parameters window.
4. If you wish to have the application print the back page of the NPA, choose Yes.
5. Choose the Submit button.

To print a batch of NPAs from the Concurrent Manager:

1. Display the Submit Requests window.
2. In the Name field, select Batch Print Notification of Personnel Action.
3. Enter print criteria in one or more of the following fields:
 - Employee Name
 - NOA Code: application prints NPAs that correspond to the specified Nature of Action Code
 - POI: application prints NPAs with the specified Personnel Office Identifier
 - Organization Group: application prints NPAs for the employees in those organizations whose names include the text you enter in this field

The Organization Group and Organization fields are mutually exclusive. You enter information in one or the other.

Use Organization Group to print NPAs for more than one organization in a business group. For example, if you defined organization names with regional

designations such as Northeast Office and Southeast Office, you could print NPAs for employees located in these organization by entering east in the Organization Group.

Note: The application locates the NPAs for any organization whose name contains the text entered in Organization Group. To retrieve NPAs for the relevant organizations, make sure that you enter text found only in the names of the organizations that you wish to query.

- Organization: application prints NPAs where the position's organization is the same the one entered in this field
The Organization Group and Organization fields are mutually exclusive. You enter information in one or the other.
- Reprint Printed RPAs: application prints notifications that have been previously printed. Select No to avoid printing them.
- Back Page: application prints the back page if you enter Yes
- From Effective Date: application prints those NPAs with an effective date that falls on or before the specified end date
- To Effective Date: application prints those NPAs with an effective date that falls on or before the specified end date
- From Approval Date: application prints those NPAs with an approval date that occurs on or before the specified end date
- To Approval Date: application prints those NPAs with an approval date that occurs on or before the specified end date

4. Choose the Submit button.

The application prints the NPAs in alphabetical order by employee Last Name.

Note: Last names in the application are listed alphabetically and by case. For example, the last name "Young" precedes the last name "Arlen."

Future, Retroactive, Cancel, Correction Actions

Retroactive and Future Actions

When you initiate an RPA for someone, the application displays a list of *pending* actions (actions that have not yet been approved for that person). By reviewing the RPAs, you can determine whether pending actions affect the one that you are processing.

When you initiate a correction or cancellation that has a future or retroactive effective date, the application displays a list of *approved* RPAs. By reviewing the RPAs, you can determine whether these actions need to be cancelled or corrected.

The Approved Request for Personnel Actions window lists the approved actions for each person you query, including:

- All future RPAs that have been approved
- Notification of Personnel Actions that have an effective date later than the one you are correcting or canceling
- Notification of Personnel Actions where the Nature of Action is the second Nature of Action of a dual action

Retroactive Actions

Retroactive actions allow you to make necessary adjustments to an employee's record. They are processed the same as other actions, with the exception that the effective date of a retroactive action is earlier than the current date. When the action is approved and submitted as an update to HR, the application performs the usual CPDF edits.

If you rehire an ex-employee and need to change that person's record, it is recommended that you process an RPA based on the current Appointment, and not a retroactive action for the previous Appointment. For information about retroactive actions and corrections to intervening actions, refer to Processing Retroactive Actions, page 3-41, and Canceling or Correcting an RPA, page 3-41.

Future Actions

HR Managers and Administrators often prepare RPA transactions in advance, for example, in expectation of a mass pay adjustment based on newly released pay table updates. A future action is an RPA that has an effective date later than the current date. In practice, it is usually an action with an effective date later than current pay period.

You process future actions the same as any other Nature of Action, with the exception that you set the effective date later than the current date. You initiate a future action, route it, approve it, and update it to HR. When the application runs the Process Future

Dated RPA concurrent process (based on the frequency established by your system administrator), the application identifies the actions due for update, performs the necessary CPDF edits and updates the actions to the HR database.

See: Scheduling Future Dated RPA Actions, page 3-39

At the time of update, the application routes any pending RPAs for the employee to the person who submitted the actions for update. This person can then review the RPAs and take appropriate action, Correcting, Canceling, or resubmitting the RPAs for update.

If multiple actions occur on the same future effective date for an employee, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update for review and possible Cancellation or Correction.

After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager.

See: Printing the Notification, page 3-31

Correction Actions

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the Personnelist can issue a Correction. The Approved Requests folder lists the original RPA, Correction, and Cancellation actions performed against it, and the NOAC order in which the RPAs were processed.

When you process a Correction, you can update any editable field, including an employee's first, middle, and last names as well as their Social Security Number and Date of Birth. It is recommended that you use the Correction personnel action to change data items for an employee's Person, Assignment, or Position record rather than enter manual changes in the Person, Assignment or Position windows. When you update the RPA action to the HR database, the application updates the employee's record and maintains a history of those changes.

Retroactive and Intervening Corrections

When you process a Correction to an action, the application uses the To Side position information of the most recent NPA. The application uses the From Side only when the NPA is a Cancellation of an Award, Separation, or Non Pay Duty Status action.

If several intervening RPAs have the same effective date, you can refer to the NOAC Process Order number in the Approved Requests for Personnel Action window to determine the sequence in which to Cancel or Correct the RPAs.

Note: If you have several intervening actions with the same effective date, the element displays the most recent updated value. The

application only changes the element when the final intervening action is updated, not for the ones with lower process order numbers.

Position data that you change manually in the Position window is not considered a retroactive change. To include those data item changes in an action, Cancel the original RPA and process a new action.

Processing Future Actions

You can process actions with future effective dates to prepare RPAs in advance. A future action is an RPA that has an effective date later than the current date. In practice, it is usually an action with an effective date later than current pay period.

Use the Submit Requests window.

To process a future action:

1. Initiate an action and enter an effective date later than the current date.

Until you enter an effective date, the application populates the RPA with information based on the current date. Prior to entering the effective date, you can view information for a later or earlier date by date tracking the RPA.

2. Process the action as you would any other RPA completing, approving, and updating the action.

See: Processing a Request for Personnel Action, page 3-18

When the application runs the Process Future Dated RPA concurrent process for the action's effective date, the application reapplies CPDF edits to validate the information contained in the RPA. After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager

See: Setting the Frequency for Processing Future Dated Actions, page 3-39

Scheduling Future Dated RPA Actions

If you prepare RPAs in advance of the effective date, you can have the application update the actions to the database when the effective date is reached. To have the application process future-dated RPAs, you specify how often the application retrieves and updates to the database those RPAs that have reached the effective date. For example, you might schedule the process to run nightly, and the application would update those RPAs effective that day.

The number of transactions due for update on a given day may run into the thousands, such as a mass salary update. To improve the performance and expedite the number of transactions run, you can specify the number of batches to run simultaneously (number

of threads), and the number of transactions in each batch (batch size).

You do not have to belong to the groupbox of the user who initiated the RPA; the responsibility you choose when logging onto the application determines which future-dated RPAs you can schedule. When you log in with a:

- Secure view responsibility, you can schedule the process for future-dated RPAs created in that secure view responsibility

The application retrieves those RPA records where the business group ID of your current login matches the business group ID of the RPA originator's login.

- Non-secure responsibility, you can schedule the process for all future-dated RPAs
If you have set up cross-business group functionality, the process runs for RPAs in all business groups. Otherwise, it runs for RPAs in your current login's business group.

Use the Submit Requests window.

To schedule the process for updating future dated actions:

1. In the Name field, select Process Future Dated RPAs from the list of values.
2. In the Parameters field, enter the:
 - Personnel Office ID
By specifying the POI, you limit the RPAs processed to those administered by that personnel office.
 - Batch Size, the number of transactions in each batch
The default batch size is 1000.
 - No. of Threads, the number of batches to run simultaneously
The default number of threads is 10.
3. To define a schedule, set the Run the Job options to run a request as soon as possible, at a specific time, or repeatedly at specific intervals.
4. Specify the Completion Options.
5. Choose the Submit button.

If multiple actions occur on the same future effective date for an employee, the application processes the NOAC with the highest priority and returns the other NOACs to the person who submitted the action for update. The recipient can then review, and if necessary process a Cancellation or Correction action.

When the application processes the actions that are effective for that day, the

application reapplys CPDF edits to validate the information contained in the RPA. To account for any system down-time, the application also updates any actions with earlier effective dates that might have been skipped when the system was off-line.

If you have multiple POIs, you can repeat these steps to set up a processing schedule for each appropriate POI.

Processing Retroactive Actions

Retroactive actions allow you to make adjustments to an employee's record that occur earlier than the current date.

Note: For rehired ex-employees, do not process retroactive actions to change the person's record. Instead process an RPA based on the current Appointment. See Rehiring an Ex-Employee, page 1-24

To process a retroactive action:

1. Initiate an action and enter an effective date earlier than the current date.

The application populates the RPA with information based on the current date until you enter the effective date. Prior to entering the effective date, you can view information for an earlier date by datetracking the RPA.

2. Process the action as you would any other RPA completing, approving, and updating the action.

When the action is approved and submitted as an update to HR, the application performs the usual CPDF edits.

For retroactive action in which you select and then update information about an employee, the application informs you if the employee has intervening action. You may need to review and subsequently Cancel or Correct these actions depending on the purpose or details included in the retroactive personnel action.

For information on processing retroactive and intervening correction actions, see Correcting an NPA, page 3-44.

Cancelling an NPA

If the Servicing Personnel Office determines that information on a Notification of Personnel Action is inaccurate or an action is invalid or improper, the Personnelist can issue a Cancellation. The Approved Requests folder lists the original RPA, Correction, and Cancellation actions performed against it, and the NOAC order in which the RPAs were processed.

If you Cancel a *non-Appointment* action, the application Cancels the action and any

Corrections made to it. If you Cancel an *Appointment* action, the application automatically Cancels all subsequent Approved personnel actions and Corrections and generates an NPA for the starting original action. The application does not generate NPAs for the subsequent actions, but marks them as Canceled so that they are no longer listed in the Approved Requests for Personnel Action window. As a reminder, if you do Cancel an Appointment action, delete any pending RPA's for that person. (Open a pending RPA from your Workflow worklist and remove the employee's name, then delete the RPA.)

To cancel an NPA:

1. Select Cancellation/Correction from the Navigator.
2. In the Find window, enter query criteria for the Name or Social Security. You see a list of Approved and future actions. A processed status indicates the action has been Approved and updated to the HR database; a pending status indicates a future action.
3. In the Personnel Actions region, click Completed, Pending, or All to specify the type of actions that you wish to view for that employee.
4. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action you want to Cancel. You can only process RPAs for which you are part of the original routing group.

Note: If you are canceling dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.

5. Choose the Cancellation button.

The RPA opens with the Cancellation Nature of Action entered. Because the Nature of Action is to withdraw the action, you cannot change the Nature of Action family or the data in the form.

6. Route, approve, and submit the RPA for update as you would other RPAs.

Note: When you close the Cancellation action, the application places it in your Workflow Worklist where you can continue to work on it. If you delete the Cancellation action before approving and updating it to the database, the application restores the original approved action to the Approved Requests for Personnel Action window.

Canceling or Correcting Future Approved Actions

The application lists future approved actions in the Approved Requests for Personnel Action window. This window lists the approved actions for each person queried, including:

- All-future approved RPAs
- NPAs that have an effective date later than the one that you are canceling or correcting
- NPAs where the NOAC is the second NOAC of a dual action.

See: Processing Future Actions, page 3-39

Canceling Approved Future Actions

Use the Approved Requests for Personnel Action window.

To cancel an approved future action:

1. Select Cancellation/Correction from the Navigator.

The Approved Requests for Personnel Action window appears.

2. Query the future action you want to cancel by entering the query criteria in the Name or Social Security field.

You see a list of approved and future actions. A pending status indicates a future action.

3. From the Approved Requests for Personnel Action window, select the future RPA that you want to cancel.

4. Choose the Reroute button to reroute the RPA to the person who submitted the RPA for Update to HR.

Cancellation and Correction actions remain in the action's original routing group.

5. To cancel the RPA, the person who submitted the RPA for update can route the RPA to the Approver for cancellation. (The Approver opens the RPA and deletes it by choosing the Delete Record icon from the toolbar.)

The action is listed as cancelled in the History for that action.

Correcting Approved Future Actions

Use the Approved Requests for Personnel Action window.

To correct an approved future action:

1. Select Cancellation/Correction from the Navigator.

The Approved Requests for Personnel Action window appears.
2. Query the future RPA you want to correct by entering the query criteria in the Name or Social Security field.

You see a list of approved and future actions. A pending status indicates a future action.
3. From the Approved Requests for Personnel Action window, select the future RPA that you want to correct.
4. Choose the Reroute button to reroute the RPA to the person who submitted the RPA for update.
5. The person who submitted the RPA for update can correct the action, route it to the Approver for approval, and submit the Correction for Update to HR.

Correcting an NPA

When you process a Correction, you can update any editable field, including an employee's first, middle, and last names as well as their Social Security Number and Date of Birth.

Note: You should process any Name Change Corrections (not Cancellation) against the original RPA where the name was entered in error, usually an Appointment or a Name Change action

To correct a Notification of Personnel Action:

1. Select Cancellation/Correction from the Navigator.
2. In the Find window enter query criteria for the Name or Social Security.
3. In the Personnel Actions region, click Completed, Pending, or All to specify the type of actions that you wish to view for that employee.
4. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action that you want to correct.
 - If the Corrections are hidden from view, choose the Show Corrections button to list them.

- If you are Correcting dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.

5. Choose the Correction button.
6. An RPA window opens with the Correction Nature of Action displayed. Enter the data that you wish to correct in the appropriate field.

When you create a Correction action, the application populates the From Position side details with the Position information from the original RPA.

If you are correcting an intervening action, the application retrieves the From Position side data from the most recent retroactive RPA. If the most recent retroactive RPA is a Cancellation action, the application uses the RPA that preceded the Cancellation.

When you process the Correction, you can also review and change the extra information details. The application displays the RPA extra information values entered in the original RPA's extra information, and then refreshes the RPA's extra information with the Position, Assignment, and Position extra information based on the RPA's effective date. You can change the extra information, including replacing previously updated data with a null (blank) value.

7. Complete and route the RPA, following the usual steps for processing an RPA within the Personnel Office.

If you close the Correction action, the system places it in your Workflow Worklist where you can continue to work on it.

If you delete the Correction action before approving and updating it to the database, the application restores the original action to the Approved Requests for Personnel Action window.

Upon update, the application enters the corrections in the appropriate records for the effective date of the original action. The application creates a Remark noting that the item is corrected, and generates a Notification of Personnel action that you can then print. The printed Notification contains all the information contained in the NPA as well as the corrected data items.

Insertion Data

If you are Correcting an action that has insertion data in the NOAC description, such as an NTE date, you cannot correct this information. If necessary, cancel the action and reprocess it.

Other RPA Actions

Retained Grade Actions

To have the application calculate pay using Retained Grade information, you must complete the US Federal Retained Grade Person Extra Information before updating an action to the HR database.

You can enter more than one Retained Grade record for an employee. When calculating pay, the application uses the active record. The application identifies the active records where the To Date has not been reached and chooses the one with the earliest From Date. For example, in the table below, if you are processing an action with an effective date of September 1, 2003, the application would use the first retained grade record since its start date of January 1, 2003 is earlier than the second record's start date of June 1, 2003.

Example dates for processing an action

From Date	To Date
1 - Jan-03	31 - Dec-04
1 - Jun-03	31 - May-05

If you later change a person's Retained Grade extra information (Retained Pay Plan, Grade, and Pay Basis), the application recalculates the employee's pay upon update to the HR database.

Tip: When you then process an RPA for someone who has a Retained Grade record, it is recommended that you enter the Effective Date before selecting the person's name. Entering the effective date first ensures that the application retrieves the appropriate retained grade details.

Pay Tables and Retained Grade

Every position has a pay plan and pay table ID. Pay calculations performed for an employee on Retained Grade access the Retained Grade pay table ID, not the position's pay table ID. Similarly, the application calculates pay using the retained pay plan and grade, not the position's pay plan and grade.

When you construct pay tables, confirm whether anyone is on Retained Grade. If so,

create Retained Grade pay tables and maintain them until you no longer expect to place anyone on them. When the new pay tables are released, make sure that you update the Retained Grade pay tables.

Retained Grades and Pay Basis Formats

If an employee is on Retained Grade with a Pay Rate Determinant (PRD) of A, B, E, F, U, or V, the pay fields on the RPA reflect the Retained Grade Pay Basis.

For some employees, the pay basis of the Retained Grade is not the same as their occupied position. For example, an employee might have a mixed pay basis with a per annum pay basis for their retained grade and a per hour pay basis for their position. To make the salary formats commensurable, the application displays the To and From pay amounts in the Retained Grade pay basis.

First Action Following Update 34 Installation

If you are implementing Oracle US Federal HRMS and you have legacy employees or you are updating your current installation with the Update 34 changes, the following condition applies. For the first action you process for an employee who occupies a retained grade, the From salary information on the RPA displays the occupied position's pay basis and the To salary information displays the retained grade pay basis.

If the occupied and the retained grade pay basis are not the same, the application inserts Remark AAA. This Remark explains that although the salary amount formats are different, the employee's salary remains the same.

All subsequent actions processed with effective dates later than the updated first action display the To and From Salary amounts in the retained grade pay basis.

Temporary Promotion Retained Grade

You can temporarily promote an employee who occupies a retained grade record by processing a NOAC 703 Promotion NTE. When you process a NOAC 703, you enter the Temporary Promotion Step and the Date WGI Due in the RPA Extra Information. Upon update to HR database, the application:

- End dates the active retained grade record
- Creates a new retained grade record with the same values as the previous record as well as the Temporary Promotion Step
- Updates the WGI Due date information in the WGI element
- Records the step information in the Person Federal Retained Grade extra information
- Displays the Temporary Promotion Step in the RPA and NPA reports

Employees who are temporarily promoted while on retained grade are eligible for Within Grade Increases, QSIs, and pay adjustments. The salary computation is based on the details of the temporary promotion, not the retained grade.

Termination Retained Grade

When you first put someone on Retained Grade by processing a NOAC 740 Position Change, you enter the Retained Grade record. The application stores this information in the US Federal Retained Grade Person Extra Information. When you process an Automatic Within Grade Increase for the employee on Retained Grade, the system automatically increases the Retained Step.

When you create a retained grade record, the application end dates the record two years after the record's start date. For example, if the Date From is 10-January-2003, the Date To is set to 10-January-2005. If your agency practices require a two year minus one day interval, you can manually enter a different Date To, such as 09-January-2005.

To keep your changes synchronized, when you:

- Create or update a retained grade, date track to the retained grade record's start date.
- Terminate a retained grade, enter the effective date before you select the employee so that you can view the records that are active as of the effective date.

Termination of Retained Grade Records

You can terminate a retained grade or a Temporary Promotion while on retained grade by processing a single RPA using one of the following NOACs:

- 702 Promotion
- 740 Position Change
- 866 Termination of Retained Grade

The application displays the retained grade information in the RPA Extra Information (US Fed Termination of Retained Grade). If you are processing a:

- NOAC 702 action, the application lists all the retained grades to be terminated

A promotion removes an employee from retained grade, so upon update to the HR database, the application automatically terminates all retained grade records. The application end dates the retained grade records one day prior to the RPA effective date. If the employee was on a Temporary Promotion, the 702 action terminates the retained grade as well as the Temporary Promotion and promotes the employee to the current position.

- NOAC 740, the application lists all the retained grades and you can terminate one or more of them

You select each retained grade record and enter a yes (Y) to terminate or a no (N) to continue the retained grade. Upon update, the application terminates the records you specified as yes (Y). It end dates the retained grade record one day prior to the RPA effective date.

- NOAC 866, the application lists the active retained grade

Upon update, the application terminates the retained grade, end dates the record as of the RPA effective date, and updates the new salary amounts on the day after the RPA effective date.

If the employee has more than one retained grade record, the application places the employee on the next active record (the one with earliest From Date that has not yet reached its To Date.) If the employee is also on Temporary Promotion, when you process the 866 action, you can keep the same step or change it in the RPA extra information. Upon update to HR, the application includes this Temporary Promotion step information in the active record.

You can terminate all active records by processing a NOAC 866 for each one as long as the PRD is other than 0 or 6.

Processing Corrections

You cannot correct the Retained Grade records terminated by the original action, such as a NOAC 740 or 866 but you can choose new or active records. If you need to change the originally terminated Retained Grade record, cancel the action that terminated the record and process a new action.

Change in Hours, Work Schedules, or Duty Station

The application maintains position-related Work Schedule, Part-Time hours, and Duty Station information in the Assignment and Position Extra Information. You can change this information when you process an RPA, such as a Return to Duty that involves a Change in Work Schedule.

When you process an RPA and choose a new To Position, the application populates the RPA with the To Position's Work Schedule, Part-Time Hours, and Duty Station information as of the RPA's effective date. If you choose a new work schedule or Duty Station and update the RPA, the application enters the same value in the Assignment and Position record to ensure that the records have identical values.

Within Grade Increases

When you process a NOA 781 Change in Work Schedule (NOAC 781) or Change in Hours (NOAC 782), you enter the date for the Date WGI Due in the RPA EIT US Fed Change Schedule and Hours. Upon update to HR, the new Within Grade Increase element:

- Stores the date you entered for the Date WGI Due
- Stores the date entered in the previous Within Grade element for the Date Last Equivalent Increase

Part-Time Indicator

When you process a Change in Work Schedule or a Change in Hours, the application updates the value of the part-time indicator in the Assignment Non-RPA Extra Information when it updates the action to the HR database.

If the work schedule is B, F, G, I, or J, the application updates the part-time indicator with a null (blank) value. If the work schedule is P, Q, S, or T, the application updates the part-time indicator with the value that you entered in the RPA Extra Information.

Processing Not to Exceed Actions

You can process RPA actions that involve Not To Exceed (NTE) Dates. The dates you enter in the RPA are for record purposes only. When an NTE date is reached, you must initiate an RPA to terminate a temporary person.

To enter NTE dates:

1. Enter the dates in a Nature of Action description or Remark text.

After an RPA has been approved and has successfully been updated, the application populates the Assignment NTE Extra Information with the new dates.

If the action changes the employee's assignment status so that the NTE date no longer applies, upon update the application automatically nulls (clears) the date from the Assignment NTE Extra Information.

Processing Name Change Actions

Most name changes involve a change to the person's last name. For this reason, when you process a Name Change RPA, the application does not supply a List of Values for the last name field. You can also change an employee's first and middle names using a Name Change RPA.

Changing an Employee's Name

Use the Requests for Personnel Action window.

To change an employee's name:

1. Choose Name Change from Change Actions listed on the Navigator menu.

2. Enter the social security number for the person whose name you want to change.

The application displays the first, middle, and last name of the person.

Note: If you choose the social security number after entering the person's full name, the application replaces the name with the name values stored for that social security number. Re-enter the new first, middle, and last names.

3. Enter the person's last name. If appropriate, change the person's first and middle names.
4. Complete the RPA, following the usual steps for processing an action.

When the application updates the database, it updates the person's entire name as entered on the RPA (first, middle, and last name).

Note: The name shown in the Employee field at the top of the RPA does not change until the RPA is updated to the database.

Correcting an Employee's Name

Use the Approved Requests for Personnel Action window.

To correct an employee's name:

1. Select Cancellation/Correction from the Navigator.

The Approved Requests for Personnel Action window appears.

2. Enter query criteria for the Name or Social Security.
3. From the Approved Requests for Personnel Action window, select the Notification of Personnel Action that you want to correct.

Note: If you are correcting dual actions, you must process a separate RPA for each action. The second action is listed below the first with the number 2 next to it.

4. Choose the Correction button.
5. An RPA window opens with the correction Nature of Action displayed. The information in Part A is retained, but the remainder of the form is not populated. Enter the data that you wish to correct in the appropriate field.
6. Complete and route the RPA, following the usual steps for processing an RPA

within the Personnel Office.

Upon update, the application enters the corrections in the appropriate records for the effective date of the original action. The application creates a Remark noting that the item is corrected, and generates a Notification of Personnel action that you can then print. See: Printing Notifications, page 3-31.

Processing Conversion Actions

You can process Conversion to Appointment actions using an RPA.

To enter Conversion Dates in an RPA for Conversion:

1. Initiate a Conversion to Appointment action.
2. Enter the date on which the conversion occurs in the Conversion Date segment of the RPA Extra Information.

Upon update to the HR database, the application replaces existing Conversion dates in the Person US Fed Conversions Extra Information with the new ones from the RPA.

Note: If you did not enter a Conversion Date, the application clears the Conversion Date field .

Correcting Conversion Actions

When you process a Correction action, you cannot replace existing data with a null (empty) value. However, after updating the Correction to the HR database, you can navigate to the Person US Fed Conversion Extra Information and remove the data there.

Conversion of Ex-Employee

If you decide to rehire an ex-employee, you can process Appointment and conversion personnel actions for that person. See: Rehiring an Ex-Employee, page 1-24

Verifying or Changing FEGLI Codes

The two-character Federal Employee Group Life Insurance (FEGLI) codes replace the existing codes as of April 25, 1999. The two-character FEGLI code is displayed on the employee's RPA, Element Entry window after update to HR, on the printed NPA, and within the CPDF Status report.

If you process a retroactive personnel action with an Effective Date prior to April 25, 1999, and on update to the HR database the application notifies you that the FEGLI code may have changed, you may need to change the employee's element record.

To verify or change the FEGLI code:

1. Display the employee's Element Entry window.
2. Datetrack the Element Entry window to April 25, 1999. You can only change the FEGLI code if you are datetracked to April 25, 1999.
3. Verify that the FEGLI code is valid for that date. If necessary, change it.
4. Save the record.

Alternative Federal HR Systems

Alternative Federal HR Systems

The US Federal government has authorized changes to human resource and payroll systems to give agencies greater flexibility in managing their daily operations. For example, the government has authorized a system called the National Security Personnel System (NSPS) which employs HR practices commonly found in business, such as pay for performance, pay banding, and market pay. The US Federal product describes these emerging systems as alternative federal HR systems (AFHR).

As an HR professional, you must administer the appropriate guidelines, calculate pay, and generate reports based on the applicable personnel system. For example, when you process a NOA 893 Reg WRI action, the resulting pay calculations and updates to extra information depend on which system governs the employee, a standard (non-AFHR) or AFHR system.

To assist you in managing employees under new regulatory systems, you can:

- Process RPAs for standard and AFHR employees using AFHR Nature of Action Codes.

The Office of Personnel Management (OPM) expanded the use of Nature of Actions (NOAs) initially reserved for AFHR employees also to cover standard employees. The application determines whether the employee is a standard or AFHR employee, and applies the appropriate validation and processing.

- Identify employee personnel systems.

The employee's assigned position determines which business rules and calculations the application uses. The Personnel System Indicator (PSI) identifies positions as non-AFHR (null or 00) or AFHR (01 NSPS). You can record this information in the PSI segment in the US Alt HR position extra information type. You can create new AFHR positions and move standard employees to these positions.

- Process pay increases, award actions, pay adjustments, group adjustments, and pay reductions for AFHR employees

Business rules and pay calculations for pay-related NOAs include support for pay for performance and local market supplements.

Process RPAs with AFHR Nature of Action Codes

The Office of Personnel Management (OPM) has issued modifications to existing Nature of Actions (NOAs) and added new NOAs to support alternative human resource systems such as the NSPS. You can process RPAs using the new and changed NOAs. The following table lists the meanings and start dates for these NOAs.

NOA	Meaning	Start Date
713	Change to Lower Grade, Level or Band	30-Apr-2006
840	Individual Cash Award Rating Based	07-Jan-2007
841	Group Award - Chap 45	07-Jan-2007
849	Individual Cash Award Non-Rating Based	07-Jan-2007
878	Presidential Rank Award	30-Apr-2006
891	Regular Performance Pay (previously GM Within Grade Increase)	30-Apr-2006
892	Irregular Performance Pay (previously Quality Increase)	30-Apr-2006
893	Reg WRI (previously Within Grade Increase)	30-Apr-2006
894	General Adjustment (previously Pay Adjustment)	07-Jan-2007

The following table lists the NOAs for personnel actions authorized by alternative systems. These NOAs start 07-Jan-2007.

NOA	Meaning	Process as a Mass Action
885	Lump Sum Performance Payment Rating Based-In Lieu of Pay Adjustment	Yes
886	Lump Sum Performance Payment Not In Lieu of Pay Adjustment	Yes
887	Lump Sum Performance Payment Non-Rating Based	Yes
889	Group Award - Other	Yes
890	Miscellaneous Pay Adjustment	No

NOA	Meaning	Process as a Mass Action
896	Group Adjustment	No
897	Pay Reduction	No

See: NOAC Families and Request Information Types, *Oracle US Federal Human Resources Configuring, Reporting, and System Administration Guide*

Identify Employee Personnel Systems

With the increasing number of personnel systems authorized by OPM, HR professionals must find ways to effectively manage employees based on the appropriate regulatory guidelines. You can easily identify an employee's personnel system by entering its associated code in the position extra information (US Federal Alt HR System). The application treats currently or previously occupied positions as standard positions (personnel system indicator of null or 00). You cannot convert these positions to AFHR positions. You must create new positions for employees on AFHR and then move the employees to the AFHR positions.

See: Defining a Position, *Oracle US Federal Human Resources Enterprise and Workforce Management Guide*

Process Pay Increases, Adjustments, Reductions

You process pay-related actions for AFHR and standard employees the same way. The principal exception occurs when entering basic pay. After you enter the basic pay, custom code produces the calculations for the local market supplement percentage locality pay, adjusted basic pay, other pay, and total salary values. The application validates the minimum and maximum rates based on the employee's pay rate determinant (PRD).

The application applies the appropriate pay cap checks on adjusted basic pay. When the application calculates pay, the application compares the adjusted basic pay to the pay cap. If the adjusted basic pay exceeds the pay limit, the application sets the adjusted basic pay at the pay limit and subtracts the basic pay from the new adjusted basic pay, entering the resulting amount as the local market supplement (LMS) locality pay on the RPA. If the total pay exceeds the total salary cap, the application sets the adjusted basic pay at the pay limit, subtracts the basic pay from the new adjusted basic pay, and the enters the resulting value as the LMS locality pay on the RPA. The application notifies you that the locality pay has been adjusted to equal the difference between the basic pay and the adjusted basic pay.

The application performs a similar check when validating the total pay. For example, under NSPS, if you authorize Availability Pay and Supervisory Differential, you cannot

reduce these payments nor can the employee's total salary exceed the total salary pay cap. If the total pay exceeds the total salary cap, the application subtracts the adjusted basic pay from the total salary cap and displays the resulting capped other pay on the RPA, and enters the unadjusted Availability Pay and Supervisory Differential pay in the assignment element entries.

After update to HR, the application updates the date for the last equivalent increase with the effective date of the RPA for appropriate pay actions.

See: Pay Calculation on an RPA, page 3-10

Pay Increases (891, 892, 893)

You can use the NOAs authorized by the Office of Personnel Management (OPM) to grant pay increases to AFHR and standard employees. For example, you can grant pay increases based on performance criteria rather than the standard waiting periods. The following table describes the pay increases for standard and AFHR employees.

NOA	Standard	AFHR
891 Regular Performance Pay	Process performance-based increases	Process performance-based increases
892 Irregular Performance Pay	Process quality step increases	Grant performance pay increase
893 Regular Within Range Increase	Process within range increases	Process within range increases

See: Automatic Within Grade Increases, *Oracle US Federal Human Resources Compensation and Benefits Management Guide*

Award Payments (840, 841, 849, 885, 886, 887)

You can process individual cash awards and lump sum performance awards for AFHR and standard employees as individual actions or mass award actions. (OPM authorized the reuse of NOA 885 as a lump sum performance payment.) For these actions, the application no longer limits the award amount or percentage.

You process award actions the same way for AFHR and standard employees, entering an award amount or percentage in the RPA Award window. The application calculates the result based on the adjusted basic pay. If the pay basis is not per annum, the application determines the award salary by converting the adjusted basic pay to an annual amount. Custom hooks enable system administrators to change the calculation to compute the award amount using a value other than adjusted basic pay.

See: Award Actions, *Oracle US Federal Human Resources Compensation and Benefits*

Miscellaneous Pay Adjustment (NOA 890)

You can use NOA 890 to process standard and AFHR employees. Using NOA, you can implement alternative personnel systems and move standard employees to AFHR positions. When moving employees to AFHR positions, you can also make appropriate changes in the RPA extra information. For example, you can change the person's Tenure, Appointment Type, Conversion to Career Due date, retirement plan, and Date Last Equivalent Increase.

See: Moving Employees to AFHR Positions, page 3-58

Apart from moving standard employees to AFHR positions, you can process the following actions using NOA 890:

- Process adjustments in an employee's basic pay.
- Terminate an employee's pay retention.
- Move an employee from a GM pay plan to a GS pay plan.
- Move an employee from a GS pay plan to WG pay plan.
- Process an increase in the rate of pay for an employee who is on an ES pay plan.
- Process higher rate of pay for an employee.

Group Adjustments (NOA 896)

You can use NOA 896 to recognize the contributions of a team by authorizing a group pay adjustment for all team members. You must process an RPA for each AFHR team member.

Pay Reduction (NOA 897)

If an AFHR employee's performance or conduct warrants a reduction in pay, you can process a reduction of pay within an existing pay range.

Moving Employees to AFHR Positions

After OPM approves an alternative federal human resource system (AFHR), you can move employees affected by the change from their existing system to the new one. For example, you might move employees from a standard grade and step wage schedule to a system based on performance based schedules.

You identify the applicable personnel system in the position definition. The employee's assigned position then determines which business rules and calculations the application uses. To move employees from an existing system to a new system, complete the following steps.

1. Create a new position.

You cannot convert existing positions to AFHR positions. You must create new positions and then move employees into them.

See: Creating a Position, *Oracle HRMS Enterprise and Workforce Management Guide*

2. In the Position extra information, enter the Personnel System Indicator (PSI) in the US Federal Alt HR System flexfield.

Note: You do not have to enter information for standard positions.
A PSI of null or 00 identifies the position as standard.

See: Creating a Position, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Process and update an RPA to move the employee to the new position.

You can process a NOA 890 Miscellaneous Pay Adjustment to move employees to their new AFHR positions.

See: Processing an RPA, page 3-18

Workforce Management Mass Actions

Workforce Management Mass Actions Overview

When you have a large number of employees affected by the same personnel action, such as an annual pay adjustment, you may find it easier and more efficient to process a mass action.

You can process:

- Mass Salary change actions, *Oracle HRMS Compensation and Benefits Management Guide*, including standard pay or percent pay adjustments, locality adjustments
- Mass pay table, *Oracle HRMS Compensation and Benefits Guide* updates for special rate tables
- Mass Awards, *Oracle HRMS Compensation and Benefits Management Guide*
- Mass Transfer In and Out actions, page 4-15
- Mass Realignments, page 4-20
- Retention Register, page 4-30
- Mass NOAs, page 4-8
- Mass Cancellation, page 4-27

The application processes step increases automatically for you, including Automatic Within Grade Increases (WGI) and Quality Step Increases (QSI). The default automatic WGI requires no response by the Personnel Office. The process searches for employees eligible for a WGI, generates RPAs for each employee entitled to the WGI, notifies the Personnel Office of the WGI approval, updates the employee records on the effective date, and generates Notification of Personnel Actions (NPAs).

See: Automatic Within Grade Increases (WGIs), *Oracle HRM Compensation and Benefits*

Management Guide

When you process a mass action, you can specify the selection criteria as well as the data that you wish to change. You can preview your results and continue to adjust the data until you are ready to execute the action.

The mass actions have two windows, a Preview and Final window. You can process a mass action entirely from the Final window, or work with the Preview and then the Final window. The windows are identical with the exception that the final window contains an Execute button for running the final process. You might use both windows in your agency for security reasons to limit the number of people who can run the final process.

The following sections provide a more detailed description of the mass action process.

Security

The application supports secure user and cross-business group functionality. When you create a mass action, the application filters the Selection Criteria list for organizations, positions, and hierarchies. It also filters the information that you view and update in the Preview window and for the Final execution.

When you first save a mass action, the application stores the business group ID attached to your login's responsibility with the mass action record. The application then limits access to users whose business group login corresponds to the one saved with the mass action.

Note: The name you assign a mass action is unique. Once you save an action with that name, you cannot use it again in any business group.

There are two exceptions to these general guidelines. The HR: Cross Business group setting does *not* apply to Mass Realignments or Mass Transfers.

- **Mass Realignment:** The application restricts the Selection Criteria and the results displayed in the Preview and Final windows to your login responsibility's business group.
- **Mass Transfers:** Initially, you can view the entire list of *unsaved* Mass Transfer Outs when processing a Mass Transfer In across business groups. As soon as you save the Mass Transfer In action, the application stores the business group associated to your login responsibility. Only users with the same business group can then access that action.

Note: If you require access to all mass actions and to run related reports, use a non-secure responsibility.

See: Secure User Support for US Federal HR, *Configuring, Reporting, and System Administration Guide*

Eligibility Criteria

You determine which employees are affected by a mass action by entering source eligibility criteria in the mass action window. The application then uses the eligibility criteria to retrieve employees from the database that should be included in the action.

In addition to defining source criteria, you also enter data that applies to all eligible employees, such as the target organization when you realign or transfer employees. Based on this criteria, the Preview window lists the employees who are eligible as of the effective date or the current date, if you have not yet entered an effective date. The application also lists vacant positions (realignments and transfers).

The target data that you enter in the mass action window applies to all selected employees; however, you can override the target data for an individual employee or position record. For example, in a realignment, you can change the target position details for an individual employee.

When you save the Preview, the application stores the criteria name and the employee's selection status on the Person Mass Action Extra Information (Mass Salary and Transfer In) or the Position Mass Action Extra Information (Realignment and Transfer Out).

After saving the criteria, you can review the criteria and its run results by performing a standard query or printing reports. If the Status field is Unprocessed or Error, you can continue to make necessary changes and save your results.

Note: If you need to process a group of employees separately, such as those employees who require different Legal Authority Codes, you can create a second Preview using different selection criteria, as explained in Deselecting Employees for Mass Actions, page 4-1 .

Run Results Preview Folder

You can use the folder tool to customize the view of the folder in which you're viewing the run results. Insert columns when you want to consider additional data elements to assist in evaluating employee eligibility.

For example, you might add a column for the last name in the Transfer In window to more easily locate the employees whose actions you want to process. Or on a Transfer Out, you might add a column to display Not to Exceed dates to identify temporary employees.

In addition, the product includes 20 columns that you can use for adding columns for agency data. You can change column titles using custom windows, and populate the columns with agency data using agency hooks.

Note: The application does not include this additional data in the RPA or in the Interface table for Mass Transfer Out actions.

Deselecting Employees for Mass Actions

From the Preview window, you can deselect employees you want to exclude from the mass action, and enter a reason for their elimination in the comments field.

You can only select an employee once for a specific mass action. If you create a new Preview using the same eligibility source criteria, the application automatically deselects the employees and lists the Criteria Name where you selected that person.

Processing Separate Groups of Employees

When processing mass actions, you can separate employees according to different target criteria. For example, if you are realigning employees from Department A to two target agencies, Agency C and Agency D, you can set up two sets of criteria. When you preview the list of eligible employees using Agency C's criteria, the application selects all the eligible employees from Department A. You can then deselect employees you want to exclude. When you view the list of eligible employees using Agency D's criteria, the application lists Department A's employees, and deselects those employees selected based on Agency C's criteria.

As a convenience, you can print reports showing selected or deselected employees until you execute the action.

Remarks and Legal Authority Codes

The product includes predefined Remarks and Legal Authority Codes that you can choose from the list of values. You can also enter free-form Remarks.

The Remarks and Codes that you enter in the Legal Authority Codes and Remarks window apply to all employees selected for the mass action. You cannot change them for an individual employee.

Final Mass Action

You can run the final mass action from the Final mass action window or the Concurrent Manager.

In both cases, when the effective date is reached, the application:

- Selects eligible employees
- Creates RPAs
- Enters the Approving Official's name, working title, and approval date

The Approving Official is the employee you entered in the Personnel Officer Identifiers window.

- If the action is a Mass Transfer Out, generates the final Interface table

After successfully updating the mass action, the next time the Process Future Dated RPA concurrent manager process runs, the application updates the actions to the database with the appropriate information.

Note: The Process Future Action Dated RPA process updates all current, retroactive and future dated actions that have reached their effective date. The only exception is Mass Awards where the application immediately updates Mass Award actions that have a current or retroactive date.

Status of Mass Actions

The application changes the Status field on the mass action window to reflect the phase of the process. When you run the final process, the Status field changes from Unprocessed to Submitted. When the application updates the mass action to the database, the status changes to Processed.

If an error occurs during Preview or any stage of the final run process, the application changes the Status to Error and enters the error message text in the Process Errors Log.

See: Error Handling, page 4-7

Printed Mass Action Reports

Print reports to review the run results and to generate the appropriate Notifications.

Before you execute the mass action, you can print:

- Preview report for a list of employees selected in the criteria
- Deselection report for a list of employees deselected from the criteria

After the application updates the RPAs to the database, you can print the Notification of Personnel Action as a:

- List form notice that includes all employees selected for the mass action (Listing of All) or only one employee (Listing for Employee)
- Standard NPA (Notification of Personnel Action SF-50) for one employee

Workforce Management Mass Actions

When you have a large number of employees affected by the same personnel action, such as an annual pay adjustment, you may find it easier and more efficient to process a mass action.

support?

The product provides the capability to automatically process Within Grade Increases. Additionally, you can process mass actions for:

- Mass Salary
- Mass Realignment
- Mass Transfer In and Out
- Mass Awards
- Mass NOA
- Mass Cancellation

Note: You process single realignments, transfers, or salary adjustments in the usual way, by completing an RPA for that person.

How does the product support Reduction in Force actions?

The product allows you to create, view, and print a retention register for use with Reduction in Force (RIF) actions.

Mass Transfers and Realignments

Error Handling

If the application displays a message notifying you of an error, it changes the Status field to Error. The Process Log Federal Maintenance Form displays the complete error message.

The log lists errors that occur when:

- You preview the run results
- You execute the final process

If there is an application error after you execute the final process, for example the system is off-line, the Status field on the Final form changes to Error. When the error has been corrected, the application restores the Submitted Status. You can resubmit the final process by choosing the Execute button.

- The application updates the mass action

If there is an error on a specific record when the application updates the mass action, for example, an RPA does not pass the CPDF edits, the application routes the RPA to the appropriate Personnel Office groupbox.

For example, if there's an error when the application updates a Realignment action, the application routes the RPA back to the losing Personnel Office groupbox, not the gaining office's groupbox.

If you are assigned to that groupbox, you can view the rejected RPAs sent to the groupbox inbox and correct and resubmit the RPA, or cancel the action.

Note: To have the application correctly route the information, make sure that you define a Personnel Office groupbox for the employees (Routing Group and Groupbox Federal Maintenance window), and associate the groupbox with a Personnel Office ID and an Approving Officer (Personnel Office ID Federal Maintenance window).

Mass Transfers

When an Executive Order or directive requires a transfer of employees and positions, the losing and gaining agency can process mass transfer actions.

To prepare for the transfer in advance, the losing agency can print a report of selected employees or generate an Interface table. These reporting mechanisms allow the losing and gaining agency to discuss the transfer.

The printed list contains the selected employees' names, social security numbers, and their Agency From and To information. The Interface table contains further person and position details that the gaining agency can use to create and classify positions for the incoming employees.

Mass NOA

Oracle Federal HR provides the ability to process certain Nature of Actions Codes (NOAs) in mass that accomplish Non-Pay Actions, Return to Duty or Pay Status change, Mass Position Changes that affect employee records, or require RPA or NPA changes. Using the Mass NOA functionality, US Federal HR administrator can process specific personnel actions for multiple employees in a single request.

When you process personnel actions for employee for a specific NOA, you can select employees pertaining to organizations belong to login business group. For information on security for mass actions, see: [Workforce Management Mass Actions Overview](#).

You can perform the personnel actions for certain NOA Codes in mass. The following table lists the Nature of Action Codes (NOAC) that you can select to perform personnel action for multiple employees in a single run. The table also describes the type of records that the application selects when mass processing happens:

NOAC	Description	NOA	Records that the Application Selects for Mass Processing
280	Placement in Pay Status	Placement in Pay Status	Records with assignment status of Non Pay
292	Return to Duty	RTD	Records with assignment status: Furlough, Furlough NTE, Leave Without Pay Mil, Leave Without Pay NTE.
430	Placement in Nonpay Status	Placement in Nonpay Status	Records with a Seasonal work schedule. (Work Schedule codes G, J, Q, or T)
460	Leave Without Pay Not-to-exceed (date)	LWOP NTE (date)	Records with Active status.

NOAC	Description	NOA	Records that the Application Selects for Mass Processing
471	Furlough	Furlough	Records with Active status.
472	Furlough Not-to-exceed (date)	Furlough NTE (date)	Records with Active status.
772	Extension of Furlough Not-to-exceed (date)	Ext of Furlough NTE (date)	Records with Active status.
773	Extension of Leave Without Pay Not-to-exceed (date)	Ext of LWOP NTE (date)	Records with Active status.
792	Change in Duty Station	Chg in Duty Station	Records with Active status.
800	Change in Data Element	Chg in Data Element	Records with Active status.

Tasks in Processing a Mass NOA

To perform mass processing of a NOA, you can use the:

- Mass NOA Selectable (Preview) window that provides the criteria to select employees for mass NOA processing. You can preview the list of employees and the proposed change before you perform the final mass processing.
- Mass NOA Selectable (Final) window, which is identical to the Mass NOA Selectable (Preview) window except that the final window contains an Execute button for running the final process.

You can process a mass NOA directly from the Final window.

See: Processing a Mass NOA, page 4-22

Processing Mass Actions

When you process a mass action, you can run the entire action from the Final mass action window, or work with the Preview and Final window. The windows are identical with the exception that the final window contains an Execute button for

running the final process.

Before you process a mass action, you must set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer. This setup enables the application to enter the appropriate Approval information on the Notification, and to route errors and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

This procedures covers the basic steps for processing Transfer Out actions, Salary Adjustments, Mass Awards, and Realignments as well as general information about mass actions. Refer to the following procedures for information unique to that mass action:

- Processing a Mass Standard Pay Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Mass Percent Pay Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Locality Adjustment, *Oracle HRMS Compensation and Benefits Management Guide*
- Processing a Mass Transfer Out, page 4-15
- Processing a Mass Transfer In, page 4-17
- Processing Mass Realignments, page 4-20
- Processing Mass NOAs, page 4-8
- Processing Mass Cancellations, page 4-27

To process a mass action:

1. Display the mass action window.

In the Find window, choose New to create a new mass action or query an existing mass action.

See: Finding a Mass Salary Action, *Oracle HRMS Compensation and Benefits Management Guide*

2. Complete the eligibility criteria.

Enter a unique name, an effective date, and specify the appropriate selection criteria, including source and target information where applicable.

See: Setting Eligibility Criteria, page 4-1

The Status field indicates the phase of the process. The status is Unprocessed until you execute the action (Submitted) and the application creates an RPA (Processed). If there is an error in executing the action, the Status field changes to Error, as described in Error Handling, page 4-7.

3. Choose the LACs/Remarks button and choose the applicable Legal Authority Codes and Remarks from the list of values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-12

4. Save your results.
5. Choose the Preview button to view the run results.

The application lists as selected all employees who are eligible as of the Effective Date. If you have not yet entered an Effective Date the application uses the current date. See: Setting Eligibility Criteria, page 4-1

6. Deselect the employees or vacant position (realignment) to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

7. Where necessary, change the default values for an employee record.

Most mass action Preview windows permit you to override some of the default target values. For example, for a realignment, you can override the duty station entered in the Position Details window with the appropriate one.

8. Save your results.
9. When you are ready to run the final results, choose the Execute button on the Final mass action window.

As an alternative, if you have prepared several actions in advance, you can execute the actions from the Concurrent Manager. See: Running the Final Action, page 4-13

If it is a current or retroactive action, the application immediately selects the employees based on the eligibility criteria, generates RPAs, and updates the database. If it is a future effective action, when the effective date is reached, the application selects the employees based on the eligibility criteria and generates approved RPAs. The Process Future Dated RPAs process updates the actions to the database.

If you decide not to execute a mass action, you can delete it, as explained in Deleting Invalid Mass Actions, page 4-15.

10. Print the required reports.

You can print a list Notifications of Personnel Action in either list or standard form. See: Printing Mass Action Reports, page 4-13

Entering Remarks and Legal Authority Codes

You enter Remarks and Codes in the Legal Authority Codes and Remarks window. These Remarks and Codes apply to all employees selected for the mass action.

The product includes Remarks and Legal Authority Codes which you can choose from the List of Values. If the Code or Remark contains insertion data, the system displays a dialog box prompting you for that information. Enter the data and choose OK.

To enter a free-form Remark in the Remarks field:

1. Choose the ZZZ Remark to open a text entry field where you can enter the applicable text.

To edit the insertion data, position your cursor in the description field and enter the correct data. For information about adding agency Remarks or Legal Authority Codes, see *Nature of Action Maintenance Forms, Configuring, Reporting, and System Administration Guide*

To change a Remark or Legal Authority Code:

1. Replace it with a different one by choosing a new Remark from the List of Values. Or, delete it using the Delete icon on the toolbar.

To enter different Remarks or Legal Authority Codes for a group of employees:

1. Deselect the employees in the current Preview. and c
2. Create a new Preview using the same criteria.

3. Enter the appropriate Remarks and Legal Authority codes for this set of employees. See Deselecting Employees for Mass Actions, page 4-1

Running the Final Mass Action

When you have completed the mass action and previewed the results, you can update the action to the database either from the Final mass action window or the Concurrent Manager.

If the action has a current or retroactive effective date, the application immediately updates the action to the database. If the action is for a future effective date, when the application runs the Process Future Dated RPA concurrent process for the action's effective date, the application reapplies CPDF edits to validate the information contained in the RPA. After the application updates the database with that day's actions, you can print the Notification of Personnel Action from the Concurrent Manager.

Important: Before running the final mass action, you must choose Preview at least once and save the Criteria.

To run the final mass action from the form:

1. Open the Final mass action window.
2. Choose the Execute button.

If you submit a final process by mistake, you can cancel the process prior to the effective date by querying the request in the Concurrent Requests Summary window and cancelling it there.

To run the final mass action from the Concurrent Manager:

1. In the Name field, select the mass action process: Process Mass Salary, Process Mass Realignment, Process Mass Transfer In, Process Mass Transfer Out.
You choose Process Mass Salary for all mass salary actions, including Standard Pay Adjustment, Percent Pay Adjustment, Locality Pay Adjustment.
2. In the Parameters window, select the mass action name (the name under which you entered and saved the action).
3. Choose the Submit button.

Printing Mass Action Reports

Print reports to review the run results and to generate the appropriate Notifications.

You can print reports using the Print button on the toolbar, the Print menu option, or print a report from the Concurrent Manager. In general, you may find it easiest to locate all related reports and print them from the Concurrent Manager. For example, from the Concurrent Manager you can print a listing of selected employees, deselected employees, and Notifications.

To print a mass action report from the Concurrent Manager:

1. In the Submit Processes and Reports window Name field, select the report name.
2. Enter the criteria name in the parameters field. If prompted, enter further parameter information to establish eligibility criteria.
3. Enter the number of copies you want the system to print.
4. Enter the printer you wish to use.
5. Choose the Submit button.

Setting up a Workflow Administrator's Groupbox

If an error occurs when routing a Within Grade Increase, Position Description, or other personnel action, and the application does not find a designated groupbox, such as a Personnel Office groupbox, you receive a notification in the Workflow Administrator's groupbox.

The notification contains information including the RPA request ID, the supervisor name, and other details which you can use to correct the problem.

For example, if you have not defined the Personnel Office groupbox, you can enter that information or ask the appropriate person to correct it. Once you correct the problem, resubmit the notification (or abort it). When the notification is resubmitted, the application sends it to the Personnel Office or to the supervisor, depending on the preference set at implementation.

To set up the administrator's groupbox:

1. Follow the procedure for setting up a groupbox.

See: Setting up Groupboxes, *Configuring, Reporting, and System Administration Guide*

2. You must name the groupbox GHRWFADMIN.

This groupbox name indicates to the system where it should send notifications.

3. Assign at least one user to the groupbox.

If you want to set up a different destination or use a different groupbox name, refer to the documentation that comes with Oracle Workflow for the post-install

procedure.

Deleting Invalid Mass Actions

You can delete Unprocessed mass actions that you have saved. (You cannot delete mass actions that have an Error or Processed status.) Deleting Unprocessed mass actions purges unwanted records from the database and allows you to reuse the mass action name.

Use the Mass Action Preview window.

To delete an unprocessed mass action:

1. Query the mass action name and confirm that the status is unprocessed.
2. Place your cursor in the Name field and choose Delete from the Edit menu.
3. Choose Yes to delete the mass action from the decision dialog.

The application removes the data from the fields of the mass award action window.

4. Choose Save from the File menu to have the application update the database with the deletion.

Processing a Mass Transfer Out

When you transfer employees and positions between agencies, the losing agency can process mass transfer actions using the Mass Transfer Out window.

To prepare in advance for the transfer, the losing agency can print a report of selected employees or generate an Interface table. These reporting mechanisms allow the losing and gaining agency to discuss the transfer.

To process a Mass Transfer Out action:

1. Set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer.

The application automatically routes notifications, errors, and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

2. Display the Mass Transfer Out window.
3. Complete the eligibility criteria.

Enter a unique name, an effective date, and specify the appropriate selection

criteria, including source and target information.

You can further reduce the selection based on:

- Organization: the application transfers all positions within the organization
- Organization and organization hierarchy: the application transfers all positions in the organization hierarchy, starting at the hierarchy level at which the organization is placed
- Position and position hierarchy: the application transfers all positions in the position hierarchy, starting at the hierarchy level at which the position is placed
- Additional Source Criteria, such as the Personnel Office ID and the occupational series.

4. Choose the LACs/Remarks button and choose the applicable Legal Authority Codes and Remarks from the List of Values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-12

5. Save your results.
6. Choose the Preview button to view the run results.

The Preview window lists vacant and occupied positions as of the effective date, excluding employees whose approved and updated actions convert, reassign, or promote them to another agency prior to the effective date.

7. Deselect the employees to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

8. Where necessary, change the default value Agency Code Transfer To information, if it is not the same as the one entered in the mass action window.
9. Save your results.
10. When you are ready to run the final results, choose the Execute button on the Final Mass Transfer Out window.

Note: You can also run the final mass action from the Concurrent Manager by choosing Process Mass Transfer Out. See: Running the Final Action, page 4-13

When you choose the Execute button, the application generates an Interface table for the run results. The gaining agency uses the interface table.

See: Processing Mass Transfer In Actions, page 4-17

If an error occurs during the creation of the interface records, the application does not generate any RPAs. You must correct the data for the employee and position records reported in the Federal Process Log, or deselect those records, and then resubmit the Mass Transfer Out.

When you run the final process, the application:

- Selects the employees that meet the eligibility criteria, generates RPAs, and updates the database.

If the Mass Transfer has a future effective date, the application repeats the same process when the effective date is reached.

- End dates vacant positions and occupied positions selected for the transfer out
- Creates a final interface table of occupied positions for the gaining agency (GHR_INTERFACE, source type MASS TRANSFER)
- Terminates employees, updating the appropriate Person and Assignment status and entering an end date for in the element records.

11. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel Action in either list or standard form. See: Printing Mass Action Reports, page 4-13

After you transfer an employee, you can process a Cancellation or Correction action for that person, but you may need to notify the gaining agency of the action.

Processing a Mass Transfer In

When you process a Mass Transfer In (NOAC 132), you work with data generated by

the Mass Transfer Out (NOAC 352) Interface table. After importing this data into your application, you can view and edit the employee and position data. You can also add new employee records to the existing data.

Note: If you do not import the data from the interface table, you can manually enter the information provided by the losing agency. When you save the Transfer In data, the application creates an Interface table for you.

When you execute the Mass Transfer In, the application submits the data for update to HR. Upon update the application generates the person records, hires the employees, and creates the assignment records.

To process a Transfer In:

1. Set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer.

This setup enables the application to enter the appropriate Approval information on the Notification, and route errors and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

2. Set up your organizations, positions, and their associated hierarchies.

See: Creating Organization Hierarchies, *Enterprise and Workforce Management Guide*, Creating Position Hierarchies, *Enterprise and Workforce Management Guide*

3. Import the data from the interface table (GHR_INTERFACE, source type MASS TRANSFER).

4. Display the Mass Transfer In window.

5. Enter the name in the Name field from the Interface table provided by the losing agency.

6. Enter an effective date for the Mass Transfer In that is at least one day after the Mass Transfer Out effective date.

7. Enter a description in the Reason field.

8. In the Employee Details section, set your view option. Choose

- Select to list all employees, including those whose actions you've processed or whose records contain errors
- Unselect to change the default setting for Preview so that all eligible employees

listed in the Preview window are deselected

- Include Errored Records to view only those records that contain errors
- Override Previous Selection to re-select everyone that you deselected from other Previews.

9. The Employee Details section lists employees who match your selection criteria. Complete the data required to add the person to the agency, such as the Position Title, Step and Rate information, and Target Organization.

The status field shows whether the action is unprocessed (empty), processed (executed), or whether there's an error (error). You may encounter an error if:

- You are manually entering employee data and enter invalid data
- Have custom predefined data that the losing agency did not have and your business rules invalidate that data
- Encounter an error produced by your import procedure of the interface data.

10. To view detailed data for an employee, select the person on the Mass Transfer In window and choose the Open button to display the Person Detail window. You can then view and edit the employee's data there.

11. Save your results.

12. Choose the applicable Legal Authority Codes and Remarks.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-12

13. When you are ready to run the final results, choose the Execute button on the Final Mass Transfer In window.

Note: You can also run the final mass action from the Concurrent Manager by choosing Process Mass Transfer In.. See: Running the Final Action, page 4-13

When the effective date is reached, the application creates the RPAs for Mass Transfer In (NOAC 132) for each person selected. The application generates the person records, hires the employees, and creates the assignment records. (If the Transfer In and Transfer Out agencies share the same database, the application rehires the employees.)

14. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel

Action in either list or standard form. See: Printing Mass Action Reports, page 4-13

The application provides you with person, position, and assignment records. You can complete the process of adding the employees to your agency by following your usual procedures for adding new employees. For example, you might add them as users to the application, assign them to workflow routing groups, and so on.

Processing Mass Realignments

You can process Mass Realignment when you need to update Organization details in one or more positions, such as OPM Organizational Component, Agency or Subelement codes, Office Symbol, or Organization Function Code. You can perform a Mass Realignment within the same agency or organization. When you process a Mass Realignment, the application retrieves all valid positions: those vacant and occupied positions that have a Hiring Status of Active or Proposed as of the effective date.

Use the Mass Realignment window.

To process a Mass Realignment action:

1. Complete the selection criteria.

Enter a unique name, an effective date, and specify the appropriate selection criteria, including source and target information. You can set the selection at the organization or position level. Choose:

- Organization: the application realigns all positions within the organization
- Organization and organization hierarchy: the application realigns all positions in the organization hierarchy, starting at the hierarchy level at which the organization is placed
- Position and position hierarchy: the application realigns all positions in the position hierarchy, starting at the hierarchy level at which the position is placed

2. Save your results.
3. Click the Position Details button and enter the data that applies to the positions that you are realigning to the Target Organization.
4. Click the LACs/Remarks button and select the applicable Legal Authority Codes and Remarks from the list of values.

You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-12

5. Click the Preview button to view the run results.

The Preview window lists vacant and occupied positions as of the effective date, excluding employees whose approved and updated actions convert, reassign, or promote them to another agency prior to the effective date.

6. Deselect the employees or vacant position (realignment) to exclude from the mass action.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

7. Save your results.
8. Where necessary, change the default target Position Details for an individual employee or position.
9. When you are ready to run the final results, click the Execute button on the Final Mass Realignment window.

Note: You can also run the final mass action from the Concurrent Manager by choosing Process Mass Realignment. See: Running the Final Action, page 4-13

When you run the final process, if the action is current or retroactive, the application selects the employees based on the eligibility criteria, generates RPAs, and updates the database. If it is a future effective action, when the effective date is reached, the application selects the employees based on the eligibility criteria and generates the RPAs and updates the database. The application also:

- Realigns vacant and occupied positions to the target organization
- Updates the Assignment information
- Updates the occupied and vacant position information with the information

entered for Position Details

10. Print the required reports.

You can print a list form of all employees or individual Notifications of Personnel Action in list or standard form. See: Printing Mass Action Reports, page 4-13

After the Realignment action, you can add the positions and organizations to existing hierarchies or build new hierarchies to represent the reporting relationships.

Processing a Mass NOA

You can perform mass processing of multiple of employee records for the following NOAs:

- 292 Return to Duty
- 430 Placement in Nonpay Status
- 460 Leave Without Pay Not-to-exceed (date)
- 471 Furlough
- 472 Furlough Not-to-exceed (date)
- 772 Extension of Furlough Not-to-exceed (date)
- 773 Extension of Leave Without Pay Not-to-exceed (date)
- 792 Change in Duty Station
- 800 Change in Data Element

To identify employee records to perform mass processing:

1. Provide the selection criteria
2. Preview the records and proposed changes for the employees
3. Take final action to make the mass processing effective

To mass process a NOA:

1. Set up a groupbox, associate that groupbox to a Personnel Office ID, and assign an approving officer. The application automatically routes notifications, errors, and rejected actions to the Personnel Office groupbox responsible for correcting the action.

See: Maintaining Personnel Office ID Information, *Configuring, Reporting, and System Administration Guide*

2. Display the Mass NOA Selectable (Preview) window.
3. Enter the following fields:

Field Name	Optional / Required	Description
Process Name	R	Text field to enter name.
Effective Date	R	Enter the effective date for the mass change.
NOA	R	Select the NOA to perform the mass action.
NTE Date	O	Enter the date, which is required for certain NOAs only (460, 472, 772, and 773)

The Status field indicates the phase of the process. The status is Unprocessed until you execute the action (Submitted) and the application creates an RPA (Processed). If there is an error in executing the action, the Status field changes to Error, as described in Error Handling

4. Use the following the additional criteria to select employee records. The following table lists the criteria common to all the NOAs:

Field Name	Optional / Required	Description
Organization	O	Select a value from the list.
Agency	O	Select a value from the list.
Agency Sub-Element	O	Select a value from the list.
Personnel Office Identifier	O	Select a value from the list.
Duty Station	O	Select a value from the list.

In addition to the additional selection criteria, you can enter the following NOA specific criteria to select employee records for mass processing. The following fields

in the table for the NOAs are optional:

NOA	NOA Specific Selection Fields
292	Assignment Status
792	Duty Location
800	OCCI Series, Bargaining Unit Status, FLSA Category
772	Assignment Status
773	Assignment Status

5. Click the LACs/Remarks button and select the applicable Legal Authority Codes and Remarks from the List of Values. The legal authority codes are based on the NOA selected in the previous step. You can also insert Remarks by choosing the ZZZ code.

Entering Remarks and Legal Authority Codes, page 4-12

6. Save your results.
7. Click the Preview button to view the run results. Review the employee records that the application lists for mass processing of the NOA. The application lists all employees who are eligible as of the Effective Date. If you have not yet entered an Effective Date the application uses the current date.

You can view the existing value in the Old column and proposed change in the New column for various components.

The following columns are displayed for each of the Mass NOA action previews:

NOA 280, 292, 430, 460, 471, 472, 772, and 773

Name

SSN

NOA

LAC 1

LAC 2

Organization

Agency / Sub element

POI / POI Description
Position Title
Position Number and Sequence
Old Assignment Status
New Assignment Status
Old Type of Employment
New Type of Employment
Old Pay Status USERRA Status
New Pay Status USERRA Status
Furlough Indicator
Old LWOP NTE Start Date
New LWOP NTE Start Date
Old LWOP NTE
New LWOP NTE
Old Furlough NTE Start Date
New Furlough NTE Start Date
Old Furlough NTE
New Furlough NTE
NOA 792
Name
SSN
NOA
LAC 1
LAC 2
Organization
Agency / Subelement
POI / POI Description
Position Title
Position Number and Sequence
Old Duty Station Code
Old Duty Station Description
New Duty Station Code

New Duty Station Description
Old Bargaining Unit Status Code
New Bargaining Unit Status Code
Old Locality Amount
New Locality Amount
Old Adjusted Basic Pay
New Adjusted Basic Pay
Old Total Salary
New Total Salary
NOA 800
Name
SSN
NOA
LAC 1
LAC 2
Organization
Old Agency / Subelement
New Agency / Subelement
POI / POI Description
Position Title
Position Number and Sequence
Old Bargaining Unit Status Code
New Bargaining Unit Status Code
Old Occ Series
New Occ Series
Old Functional Class
New Functional Class
Old FLSA Category
New FLSA Category

8. If required, you can deselect the employees to exclude from the mass action. You can select and deselect multiple records at a time.

You can select and deselect multiple records at a time.

- To select all the employee records, choose All from the Selection list. You can then manually deselect the records that you do not want the application to process.
- To deselect all the employee records, choose None from the Selection list. You can then manually select the records that you want the application to process.
- To have the application select a few records from the list of retrieved employee records, deselect the records you want processed. Choose Invert from the Selection list. The application selects the previously deselected records, and deselects the remaining records.

The application displays the comments field where you can enter a reason for excluding that person or position. See: Deselecting Employees from Mass Actions, page 4-1

9. Save your results.

When you are ready to run the final results, choose the Execute button on the Mass NOA Selectable (Final) window.

You can also run the final mass action from the Concurrent Manager by choosing Process Mass Transfer Out. See: Running the Final Action, page 4-13

What's Next

Navigate to the View Requests window and view the process log for each record associated with the mass action that is processed. The process log includes the employee name, employee ID, NOA, and the effective date. You can view separate lists within the process log for processed records, error records include the error message, and group box to which the error RPAs are routed.

You can print mass action reports.

See: Printing Mass Action Reports, page 4-13

Processing a Mass Cancellation

You can use the Mass Cancellation functionality to cancel any mass process that has been completed.

Using the Mass Cancellation functionality, you can cancel the following mass actions:

- Mass Realignment
- Mass Awards
- Mass Salary

- Mass NOA

Mass Cancellation will cancel all of the actions accomplished by the mass process to be cancelled. This process will not allow for selection of individual records to cancel or exclude from cancellation. For the respective action of the Mass Cancellation, the appropriate Legal Authority Codes and Remark Codes must be entered similar to the RPA Form.

To process the mass cancellation function, you can use the:

- Preview Mass Cancellation window, where you can select the mass action that you want to cancel and preview the records.
- Final Mass Cancellation window, which is similar to the Preview Mass Cancellation window except that it contains the Execute button for final processing of the cancellation of a mass action.

You can process a mass cancellation directly from the Final Mass Cancellation window.

To process a mass cancellation:

1. Navigate to the Mass Cancellation (Preview) window.
2. Enter the name of the cancellation request.
3. Select the mass action that you want to cancel. The application provides a list of mass processes that have been processed earlier. The list of actions to be cancelled is not limited to the processes created by the user who is processing the cancellation.
4. Enter the target mass action name.
5. Click the LACs/Remarks button and select the applicable Legal Authority Codes and Remarks from the List of Values. The legal authority codes are based on the Cancellation NOA Code selected in the previous step. You can also insert Remarks by choosing the ZZZ code. See: Entering Remarks and Legal Authority Codes, page 4-12
6. Save your results.
7. Click the Preview button to view the run results. You can preview the action to be cancelled but cannot select or deselect records or change any of the record values. The preview will only allow the user to ensure that the correct mass process has been selected. You can identify the records that are affected by the mass process being cancelled.
8. When you are ready to run the final results, choose the Execute button on the Mass Cancellation (Final) window.

You can also run the final mass action from the Concurrent Manager. See: Running

the Final Action, page 4-13

9. Navigate to the View Requests window and view the process log for the mass cancellation process.

What's Next

When the mass cancellation is executed, the system will create cancellation RPAs/NPAs as is done for the individual cancellation actions.

Reduction in Force

Retention Register Folder

The Retention Register lists employees based on Tenure Group, Tenure Subgroup, Service Computation Date (SCD RIF), Performance Score, and Adjusted SCD. The application displays all eligible employees.

The Retention Register folder displays most of the fields that appear on the report. You can customize the folder to include other fields by using the folder tool.

The application sorts the data as follows:

- Tenure Group order (Tenure Group 1 first)
- Veterans Preference (Tenure Subgroup AD first)
- Adjusted SCD (earliest date first)
- last name
- first name
- middle name

You can rearrange the columns, but not the sort order. If you rearrange the columns, the printed Register shows the default column order.

Extending RIF Lookup Values

If you extend the seeded Lookup values for Tenure, Veterans Preference for RIF, and Rating of Record, do not change the Description fields for the predefined values. The Description field shows the value and its associated sort order.

For example, the GHR_US_TENURE Description Field identifies Conditional Tenure Group 2 as II and the GHR_US_TENURE_GROUP Description field shows the sort order for Tenure Group II as 2.

Producing a Retention Register

Use the Reduction in Force window to view a Retention Register for a specific competitive area and competitive level.

Important: This software should not be used as the sole method of assessment for making judgements about hiring, performance, or

deployment. Your agency may be held liable if you rely on incorrect computer data or computerized rules to make such judgments. It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate. All personal information that you store or use with this software must be up to date, accurate, and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

To Run a Retention Register:

1. Enter the US Government SCD RIF Person Extra Information for each applicable employee.
2. Enter the Competitive Area and Competitive Level segments on US Government Position Group 1 Extra Information
3. Display the Reduction in Force window.
4. Complete the eligibility criteria.

Enter a unique name for the criteria and specify the appropriate selection criteria.

5. Enter an Effective Date (generally the OPM RIF date).

The printed Register displays two dates: the Date of Register (the system date on which you run the Retention Register) and the Effective Date (the OPM RIF date).

6. Choose the Run Register button to save the criteria name and criteria and to preview the selection.

The application lists all employees who are eligible as of the current date. It does not include pending or future actions that would change an employee's retention standing.

See Also

Retention Register Folder, page 4-30

Printing the Retention Register, page 4-30

Printing the Retention Register

You can print the Retention Register from the window by choosing the Print icon on the toolbar or printing it from the Concurrent Manager. The printed report lists the eligible employees and other required data, such as the number of Vacancies in the Competitive Level.

Note: The system bases the printed report on the eligibility criteria only. For example, if you rearrange the column order, the system does not print the report in newly arranged column sequence.

To print a Retention Register report from the Concurrent Manager:

1. In the Submit Processes and Reports window Name field, select the Reduction in Force Retention Register.

2. Enter the criteria in the parameters field.

The parameters are the same as the ones you completed in the Reduction in Force window.

3. Enter the Print options.

4. Choose the Submit button.

See: Retention Register Folder, page 4-30

Talent Management

Talent Management Overview

Talent Management is essentially the management of worker competencies to meet enterprise objectives. Oracle HRMS, Oracle SSHR, and Oracle Learning Management (OLM) each supply key components of the Talent Management functionality. For many talent-management tasks, you can use either the Oracle HRMS forms-based interface or the SSHR interface.

Oracle HRMS and Talent Management

The Oracle HRMS Talent Management functionality encompasses competency management, career paths, education and qualifications, events, and reviews.

Competency Management

Competencies are measurable skills a workforce either has or must develop to meet enterprise objectives. The Oracle HRMS competency management functions enable you to:

- Define a library of competencies or upload competency definitions from third-parties. You can use such definitions throughout the enterprise to ensure consistency of approach.
- Identify each worker's competencies in a competency profile.
- Measure competencies using either general rating scales or proficiency scales that are specific to the competency.
- Define the competency requirements of a business group, organization, job, or position.
- Define core competencies for a business group or organization. All workers in the

business group or organization must have its core competencies.

- Link competencies to qualifications.

Career Paths

You can define career paths based on either job progression or position progression. You define job-based career paths using the Oracle HRMS Map Career Path function. For position-based career paths, you use new or existing position hierarchies.

Education and Qualifications

The Education and Qualifications functions enable you to:

- Identify the educational and professional qualifications your enterprise recognizes.
- Identify the educational establishments that deliver recognized qualifications.
- Record qualifications obtained by each worker.

Events and Reviews

You can set up an event, such as a training course or departmental meeting, and identify employees who are to attend the event. You use this functionality for scheduling training courses only if you are not using Oracle Learning Management.

You can record information about any employee review meeting, such as a performance review, disciplinary hearing, or medical test, using the Employee Review function.

Work Preferences

You can enter work preferences (such as preferred work locations and work hours) for an individual in the Oracle HRMS Work Preferences window.

Oracle SSHR and Talent Management

Managers, HR professionals, and employees can access talent-management functions using SSHR.

Competency Profile

Managers can use the self-service Competency Profile function to update the competency profiles of their subordinates. Employees can use this function to update their own competency profiles.

Suitability Matching

Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process

uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

Succession Planning

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

Education and Qualifications

Managers can use the self-service Education and Qualifications function to update records of educational qualifications obtained by their subordinates. Employees can use this function to update their own records.

Other Professional Qualifications

Managers can use the self-service Other Professional Qualifications function to update records of professional qualifications obtained by their subordinates. Employees can use this function to update their own records.

Events and Bookings

Managers can use the self-service Event and Bookings function to create events and event bookings for their subordinates. Employees can use this function to create events and event bookings for themselves.

Employee Reviews

Both managers and employees can use the self-service Employee Review function to set up review meetings and invite reviewers to attend.

Work Preferences

Managers can use the self-service Work Preferences function to enter work preferences (such as preferred work locations and work hours) for a subordinate. Employees can use this function to enter their own work preferences.

Note: The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Oracle Performance Management. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management self-service functions.

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

Oracle Learning Management (OLM) and Talent Management

Oracle Learning Management (OLM), formerly Oracle Training Administration, is a complete system for the definition and delivery of training. OLM is tightly integrated with the talent-management functionality of HRMS. For example:

- When a learner completes a class, OLM can automatically update the learner's competency profile with the competencies and competency levels delivered by the class.
- An appraisal can include a learning path, which identifies classes to be taken by the appraisee.

Oracle Learning Management requires a separate license.

See: Introduction to Oracle Learning Management, *Oracle Learning Management User Guide*

Reporting in Talent Management

The Talent Management functions together provide over 50 standard and HRMSi reports. These reports extract and present talent-management-related information about the individual and the enterprise.

See Reports and Processes in Oracle HRMS, *Oracle HRMS Window Navigation and Reports Guide*

Talent Management Key Concepts

For more information about the Talent Management functions, see:

- Career Paths, page 5-43
- Competencies Overview, page 5-8
- Competency Profiles, page 5-28
- Event and Attendance Administration, page 5-49
- Qualification Types, page 5-36
- Suitability Matching, page 5-30
- Succession Planning, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

Oracle Performance Management is a separately licensed product. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives

Management functions.

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

Talent Management Requirements

Oracle HRMS enables you to define all the components of a talent management system to meet the needs of your enterprise.

Oracle Performance Management is a separately licensed product. You must purchase a separate Oracle Performance Management license in addition to an Oracle Self-Service HR license to use the Appraisals, Questionnaire Administration, and Objectives Management functions.

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

What are the advantages of the competency functions?

The Oracle HRMS competency functions enable you to:

- Identify and measure consistently the knowledge, skills, and behavior displayed by your workers across the enterprise.
- Speed the deployment process within your enterprise and reduce recruitment costs. You can identify and select workers and applicants on a common basis and match them with opportunities that arise across the whole enterprise. This ensures that an able candidate is not rejected because of a mismatch for one vacancy when other suitable vacancies exist.
- Ensure your enterprise meets its business goals. You do this by linking the competencies held by your workers into the competencies required to meet the business goals of your enterprise.

Can I perform competency evaluation during appraisals?

Yes. Oracle HRMS's highly configurable web interface enables you to perform competency-based evaluation as part of the appraisal process. You create appraisal templates, which can include competency assessment templates, to define the structure of the appraisal.

Can I define my enterprise's career paths in Oracle HRMS?

Yes. Oracle HRMS enables you to define career paths based on either job progression or position progression. You use the model that best reflects the structure of your enterprise.

Can I link competencies to qualifications?

Yes. You can link a person's acquisition of competencies to their achievement of formal qualifications, typically awarded by external, nationally recognized bodies. Such competencies have well defined performance standards that an assessor uses to determine whether a person has achieved a competency. Thus, you can measure workforce competencies against both enterprise *and* industry or national standards. You can encourage your workforce to acquire such qualifications by developing related competencies, thereby improving the enterprise skill base.

How can I use the suitability function in my enterprise?

Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities. Employees can use this function to find opportunities suited to their competency levels.

How can I use Oracle Learning Management (OLM) to help with talent management?

OLM enables you to record the competencies that a course is expected to deliver. You can then use this information to update the competency profiles of the learners who have attended a class.

Important: This software should not be used as the sole method of assessment for making judgements about hiring, performance, or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.

It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Can I use HRMS Intelligence to investigate and monitor career management?

Yes. HRMS Intelligence Reports and Discoverer Workbooks enable you to investigate competencies, proficiencies, appraisal activity, and training in your enterprise. You can use HRMS Intelligence to answer business questions such as:

- Who has the required competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How do a worker's competencies compare with those required by a particular job?
- Do my employees need more training?

I need to enter competency information from a third-party skills vendor. How can I do this efficiently?

You can quickly and efficiently load competency details from a third-party skills vendor directly into Oracle HRMS using Web Applications Desktop Integrator (Web ADI). Web ADI enables you to manipulate and upload competency information, such as rating scales, rating levels, and competencies, from a text file or spreadsheet into the application. This means you can automatically load data into the application without having to enter the details individually.

See: Uploading Third-Party Competency Information, page 5-20

Competencies

Competencies Overview

In Oracle HRMS, a competency is any measurable behavior or ability that is required by the enterprise and that a worker demonstrates in the work context. For example, a competency can be:

- Knowledge (such as knowledge of consumer-protection or taxation laws)
- A skill (such as negotiation or critical thinking)
- An attitude (such as tenacity or commitment)
- An attribute (such as absence of color blindness or perfect pitch)

Competency definitions are the basis of many talent-management activities. In particular, you can define:

- A *competency profile* for each worker showing the worker's level of proficiency in various competencies
See: Competency Profiles, page 5-28
- The *competency requirements* of a business group, organization, job, or position to enable you to identify suitable candidates for vacancies and assess workers against these requirements.
See: Competency Requirements, page 5-22

Global and Local Competencies

You can define competencies that are available to a particular business group. Alternatively, you can create global competencies, which are available throughout the enterprise, provided that your system administrator has identified a global competence key flexfield structure on the HR:Global Competence Flex Structure profile option.

Global competencies are most useful if your enterprise operates in multiple countries but you want to use the same competency definitions in all legislations.

Competency Measurement

The HRMS competency functions enable you to set performance expectations for your workers that are consistent and objective.

During appraisal activities, HRMS enables you to assess the degree to which a worker possesses a competency. For example, for the negotiation skills competency, a worker's

proficiency level could be 3 on a scale of 1 through 5, where 5 indicates the greatest expertise.

See: Competency Measurement, page 5-11

Defining Competencies

You can define competencies individually in the Competencies window. Alternatively, you can upload multiple global competencies from third-party suppliers using the Oracle HRMS Web ADI interface. This approach may be useful to enterprises implementing competency support for the first time.

See: Defining Competencies, page 5-15 and Uploading Third-Party Competency Information, page 5-20

Unit Standard Competencies

Some legislations identify a special type of competency known as a *unit standard competency*. (A Unit Standard is typically a nationally registered document that describes performance standards for a competency. Industry representatives define and maintain the Unit Standard.)

A formal qualification results from the achievement of one or more unit standard competencies. Such qualifications are registered with a national Qualifications Framework, which identifies, for example, the number of credits attached to the qualification and to its constituent competencies, the awarding body, and the field of learning to which the qualification belongs.

Competency Types

If your enterprise defines many competencies, you may find it helpful to classify them by type. For example, you can define a competency type of Language Skills to include any language competency that your enterprise values (such as written Spanish, spoken Spanish, written Japanese, spoken Japanese, and so on). You can then retrieve competency definitions by type.

See: Competency Types, page 5-14

Rating Scales

Rating scales describe competencies and objectives in a general way.

Rating scales are of three types:

- **Proficiency scales** measure a person's mastery of a skill or technique. For example, a person's management skills could be:
 1. Basic

2. Good
3. Excellent
4. Expert

You apply proficiency rating scales to competencies only. You can apply a single proficiency scale to multiple competencies. (Alternatively, you can define proficiency levels that are unique to a competency. See: Competency Measurement, page 5-11)

You can measure unit standard competencies using proficiency rating scales. You may want to measure all enterprise competencies using the same scale, for example. However, you must also define outcomes and assessment criteria for unit standard competencies if they are to lead to formal qualifications.

- **Performance scales** measure a worker's *delivery* of a competency or objective. A worker's competency can rank high on a proficiency scale but less high on a performance scale, or low on a proficiency scale but much higher on a performance scale. You can select a performance rating scale when defining competency assessment templates, objective assessment templates, and appraisal templates.
- **Weighting scales** measure the importance of a competency to the enterprise. For example, a competency's importance could be one of:
 1. Low
 2. Medium
 3. High

A skill that is extremely important to the enterprise would attract a higher weighting than one that is occasionally relevant or of minor importance. You can select a weighting scale when defining a competency assessment template.

Note: You can also apply weighting values to objectives. However, you do not use weighting scales. Instead, the lookup HR_WPM_WEIGHTING defines a single scale for use throughout the enterprise.

You can create rating scales that are available to a particular business group only or you can create global rating scales that are available to all organizations within your enterprise, irrespective of the setting of the HR: Cross Business Group profile option. If you use more than one rating scale of a particular type (for example, if you use multiple proficiency rating scales), ensure they are comparable by giving high numbers to high ratings and low numbers to low ratings.

Default Rating Scales

When you define a proficiency, performance, or weighting scale, you can make it the default scale of that type either within the current business group or globally. A default rating scale applies only when you define competencies.

Rating Scale Attachments

You can add attachments to rating scales. For example, you can attach a competency or objective description or a video of a person demonstrating a skill.

Competency Measurement

To measure competencies, you can define:

- **Proficiency levels**, which are specific to a single competency
- **Proficiency rating scales**, which you can apply to multiple competencies

Proficiency Levels

Each proficiency level that you define for a particular competency has a brief description and a detailed behavioral indicator that enables an assessor accurately to identify a worker's proficiency level.

The following table shows proficiency levels and behavioral indicators for the competency Merchandise Display.

Level	Description	Behavioral Indicator
1	Novice	Has no or minimal merchandise-display experience. Has completed no recommended training.
2	Beginner	Has completed five or fewer merchandise-display activities. Has completed training level 1.
3	Intermediate	Has completed 20 or fewer merchandise-display activities. Has completed training level 2.

Level	Description	Behavioral Indicator
4	Advanced	Has significant merchandise-display experience. Has completed training level 4 and trains junior staff. The worker's merchandise displays are known to improve sales of displayed items.
5	Expert	Is an acknowledged expert by his or her peers inside and outside the enterprise. Has significant merchandise-display experience. Has completed training level 6 and trains both junior and senior staff.

The behavioral indicator for each proficiency level is detailed and specific: you could not apply these behavioral indicators unaltered to a different competency.

Proficiency levels are part of the competency definition.

See: Defining Competencies, page 5-15

Proficiency Rating Scales

Each level in a proficiency rating scale comprises a brief description and can include a behavioral indicator. However, the behavioral indicators are general enough to enable you to apply the scale to multiple competencies. For example:

Level	Description	Behavioral Indicator
1	Novice	Cannot work unsupervised.
2	Beginner	Can perform simple tasks unsupervised, but generally requires guidance.
3	Intermediate	Can perform basic tasks unsupervised, but requires guidance for more complex tasks.

Level	Description	Behavioral Indicator
4	Advanced	Can perform most tasks unsupervised, but requires occasional guidance.
5	Expert	Can perform all tasks unsupervised, and supervises others.

As this rating scale lacks detail relevant to a specific competency, you could apply it to various competencies, such as Negotiating with Suppliers, Planning Store Layouts, and Inventory Control.

See: Rating Scales, page 5-9

Which Method of Measurement?

Proficiency levels are suitable if your enterprise competencies are varied and you want to define accurately what is expected of your workforce. The result is multiple, equivalent measurement systems. Proficiency rating scales are suitable if generic proficiency levels provide enough detail for your purposes and if consistency of measurement is important.

You can use both methods. For example, you could use a proficiency rating scale for your core competencies and proficiency levels for specific job or position competencies. Whichever approach you adopt, give high numbers to high ratings and low numbers to low ratings, so that analysis of the ratings gives consistent and sensible results.

Measuring Unit Standard Competencies

For unit standard competencies, which can lead to formal qualifications, you must define outcomes and specify assessment criteria. Outcomes are nationally defined behaviors or performance standards specific to the unit standard competency. Each outcome has a set of assessment criteria. A registered assessor (from the awarding body, for example) determines whether a worker has achieved the unit standard competency by measuring the outcomes using the assessment criteria.

You can also measure unit standard competencies using proficiency levels or proficiency rating scales. For example, you may want to measure all enterprise competencies using a general rating scale, regardless of whether they lead to formal qualifications. However, the proficiency rating scale or proficiency levels must be in addition to the outcomes and assessment criteria you define for unit standard competencies.

Assessing Competencies

During an appraisal, you assess a worker's competency levels using the measurement scheme defined for each competency.

See: Assessing Competencies and Objectives, *Oracle Performance Management Implementation and User Guide*

Competency Types

Enterprises that make full use of the Oracle HRMS competency functions may create or import many competency definitions. For example, you can define the competencies required by each grade of every job or position in your enterprise. For ease of management and retrieval, you can group competency definitions into *competency types*. The types themselves are for you to define. For example, you can define competency types to differentiate various skill sets, such as management skills, language skills, neonatal nursing skills, retail management skills, and so on. Alternatively, you can define a competency type for each job or position, such as sales manager, department manager, sales assistant, area manager, and so on. A competency can belong to more than one type, and overlap between types is likely to occur.

You can retrieve competencies by competency type when searching for competencies:

- In the Find Competencies window
See: Querying Competencies, page 5-19
- To include in the Competencies section of an appraisal when defining a competency assessment template

See: Assessment Templates, *Oracle Performance Management Implementation and User Guide*

You can update a competency-type definition unless you have included the competencies belonging to a type in a current assessment template. This restriction prevents use of the type in multiple templates giving different results.

Defining Rating Scales

Use the Rating Scales window to define performance, proficiency, and weighting scales.

To define a rating scale:

1. Enter a name and description for the rating scale.
2. Select the rating-scale type.
3. Select Default Rating Scale to make this rating scale the default of its type either

within the business group or globally.

4. To make this rating scale available to all enterprise business groups, select Global.

Note: You cannot change this selection after saving the rating scale.

5. Enter the first level and level name. For example, enter 1 in the Level field and Novice in the Name field.
6. In the Behavioral Indicator field, describe the behaviors that define this performance level (for example, the worker cannot work unsupervised). You can enter up to 2000 characters in this field.
7. Save your work.
8. Repeat Steps 5 through 7 for subsequent levels until the rating scale is complete.
9. To add attachments to the rating scale, position the cursor in the rating-scale name field and click the Attachments icon to open the standard Attachments window.
10. Save your work.

Defining Competencies

Use the Competencies window to define competencies.

To define a competency:

1. Select New in the Find Competencies window.
2. Select either Local or Global in the Scope region.
 - A local competency is visible only within the current business group, and the competency key flexfield for the business group defines the competency name structure.
 - A global competency is visible to all business groups in your enterprise. You can select Global only if your system administrator has set the HR: Global Competency Flex Structure user profile options to Yes. The global competency key flexfield defines the competency name structure.

Note: After saving a competency, you cannot change its scope.

If you change your scope selection before saving the competency, Oracle HRMS deletes any information that you have entered in the

Name, Rating Scale, and Primary Evaluation Method fields.

3. Click in the Name field, and complete the fields in the Competence Flexfield window.
4. Enter a description for the competency.
5. If you use Oracle Projects, enter a name or code in the Alias field to identify the competency. Otherwise, leave the field blank.
6. If you are defining a unit standard competency, select Unit Standard in the Cluster field.

Note: After saving a competency, you cannot change its cluster value from Unit Standard to any other value.

Entering Rating or Proficiency Information

7. On the Valid Date and Proficiency tab, enter the dates between which the competency is valid. You must enter a start date, but you can leave the end date blank.
8. You can either select a general rating scale or define proficiency levels specific to this competency.

Note: This step applies primarily to competencies that are not unit standard competencies. Although you can select a rating scale or specify proficiency levels for a unit standard competency, you must also complete the tasks described in Entering Outcomes and Assessment Criteria, page 5-18.

To select a rating scale:

1. Select the Scale option.
2. If you have defined a default proficiency rating scale for this type of competency (local or global), its name appears automatically in the Rating Scale field. Otherwise, select a rating scale.
3. To view the selected rating scale, click Levels.

To specify proficiency levels:

1. Select the Levels option.

2. Click Levels to open the Levels window.
3. Define the first proficiency level by assigning a level number (for example, 0), a name (for example, Beginner), and a behavioral indicator (for example, the worker has no experience of inventory management and cannot perform basic tasks without supervision). Repeat this step for other proficiency levels.

Entering Competency Evaluation Details

9. Select the main method of evaluating the competency (for example, Written Examination or Peer Assessment).
10. To specify when the competency must be reassessed, enter a number in the Renewal Period field and select a unit. For example, enter 5 in the Renewal Period field and select Year if you assess the competency every 5 years.
11. Select Certification Required if you need a certificate to confirm possession of the competency. For example, you may need a driver's license to prove competency to drive.

If you select Certification Required, enter the certification method and date whenever you include this competency in a worker's competency profile.

12. Save your work.

The rest of this topic applies only if you are defining a unit standard competency.

Entering Qualifications Framework Details

Note: This section applies only if you are defining a unit standard competency.

13. Click the Unit Standard Qualifications Framework Details tab.
14. In the Unit Standard ID field, enter the Qualifications Framework code for the competency.
15. Select the main and subsidiary fields of learning to which the competency belongs.

The main field of learning identifies the industry or sector to which the competency belongs (for example, Management Studies or Nursing).

The subsidiary field identifies the subject area within the field of learning to which the competency belongs (for example, Marketing or Neonatal Care).

16. Select the level type and level.

Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a competency could be at Level 6 on

a scale ranging from Level 1 through Level 8.

The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).

17. Select the credit type and enter the number of credits this competency earns.
The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a unit standard competency.
18. Select the codes that identify the provider of the unit standard competency and the provider's Quality Assurance (QA) organization.

Entering Qualifications Information

Note: This section applies only if you are defining a unit standard competency.

19. Click Qualifications to open the Competency Qualifications window.
20. In the Qualification Links region, select the name of a qualification to which this unit standard competency contributes.
The identifier of the selected qualification appears automatically.
21. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
22. Repeat Steps 20 and 21 for additional qualifications. (A single unit standard competency can contribute to more than one qualification.)
23. Save your work.

Entering Outcomes and Assessment Criteria

Note: This section applies only if you are defining a unit standard competency.

24. Click Outcomes to open the Outcomes and Assessment Criteria window.
25. Enter the number and name of a behavior or performance standard (for example, "Audience response above average" for a presentation skills competency).
26. Enter the dates between which the outcome is valid. You must enter a start date, but you can leave the end date blank.
27. In the Assessment Criteria field, define how to assess the outcome (for example, the

audience rating for a minimum of three presentations is 60% or higher). This information must help an assessor decide whether an outcome has been achieved.

28. Repeat Steps 25 through 27 for additional outcomes.
29. Save your work.

Querying Competencies

When you open the Competencies window, the Find Competencies window opens automatically.

You can query competencies by specifying any combination of:

- Full or partial competency name
- Competency type
- Qualifications Framework qualification, which limits the search to unit standard competencies that are linked to the qualification
- Organization, job, or position, which limits the search to the competency requirements of the specified work structure

To query a competency:

1. Specify a scope value:
 - Local limits the search to competencies in the current business group.
 - Global limits the search to competencies defined as global.
2. Enter your search criteria.
3. Click Find.

The first competency that matches your search criteria appears in the Competencies window. Scroll through additional matching competencies using the Down Arrow key.

The competency name comprises the values you entered in the Competency Flexfield window when you created the competency. For example, if the Competency Flexfield window has one required field and two optional fields, and you enter the competency name Teamwork in the required field and leave the optional fields blank, the competency appears in the Competencies window as "Teamwork ..", where two dots represent the empty optional fields.

Uploading Third-Party Competency Information

The Upload Third Party Skills function enables you to upload global competency definitions and rating scales from a text file or spreadsheet to Oracle HRMS using Oracle HRMS Web Applications Desktop Integrator (Web ADI).

See: Data Upload Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

1. If you intend to upload competency information from a text file, then ensure the text is formatted correctly.

See: Format of Text Files, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Otherwise, you can enter competency information directly into the spreadsheet that Web ADI creates.

2. Select Upload Third Party Skills from the Career Management menu, and follow the on-screen instructions to populate the spreadsheet.

Note: Select an appropriate integrator and layout for the competency-information type that you want to upload. For example, select Upload Third Party Rating Scale integrator to upload rating scales.

3. Upload the spreadsheet contents to Oracle HRMS.

See: Uploading Data Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If the upload fails, correct any errors in the spreadsheet and retry the upload. Diagnostic messages appear in the Messages column at the end of each spreadsheet row.

Grouping Competencies into Types

Use the Competence Types window to group competencies into types.

Before you can perform this task, your system administrator must have added the enterprise competency types to the lookup COMPETENCE_TYPE.

To group competencies into types:

1. Query the competency type.
2. Select competencies to include in this competency type.

3. Save your work.

Competencies that you do not add to a competency type belong to the type Other by default.

Competency Requirements

Competency Requirements

A worker's competency profile identifies competencies that the worker possesses and records the worker's proficiency level in each competency. You can also define the enterprise's *competency requirements*, which are competencies the workforce must have to deliver business success. You can use this information in various ways. For example:

- You can search for candidates for vacancies and opportunities for workers, and identify the best match between the requirements of a role and the skills and experience of the worker.
- When assessing workers during appraisals, you can compare worker competencies with the requirements and proficiency levels for their roles. Having a benchmark statement of requirements that is based on business need brings consistency and objectivity to the appraisal process.
- You can target training and other development activities to close the gap between a worker's competencies and those required by the enterprise.

You can define your competency requirements for:

- Business groups
- Organizations
- Jobs
- Positions

In addition:

- If you use Oracle iRecruitment, you can define competency requirements for vacancies.

See: Creating and Maintaining Vacancies, *Oracle iRecruitment Implementation and User Guide*

- When using the Oracle SSHR Suitability Matching function, you can construct one-time lists of competency requirements when searching for:
 - Workers who meet those requirements
 - Work opportunities that require those competencies

See: The SSHR Suitability Matching Function, page 5-23

Business Group (Core) Competencies

Competency requirements that you define for the business group are referred to as *core competencies*. Typically, core competencies are generic and fundamental to your enterprise strategy. For example, communication skills, negotiation skills, and quality focus may be suitable core competencies in your enterprise. Every member of the business group should demonstrate the core competencies, though the degree of proficiency can vary with seniority and experience. When you define the core competencies, you specify maximum and minimum proficiency levels to encompass the acceptable range.

Organization, Job, and Position Competency Requirements

Competency requirements that you define for organizations apply to all members of the organization but are not core competencies. Competency requirements that you define for jobs and positions apply to all holders of those roles. You can also define competency requirements for particular grades within job or position. Position competency requirements automatically include the requirements of the associated business group, organization, and job.

Essential Competencies

You can designate any competency requirement as essential. The Suitability Matching function identifies workers who possess essential competencies separately from those who possess desirable (nonessential) competencies.

See: The SSHR Suitability Matching Function, page 5-23

How HRMS Uses Competency Requirements

The SSHR Suitability Matching and Appraisals functions are the primary users of competency requirements.

The SSHR Suitability Matching Function

The Suitability Matching function, which you can access from HR Professional, Employee, and Manager Self-Service menus, enables you to find workers for opportunities and opportunities for workers. The application performs this function by comparing worker competency profiles with the competency requirements of business groups, organizations, jobs, positions, and vacancies. The comparison varies with each suitability-matching action. For example, for the action Find Suitable People by Role, you can search for a worker who matches the requirements of an organization only or of a job, position, or vacancy within that organization. You can also include the core competencies in the list of requirements to match.

When you perform the search for workers who match your competency requirements, HRMS identifies workers who:

- Meet all essential and desirable competency requirements
- Meet all essential competency requirements
- Meet all desirable competency requirements
- Meet some or no essential or desirable competency requirements

See: Suitability Matching, page 5-30

The Appraisals Function

When you perform an appraisal, you can assess a worker against the competency requirements of their job or position by selecting Include Job Competencies in the competency assessment template. This selection causes the core competencies, any organization competency requirements, and the job or position competency requirements to appear in the Competencies section of the appraisal. You can use the appraisals function View Competency Gaps to identify areas for development and select training to address deficiencies.

Reporting on Competency Requirements

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

Workforce Intelligence Reporting

The Competence Requirement worksheet in the Competence (Skill) Development Detail Workbook lists the competency requirements of all organizations, jobs, positions, and grades in a business group.

See: Competence (Skill) Development Detail Workbook, page 5-54

Workforce Intelligence (HRMSi) Reporting

The Competence Match (Organization Hierarchy) Status Analytics Workbook provides various analyses of worker competency profiles compared with the requirements of their roles within an organization hierarchy.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

Defining Core Competencies

Core competencies are those required by every member of a business group, and you define them for the business group.

Use the Competence Requirements window.

To define core competencies:

1. In the Business Group field, select a business group.
2. Click Find to display any competency requirements already defined for this business group. If the application displays existing competency requirements, you can:
 - Delete or edit existing competency requirements. To delete an existing core competency, select the competency and click the Delete icon.
 - Define additional competency requirements.
3. To define a core competency, click the first empty row of the competency table and select a competency.
4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this business group.
5. If all workers in this business group *must* possess this competency, then select Essential. When performing suitability matches, the application lists workers who possess essential competencies separately from those who do not.
6. Enter the date from which this competency is required in this business group.
7. Repeat Steps 3 through 6 to define additional core competencies for this business group.
8. Save your work.

What's Next

You can also define competency requirements for organizations, jobs, and positions.

See: Defining Organization, Job, and Position Competency Requirements, page 5-25

Defining Organization, Job, and Position Competency Requirements

You can identify the competencies that workers in an organization or holders of jobs or positions must possess. When you use the Suitability Matching function or advertise a vacancy, the application can compare worker competencies with the competency requirements for an organization, job, or position to find suitable candidates.

Use the Competence Requirements window.

To define competency requirements for an organization, job, or position:

1. Select the organization, job, or position.
2. Click Find to display existing competency requirements. Note that positions inherit competency requirements defined for the business group (the core competencies), organization, and job with which they are associated. If the application displays existing competency requirements, then you can:
 - Delete or edit existing competency requirements. To delete an existing competency requirement, select the competency and click the Delete icon.
 - Define additional competency requirements.
3. To define a competency requirement, click the first empty row of the competency table and select a competency.
4. In the Low and High fields, select the extents of the rating scale that are desirable for this competency in this organization, job, or position.
5. If all workers in this organization, job, or position must possess this competency, select Essential. When performing suitability matches, the application lists workers who possess this competency separately from those who do not.
6. For jobs and positions only, select a grade, if appropriate.
7. Enter the date from which this competency is required.
8. Repeat Steps 3 through 7 to define additional competency requirements for this organization, job, or position.
9. Save your work.

Related Topics

[Copying Competency Requirements, page 5-26](#)

Copying Competency Requirements

You can copy the core competencies (those defined as required for the business group) or competency requirements defined for an organization, job, or position to another organization, job, or position.

Use the Competence Requirements window.

To copy competency requirements:

1. Select the organization, job, or position to which you want to copy competency requirements.
2. Click Copy Competencies.
The Copy Competencies window opens.
3. To copy the core competencies, leave Core Competencies selected. Otherwise, deselect core competencies and select the organization, job, or position from which you want to copy the competency requirements.
4. To copy the proficiency levels, leave Copy Levels selected. Otherwise, deselect this value. Note that, if you copy the proficiency levels, then you can edit them after copying.
5. Specify the date from which these competency requirements apply to your organization, job, or position.
6. Click Copy Competencies.
7. Edit or delete any of the copied competency requirements, if required. For example, you may want to enter a grade for competency requirements that you copy to a job, change the validity dates of a requirement, or delete duplicate requirements.
8. Repeat this procedure from Step 2 to copy additional competencies, if appropriate.
9. Save your work.

Viewing Competency Requirements

Use the Competence Requirements window to view competencies required at the business group, organization, job or position level.

To view competency requirements:

1. Select the business group, organization, job, or position.
2. Click Find.

The application displays competency requirements defined for the specified work structure.

Competency Profiles

Competency Profiles

A competency profile is a list of a worker's competencies showing the worker's level of proficiency in each competency. For unit standard competencies, which the worker usually acquires in increments, the competency profile shows whether the competency is In Progress or Achieved.

Setting Up the Competency Profile

You can create a worker's competency profile when the worker first joins the enterprise using details from the worker's resume, tests, or interviews. You can also copy competency requirements from a vacancy definition in Oracle iRecruitment to a competency profile.

Copying Core or Primary Assignment Competencies to the Competency Profile

Some competencies are important for all employees throughout your enterprise. Such competencies are referred to in Oracle HRMS as *core competencies*, and you define them as competency requirements for the business group. Other competencies are required for particular organizations, jobs, positions, or grades within job or position. You can copy both the core competencies and any competency requirements associated with a worker's primary assignment to the worker's competency profile. This feature enables you to set up a worker's competency profile efficiently and ensures that you assess the worker's proficiency in all relevant competencies.

See: Creating a Competency Profile, page 5-32

Maintaining Competency Profiles

You can update a worker's competency profile at any time using:

- The Manager Self-Service Competency Profile function
- The Employee Self-Service Competency Profile function
- The Competence Profile window in the forms-based interface

If you need to recertify a competency at intervals (for example, annually), then you can define a periodic alert (using Oracle Alert) to notify you as the recertification date approaches.

Assessing Competencies in an Appraisal

You can assess a worker's competencies during an appraisal if you include a

competency assessment template in the appraisal template. Otherwise, no Competencies section appears in the appraisal. Competency assessment templates can include some competencies (for example, those required by a worker's job) by default. You can update the Competencies section for a worker during the appraisal process. For competencies already included in the worker's competency profile, the worker's current proficiency level appears in the Competencies section of the appraisal.

See: The Appraisal Template, *Oracle Performance Management Implementation and User Guide* and Assessment Templates, *Oracle Performance Management Implementation and User Guide*

HRMS can update a worker's competency profile automatically after an appraisal. You can enable this feature at site level by setting the user profile option Apply Assessment Competencies to Person to Yes.

See: Setting Up the Appraisal Process, *Oracle Performance Management Implementation and User Guide*

Alternatively, you can enable this feature at appraisal level by selecting Update Competency Profile in the appraisal template.

See: The Appraisal Template, *Oracle Performance Management Implementation and User Guide*

When you enable this feature, HRMS writes the new proficiency level (allocated to the worker on the Final Ratings page of the appraisal by the main appraiser) to the worker's competency profile.

The Competency Profile and Oracle Learning Management

Training is the primary method of acquiring new skills and developing existing skills. Users of Oracle Learning Management can configure the application to update learners' competency profiles automatically on successful completion of training.

See: Competencies, *Oracle Learning Management Implementation Guide* and Configuring Competency Update Automation, *Oracle Learning Management Implementation Guide*

How HRMS Uses Competency Profiles

The Oracle HRMS Self-Service Suitability Matching function enables you to:

- Find workers for opportunities.
- Find opportunities for workers.

The application performs this function by comparing worker competency profiles with the competency requirements of vacancies, jobs, and positions.

See: Suitability Matching, page 5-30

Reporting on Competency Status

HRMS can generate several reports that analyze competency profiles and competency requirements to provide business intelligence.

Workforce Intelligence Reporting

The Competence (Skill) Development Detail Workbook provides two worksheets of interest:

- The Person Competence Profile Worksheet identifies workers with similar competency profiles and enables you to compare the competency profiles of workers at the same grade.
- The Competence Delivered by Training Activity worksheet identifies competencies workers acquire by means of formal learning activities.

See: Competence (Skill) Development Detail Workbook , page 5-54

The Competence Updates after Appraisal workbook provides a summary of changes made to competency profiles (either automatically or manually) after appraisal completion.

See: Competence Updates after Appraisal Workbook, page 5-55

Workforce Intelligence (HRMSi) Reporting

The Competence Levels (Organization Hierarchy) Detail Analytics Workbook displays, for an organization hierarchy, each worker's proficiency level in a selected competency.

See: Competence Levels (Organization Hierarchy) Detail Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

The Competence Match (Organization Hierarchy) Status Analytics Workbook compares the competency requirements of a job with the competency profiles of workers occupying that role.

See: Competence Match (Organization Hierarchy) Status Analytics Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

Suitability Matching

The SSHR Suitability Matching function, which is available to HR Professionals, managers, and workers, enables you to compare a worker's competency profile and work preferences with the requirements of a work opportunity.

Depending on the responsibility used, the default Suitability Matching page offers users between four and ten suitability-matching options. For example, workers can use this function to search for work opportunities for themselves, and managers and HR Professionals can use this function to find candidates for work opportunities.

The available suitability-matching options are shown in the following table.

Suitability Matching Options

Category	Option	Access by Responsibility
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

Creating a Competency Profile

Use the Competence Profile window to create, view, and update a worker's competency profile. Alternatively, you can use the SSHR Competency Profile function, which is available to both employees and managers.

The Competence Profile window displays all competencies, past and present, held by the worker. To see only current competencies and proficiency levels, select Current Competencies. If a worker has a competency profile in more than one business group, then you can see, but not update, any *global* competencies the worker acquired in other business groups.

To populate a worker's competency profile, you can:

- Add competencies individually to the profile.
- Copy competencies to the profile.

The amount of information you enter for a competency depends on the competency type: unit standard competencies require more information than non-unit-standard competencies.

See: Competencies Overview, page 5-8

To add individual competencies to a competency profile:

1. Select the first competency this worker possesses.
2. Select the worker's proficiency level in this competency.

Note: If you update a proficiency level, enter the date from which the new level applies. When you save the competency profile, HRMS automatically ends the previous proficiency level on the day before the new level starts.

3. Enter the date from which the worker possesses the competency at this level. You can enter an expiry date, if required.
4. In the Source of Proficiency Rating field, you can select the method, such as training course or previous experience, by which the worker gained the competency.

The Status Field

The Status field, which is read only, can contain the value Achieved or In Progress.

- When the worker has achieved all outcomes for a unit standard competency, its status is Achieved. Otherwise, its status is In Progress.

When you save the competency profile, Oracle HRMS changes the status of a

unit standard competency from In Progress to Achieved if the person has achieved all outcomes for the competency.

- All non-unit-standard competencies have the status Achieved, by default.

When you add a competency to the profile, the Status field is blank. Oracle HRMS populates the field only when you save the competency profile.

Entering Certification Details

5. Click the Certification tab.
6. Select the certification method (for example, examination) for the competency, and enter the certification date.
7. In the Next Review field, enter the date on which you must reassess the competency, if appropriate.

Viewing Qualifications Framework Details

8. **Note:** This step applies to unit standard competencies only.

Click the Unit Standard Qualifications Framework Details tab.

The Qualifications Framework Details for the unit standard competency appear, including the number of credits associated with the competency, the field of learning to which the competency belongs, and the unit standard identifier.

9. Repeat from Step 1 to select additional competencies.
10. Save your work.

To record outcomes achieved:

Note: This procedure applies to unit standard competencies only.

You record outcomes achieved towards a unit standard competency in the Outcomes Achieved window.

1. Select a unit standard competency and click the Outcomes Achieved button.
2. Select the name of the outcome achieved towards the selected unit standard competency.

The assessment criteria for this outcome appear in the Assessment Criteria field.

3. In the Date From field, select the date on which the outcome was assessed as

achieved.

4. If you must reassess the outcome at a future date, enter that date in the Date To field.
5. Repeat from Step 2 for additional outcomes for this unit standard competency.
6. Save your work.

If the worker has achieved all outcomes for a unit standard competency, Oracle HRMS updates the status of the competency to Achieved when you save the competency profile. Otherwise, the competency status remains In Progress.

To copy competencies to the competency profile:

1. Click Copy Competencies to open the Copy Competencies window.
2. In the Copy Competencies window, do one of the following:
 - Select Core Competencies to copy competency requirements defined for the business group.
 - Select Primary Assignment Competencies to copy competency requirements from the organization, job, position, and grade to which the worker is assigned.
 - Select a vacancy to copy the competency requirements from a vacancy definition in Oracle iRecruitment. The application automatically copies the competencies defined for the vacancy.
3. Enter the dates between which the copied competencies are valid. You must specify a start date, but the end date is optional.
4. Click Copy.
You can delete or update any of the copied competencies (for example, by specifying proficiency levels and certification details).
5. Save your work.

Entering Work Preferences for a Worker

You can record workers' preferences, such as their willingness to travel or relocate and their preferred working hours. When you use the SSHR Suitability Matching function to match workers to opportunities or find opportunities for workers, the application can take work preferences into account.

To enter work preferences, you can use the Self-Service Work Preferences function, which is available to both managers and employees.

In the forms-based interface, use the Work Preferences window, accessed from the People window.

To enter work preferences for a worker:

1. Select any relevant work capabilities. For example, if a worker will accept international travel but is not willing to relocate domestically, select Visit Internationally but leave Relocation Required for Position deselected.
2. Enter the worker's preferred working hours and work schedule.
3. Complete the International Deployment region if the worker is willing to relocate or travel internationally.
4. Save your work.

Related Topics

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

Qualifications

Qualification Types

Oracle HRMS enables you to record the types of qualifications recognized by your enterprise, including:

- Educational and vocational qualifications
- Licenses
- Awards
- Honors

You can rank qualifications. For example, you could rank a doctorate as 1, a master's degree as 2, a bachelor's degree as 3, and so on. You can rank equivalent qualifications at the same level. For example, you could rank both a bachelor's degree and a vocational qualification as level 3. This feature is useful for identifying all workers qualified at level 3 or above, for example.

Qualifications Framework Qualifications

Qualifications Framework qualifications result from the achievement of unit standard competencies. For this type of qualification, you record national Qualifications Framework details, including the number of credits attached to the qualification, the awarding body, and the field of learning to which the qualification belongs.

Schools and Colleges

You can identify the schools and colleges that deliver the qualifications that your enterprise recognizes so that you can record where a worker gained a qualification. As schools and colleges are available to all business groups, you have to define them once only.

Defining Qualification Types

Use the Qualification Types window to define the qualifications that your enterprise recognizes.

Before you start this task, your system administrator must define generic qualification types (such as Degree, Diploma, and License) in the PER_CATEGORIES lookup.

To define qualification types:

1. Enter the name of the qualification.
2. In the Category field, select the qualification type.
3. If required, rank the qualification.

Entering Qualifications Framework Details

Note: This section applies only if you are defining a Qualifications Framework qualification.

4. Enter the Qualifications Framework identifier for the qualification.
5. Select the Qualifications Framework qualification type (for example, Diploma, Bachelor of Arts, or School Certificate).
6. Select the main and subsidiary fields of learning to which the qualification belongs.
The main field of learning identifies the industry or sector to which the qualification belongs (for example, Management Studies or Nursing).
The subsidiary field identifies the subject area within the field of learning to which the qualification belongs (for example, Marketing or Neonatal Care).
7. Select the level type and level.
Qualifications Framework levels indicate the extent to which knowledge and skills have been advanced by learning. For example, a qualification could be at Level 3 on a scale ranging from Level 1 through Level 5.
The level type identifies the category to which the Qualifications Framework level belongs (for example, NQF, NVQ, or HND).
8. Select the credit type and enter the total number of credits for this qualification.
The credit type identifies the unit of measure for unit standard credits. For example, the credit type could be notional hours of work or study required to achieve a Qualifications Framework qualification.
9. Select the qualification provider.
10. Select the Quality Assurance (QA) organization that registered the qualification provider.

Entering Qualification Competencies

Note: This section applies only if you are defining a Qualifications Framework qualification.

11. Click Competencies to open the Qualification Competencies window.
12. In the Unit Standard Competency Links region, select the name of a unit standard competency that contributes to this qualification.
The Unit Standard ID appears automatically.
13. Select the unit standard type. This value specifies the relevance of the unit standard competency to the qualification (for example, core or optional).
14. Enter the dates between which the link is valid. You must enter a start date, but you can leave the end date blank.
15. Repeat Steps 12 through 14 for additional unit standard competencies.
16. Save your work.

Entering Qualifications

You can enter your workers' completed and in-progress qualifications when they first join the enterprise. You may need to update a worker's qualifications record after completion of a training course, for example.

Note: If the worker for whom you are entering qualifications has qualifications records in other business groups, then you will be able to see, but not update, qualifications entered for the worker in those other business groups.

Workers and managers can use these SSHR functions to enter and update worker qualification records:

- Education and Qualifications
- Other Professional Qualifications

In the forms-based interface, use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the qualification type, and enter its title.

For information about defining qualification types, see: Defining Qualification Types, page 5-36

2. Select the qualification status, for example, ongoing or completed.
3. Enter the grade at which the worker holds the qualification, if appropriate.
4. Select the establishment at which the worker gained the qualification. The list comprises establishments you recorded the worker as having attended.

See: Entering Schools and Colleges Attended, page 5-41

5. Enter the name of the body that awards the qualification. If you record this value in the qualification types record for a Qualifications Framework qualification, it appears here automatically.
6. Enter the dates between which the worker studied for the qualification. Leave the end date blank if the qualification is in progress.
7. Enter the worker's ranking in the study group, if relevant.
8. Save your work.

To enter license details:

1. Click the License tab.
2. Enter the license number, for example, a driver's license number.
3. Enter any restrictions on the license. For example, the license may not be valid in certain states.
4. Enter the license expiry date.

To enter tuition fees:

1. Click the Tuition tab.
2. Enter the fee amount, and select the currency.
3. Select the tuition method, for example, day release.
4. Specify how the worker's tuition fees will be reimbursed (for example, bank transfer when the qualification is awarded).

To enter training details:

1. Click the Training tab.

2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification (for example, 60 days).
4. Enter the units in which the training is measured, for example, days.

To enter professional membership details:

1. Click the Professional Membership tab.
2. Select the professional body to which the person belongs. The list comprises organizations with the classification Professional Body.
3. Enter the worker's membership number and category.
The available membership categories depend on the table used to calculate subscription rates for the professional body. Oracle Payroll uses this table when calculating the amount to deduct from a worker's salary during the payroll run.
4. Select the method by which the subscription is to be paid. This is optional and for information only.

To view Qualifications Framework details:

Note: This section applies to Qualifications Framework qualifications only.

1. Click the Qualifications Framework Details tab.
2. Details of the selected qualification appear. For example, you can see its ID, the field of learning to which it belongs, and the number of credits earned. You cannot update this information.

To enter subject details:

1. Save your work.
2. Select the first subject the qualification comprises.
3. Select the subject status, for example, passed or ongoing.
4. Enter the dates between which the subject is studied. You must enter a start date, but you can leave the end date blank.

5. If the subject forms a major part of the qualification, select Major.
6. Optionally, enter the grade at which the worker studies the subject.
7. Enter further subjects, as appropriate.
8. Save your work.

Defining Schools and Colleges

Use the Schools and Colleges window to define the establishments that deliver the qualifications that your enterprise recognizes.

To create establishments:

1. Enter the establishment name.
2. Enter the location name.
3. Repeat Steps 1 and 2 for additional establishments or locations.
4. Save your work.

These establishments appear in the list of schools and colleges in the Schools and Colleges Attended window.

Entering Schools and Colleges Attended

Use the Schools and Colleges Attended window, accessed from the People window, to enter a worker's attendance at educational establishments.

Note: If a worker has person records in other business groups, then you can see, but not update, any establishment information entered for the worker in those other business groups.

To enter schools and colleges attended:

1. Select the name of the school or college attended.

If the school or college does not appear in the list of values, then you can enter the information in the name field.

Note: If you enter the name of the school or college, then it is available for this worker only. To update the global list of schools and colleges that is available to all workers, see: Defining Schools

and Colleges, page 5-41

2. Enter the attendance dates, and indicate whether the worker's attendance was full time. If the attendance is ongoing, then leave the end date blank.
3. Repeat Steps 1 and 2 for additional establishments.
4. Save your work.

In a worker's qualifications record, you select the establishment at which the worker gained a qualification from the list of schools and colleges the worker attended.

Career Paths

Career Paths

A career path defines a route to a job or position from a different job or position that is lower in the hierarchy. You can base career paths on either job progression or position progression, but not both. A job or position can appear in multiple career paths, but once only in any single career path.

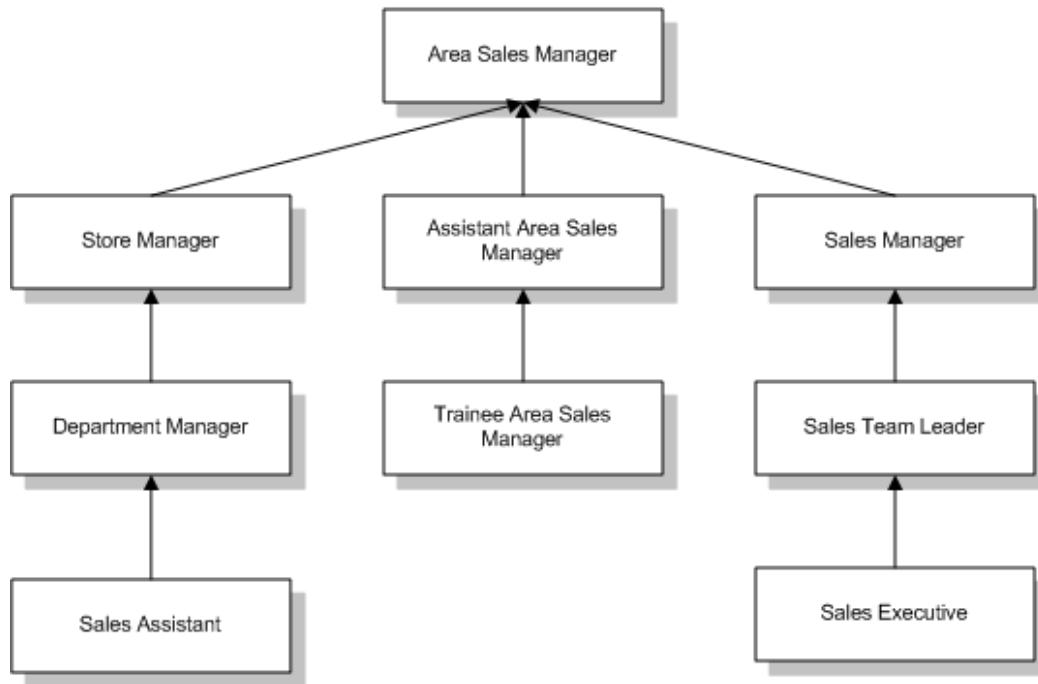
You can identify career paths for a worker in various ways. For example, you can include the names of possible career paths:

- In the Overall Rating and Comments or Advancement Potential sections of the worker's appraisal
- In appraisal questionnaires
- In a document or in comments attached to a worker's record

Career Paths Based on Job Progression

The career path is a hierarchy of jobs that you build from the top down. For example, for the job Area Sales Manager, you could define the following career path to show possible routes to that job:

Job-Based Career Path



See: Defining Career Paths, page 5-44

Lines of Progression for Affirmative Action Plan (AAP) Reporting (U.S. Only)

For the AAP-Workforce Analysis report, you use career paths based on job progression to define lines of progression.

Career Paths Based on Position Progression

For career paths based on position progression, you define a standard position hierarchy.

See: Creating a Position Hierarchy, *Oracle HRMS Enterprise and Workforce Management Guide*

Defining Career Paths

A career path shows a route to a job or position from a different job or position.

You define career paths for positions using position hierarchies.

See: Position Hierarchies, *Oracle HRMS Enterprise and Workforce Management Guide*

You define career paths for jobs using the Career Path Names window and the Map Career Path window.

To define a career path based on job progression:

1. In the Career Path Names window, enter the names of the career paths you want to define.
2. Save your work.
3. Open the Map Career Path window. In the Name field, select the top job in the career path you are mapping.
4. In the Career Path Name field, select the name of a career path you defined in Step 1.
5. In the Job Progression From block, select all jobs that are one level down from the job identified in the Name field.
6. To extend the career path downwards from any one of these jobs, select the relevant Down check box.

The window now shows your selected job in the Name field. The Job Progression To field now shows the job at the top of the career path.

7. Repeat Steps 5 and 6 until the career path is fully defined. To move back up the career path, select the Up check box.
8. Save your work.

Skills Matching

The Special Information Approach to Skills Matching

From Release 11 onwards, the recommended approach to holding and matching skills information is to define a framework of competencies. These provide the common language for a wide range of human resource activities including assessments, appraisals, employee profiling, career development, and recruitment. You can build up a wealth of skills information that can be maintained and used by employees and line managers themselves, using the web Direct Access interface.

However, Oracle HRMS continues to support the earlier approach to handling skills information, using Special Information Types. This is an alternative to the competence approach.

What are Special Information Types (SITs)?

Special Information Types are a flexible way to hold additional information you require about people and, if necessary, to compare this information with the requirements of jobs or positions. For each Special Information Type you can define up to thirty fields to hold details of competencies, professional qualifications, education, and valid experience. For each person, job, or position, you can make multiple entries for each Special Information Type.

For example, suppose you want to store details of technical skills. You could set up the following fields:

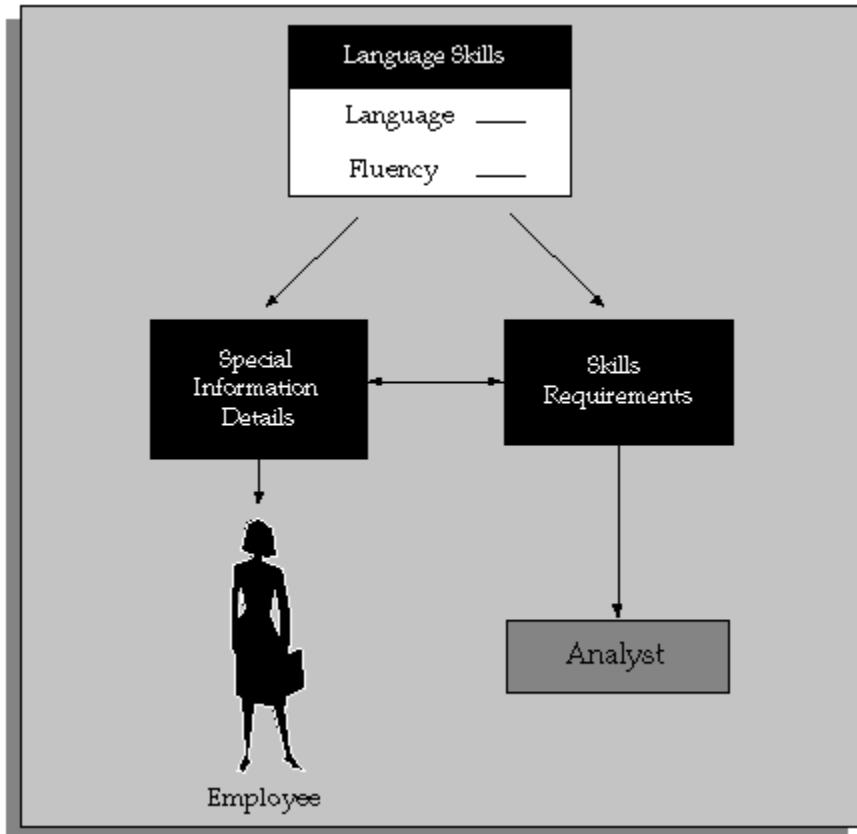
- Skills - with a list of valid values to control the vocabulary used to describe the skills
- Years Experience - to hold the number of years of experience in using the skills

You can display the fields you define in one or more of the following windows:

- Special Information, to record skills or experience for an employee or applicant
- Job Requirements, to hold skill requirements for a job
- Position Requirements, to hold skill requirements for a position
- Skill Provisions, to record the skills or qualifications provided by training activities in Oracle Training Administration

Using views and reports, you can then match people to posts, according to their skills or other attributes.

Matching Skills Requirements to Special Information



Tips for Defining Special Information Types to Hold Skills Information

- If you want to give different sets of people access to different categories of skills information, define each category as a separate Special Information Type. You can configure the Special Information window to display just one Special Information Type.
- If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.
- You can use cross-validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.
- You can speed up data entry and minimize errors by defining an 'Alias' for common combinations of segment values. For example, completion of a course may always result in a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.
- If you want users to enter the precise title of a qualification (perhaps read from a

resume), you cannot supply a list of values. However, consider providing additional fields with lists of values using broad terms such as 'degree-level' or 'science' to help users searching for information.

Unstructured Information

You may want to hold some skills information, such as resumes, as unstructured, free text information. You can store this information as attachments to the People and Special Information windows.

Skills Matching Report

The standard Skills Matching Report matches people against all the requirements you have entered for one job or position (held in Special Information Types).

The List People By Special Information window displays a list of people who match a particular profile for one Special Information Type.

Running the Skills Matching Report

This report matches employees, applicants, or both against the requirements of one job or position (held in Special Information Types). You can select the closeness of the match you require.

You run reports in the Submit Requests window.

To run the Skills Matching Report:

1. In the Name field, select Job and Position Skills Matching Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the Job or Position to which you want to match people.
4. Select the person type, or types, you require.
5. Select the closeness of match you require from one of the following levels:
 - One or more essential skills
 - All essential skills
 - All essential and one or more desirable skills
6. Choose the Submit button.

Event and Attendance Administration

Event and Attendance Administration

You can use the events and attendance administration features in Oracle Human Resources to:

- Set up events
- Book employees and applicants onto events
- Record information about employee interviews, such as disciplinary hearings and performance reviews

Note: The system administrator can create configured versions of the Event Bookings window so that you use one version for employees and another version for applicants.

Event Bookings and Attendance

You can view all the events a person has attended or is scheduled to attend in the Oracle HRMS Book Event window. You can also enter new bookings here. See: Creating a Booking Event, page 5-51

Employee Reviews

You can use the Employee Review window to record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

To prepare for a performance review, you can view the employee's:

- Career history, using the Assignment History window
See: Viewing a Worker's Assignment History, page 2-144
- Likely career paths
See: Career Paths, page 5-43

If you are using Oracle Self-Service Human Resources (SSHR), you can use web-based access to complete assessment and appraisal templates for your employees.

Events, Reviews and Competence Profiles

If you have adopted the competence approach, you can use events or reviews as an

opportunity to update your employees' competence profiles. For example, you may decide that employees' attendance at a team-leading seminar provided them with the Team-Leading competence at level 1. Once you have determined the competencies delivered by the event, you can update the appropriate employees' competence profiles.

Entering Performance Ratings

You carry forward details from the Employee Review window to the Performance window (which opens from the Salary Administration window). In this window, you can enter performance ratings for an employee at any time. You can also schedule the next performance review, and, optionally, associate a salary change with a performance review.

Note: You cannot use a performance review entered through Oracle Self-Service Human Resources (SSHR).

In order to perform this task, performance rating values for the Lookup Type PERFORMANCE_RATING must have been defined.

To enter a performance rating for an existing review:

1. Select an existing review by one or all of the following:
 - Date
 - Location
 - Type
2. Select a performance rating.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

To enter a new review and performance rating:

1. Enter the new review date.
2. Select a performance rating, if required.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically)

Entering an Employee Review

You can record details of a review event using the Employee Review window.

Before you can enter employee reviews, different types of employee interview must have been defined as values for the Lookup Type EMP_INTERVIEW_TYPE. These interview types could include disciplinary hearings and performance reviews.

To enter a review for an employee:

1. Select an interview type, and enter a start date. The other fields are optional.

If you select a location for the employee's review that has a time zone associated with it, the Timezone field displays the time zone with that location, regardless of your location.

2. Save the review.
3. You can select reviewers by name or employee number. Save your work.

If you want to enter a performance rating for the employee associated with this review, navigate to the Assignment or Salary Administration window.

See: Entering Performance Ratings, page 5-50

Creating a Booking Event

You use the Book Event window to create booking events.

Tip: Your system administrator can set up the Additional Event Details descriptive flexfield to record booking statuses (such as Wait Listed, Confirmed, and Attended). This descriptive flexfield displays on the Book Event window, the Employee Review window, and the Applicant Interview window.

You can select relevant values in the Type field, such as departmental meeting or marketing presentation, only if your system administrator defines values for the Lookup Types EMP_EVENT_TYPE and APL_EVENT_TYPE. Before you create booking events, ensure that relevant values are available in the Type field.

U.S. only: All Tenure-specific events must begin with the word Tenure.

To create a booking event:

1. Select the type of event in the Type field, and then enter the date, time, supplying organization, location, and contact name.

Note: You can only select locations that are associated with a timezone. You associate a location with a timezone in the Location window.

2. Save the event.
3. You can select attendees by name or number in the Bookings block of this window.

Workforce Intelligence Key Concepts for Competencies, Qualifications and Development

Key Concepts for Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications and Development Intelligence enables you to investigate the competencies and proficiencies of employees and applicants.

The following concepts enable you to accurately interpret the results of the Competencies, Qualifications and Development intelligence reports:

Competencies and Proficiencies

Within Oracle HRMS, you define competencies and proficiencies against a person and job. If a person has multiple assignments for the same job, these reports only count the person once. This ensures that trends remain accurate.

In order to appear in the reports, people must work for the required job and grade for a competence on the report run date.

Note: You must define competencies against jobs, and assign valid grades to jobs, or these reports will not be able to compare individual's proficiencies with their job competence requirements.

Workforce Intelligence for Competencies, Qualifications and Development

Competence (Skill) Development Detail Workbook

This workbook investigates the skills of your workforce, with regard to skills held by workers, skills required, or skills delivered through training, within your organization. The resulting information enables you to:

- View competencies owned by workers within your organization
- Analyze competence shortages within your organization
- Analyze competencies delivered by training

Worksheets

This workbook has the following worksheets:

- Competence Delivered by Training Activity
- Competence Requirement
- Person Competence Profile

Competence Delivered by Training Activity Worksheet

This worksheet reports on competencies delivered by training activities and events. The resulting information enables you to:

- Compare the competencies delivered by training to those required.
- Analyze training efficiency.

Business Questions

Which competencies do courses provide?

Competence Requirement Worksheet

This worksheet displays competence requirements for all organizations within a business group. The worksheet enables you to analyze competence requirements for business groups, organizations, jobs, positions, and grades. For each requirement you can investigate the:

- Competencies needed for a particular job.
- Skills shortages within an organization.

Business Questions

Which jobs require a particular competence, and at what level?

Headings and Calculations

This worksheet uses the following calculations:

- **Required For**

Populates the Required For column with the organization and job that require a particular competence.

Person Competence Profile Worksheet

This worksheet enables you to analyze people's competency profiles by type. It enables you to:

- View people with similar competencies.
- Compare people of similar grade.

Business Questions

How proficient is an individual for a particular competence?

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 5-53

Competence Updates after Appraisal Workbook

The Competence Updates after Appraisal Workbook enables administrators and managers to view competence updates, both automatic and manual, made as a result of a completed appraisal. You can view competence updates for all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

Worksheets

This workbook contains two worksheets:

- Competence Updates after Appraisal by Organization Hierarchy
- Competence Updates after Appraisal by Supervisor Hierarchy

Competence Updates after Appraisal by Organization Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, competence names, and new and previous (if any) proficiency levels for each competence.

Business Questions

What competence updates have appraisees in my department received through appraisals?

Parameters

You must enter values for five parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organization
- Start Date
- End Date

Competence Updates after Appraisal by Supervisor Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals performed on workers under a specified supervisor.

Business Questions

What competence updates have my direct and indirect reports received through appraisals?

Parameters

You must enter values for three parameters:

- Supervisor
- Start Date
- End Date

Glossary

360-Degree Appraisal

Part of the Performance Management Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

Absence

A period of time in which an employee performs no work for the assigned organization.

Absence Case

Two or more absences for the same person that you associate manually because they share a common factor, such as the same underlying cause.

Absence Type

Category of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual

The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Period

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Plan

See: *PTO Accrual Plan*, page Glossary-30

Accrual Term

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Action

In AME, an Action is the *Then* part of an Approval Rule that specifies how the application must progress a transaction's approval process in a particular way depending on the conditions met.

Action Type

In AME, an action type is the generic container for specific actions. It enables you to specify the action to take if a transaction meets the condition of an approval rule. The action type, thus, generates the appropriate approvers for a transaction. As an AME administrator you can make particular action types available for specified transaction types.

Activity Rate

The monetary amount or percentage associated with an activity, such as \$12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Agency

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

Agency Candidate

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

Agency User

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

Align

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

AME

Oracle Approvals Management Engine. A highly extensible approvals rules engine that enables organizations implementing Oracle Applications to simply and effectively define business rules that determine who must approve a transaction originating within an application. You can devise simple or complex rules, as your organization requires, which then form part of your overall business flow. A central repository holds all the rules to facilitate management and sharing between business processes.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

An applicant is a person who submits an application for employment to an organization.

Applicability

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which

candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-5.

Appraisee

The person who is the subject of an appraisal.

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Approval Rule

In AME, a business rule that determines a transaction's approval process. You construct rules using *conditions* and *actions*. For example, you can write a business rule with the conditions that if the total cost of a transaction is less than 1000 USD, and the transaction is for travel expenses, then the action must be to obtain approval from the immediate supervisor of the person triggering the transaction.

Approver Groups

In AME, an approver group is a collection of approvers you define, which you can include as part of actions when you set up your approval rules.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-12

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-4.

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of \$10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-32

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Attribute

In AME, attributes are the business facts of a transaction, such as the total amount of a transaction, percentage of a discount, an item's category, or a person's salary and so on. These business variables form part of the conditions of an approval rule, and determine how the transaction must progress for approvals.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balance Adjustment

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds

These are the input values of matching units of measure of any elements defined to feed the balance.

Balances

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-30

Bargaining Unit

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Benefit

Any part of an employee's remuneration package that is not pay. Vacation time,

employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-16

Block

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-33, *Field*, page Glossary-18

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

Budget Value

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group

The business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

Business Group Currency

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Business Number (BN)

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Business Rule

See Configurable Business Rules, page Glossary-10

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-18

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Calendars

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

Candidate Offers

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-34

Cascade

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

Cash Analysis

A specification of the different currency denominations required for paying your

employees in cash. Union contracts may require you to follow certain cash analysis rules.

Ceiling

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Certification

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Child/Family Support Payments

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Collective Agreement Grade

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

Communications

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-16

Compensation Category

A group of compensation items. Compensation Categories determine the type of compensation that you award under a plan.

Compensation Object

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation

objects include programs, plan types, plans, options, and combinations of these entities.

Competency

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-40

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-25

Competency Evaluation

A method used to measure an employees ability to do a defined job.

Competency Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

Competency Requirements

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-10, *Core Competencies*, page Glossary-11

Competency Type

A group of related competencies.

Condition

In AME, a Condition is the *If* part of an Approval Rule that specifies the conditions a transaction must meet to trigger an approval action. A condition consists of an attribute, which is a business variable, and a set of attribute values that you can define. When a transaction meets the specified attribute values, then the application triggers the appropriate action.

Configurable Business Rule

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

Configurable Forms

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

Consolidation Set

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

Contract

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution

An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competency*, page Glossary-10

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-5

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

Current Period of Service

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

Note: In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the

business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

Current Period of Placement

A contingent worker's period of placement, page Glossary-28 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-13, *Effective Date*, page Glossary-15

DateTrack

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-15

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-36

Deployment Factors

See: *Work Choices*, page Glossary-41

Deployment Proposal

The entity that controls the permanent transfer or temporary secondment of an employee from a source business group to a destination business group. The HR Professional in the destination business group creates the deployment proposal using the Global Deployments function.

Derived Factor

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield*, page Glossary-22

Deviation

A change to the standard approver list is a deviation.

Developer Descriptive Flexfield

A flexfield defined by your localization team to meet the specific legislative and

reporting needs of your country.

See also: *Extra Information Types*, page Glossary-18

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Effective Date

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-13

EIT

See: *Extra Information Type*, page Glossary-18

Electability

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

Element Classifications

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-33, *Nonrecurring Elements*, page Glossary-25

Element Link

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-37

Elements

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Set

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

Eligibility

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

Eligibility Profile

A set of eligibility criteria grouped together. Eligibility profiles help determine eligibility for compensation and benefits and are re-usable. Eligibility profiles can be linked to a compensation object (such as a program, plan, or option), a collective agreement, a grade ladder, or a work schedule to restrict eligibility for these.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay

(SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-14

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33

Flex Credit

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33, *Field*, page Glossary-18

Format Mask

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

Format Type

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Global Value

A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type

A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

Grade Rate

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-27

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-19

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

High Availability

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

Imputed Income

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Incumbent

In Oracle HRMS, the term Incumbent refers to an active worker (employee or contingent worker).

Individual Compensation Distribution

A tool that enables managers assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and

company cars. Also enables employees to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, My Oracle Support (formerly MetaLink) and Learning Management.

Initiator

A person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions

An SSHR user assistance component displayed on a web page to describe page functionality.

Integrating Application

In AME, an application that uses Oracle Approvals Management Engine to manage the approval processes of its transactions.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-14

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle's enterprise learning management system that administers online and offline educational content.

Leave Loading

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

Leaver's Statement

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Legal Employer

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

Legal Entity

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer.

Life Event

A significant change in a person's life that results in a change in eligibility or

ineligibility for a benefit.

Life Event Collision

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linked PIWs

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

Linking Interval

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

LMSS

Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring

needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

Manager-Employee Appraisal

Part of the Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

Maternity Pay Period

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

NACHA

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

National Occupational Classification (NOC) code

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-33

North American Industrial Classification (NAIC) code

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan

A benefit plan that you define outside of a program.

Objective Assessment Template

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-10

Objectives Library

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

Off-Boarding

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

OLM

Oracle Learning Management.

On-Boarding

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Options

A level of coverage for a participant's election, such as Employee Only for a medical plan, or 2x Salary for a life insurance plan.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

Organization

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

Organization Manager Hierarchy

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules.

OSSWA

Oracle Self Service Web Applications.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-19

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-21

Payment Type

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Plan

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

Personal Public Service Number (PPS)

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Person Search

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personal Scorecard

A collection of objectives for a single worker arising from a single Performance Management Plan.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

Plan Design

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Process Rule

See Configurable Business Rules, page Glossary-10

Professional Information

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

Progression Point

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-27

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

Provincial/Territorial Employment Standards Acts

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

Qualification Type

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-10

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-37

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the

first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

A function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-5

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

Rates

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rate By Criteria

A function that enables the calculation of pay from different rates for each role a worker performs in a time period.

Rating Scale

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

Record of Employment (ROE)

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall

activity.

Recurring Elements

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-25, *Standard Link*, page Glossary-37

Recruiting Area

A recruiting area consists of a set of countries, business groups, and locations. Define recruiting areas using the Generic Hierarchy function of Oracle HRMS. In iRecruitment, when managers create vacancies, they can select multiple locations as vacancy locations using recruiting areas.

Referenced Rule

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See *Configurable Business Rules*, page Glossary-10

Region

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-7, *Field*, page Glossary-18

Registered Pension Plan (RPP)

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP)

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

Reporting Group

A collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

Report Parameters

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set

A group of reports and concurrent processes that you specify to run together.

Requisition

The statement of a requirement for a vacancy or group of vacancies.

Request Groups

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-34

Residual

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-8

Responsibility

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role.

Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-40, *Request Groups*, page Glossary-34, *Security Groups*, page Glossary-34

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities,

administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period. Scheduled enrollments can be administrative, or open.

Search by Date

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Secondment

The temporary transfer of an employee to a different business group.

Security Group

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-40

Security Groups Enabled

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

Security Profile

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-34

Self Appraisal

Part of the Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Separation Category

Separation category groups the leaving reasons. HRMS*i* refers to Termination Category as Separation Category.

See also: *termination category*, page Glossary-39

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-38

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-##).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-38

SSP Qualifying Pattern

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Standard Link

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-16, *Recurring Elements*, page Glossary-33

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Student Employee

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

Supporting Objective

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

Tabbed Regions

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Terminating Employees

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Category

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

HRMSi elsewhere refers to Termination Category as Separation Category.

Termination Rule

Specifies when entries of an element should close down for an employee who leaves

your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips

An SSHR user assistance component that provides information about a field.

Total Compensation Statement

A module to communicate compensations, rewards, and benefits to employees and contingent workers.

Transaction Type

In AME, an integrating application may divide its transactions into several categories, where each category requires a distinct set of approval rules. Each set of rules is a transaction type. Different transaction types can use the same attribute name to represent values that the application fetches from different places. This enables several transaction types to share approval rules, thus facilitating a uniform approval policy across multiple transaction types.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competency

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-6

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

Viewer (SSHR)

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

Waiting Days

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

WCB Account Number

In Canada, this is the account number of the provincially administered Workers' Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Work Choices

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker

An employee, page Glossary-16 or a contingent worker, page Glossary-11

Workers' Compensation Board

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Workers' Compensation Board premiums are paid entirely by the employer.

Workflow

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Workforce Performance Management

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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