Oracle Global Human Resources Cloud
Using Global Human Resources
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

• Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

• Guides and Videos: Go to the Oracle Help Center to find guides and videos.

• Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Users and Roles

User Management

How You Manage an Incomplete Request for a User Account

This topic describes the Process User Account Request action, which may appear on the Manage User Account page for users who have no user account.

The Process User Account Request Action

The Process User Account Request action is available when the status of the worker’s user account is either Requested or Failed. These values indicate that the account request hasn’t completed.

Selecting this action submits the request again. Once the request completes successfully, the account becomes available to the user. Depending on your enterprise setup, the user may receive an email containing the user name and password.

Role Provisioning

Any roles that the user will have appear in the Roles section of the Manage User Account page. You can add or remove roles before selecting the Process User Account Request action. If you make changes to roles, then you must click Save.

The Send Pending LDAP Requests Process

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

User Names

By default, user names are generated automatically in the format specified for the default user category when you create a person record. Users who have the human resource specialist (HR specialist) role can change user names for existing HCM users whose records they can access. This topic describes the automatic generation of user names and explains how to change an existing user name.

User Names When Creating Users

You create an HCM user by selecting a task, such as Hire an Employee, in the New Person work area. The user name is generated automatically in the format specified for the default user category. This table summarizes the effects of the available formats for Oracle HCM Cloud users.

<table>
<thead>
<tr>
<th>User-Name Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The worker’s work email is the user name. If you don’t enter the work email when hiring the worker, then it can be entered later on the Security Console. This format is used by default. A different default format can be selected on the Security Console.</td>
</tr>
</tbody>
</table>
### User-Name Format

<table>
<thead>
<tr>
<th>User-Name Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FirstName. LastName</td>
<td>The user name is the worker’s first and last names separated by a single period.</td>
</tr>
<tr>
<td>FLastName</td>
<td>The user name is the worker’s last name prefixed with the initial of the worker’s first name.</td>
</tr>
<tr>
<td>Person number</td>
<td>If your enterprise uses manual numbering, then any number that you enter becomes the user name. Otherwise, the number is generated automatically and you can’t edit it. The automatically generated number becomes the user name.</td>
</tr>
</tbody>
</table>

**Note:** If the default user-name rule fails, then a system user name can be generated. The option to generate a system user name is enabled by default but can be disabled on the Security Console.

### Existing User Names

HR specialists can change an existing user name on the Manage User Account page.

To change a worker’s user name:

1. Search for and select the worker in the Person Management work area.
2. For the selected worker, select **Actions > Personal and Employment > Manage User Account**.
3. On the Manage User Account page, select **Actions > Edit User Name**.

The updated name, which can be in any format, is sent automatically to your LDAP directory server. The maximum length of the user name is 80 characters.

**Tip:** When you change an existing user name, the user’s password and roles remain the same. However, the user receives no automatic notification of the change. Therefore, you’re recommended to send details of the updated user name to the user.

### FAQs for User Management

**What happens if I reset a user’s password?**

A notification containing a reset-password link is sent to the user’s work email. If the user has no work email, then the notification is sent to the user’s line manager. Notification templates for this event must exist and be enabled.

**How can I reset a user’s password?**

If you’re a human resource specialist, then you can reset a user’s password by selecting **Actions > Reset Password** on the Manage User Account page.

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

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

You can run the **Send User Name and Password Email Notifications** process in the Scheduled Processes work area. For users for whom you haven’t so far requested an email, this process sends out user names and reset-password links. The email goes to the work email of the user or the user’s line manager. You can send the user name and password once only to any user. A notification template for this event must exist and be enabled.
Where do default user names come from?
User names are generated automatically in the format specified on the Security Console for the user category. The default format is the worker’s primary work email, but this value can be overridden for each user category. For example, your enterprise may use person number as the default user name for the default user category.

What happens when I link a user account?
The request to link the person or party record to the account goes automatically to your LDAP directory. Once the account status is Active, current roles appear in the Roles section of the Manage User Account or Edit User page. At this point, the user can sign in. You’re recommended to notify the user when the account is linked.

How can I create a user account for an existing worker?
On the Manage User Account page, select Create User Account. Update account details, if appropriate, and click Save. Once the request is processed successfully, the account becomes available.
If automatic creation of accounts is disabled, then you can’t use the Create User Account action. Instead, authorized users can create user accounts on the Security Console.

What happens if I edit a user name?
The updated user name is sent to your LDAP directory for processing when you click Save on the Manage User Account or Edit User page. The account status remains Active, and the user’s roles and password are unaffected. As the user isn’t notified automatically of the change, you’re recommended to notify the user.
Only human resource specialists can edit user names.

What happens when I copy personal data to LDAP?
User accounts are defined in your LDAP directory. The LDAP directory also holds some personal information about users, such as name, work phone, and work location address. Changes to personal information in Oracle HCM Cloud are copied automatically at intervals to your LDAP directory. To send any changes immediately, you can perform the Copy Personal Data to LDAP action. This action is optional.

Why does this worker have no user account?
Automatic creation of user accounts may be disabled in your enterprise. In this case, your enterprise may be managing user accounts outside Oracle HCM Cloud. You can link such an account to the worker’s person record on the Manage User Account, Create User, or Edit User page.

Role Management

Role Provisioning and Deprovisioning
You must provision roles to users. Otherwise, they have no access to data or functions and can’t perform application tasks. This topic explains how role mappings control role provisioning and deprovisioning. Use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task to create role mappings.

Role Provisioning Methods
You can provision roles to users:

• Automatically
• Manually
  ◦ Users such as line managers can provision roles manually to other users.
  ◦ Users can request roles for themselves.

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

Role Types
You can provision data roles, abstract roles, and job roles to users. However, for Oracle HCM Cloud users, you typically include job roles in HCM data roles and provision those data roles.

Automatic Role Provisioning
Users acquire a role automatically when at least one of their assignments satisfies the conditions in the relevant role mapping. Provisioning occurs when you create or update worker assignments. For example, when you promote a worker to a management position, the worker acquires the line manager role automatically if an appropriate role mapping exists. All changes to assignments cause review and update of a worker’s automatically provisioned roles.

Role Deprovisioning
Users lose automatically provisioned roles when they no longer satisfy the role-mapping conditions. For example, a line manager loses an automatically provisioned line manager role when he or she stops being a line manager. You can also manually deprovision automatically provisioned roles at any time.

Users lose manually provisioned roles automatically only when all of their work relationships are terminated. Otherwise, users keep manually provisioned roles until you deprovision them manually.

Roles at Termination
When you terminate a work relationship, the user automatically loses all automatically provisioned roles for which he or she no longer qualifies. The user loses manually provisioned roles only if he or she has no other work relationships. Otherwise, the user keeps manually provisioned roles until you remove them manually.

The user who’s terminating a work relationship specifies when the user loses roles. Deprovisioning can occur:

• On the termination date
• On the day after the termination date

If you enter a future termination date, then role deprovisioning doesn’t occur until that date or the day after. The Role Requests in the Last 30 Days section on the Manage User Account page is updated only when the deprovisioning request is created. Entries remain in that section until they’re processed.

Role mappings can provision roles to users automatically at termination. For example, a terminated worker could acquire the custom role Retiree at termination based on assignment status and person type values.

Reversal of Termination
Reversing a termination removes any roles that the user acquired automatically at termination. It also provisions roles to the user as follows:

• Any manually provisioned roles that were lost automatically at termination are reinstated.
• As the autoprovisioning process runs automatically when a termination is reversed, roles are provisioned automatically as specified by current role-provisioning rules.
You must reinstate manually any roles that you removed manually, if appropriate.

**Date-Effective Changes to Assignments**
Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role provisioning occurs on the day the changes take effect. The **Send Pending LDAP Requests** process identifies future-dated transactions and manages role provisioning and deprovisioning at the appropriate time. These role-provisioning changes take effect on the system date. Therefore, a delay of up to 24 hours may occur before users in other time zones acquire their roles.

**FAQs for Role Management**

**What's the provisioning method?**
The provisioning method identifies how the user acquired the role. This table describes its values.

<table>
<thead>
<tr>
<th>Provisioning Method</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>The user qualifies for the role automatically based on his or her assignment attribute values.</td>
</tr>
<tr>
<td>Manual</td>
<td>Either another user assigned the role to the user, or the user requested the role.</td>
</tr>
<tr>
<td>External</td>
<td>The user acquired the role outside Oracle Applications Cloud.</td>
</tr>
</tbody>
</table>

**Why did some roles appear automatically?**
In a role mapping:
- The conditions specified for the role match the user’s assignment attributes, such as job.
- The role has the **Autoprovision** option selected.

**Why can't I see the roles that I want to provision to a user?**
You can provision a role if a role mapping exists for the role, the **Requestable** option is selected for the role in the role mapping, and at least one of your assignments satisfies the role-mapping conditions. Otherwise, you can’t provision the role to other users.

**Why can't I see the roles that I want to request for myself?**
Before you can request a role:
- The role must appear in a role mapping where it’s **Self-requestable**.
- At least one of your assignments must match all conditions, such as job and location, in the role mapping.

Typically, an application administrator or IT security manager creates and maintains role mappings.

**What happens if I deprovision a role from a user?**
The user loses the access to functions and data that the removed role was providing exclusively. The user becomes aware of the change when he or she next signs in.
If the user acquired the role automatically, then future updates to the user’s assignments may mean that the user acquires the role again.

**Why is the user losing roles automatically?**
The user acquired these roles automatically based on his or her assignment information. Changes to the user’s assignments mean that the user is no longer eligible for these roles. Therefore, the roles no longer appear.

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

**What happens when I autoprovision roles for a user?**
The role-provisioning process reviews the user’s assignments against all current role mappings.

The user immediately:

- Acquires any role for which he or she qualifies but doesn’t have
- Loses any role for which he or she no longer qualifies

You’re recommended to autoprovision roles to individual users on the Manage User Account page when new or changed role mappings exist. Otherwise, no automatic updating of roles occurs until you next update the user’s assignments.

**What happens if I delegate a role?**
The proxy user to whom you delegate the role can perform your tasks on your data. For example, you may be a line manager who manages the absence records of reports. If you delegate the line manager role, then the proxy user can also manage the absence records of your reports.

You don’t lose the role while it’s delegated.

**Can I delegate any role?**
No. You can delegate any role that you either have currently or can provision to other users. Also, delegation must be allowed for the role. Not all roles are enabled for delegation.

**What happens if I delegate approvals?**
Approval notifications for tasks in the selected category go automatically to the selected worker during the specified period. That worker approves transactions, for example, in your place. You don’t receive approval notifications for the task category while approvals are delegated.

You may want to delegate approvals if you’re also delegating a role in which you approve transactions. However, you can delegate roles and approvals independently of each other.

**What’s a delegated role?**
A job, abstract, or data role that a user, known as the delegator, assigns to another user, known as the proxy user.

You can delegate a role either for a specified period, such as a planned absence, or indefinitely.
2 Date Effectivity

Date Effectivity

Date effectivity preserves a history of changes made to the attributes of some objects. Professional users can retrieve and edit past and future versions of an object.

Many Human Capital Management (HCM) objects, including person names, assignments, benefits plans, grades, jobs, locations, payrolls, and positions are date-effective.

Logical and Physical Records

Date-effective objects include one or more physical records. Each record has effective start and end dates. One record is current and available to transactions. Others are past or take effect in the future. Together, these records constitute the logical record or object instance.

This table shows changes to the department manager attribute in a department business object. Each row represents a single physical record.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Department Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>18 January, 2011</td>
<td></td>
<td>C. Woods</td>
</tr>
<tr>
<td>3</td>
<td>15 October, 2010</td>
<td>17 January, 2011</td>
<td>A. Chan</td>
</tr>
<tr>
<td>2</td>
<td>13 June, 2009</td>
<td>14 October, 2010</td>
<td>T. Romero</td>
</tr>
<tr>
<td>1</td>
<td>22 March, 2007</td>
<td>12 June, 2009</td>
<td>G. Martin</td>
</tr>
</tbody>
</table>

Note: The physical record number doesn't appear in the record.

Effective End Dates in Physical Records

Every physical record except the last has an effective end date. The update process adds this date, which is the day before the effective start date of the next record, whenever you update the object.

Object End Dates

You can enter a final effective end date for some date-effective objects. For example, terminating an assignment adds a final effective end date to the assignment. Alternatively, the End Date action may be available. If you end date a date-effective object, then it isn't available to transactions after that date. However, the object’s history is retrievable.
Status Values in Date-Effective Objects

Some date-effective objects, such as grades and jobs, have both effective dates and status values. When the object status is **Inactive**, the object isn't available to transactions, regardless of its effective dates. Setting the status to **Inactive** makes objects unavailable to transactions. If you can't enter an effective end date for an object, then changing its status has the same effect.

Future-Dated Changes

For date-effective objects, you can enter future changes. For example, you enter the worker promotion shown in this table on 25 October, 2011 to take effect on 18 January, 2012.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>18 January, 2012</td>
<td></td>
<td>IC2</td>
</tr>
<tr>
<td>1</td>
<td>14 October, 2010</td>
<td>17 January, 2012</td>
<td>IC1</td>
</tr>
</tbody>
</table>

Physical record 2 becomes current on 18 January, 2012. From 14 October, 2010 until 17 January, 2012 physical record 1 is current and available to transactions. Users who can access the object history can see physical record 2 before it takes effect.

When future-dated changes exist, other actions may be limited. For example, to end this worker’s assignment before the promotion takes effect, you must first delete the promotion.

Date-Enabled Objects

Some objects, such as work relationships, are date-enabled rather than date-effective. They have start and end dates that define when they’re available, but they have no history of changes. New attribute values overwrite existing attribute values.

Examples of Correcting Date-Effective Objects

You can correct most attributes of date-effective objects, regardless of whether they occur in current, past, or future physical records.

If you correct the effective start date of an object’s first physical record, then the revised date must be before the current effective start date. For the second and subsequent records, the revised date must be between the record’s current effective start and end dates.

Correcting a Current Error

On 11 March, 2011 you create a location definition but enter the wrong phone. On 21 March, 2011, you search for the definition and select the **Correct** action. Before correction, the object history is as shown in this table.
After correction, the object history is as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Location Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11 March, 2011</td>
<td></td>
<td>650.555.0175</td>
</tr>
</tbody>
</table>

Because you corrected the object, no change history exists.

Correcting a Past Error

A worker’s assignment history is as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Job</th>
<th>Working at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>20 October, 2010</td>
<td></td>
<td>Line Manager</td>
<td>No</td>
</tr>
<tr>
<td>3</td>
<td>18 August, 2010</td>
<td>19 October, 2010</td>
<td>Senior Administrator</td>
<td>No</td>
</tr>
<tr>
<td>2</td>
<td>10 May, 2010</td>
<td>17 August, 2010</td>
<td>Senior Administrator</td>
<td>Yes</td>
</tr>
<tr>
<td>1</td>
<td>25 July, 2009</td>
<td>9 May, 2010</td>
<td>Administrator</td>
<td>Yes</td>
</tr>
</tbody>
</table>

You learn that the worker’s job was actually Project Leader from 10 May to 19 October, 2010. As this period spans physical records 2 and 3, you must correct both.

To retrieve physical record 2, you set the effective as-of date in the person search to any date between 10 May and 17 August, 2010. You select the assignment from the search results and make the correction.

You then retrieve physical record 3 and make the same correction.

Examples of Updating Date-Effective Objects

When you update a date-effective object, you insert a physical record in the object’s history. Typically, the inserted record follows the current record and the effective start date is today. However, you can also enter future-dated changes and update past records.
Entering Future-Dated Changes

The grade EC3 exists from 17 June, 2009. Its ceiling step changes from 1 January, 2012. On 30 November, 2011, you change the grade’s ceiling step and enter an effective start date of 1 January, 2012. This change creates a physical record in the grade definition, as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Ceiling Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1 January, 2012</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>1</td>
<td>17 June, 2009</td>
<td>31 December, 2011</td>
<td>3</td>
</tr>
</tbody>
</table>

From 1 January, 2012 physical record 2 is in effect. Until then, physical record 1 is in effect.

Applying Historical Updates to Later Records

Jennifer Watts has one assignment, as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>18 September, 2010</td>
<td></td>
<td>A1</td>
<td>Area Office</td>
</tr>
<tr>
<td>1</td>
<td>10 April, 2010</td>
<td>17 September, 2010</td>
<td>A1</td>
<td>HQ</td>
</tr>
</tbody>
</table>

You promote Jennifer to grade A2 from 1 July, 2010. You update her assignment with an effective start date of 1 July, 2010 and enter grade A2. This update:

- Inserts a physical record between existing records 1 and 2
- Sets the effective end dates of physical record 1 to 30 June, 2010 and of the inserted record to 17 September, 2010

You also correct existing physical record 2 to change the grade from A1 to A2.

Jennifer’s assignment history is now as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>18 September, 2010</td>
<td></td>
<td>A2</td>
<td>Area Office</td>
</tr>
<tr>
<td>2</td>
<td>1 July, 2010</td>
<td>17 September, 2010</td>
<td>A2</td>
<td>HQ</td>
</tr>
<tr>
<td>1</td>
<td>10 April, 2010</td>
<td>30 June, 2010</td>
<td>A1</td>
<td>HQ</td>
</tr>
</tbody>
</table>
Examples of Effective Sequencing

Some date-effective objects, such as assignments, create a physical record for each update on one day. Physical records with the same effective start date have effective sequence numbers. This topic provides examples of effective sequencing in assignment histories.

Changing the Assignment Working Hours

You create an assignment for a worker. Later the same day, you update the assignment working hours. This change isn’t a correction, but an update. The assignment history is as shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Working Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>28 June, 2011</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>28 June, 2011</td>
<td></td>
<td>40</td>
</tr>
</tbody>
</table>

Changing the Assignment Manager

You update a worker’s assignment twice on 14 March, 2010. You change the:

1. Assignment manager from S. Taylor to J. Miles.
2. Assignment manager from J. Miles to M. Scott and the grade from C14 to C15.

Effective sequencing doesn’t apply to assignment manager and work measures. Because effective sequencing applies to grades but not assignment managers, the assignment history is as shown in this table after you make both updates.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Grade</th>
<th>Assignment Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>14 March, 2010</td>
<td></td>
<td>C15</td>
<td>M. Scott</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>14 March, 2010</td>
<td></td>
<td>C14</td>
<td>M. Scott</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>30 May, 2009</td>
<td>13 March, 2010</td>
<td>C13</td>
<td>S. Taylor</td>
</tr>
</tbody>
</table>

Changes to assignment managers and work measures are corrections rather than updates. Only the last change made on any day remains in the object history. The change of manager to M. Scott overwrites the first change from S. Taylor to J. Miles.
How You Delete Physical Records from Date-Effective Objects

The effect of deleting a physical record from a date-effective object depends on the record’s position in the object’s history. Consider the date-effective object, which has 3 physical records, shown in this table.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>15 August, 2011</td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>2</td>
<td>30 October, 2010</td>
<td>14 August, 2011</td>
<td>B</td>
</tr>
<tr>
<td>1</td>
<td>10 June, 2009</td>
<td>29 October, 2010</td>
<td>A</td>
</tr>
</tbody>
</table>

Intermediate Records

If you delete physical record 2, where the attribute value is B, then the object is as shown in this table after the deletion.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>15 August, 2011</td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>1</td>
<td>10 June, 2009</td>
<td>14 August, 2011</td>
<td>A</td>
</tr>
</tbody>
</table>

If physical records exist both before and after the deleted record, then the deletion adjusts the dates of the surrounding records automatically. The effective end date of the previous record is now the day before the effective start date of the following record. This change closes the gap in the object’s effective dates.

First or Only Records

In most cases, you can’t delete the first or only physical record.

If you can delete the first physical record, then the object exists from the effective start date of the next physical record (30 October, 2010 in this example). If only one physical record exists, then deleting that record is the same as deleting the object.

Final Records

If you delete the final physical record, then the deletion removes the effective end date automatically from the previous physical record (14 August, 2011, in this example).
How You Make Multiple Updates to Date-Effective Objects in One Day

For most date-effective objects, only one physical record exists per day. Therefore, the object history shows only the latest update to each attribute in any one day. For example, if you update a location phone three times in one day, then only the last update appears in the physical record for that date. The update process overwrites the previous two values.

For some objects, such as assignments, the update process creates a physical record for each update in a day. Such objects include an effective sequence number in each physical record to show the update order. Changes are cumulative, and the physical record with the highest effective sequence number is available to transactions for that date.

For example, this table shows multiple updates to a person's assignment working hours and job on 14 October, 2010 and 30 April, 2012.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Sequence Number</th>
<th>Effective Start Date</th>
<th>Working Hours</th>
<th>Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>2</td>
<td>30 April, 2012</td>
<td>40</td>
<td>Lead Technician</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>30 April, 2012</td>
<td>42.5</td>
<td>Lead Technician</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>14 October, 2010</td>
<td>42.5</td>
<td>Senior Technician</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>14 October, 2010</td>
<td>42.5</td>
<td>Technician</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>14 October, 2010</td>
<td>40</td>
<td>Technician</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>17 June, 2010</td>
<td>40</td>
<td>Junior Technician</td>
</tr>
</tbody>
</table>

Object Correction

Effective sequence numbers apply only when you update an object. If you correct an object, then the new value overwrites the previous value. The correction process doesn't create a separate physical record for each change.

This table shows the person's assignment record when you correct rather than update the working hours and job attributes multiple time in one day.

<table>
<thead>
<tr>
<th>Physical Record</th>
<th>Effective Start Date</th>
<th>Working Hours</th>
<th>Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>30 April, 2012</td>
<td>40</td>
<td>Lead Technician</td>
</tr>
<tr>
<td>2</td>
<td>14 October, 2010</td>
<td>42.5</td>
<td>Senior Technician</td>
</tr>
<tr>
<td>1</td>
<td>17 June, 2010</td>
<td>40</td>
<td>Junior Technician</td>
</tr>
</tbody>
</table>
FAQs for Date Effectivity

What's the difference between updating and correcting a date-effective object?

When you update an object, you insert a physical record in the object’s history. Typically, the inserted record follows the current physical record, and the effective start date is today’s date. However, you can edit the object history or create a future-dated change by setting an appropriate effective start date.

When you correct a date-effective object, you edit the information in an existing physical record. You don’t create a physical record.

What's the effective as-of date?

A date value that filters search results. For any date-effective object that matches the other search criteria, the search results include the physical record for the specified effective as-of date. The effective as-of date is one of the search criteria. Therefore, objects with effective dates that don’t include the specified date don’t appear in the search results. By default, the effective as-of date is today’s date.

How can I see future-dated or past records for a date-effective object?

When searching for a date-effective object, you can enter an effective as-of date. The search returns the physical record from the object with an effective date range that includes the specified effective as-of date.

While viewing or editing an object, you can see its history, which includes all current, past, and future physical records. You can select any of these records from the object history.

Can I delete a date-effective object?

In most cases, yes. If the Delete icon appears in the search results table when you search for the object, then you can delete it. Deletion purges all of the object’s physical records and isn’t reversible. After deletion, the object’s history is no longer available.

Alternatively, enter an effective end date for the object or change its status to make it unavailable to transactions. With these approaches, the object’s history remains available.

What happens when I end date an object?

The date that you enter becomes the final effective end date for the object. If physical records exist for the object beyond the effective end date, either they’re deleted automatically or you delete them.
The object’s history remains available. For example, the object may appear in search results if the search criteria include an effective as-of date that’s within the object’s effective dates.

What’s an effective sequence number?

A number that’s added automatically to physical records with the same effective start date in a single date-effective object, such as an assignment. The number differentiates the physical records and identifies the update order. The physical record with the highest effective sequence number is available to transactions for the relevant date.
3 Workforce Structures

Overview of Plan Workforce Deployment Offering

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

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

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

Departments, Divisions, and Organizations

Overview

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

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

Every enterprise has three fundamental structures that describe its operations and provide a basis for reporting:

- Legal
- Managerial
- Functional
In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments

Align these structures with your strategic objectives.
This figure illustrates a grid with Business Axis, representing the enterprise division, Legal Axis representing the companies, and the Functional Axis representing the business functions.

Legal Structure

The figure illustrates a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.
Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies. A legally recognized entity can own and trade assets and employ people in the jurisdiction in which the entity is registered. When granted these privileges, legal entities are also assigned responsibilities to:

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

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

The figure illustrates:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.
- Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company’s card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

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

Functional Structure

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

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

Scenario

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

Enterprise Details

In the US, InFusion employs 400 people and has company revenue of 120 million US dollars. Outside the US, InFusion employs 200 people and has revenue of 60 million US dollars.

Analysis

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, to employ and pay its workers in those countries.

InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration

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

An enterprise is a collection of legal entities sharing common control and management.

Enterprise Defined

When implementing Oracle Fusion Applications you operate within the context of an enterprise that has already been created in the application for you. This is either a predefined enterprise or an enterprise that has been created in the application by a system administrator. An enterprise organization captures the name of the deploying enterprise and the location of the headquarters. In Oracle Fusion Applications, an organization classified as an enterprise is defined before defining any other organizations in the HCM Common Organization Model. All other organizations are defined as belonging to an enterprise.

Divisions

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results. Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies don’t reflect directly the legal structure of the enterprise. The management entities and structure can include:

- Divisions and subdivisions
- Lines of business
- Other strategic business units
- Their own revenue and cost centers

These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

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

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

By definition a division can be represented in the chart of accounts. Companies can use product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise.

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

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

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

The two important components to be considered in designing your enterprise structure are cost centers and departments.

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

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

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

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach requires defining more cost center values.

- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values. The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

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

A manager of a department is typically responsible for:

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

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

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

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

Set up disability organizations to identify the external organizations with which workers with disabilities are registered. You manage disability organizations in the Workforce Structures work area. Disability organizations can also assess the degree to which a person is affected by the disability.

Disability organizations:

- Provide information and support to people with disabilities. The Royal National Institute of Blind People is an example of a disability organization.
- Can also assess the degree to which the disability affects a person.

Disability Organizations and Person Records

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

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

Related Topics

- Person Records
- Creating Third Parties Options

Guidelines for Using Single or Multiple Classifications for an Organization

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

Defining an Organization with One Classification

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

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, use an organization within the sales applications as a department that employs salespeople and classify it as a department and a sales
organization. Or, if your enterprise operates and employs people in multiple countries, create a legal entity for each country using the Manage Legal Entity task. Then use the Manage Departments task to classify the legal entity as a department.

Related Topics
- Model Your Financial Reporting Structure

Overview

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

Legal entities have the following rights and responsibilities to:
- Own property
- Trade
- Repay debt
- Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:
- Facilitating local compliance
- Minimizing the enterprise’s tax liability
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:
- Own the assets of the enterprise
- Record sales and pay taxes on those sales
- Make purchases and incur expenses
- Perform other transactions

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

You are required to publish specific and periodic disclosures of your legal entities' operations based on different jurisdictions' requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.
Individual entities privately held or held by public companies don’t have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise's reporting requirements in different currency.

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

Model Legal Entities

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers. These registers are part of the Oracle Fusion Trading Community Architecture.

When your legal entities are trading with each other, represent them as legal entities and as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

Several decisions you should consider when you create legal entities.

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

The Importance of Using Legal Entities on Transactions

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

For example, a sales order creates an obligation on the legal entity that books the order and promises to deliver the goods on the acknowledged date. The creation also creates an obligation on the purchaser to receive and pay for those goods. Contract law in most countries contains statutes that state damages can be sought for both:

- Actual losses, putting the injured party in the same state as if they had not entered into the contract.
- What is called loss of bargain, or the profit that would have made on a transaction.

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

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

In some cases, your legal entity is inferred from your business unit that’s processing the transaction. For example, Business Unit ACM UK has a default legal entity of InFusion UK Ltd. When a purchase order is placed in ACM UK, the legal entity InFusion UK Ltd is legally obligated to the supplier. Oracle Fusion Procurement, Oracle Fusion Project Portfolio Management, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.

Legal Entity and Its Relationship to Divisions

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

Legal Entity and Its Relationship to Ledgers

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

Legal Entity and Its Relationship to Balancing Segments

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

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

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

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

Implementing multiple balancing segments requires every journal entry that isn’t balanced by division or business unit, to generate balancing lines. You can’t change to multiple balancing segments after you begin using the ledger because your historical data isn’t balanced by the new balancing segments. Restating historical data must be done at that point.

If your enterprise regularly spins off businesses or holds managers accountable for utilization of assets, identify the business with a balancing segment value. If you account for each legal entity in a separate ledger, no requirement exists to identify the legal entity with a balancing segment value.
While transactions that cross balancing segments don’t necessarily cross legal entity boundaries, all transactions that cross legal entity boundaries must cross balancing segments. If you make an acquisition or are preparing to dispose of a portion of your enterprise, you may want to account for that part of the enterprise in its own balancing segment even if the portion isn’t a separate legal entity. If you don’t map legal entities sharing the same ledger to balancing segments, you can’t distinguish them using intercompany functionality or track individual equity.

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

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

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

Use Oracle Fusion Intercompany feature to create intercompany entries automatically across your balancing segments. Intercompany processing updates legal ownership within the enterprise’s groups of legal entities. Invoices or journals are created as needed. To limit the number of trading pairs for your enterprise, set up intercompany organizations and assign then to your authorized legal entities. Define processing options and intercompany accounts to use when creating intercompany transactions and to assist in consolidation elimination entries. These accounts are derived and automatically entered on your intercompany transactions based on legal entities assigned to your intercompany organizations.

Intracompany trading, in which legal ownership isn’t changed but other organizational responsibilities are, is also supported. For example, you can track assets and liabilities that move between your departments within your legal entities by creating departmental level intercompany organizations.

**Tip:** In the Oracle Fusion Supply Chain applications, you can model intercompany relationships using business units, from which legal entities are derived.

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

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

**Legal Entity and Payroll Reporting**

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

**How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units**

When you set up legal entities, you can identify them as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). Depending on how your organization is structured, you may have only one legal entity that is also a payroll statutory unit and a legal employer, or you may have multiple legal entities, payroll statutory units, and legal employers.
Legal Employers and Payroll Statutory Unit

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

Payroll Statutory Units and Tax Reporting Units

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

Tax Reporting Units and Legal Employers

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

Use the Manage Legal Reporting Unit HCM Information task to designate an existing legal reporting unit as a tax reporting unit. If you create a new legal reporting unit that belongs to a legal employer (that is not also a payroll statutory unit), you select a parent payroll statutory unit and then, when you run the Manage Legal Reporting Unit HCM Information task, you designate it as a tax reporting unit and select the legal employer.

Legislative Data Groups

Legislative data groups are a means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

Payroll-related information, such as elements, is organized by legislative data group. Each legislative data group:

- Marks a legislation in which payroll is processed.
- Is associated with a legislative code, currency, and its own cost allocation key flexfield structure.
- Is a boundary that can share the same set up and still comply with the local laws.
- Can span many jurisdictions as long as they’re within one country.
- Can contain many legal entities that act as payroll statutory units.

Examples of HCM Organization Models

These examples illustrate different models for human capital management (HCM) organizations that include a legislative data group (LDG). This example includes LDGs, which aren’t an organization classification, to show how to partition payroll data by associating them with a payroll statutory unit.

Simple Configuration

This example illustrates a simple configuration that doesn’t include any tax reporting units.
Note the following:

- The legal employer and payroll statutory units are the same, sharing the same boundaries.
- Reporting can only be done at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as these countries report at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity, which is both a payroll statutory unit and a legal employer.

Multiple Legal Employers and Tax Reporting Units

This example illustrates a more complex configuration. In this enterprise, you define one legal entity, InFusion US as a payroll statutory unit with two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit. Tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit.

The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately by one of the following:

- Payroll statutory unit
- Legal employer
- Tax reporting unit
This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US.

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

One Payroll Statutory Unit and Two Tax Reporting Units

This model makes no distinction between a legal employer and a payroll statutory unit. You define tax reporting units as subsidiaries to the legal entity.

In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting. Statutory reporting boundaries are the same for both payroll and HR management. An example of a country that might use this model is France.
This figure illustrates an example of an organization with one legal entity. The legal entity is both a legal employer and a payroll statutory unit and that has two tax reporting units.

One Payroll Statutory Unit with Several Tax Reporting Units

In this model, the enterprise has one legal entity. Legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn’t typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required

An example of a country that might use this model is India.
This figure illustrates an enterprise with one legal entity that’s a payroll statutory unit and a legal employer. The tax reporting units are independent from the legal employer.

**Multiple Payroll Statutory Units with Several Tax Reporting Units**

In this model, the enterprise has two legal entities. The legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn’t typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required
An example of a country that might use this model is the United Kingdom (UK).

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

Oracle Fusion trees are graphical representations of hierarchical data such as the structure of your organization. You manage trees in the Workforce Structures work area.

Oracle Fusion Human Capital Management (HCM) provides predefined tree structures for department, organization, position, and geography trees.

Note the following:

- You cannot change the predefined HCM tree structures.
- With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree.

For all HCM tree types, however, only one version of each tree can be active at one time.

Department Trees

Using the predefined tree structure for a department tree, you can create multiple department trees and then create multiple versions of each tree to build hierarchical representations of the departments within your organization. You can secure data by using department trees in an organization security profile.

Note the following:

- The first node of the tree is a department, and all of the child nodes are also departments.
- You can have only one first node for a department tree.
- You can’t add a department as a node more than one time in the same tree version.

Organization Trees

If you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise structure, you can automatically create a default organization tree, with the following:

- Ultimate holding company as the first node
- Divisions and country holding companies as the second level
- Legal employers as the third level

You can modify the organization tree, and create additional organization trees. If you do not use the Enterprise Structures Configurator, you can create organization trees based on the predefined organization tree structure. In an organization tree, you can select any type of organization for the first node and for the child nodes, but have only one first node.

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

Position Trees

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

You can use position trees for the following purposes:

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

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

**Geography Trees**

Using the predefined geography tree structure, you create a version to represent the countries in which your enterprise operates. For each country, you can define lower-level nodes such as states, and cities. For example, United Kingdom - England - London. Although you can create multiple versions, you can create only one geography tree in the hierarchy. You can have only one first node for a geography tree.

You use the geography tree to specify the locations to which calendar events apply.

Note the following:

- If an event applies to your entire enterprise, then you can attach it to the first node in the tree. For example, Global.
- If an event applies only to specific countries in your enterprise, then you can attach it to the nodes for those specific countries. For example, United Kingdom.
- If an event applies only to specific states or cities in a country, then you can attach it to the state or city level nodes. For example, England, London.
This figure illustrates the geographical hierarchy that you can establish using a geography tree.

Related Topics
- Create a Calendar Event Using a Geographic Tree
- How can I associate calendar events with countries
- Guidelines for Managing Trees and Tree Versions

FAQs for Departments, Divisions, and Organizations

What's a tax reporting unit?
Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications.

To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are
associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage Legal Reporting Unit HCM Information task.

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

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

What’s a legal employer?
A legal employer is a legal entity that employs workers. You define a legal entity as a legal employer in the Oracle Fusion Legal Entity Configurator.

The legal employer is captured at the work relationship level, and all assignments within that relationship are automatically with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

What’s a reporting establishment?
A reporting establishment is an organization that’s used for statutory reporting other than tax and social insurance reporting. A reporting establishment has a parent-child relationship with a legal employer, with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments. You create reporting establishments using the Manage Legal Reporting Unit HCM Information task in the Setup and Maintenance work area.

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

Can I delete an organization?
No you can’t. However, you can disable an organization if it’s no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.

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

You can see all employees in the Manager list.

Locations

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Manage Locations task in the Workforce Structures work area.
You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

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

**Location Sets**

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

Note the following:

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

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

### Uploading Locations Using a Spreadsheet

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

- Download a spreadsheet template
• Add your location information to the spreadsheet
• Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics
• Upload Workforce Structures Using a Spreadsheet

FAQs for Locations

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

How can I associate a location with an inventory organization?
From the Oracle Fusion Global Human Resources, go to the Manage Locations page. Use the Manage Locations task in the Workforce Structures work area.
To appear on the Create or Edit Location pages, your inventory organization must be effective on today's date and must exist in the location set that you selected.

What happens if I select an inventory organization when I am creating or editing a location?
The location is available for selection in purchase documents of that inventory organization in Oracle Fusion Inventory Management. If you don't select an inventory organization, then the location is available in purchase documents across all inventory organizations.

What happens if I select a geographic hierarchy node when I create or edit a location?
The calendar events that you created for the geographic node start to apply for the location and may impact the availability of worker assignments at that location. You manage locations using the Manage Locations task in the Workforce Structures work area.
The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

Related Topics
• How an Employee's Schedule Is Determined

What happens if I inactivate a location?
Starting from the effective date that you entered, you can no longer associate the location with other workforce structures, assignments, or applications. If the location is already in use, it will continue to be available to the components that currently use it.
Collective Agreements

How You Manage Collective Agreements

Use the Manage Collective Agreements task in the Workforce Structures or Setup and Maintenance work areas to manage collective agreements.

Collective Agreement Details

The details of a collective agreement are country-specific, therefore you must enter a value for the country. You may enter the bargaining unit, legal employer, and union values depending on the country. For example, you can create a collective agreement without the bargaining unit and legal employer, or only with the legal employer. When you select the value in the Country field, the values in the Bargaining Unit, Legal Employer, and Union fields are filtered to match the country selected. You can optionally associate collective agreements with worker unions and attach documents to the collective agreement.

You can provide details of the parties negotiating the collective agreement, such as the employee and employer organizations. The employee organization can be the trade union or bargaining unit representing the employee while the employer organization is represented by the company management.

A collective agreement is date-effective, therefore, you can track changes to a collective agreement over time. You can also inactivate the collective agreement. You can configure additional attributes specific to a legislation or customer using the available descriptive flexfields and extensible flexfields. If you specify a Valid To date for a collective agreement, it lapses after that date and you can’t link it to an employee.

Note: If the collective agreement is linked to an assignment, you can’t edit the Identification Code, Country, Bargaining Unit, Union, and Legal Employer fields. Additionally, you can’t delete the collective agreement.

Collective Agreements

A collective agreement is a special type of commercial agreement that’s negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

Collective Agreement Linking

You can link a collective agreement to an assignment provided the bargaining unit, country, and legal employer of the collective agreement are consistent with the assignment. If you created a collective agreement without associating it with a legal employer or bargaining unit, you can link the collective agreement to any assignment within the same country.

You can link a union, bargaining unit, or collective agreement with a worker assignment provided that its country and legal employer is consistent with the assignment.

The union, bargaining unit, and collective agreement that you can select for linking with an assignment are filtered as described in this table:
### Attribute | Filter Conditions
--- | ---
**Union** | The list of values is filtered to show unions that are active as of the start date and whose country matches the country of the legal employer on the worker assignment.

**Bargaining Unit**
- The list of values is filtered to show bargaining units that are active as of the start date and are associated with the selected union.
- If you don't select a union, the list of values is filtered to show bargaining units that are active as of the start date, and whose country matches the legal employer country or have no country tag itself.

**Collective Agreement**

> **Note:** Collective agreements list of values is filtered to show only those values that match the country of the legal employer on the worker assignment.

If you select a bargaining unit without selecting a union, the list of values is filtered this way:
- List of values shows collective agreements that are active and don’t have an associated union or bargaining unit value.
- List of values shows collective agreements that are active and match the selected bargaining unit, but don’t have an associated union.

If you select a union without selecting a bargaining unit, the list of values is filtered this way:
- List of values shows collective agreements that are active and don’t have an associated union or bargaining unit value.
- List of values shows collective agreements that are active and match the selected union, but don’t have an associated bargaining unit.

If you don’t select a union or bargaining unit, the Collective Agreement list of values is filtered to show all active collective agreements as of the start date.

If you select a union and a bargaining unit, the list of values is filtered this way:
- List of values shows collective agreements that are active and don’t have an associated union or bargaining unit value.
- List of values shows collective agreements that are active and match the selected union and bargaining unit.

### FAQs for Collective Agreements

**What's a collective agreement?**
A special type of commercial agreement that's negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The collective agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

**What's a bargaining unit?**
A specific group of employees who are represented by one authorized union or association for purposes of collective bargaining.
Why can't I see the collective agreements region for my direct report?
By default, the collective agreements region is read-only and hidden out of the box on the promote and transfer pages. You can unhide the region using the Page Composer.

Related Topics
- Modify Pages
- Modify Page Components Using Resource Catalog

Jobs and Positions

Considerations for Using Jobs and Positions

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks. Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.
- You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

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

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

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Workforce Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>Positions</td>
</tr>
<tr>
<td>Utilities</td>
<td>Positions</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Positions</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>Positions</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>Positions</td>
</tr>
</tbody>
</table>
### Primary Industry | Workforce Setup
--- | ---
Educational Services | Positions
Public Transportation | Positions
Agriculture, Forestry, Fishing, and Hunting | Jobs
Construction | Jobs
Wholesale Trade | Jobs
Information | Jobs
Finance and Insurance | Jobs
Professional, Scientific, and Technical Services | Jobs
Management of Companies and Enterprises | Jobs
Administrative and Support and Waste Management and Remediation Services | Jobs
Arts, Entertainment, and Recreation | Jobs
Accommodation and Food Services | Jobs
Other Services (Except Public Administration) | Jobs

### Management of People
Consider the following scenarios how industries manage their employee turnover:

- **Scenario 1**: Replace employees by rehiring to the same role.
- **Scenario 2**: Replace headcount but the manager uses the headcount in a different job.
- **Scenario 3**: Rehire employees to the same position, but the manager requests reallocation of budget to a different post.

The following table displays suggestions of what the industry should use, either jobs or positions, in these three scenarios:

<table>
<thead>
<tr>
<th>Industry</th>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and</td>
<td>Positions</td>
<td>Jobs</td>
<td>Jobs</td>
</tr>
</tbody>
</table>
Examples of Jobs

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

Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- Recently, three developers have resigned from the company.
- The director decides to redirect the headcount to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

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

![Job Setup Diagram](image)

Examples of Positions

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

Retail Industry

ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier’s position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it’s better for this industry to use positions.

Note the following:

- An automatic vacancy is created when an employee terminates employment.
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.
This figure illustrates the retail position setup.

Health Care Industry

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

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.
This figure illustrates the hospital position setup.

**Position Synchronization**

If position synchronization is enabled, assignments inherit specified values from the associated position.

**Synchronized Attributes**

You can select any of the following attributes for synchronization when position synchronization is enabled:

- Department
- Job
- Location
- Grade
- Grade Ladder
- Manager
- Full Time or Part Time
- Regular or Temporary
- Assignment Category
- FTE and Working Hours
- Start Time and End Time
- Probation Period
- Union, Bargaining Unit and Collective Agreement
- Synchronize Mapped Flexfields
Position Changes

All active assignments that are synchronized from position automatically inherit changes from the position. Assignment attributes synchronized from position automatically inherit changes from the position. For those attributes not synchronized from position, you can either retain the existing values or update values from the position.

The Review page in the Edit Position page displays the list of impacted assignments with a status for each assignment. The status indicates if there are any issues due to the position change. You must correct all errors before submitting the position changes.

Assignment Changes

When you change the position in existing assignments you have a choice whether to inherit the values for those attributes which are not synchronized from the position. If you choose not to inherit, then the previous values remain unchanged.

Position Synchronization Configuration Changes

If the position synchronization configuration is changed after person and assignments are created, then the Synchronize Person Assignment from Position process must be run to apply the changes in assignments.

Position Hierarchy Configuration Changes

When the manager is synchronized from the HCM position hierarchy and you change the parent position, all assignments inherit the new manager from the current parent position. When you remove a position from the hierarchy, all child positions move one level up in the hierarchy. Hence, the grandparent position is the new parent position.

The incremental flattening process is triggered when you add or change a parent position. The flattening process will update the changes in the position hierarchy.

When you change the position in an existing assignment, the manager value is updated based on the parent position of the changed position. If the parent position doesn’t have an incumbent, the incumbent in the position in the next level up in the hierarchy is the new manager.

Uploading Changes Using HCM Data Loader

When you create or update assignments using HCM Data Loader, you can synchronize them from positions. In this case, you must:

- Enable position synchronization before you load the assignments. If you enable it after the assignments are loaded, then you can synchronize from positions for current and future dates only.
- Set the Synchronize from Position (Position Override) attribute on the employment terms or assignment object to Y.

After loading the assignments, you must run the Synchronize Person Assignments from Position process to synchronize the assignments. When you run the process, set the Past Period to Be Considered in Days parameter to an appropriate value. For example, if you set this parameter to 60 days, then any assignment records with start dates during the previous 60 days are synchronized from positions. By default, Past Period to Be Considered in Days is set to 30 days.

Related Topics

- Synchronize Person Assignment from Position Process
How Assignment Values Are Inherited from Position

If you enable position synchronization, assignments inherit specified values from the associated position. You can also specify whether the inherited values can be overridden in the assignment. You can specify this at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks respectively.

Overriding of Assignment Values

When you enable position synchronization, you specify which attributes the assignment inherits from the position due to synchronization. Assignment attributes synchronized from position inherit their values from the position and are not editable. The restriction on editing values in the assignment applies only to the information that is entered in the position. For example, if the Bargaining Unit is not entered in the position, you can edit this value in the assignment even though it is one of the attributes inherited from the position. If override is allowed at the assignment level, then you can specify at the assignment level whether you want to synchronize from position or not. By default, the Synchronize from Position attribute on the Edit Assignments page is set to Yes. If you prevent override at the assignment level, users can’t update the specified attributes that the assignment has inherited from the position. You can use personalization to enable managers to specify a value for the Synchronize from Position field.

You can choose to either retain the existing values in the assignment or update the values from the position for any attributes that aren’t synchronized. So, if you don’t select the grade attribute for synchronization and update the grade value in the position, you can either retain the existing grade value in the assignment or update it from the position.

If a synchronized attribute is empty at the position, then this attribute will not be synchronized in the assignment. You can enter any value for this attribute in the assignment. If a value already exists for this attribute, it will be retained and you can change it to any other value.

Note: If you choose to specify your own values for an assignment, then that assignment won’t be synchronized with any future position changes.

Graphical Position Hierarchy

The HCM position hierarchy shows the relationship between positions and their parent positions. You can view and edit the hierarchy on the HCM Position Hierarchy page, if your data security profile allows you.

You can identify a position’s parent on the Manage Positions page if the Use HCM Position Hierarchy option is enabled for the enterprise.

The nodes of the position hierarchy represent positions and parent positions. You can:

- Add child positions under a position either by creating a new position or by selecting an existing position as the child.
- Create a copy of an existing position by specifying a new name and code. The rest of the information is copied from the original position to the copy. You can change any information that you want.
- Edit the position.
- View the incumbent details including name, person type, person number, position entry and exit dates, and their status as of the current date.
- Delete any position that doesn’t have any incumbents or child positions.
In each position node, you can view:

- Position name and code.
- Business unit, job, department, and location.
- Number of incumbents for the position.
- Open Full Time Equivalent (FTE)
- Current incumbents in the position.
How You Create a Graphical Position Hierarchy

Vision Corporation is reorganizing its workforce and defining the hierarchy for all positions. You must create a position hierarchy as shown below:

The following table summarizes the key decisions for this scenario.
Decisions to Consider | In this Example
---|---
Which business unit do these positions belong? | Vision Corp. US
What is the method for position code generation? | Manual

You must do the following before creating the position hierarchy:

2. Ensure you have the Manage HCM Position Hierarchy privilege, which enables you to update the hierarchy.
3. Create the following positions -Executive Vice President, Vice President, Senior Sales Manager, and Senior Operations Manager.
4. Display additional fields on the Create and Edit Position pages using personalization, if required.

Adding a Parent Position to an Existing Position

1. On the My Client Groups tab, click Workforce Structures.
2. On the Manage Positions page, search and select the Vice President position.
3. On the Position: Vice President page, click Edit and select Update.
4. Select Reorganization.
5. Click OK.
6. Search and select the Executive Vice President position as the parent position.
7. Click Review.
8. Click Submit.
9. Click Yes.
10. Click OK.

Creating a New Child Position

1. On the HCM Position Hierarchy page, click the orange arrow icon in the Vice President node and select Create Child Position.
2. On the Create Child Position page, enter the following details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Sales Director</td>
</tr>
<tr>
<td>Code</td>
<td>SALES_DIR</td>
</tr>
<tr>
<td>Job</td>
<td>Director</td>
</tr>
<tr>
<td>Type</td>
<td>Single Incumbent</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
<tr>
<td>Headcount</td>
<td>1</td>
</tr>
</tbody>
</table>

3. Click Save and Close.
4. For the Vice President node, repeat steps 1 and 2 using the following details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Operations Director</td>
</tr>
<tr>
<td>Code</td>
<td>OPS_DIR</td>
</tr>
<tr>
<td>Job</td>
<td>Director</td>
</tr>
<tr>
<td>Type</td>
<td>Single Incumbent</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
<tr>
<td>Headcount</td>
<td>1</td>
</tr>
</tbody>
</table>

5. Click **Save and Close**.

Adding an Existing Position as a Child Position

1. In the Sales Director node, click the orange arrow icon and select **Add Existing Position as a Child**.
2. Search and select the Senior Sales Manager position.
3. Click **OK**.
4. On the Edit Position: Senior Sales Manager page, click **Save and Close**.
5. In the Operations Director node, click the orange arrow icon and select the **Add Existing Position as Child** option.
6. In the Select Position window, search and select the Senior Operations Manager position.
7. Click **OK**.
8. On the Edit Position: Senior Operations Manager page, click **Save and Close**.

Creating Duplicate Positions

1. In the Senior Sales Manager node, click the orange arrow icon and select **Duplicate Position**.
2. On the Create Duplicate Position page, enter the following details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Sales Manager</td>
</tr>
<tr>
<td>Code</td>
<td>SALES_MGR</td>
</tr>
<tr>
<td>Type</td>
<td>Single Incumbent</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
<tr>
<td>Headcount</td>
<td>1</td>
</tr>
</tbody>
</table>

3. Click **Save and Close**.
4. In the Senior Operations Manager node, click the orange arrow icon and select **Duplicate Position**.
5. On the Create Duplicate Position page, enter the following details:
Moving the Sales Manager Node
You added the Sales Manager node under the Sales Director node instead of under the Senior Sales Manager node. You can drag the node and drop it on the Senior Sales Manager node.

1. Select the Sales Manager node and drop it on the Senior Sales Manager node. The Sales Manager position automatically becomes a child of the Senior Sales Manager position.
   If you created a node in a wrong place, you can just drag and drop the node to the correct place. The hierarchy automatically adjusts itself when you do so.

Reviewing and Submitting the Position Hierarchy Changes
1. On the HCM Position Hierarchy page, click Review. This page shows the positions that you added to the hierarchy or the changes made to existing positions.
2. Click Submit.
3. Click Yes.
4. Click OK. If approval rules are set up, you’ll be able to see the hierarchy changes after they are approved/

FAQs for Jobs and Positions

**What happens if I specify a parent position?**
You can specify a parent position when you enable HCM position hierarchy using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. A parent position is one, which is the next position up in the position hierarchy.

On the Manage Positions page, click the parent position link to view the position details and click the icon next to the parent position to refresh the search with the parent position.

As a prerequisite, you specify a parent position to synchronize the line manager from the parent position. When you select to synchronize the line manager using the position hierarchy the incumbent in the parent position is populated as the new manager.

**What happens if I specify the standard working hours in a position?**
In an assignment, the standard working hours are inherited from the position. The working hours and the standard working hours provided in the position are used to calculate the FTE (Full Time Equivalent) in the assignment. If there is a FTE value
already existing in the position, you can choose to update it based on the ratio of the working hours to standard working hours.

When position synchronization is enabled, even if FTE value exists for the position, it is not copied to the assignment during synchronization. Instead, the assignment FTE value is calculated as a ratio of working hours to standard working hours, if specified.

Related Topics

- Work Day Information

Grades

Grades

From the Manage Grades page, create grades to record the level of compensation for workers. You can:

- Create grades for multiple pay components, such as salary, bonus, and overtime rates
- Define one or more grades that are applicable for jobs and positions

This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments for a worker.

Grades and Sets

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

Grade Steps

Grade steps are distinct increments of progression within a grade. You can set up grades with or without grade steps.
The following figure illustrates the difference between grades with and without steps.

### Grades Without Steps
- Pharmacy Technician Trainee
- Pharmacy Technician I
- Pharmacy Technician II
- Pharmacy Technician III

### Grades with Steps
- Pharmacy Technician Trainee
  - Step 1
  - Step 2
  - Step 3
- Pharmacy Technician I
  - Step 4
  - Step 5
  - Step 6
  - Step 7
- Pharmacy Technician II
  - Step 8
  - Step 9
  - Step 10
  - Step 11
- Pharmacy Technician III
  - Step 12
  - Step 13
  - Step 14
  - Step 15

### Grade Rates
Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades.

For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

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

Grade rates contain the pay values that are related to each grade.

Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay such as salary, overtime, and bonuses.

Note the following:

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

This figure illustrates a grade that has two rate types associated with it:

- Salary rate type that has a range of values
- Bonus rate type with a fixed amount

This figure illustrates a different grade that has two rate types associated with it:

- Salary rate type that has a fixed amount
- Overtime rate type that also has a fixed amount
Rate Types
The types of rates that you can set up depend on the values for lookup type GRADE_PAY_RATE_TYPE. Examples of rate types are salary, bonus, and overtime pay.

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

Grade Rates and Grades
You can do the following:
- Set up grade rates when you set up grades
- Set up grade rates independently from grades

For grades with steps, you enter rates when you attach the grades to a grade ladder.

Related Topics
- Lookup Types for Grades

Grade Ladders
Grade ladders group grades and grades with steps in the sequence in which your workers typically progress. You create grade ladders either from the Manage Progression Grade Ladders page (in the Compensation work area) or from the Manage Grade Ladders page (in the Workforce Structures work area).

Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You may create different grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.
Ladders with Grades
You create ladders with grades by building a hierarchy of grades that were created without steps. When you set up this type of ladder, only grades without steps are available to add to the ladder. You can’t create a grade ladder with a combination of both grades and grades with steps.

You don’t define any grade rates when you set up a ladder with grades; the rates for the grades within the ladder are inherited from the rates that were added when you set up the grades. To add or edit rates for grades, you must use the Manage Grade Rates task.

Ladders with Grade Steps
You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.

You define step rates when you set up the ladder, and the rates are unique to each ladder. You can’t share step rates between grade ladders.

Grade Ladder on Worker Assignment
You can use the grade ladder in the worker assignment to ensure that workers are compensated according to the grade structure defined in the job or position.

Selecting Grade Ladder for Worker Assignment
Transactions, such as New Hire, Add Assignment, and Create Work Relationship involve creating a new assignment. During assignment creation, the grade ladder is automatically populated based on the selected job or position. This isn’t true for transactions that involve an assignment update (for example, promotion, transfer). You must manually select the grade ladder when you update the assignment.

Note: The Grade Ladder field isn’t displayed if a grade ladder isn’t defined for the worker organization.

You must select from the grades populated for the grade ladder. If the selected grade includes steps, you can view the steps and the associated salary rates by clicking the Grade Details icon. The step rate is displayed based on the legislative data group associated with the assignment business unit.

The grade step progression process evaluates a worker’s eligibility to progress to a new grade or step based on the defined rules and updates the salary rate. The process can be run for workers associated with a particular grade ladder to move them to a new grade or step and update their salary rate.

If the grade ladder selected in the assignment is associated with an automatic grade step progression process, you can exclude the worker from the process. To exclude the worker, deselect the Include in grade step progression check box.

Note: The Include in grade step progression check box isn’t displayed if a grade ladder isn’t defined for the worker organization.
How Grades, Grade Rates, and Sets Work with Legislative Data Groups

You assign grades to sets, and grade rates to legislative data groups from the Workforce Structures > Manage Grade Rates page.

If you have grades that are common across multiple business units, you can:

- Assign them to the set that’s associated with business units.
- Set up grade rates that are specific to each legislative data group.

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

Grades and Sets

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

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people.

For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that is shared between the countries, but set up different grade rates for each country in the applicable currency.

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

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

- Jobs
- Positions
- Assignments
- Compensation
- Payroll

How Grades Work with Jobs and Positions

You can define one or more grades that are applicable for each job and position. Using this list of valid grades, combined with the settings for two profile options you restrict the grades that can be selected when you set up assignments for a worker.

Note the following:

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

How Grades Work with Assignments

When you set up assignments, you can select the applicable grade for the job or position.

Two profile options determine the grades that are available for selection:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PER_ENFORCE_VALID_GRADES</td>
<td>If you set this site-level profile option to Yes:</td>
</tr>
<tr>
<td></td>
<td>- Users can select a grade only from the list that you defined for the job or position.</td>
</tr>
<tr>
<td></td>
<td>- If users select both job and position for the assignment, they can select grades that are valid for the position only.</td>
</tr>
<tr>
<td></td>
<td>- If valid grades are defined for neither job nor position, then users can select from all grades.</td>
</tr>
<tr>
<td></td>
<td>- If you set this site-level profile option to No:</td>
</tr>
<tr>
<td></td>
<td>- User can select from all the grades</td>
</tr>
<tr>
<td></td>
<td>- This is also the default value</td>
</tr>
</tbody>
</table>
Profile Option | Description
--- | ---
PER_DEFAULTGRADE_FROMJOB_POSITION | If you set this site-level profile option to Yes and there is only one valid grade for a job or position:
  • The grade is used by default in the assignment.
    o If an entry grade is defined for a position, then that grade is used by default when the user creates a new assignment.
  If you set this site-level profile option to No:
  • User can select from all the grades
  • This is also the default value

How Grades and Grade Rates Work with Compensation and Payroll
Depending on the configuration of the legal employer to which workers belong, their salary can be stored at the assignment level. The grade rate can be linked to the salary basis within the salary record, in which case their salaries are validated using the grade rates.

For example, assume an assignment record for a worker indicates they are in Grade A1 with the salary of USD 40000.00:
  • The grade rate range that’s attached to Grade A1 is 30,000.00 USD to 50,000.00 USD. Therefore, the salary is within the grade rate range and no warnings are issued.
  • If their manager or a human resource (HR) specialist changes their salary to 55,000.00 USD, a warning is issued that the new salary is outside their salary range.

In addition, compa-ratios and salary range positions for workers are calculated using the minimum and maximum amounts that are defined in the grade rates for their grades.

Payroll elements reference grades in the eligibility criteria. For example, assume you want to process a bonus for all workers who are at grade level A2. To accomplish this, you would create an earnings element for the bonus and specify A2 for the grade in the eligibility criteria. The result of this setup, when combined with additional eligibility criteria that may be applied by the bonus plan, is that when payroll is processed, workers who are at grade level A2 and who meet the additional eligibility criteria would receive the bonus.

Related Topics
  • How Many Salary Bases to Create
  • Individual Compensation Plans

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

Grades with Steps
The grade structure for annual salary amounts for administrative workers in InFusion Corporation includes five grades, and each grade includes five steps.

  • When workers move from one grade to another in this ladder, they don't always start at step 1 of a grade.
  • The next step is based on their previous salary plus two steps.
For example, a worker could move from Step 5 in Grade 1 to Step 3 in Grade 2.

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

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

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

- Set up five different grades and add five steps for each grade.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for annual salary amounts using the rates in the preceding table.

**Grades Without Steps**

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

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

<table>
<thead>
<tr>
<th>Grade</th>
<th>Annual Salary Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>103,900</td>
</tr>
<tr>
<td>2</td>
<td>111,800</td>
</tr>
<tr>
<td>3</td>
<td>119,900</td>
</tr>
<tr>
<td>4</td>
<td>127,800</td>
</tr>
<tr>
<td>5</td>
<td>135,900</td>
</tr>
<tr>
<td>6</td>
<td>143,700</td>
</tr>
<tr>
<td>7</td>
<td>151,800</td>
</tr>
<tr>
<td>8</td>
<td>155,500</td>
</tr>
</tbody>
</table>
To set up your grade structure to reflect this table, perform the following tasks:

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

### Grades with Grade Rate Ranges

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

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

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

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

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

### Grade Rates with Hourly Amounts

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

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

<table>
<thead>
<tr>
<th>Grade</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10.64</td>
<td>11.07</td>
<td>11.49</td>
<td>11.96</td>
<td>12.40</td>
</tr>
<tr>
<td>2</td>
<td>11.77</td>
<td>12.27</td>
<td>12.76</td>
<td>13.24</td>
<td>13.72</td>
</tr>
<tr>
<td>3</td>
<td>12.92</td>
<td>13.46</td>
<td>13.98</td>
<td>14.55</td>
<td>15.07</td>
</tr>
<tr>
<td>4</td>
<td>14.03</td>
<td>14.63</td>
<td>15.21</td>
<td>15.80</td>
<td>16.39</td>
</tr>
<tr>
<td>5</td>
<td>15.20</td>
<td>15.83</td>
<td>16.46</td>
<td>17.12</td>
<td>17.75</td>
</tr>
</tbody>
</table>

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

- Create five grades, each with five steps.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for hourly amounts using the rates in the table.
How You Set Up Grade Ladders for Pay Scale Requirements

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

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

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

Summary of the Tasks

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Creating Grades

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

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

4. Click Next to access the Create Grade: Grade Steps page.
5. In the Grade Steps region of the Create Grade: Grade Steps page, click Add Row.
6. Add four steps for the grade by completing the fields as shown in this table. You must click Add Row after adding each step.

| Field      | Value |
7. Verify that Year 4 is the ceiling step.
8. Click Submit. You will add the grade rates when you create the grade ladder.
9. In the Warning dialog, click Yes.
10. In the Confirmation dialog, click OK.
11. Repeat steps 2 through 9 to add three more grades with steps. Complete the information for each grade using the information in these tables. The ceiling step in each grade is Year 4.

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

Creating a Grade Ladder

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

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

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

1. In the Workforce Structures work area, click Manage Grade Ladders to open the Manage Grade Ladders page.
2. On the Manage Grade Ladders page, click Create to access the Create Grade Ladder: Grade Ladder Details page.
3. In the Grade Ladder Details region of the Create Grade Ladder: Grade Ladder Details page, complete the fields as shown in this table, using default values unless otherwise indicated.
4. Click **Next** to access the Create Grade Ladder: Grades page.
5. In the Search Grades region of the Create Grade Ladder: Grades page, enter TECH in the **Code** field and click **Search**.
6. Select Tech03 and click **Add to Grade Ladder**.
7. Select Tech04 and click **Add to Grade Ladder**.
8. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
9. Select Tech05 and click **Add to Grade Ladder**.
10. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
11. Select Tech06 and click **Add to Grade Ladder**.
12. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
13. Verify that the grades appear in numerical order, with Tech06 at the beginning of the ladder and Tech03 at the end of the ladder.
14. Click **Next** to access the Create Grade Ladder: Rate Values page.
15. On the Create Grade Ladder: Rate Values page, select the legislative data group for Germany.
16. In the Grade Step Rates region, click **Add Row**.
17. Complete the following fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Type</td>
<td>Grade with steps</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Grade Name</th>
<th>Step Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technicians 03</td>
<td>Step 1</td>
<td>1,750.73</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 2</td>
<td>1,878.90</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 3</td>
<td>2,009.79</td>
</tr>
<tr>
<td>Technicians 03</td>
<td>Step 4</td>
<td>2,143.92</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 1</td>
<td>2,238.57</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 2</td>
<td>2,408.39</td>
</tr>
<tr>
<td>Grade Name</td>
<td>Step Name</td>
<td>Value</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
<td>---------</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 3</td>
<td>2,577.68</td>
</tr>
<tr>
<td>Technicians 04</td>
<td>Step 4</td>
<td>2,744.81</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 1</td>
<td>2,831.87</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 2</td>
<td>3,047.14</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 3</td>
<td>3,257.52</td>
</tr>
<tr>
<td>Technicians 05</td>
<td>Step 4</td>
<td>3,469.00</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 1</td>
<td>3,586.36</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 2</td>
<td>3,851.38</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 3</td>
<td>4,122.34</td>
</tr>
<tr>
<td>Technicians 06</td>
<td>Step 4</td>
<td>2,143.92</td>
</tr>
</tbody>
</table>

19. Click Next.
20. On the Create Grade Ladder: Review page, review the grade ladder hierarchy and the rates, and click Submit.
21. In the Warning dialog, click Yes.
22. In the Confirmation dialog, click OK.

Example of Setting Up Grade Ladders for Spine Point Requirements

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points. You manage grade ladders using the Manage Grade Ladders task in the Workforce Structures work area.

Spine Points

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

You can use grade ladders to meet the requirements of a grade structure with spine points. The following table illustrates a grade structure with spine points that is similar to the one used for university workers in the UK.

<table>
<thead>
<tr>
<th>Spine Point</th>
<th>Salary</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>25,674</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>26,361</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>27,068</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>27,796</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>30,394</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>31,778</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>32,648</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>33,542</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>34,466</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>35,425</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>38,441</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>39,510</td>
<td>3</td>
</tr>
<tr>
<td>13</td>
<td>40,634</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>41,746</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>42,914</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>44,118</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>45,358</td>
<td></td>
</tr>
</tbody>
</table>

Analysis

To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number.
- Create a grade ladder with all three grades.
- Create step rates with annual salary amounts.
## Resulting Grades, Rates, and Grade Ladder

The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

<table>
<thead>
<tr>
<th>Grade Name</th>
<th>Steps</th>
<th>Ceiling Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 1</td>
<td>• Spine Point 1</td>
<td>Spine Point 5</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 4</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 6</td>
<td></td>
</tr>
<tr>
<td>Grade 2</td>
<td>• Spine Point 6</td>
<td>Spine Point 11</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 8</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 12</td>
<td></td>
</tr>
<tr>
<td>Grade 3</td>
<td>• Spine Point 12</td>
<td>Spine Point 17</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 13</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 14</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 16</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Spine Point 17</td>
<td></td>
</tr>
</tbody>
</table>

The following table lists the grades, steps, and rates to add to the ladder.

<table>
<thead>
<tr>
<th>Grade Name</th>
<th>Steps</th>
<th>Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 1</td>
<td>• Spine Point 1</td>
<td>25, 674</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 2</td>
<td>26, 631</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 3</td>
<td>27, 068</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 4</td>
<td>27, 796</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 5</td>
<td>30, 394</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 6</td>
<td>31, 778</td>
</tr>
<tr>
<td>Grade 2</td>
<td>• Spine Point 6</td>
<td>31, 778</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 7</td>
<td>32, 648</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 8</td>
<td>33, 542</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 9</td>
<td>34, 466</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 10</td>
<td>35, 425</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 11</td>
<td>38, 441</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 12</td>
<td>39, 510</td>
</tr>
<tr>
<td>Grade 3</td>
<td>• Spine Point 12</td>
<td>39, 510</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 13</td>
<td>40, 634</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 14</td>
<td>41, 746</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 15</td>
<td>42, 914</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 16</td>
<td>44, 118</td>
</tr>
<tr>
<td></td>
<td>• Spine Point 17</td>
<td>45, 358</td>
</tr>
</tbody>
</table>
FAQs for Grades

How can I edit rates for a grade?
You can edit rates using the Manage Grade Rates task. However, you can’t edit rates within the Manage Grades task, because grades and rates have separate effective dates.

How can I add rates to grade steps?
Rates can be added to a grade with steps, when you add the grade to a grade ladder.

What’s the difference between grade ladders and progression grade ladders?
Grade ladders group grades and grades with steps in the sequence in which your workers typically progress. Progression grade ladders are hierarchies used to group grades and steps and define their sequence. They include the associated progression rules and rates for each grade and step within the ladders. Oracle Fusion Human Capital Management has both a Grade Ladder and a Progression Grade Ladder For a specific grade ladder definition; you should use one of these, but not both.

The differences between them are:

<table>
<thead>
<tr>
<th>Progression Grade Ladders</th>
<th>Grade Ladder</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Viewed in Manage Progression Grade Ladders page in Compensation work area</td>
<td>• Viewed in Manage Grade Ladders page in Workforce Structures work area</td>
</tr>
<tr>
<td>• Required if you are using grade step progression or rate synchronization processes</td>
<td></td>
</tr>
<tr>
<td>• Enables population of worker salary record from grade or step rates during employment transactions</td>
<td></td>
</tr>
<tr>
<td>• Only one rate (grade rate or step rate) allowed per progression grade ladder</td>
<td></td>
</tr>
<tr>
<td>• Associated with a single legislative data group</td>
<td></td>
</tr>
</tbody>
</table>

Can I edit the legislative data group for a grade rate?
No. If you need to change the legislative data group for a grade rate, you must change the grade rate to inactive and create a new grade rate with the correct legislative data group.

What’s a grade ladder hierarchy?
The grade ladder hierarchy consists of grades. You can move the grades up and down within the hierarchy, and add or remove grades. You can click any grade to view the details.

Quick Actions
Quick Actions

Quick actions are links on the Home page that enable you to initiate actions quickly on yourself, your team, or your client groups. You can view the quick actions grouped under the following tabs:

- **Me** - This tab lists actions to manage your own information.
- **My Team** - This tab lists actions to manage your team.
- **My Client Groups** - This tab lists actions to manage people within your area of responsibility.

Click the **Show More** link to view all the available actions grouped under a specific head.

The set of actions that you see are displayed based on your security privileges. The people that you can act on differ based on the tab you’re on. Consider that you are both a line manager and an HR Specialist. You can access the Promote action from both the tabs: My Team and My Client Groups. Also, you will see a different set of employees on each tab whom you can promote. You can promote only your direct reports using the Promote task in the My Team tab. You can promote only those employees that you have access to as an HR Specialist, using the Promote task in the My Client Groups tab.
4 Person Information

Person Records

All workers, nonworkers, and contacts have a single person record in the enterprise identified by a person number. You can’t create the person record in isolation because it requires one of the following:

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

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

You create the person record either

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

Person Records Compared with Work Relationships

The following table compares Person Records and Work Relationship Records.

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Particulars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Records</td>
<td>Holds personal information such as:</td>
</tr>
<tr>
<td></td>
<td>• Name</td>
</tr>
<tr>
<td></td>
<td>• Date of birth</td>
</tr>
<tr>
<td></td>
<td>• Disability information</td>
</tr>
<tr>
<td></td>
<td>May also apply to more than one work relationship such as National ID.</td>
</tr>
</tbody>
</table>

| Work Relationships    | Holds employment information such as:                                       |
|                       | • Job                                                                        |
|                       | • Payroll                                                                    |
|                       | • Working Hours                                                              |
|                       | This can vary among work relationships and be specific to a legal employer.  |

Note: A person’s worker type (for example, employee) is derived from the person’s work relationship; it’s not part of the person record. A person with multiple work relationships of different types has multiple worker types.
Local Information in Person Records

In a single global enterprise, all users who have access to a person see the same person record, but the person record can contain local variations of some information.

For example, the person record can contain the person’s name in a local language and multiple national IDs. You can also record some information, such as marital status, using terms that are most appropriate for each country in which the person has work relationships. All local information is visible to anyone who can view the person record.

Access to Person Information

Having security access to a person record doesn’t automatically allow access to all of a person’s work relationships and assignments.

For example, your access may be limited to specific legal employers, which may exclude some work relationships.

**Related Topics**
- Work Relationships

Examples of Person Records

Multiple people may be able to manage a person record, including human resource (HR) specialists in any of the person’s legal employers and the person to whom the record belongs.

The first of the following examples show how multiple people can manage the person record sequentially; the second shows how multiple people can manage the person record simultaneously.

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

Miguel is an ex-employee of legal employer A in the United States. Today, Miguel starts a contingent worker work relationship with legal employer B in Brazil, where you’re the HR specialist.
When you attempt to add Miguel as a contingent worker, the application finds his existing person record; therefore, you need only to create the contingent worker work relationship. You also update his person record as follows:

<table>
<thead>
<tr>
<th>Details</th>
<th>Action Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miguel is married</td>
<td>Do the following:</td>
</tr>
<tr>
<td></td>
<td>• Enter his new marital status in the country information for Brazil</td>
</tr>
<tr>
<td></td>
<td>• Update his marital status in the US country information.</td>
</tr>
<tr>
<td>Miguel has a new emergency contact</td>
<td>Replace his previous emergency contact by doing the following:</td>
</tr>
<tr>
<td></td>
<td>• End date the previous contact relationship.</td>
</tr>
<tr>
<td></td>
<td>• Create a new one.</td>
</tr>
<tr>
<td>Miguel’s address</td>
<td>Update his addresses. Address information is date-effective, which means you can retrieve his previous addresses if necessary.</td>
</tr>
<tr>
<td>Miguel’s national ID(s)</td>
<td>Add his Brazilian national ID, therefore the person record now holds two national IDs.</td>
</tr>
<tr>
<td>Miguel’s local name</td>
<td>As Miguel is living and working in Brazil, you enter a local name using the Brazilian name format.</td>
</tr>
</tbody>
</table>

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

You have no access to legal employer A so you can’t see Miguel’s work relationship with legal employer A. If you need more information about his previous work relationship, you must ask Miguel or his previous line manager to share this information with you.
Managing the Person Record When Multiple Active Work Relationships Exist

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

<table>
<thead>
<tr>
<th>Worker Type</th>
<th>Contingent Worker Work Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Employer A (UK)</td>
<td>Legal Employer B (France)</td>
</tr>
</tbody>
</table>

As the HR specialist for legal employer A, you manage Marie’s employee work relationship. The HR specialist for legal employer B manages her contingent worker work relationship. You can both manage all components of Marie’s person record. In addition, Marie can edit the following details in the Personal Information work area:

- Marital status and name
- Addresses
- Contacts
- Document records
- Phone numbers
- Email addresses
- Other communication methods
- Communication methods order of preference

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

- Marie manages her own contacts and benefits information.
  - She names her son as a dependent and her husband as an emergency contact.
- Marie manages her home address, which is also her primary mailing address.
  - The enterprise has defined the address type Local Overseas.
  - The HR specialist for legal employer B enters a Local Overseas address for Marie in France.
• The HR specialist in legal employer B enters a local name for Marie in French.

• You enter details of Marie’s UK driver’s license. The HR specialist in France enters details of Marie’s French driver’s license and her passport. Marie can review and update this information.

• You enter Marie’s UK national ID, and the HR specialist in France enters her French national ID.

• Both UK and French versions of Marie’s marital status exist in her person record. When Marie’s marital status changes, she edits both versions.

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

### Person-Record Keyword Searches

The application searches for keywords in these person attributes: department, person number, job name and code, position name and code, person name, primary email, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, memberships, areas of interest, and areas of expertise.

### Access to Restricted Information

Line managers can access their workers’ restricted information such as competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations. Restricted information is included in search results when the searcher is a line manager. For example, if a line manager searches for a language skill and a match is found in any direct or indirect reports, that information appears in the search results. However, if the match is found in public information such as areas of expertise, it appears in the search results for any user.

### Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied to ensure that the source and indexed values don’t differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

### Name and Keyword Search

The person search uses a person’s full name instead of the first name or last name. The full name definition may vary for each country. For example, the full name definition for India may be First Name Middle Name Last Name, while the full name definition for Canada may be First Name Known As Last Name Suffix. You control the definition of the full name using the Manage Person Name Formats task in the Setup and Maintenance work area.

There is an implied OR condition between the search criteria when you use keyword search. When you use the name search, there is an implied AND condition between the search criteria. For example, when you enter Chris Harper in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results. Here are some examples:

<table>
<thead>
<tr>
<th>You enter...</th>
<th>Search Results</th>
</tr>
</thead>
</table>
| Harper Chris| • Jenner, Chris  
              • Harper, Smith  
              • Chris, Ray  
              • Harper, Liam  
              • Harper, Chris  
              • Harper, Christopher |
| Chris Harper| • Jenner, Chris  
              • Harper, Smith |
You enter... | Search Results
--- | ---
| Chris, Ray  
Harper, Liam  
Harper, Chris  
Harper, Christopher |

Chris%  |  
| Jenner, Chris  
Black, Chris  
Blake, Christopher  
Simpson, Christy  
Harper, Chris  
Harper, Christopher  
Christ Johnson |

Chris  |  
| Jenner, Chris  
Black, Chris  
Harper, Chris |

*Chris Harper*  |  
| Harper, Chris |

Chris and Harper  |  
| Harper, Chris |

*Chris* "Harper*  |  
| Harper, Chris |

**Date-Effective Search**

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

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

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

**Person Names and Languages**

You can define how to display people’s names in the application and in which language. You can define whether to display a person’s name in the global or the local language.

Person name has two parts, style and format.

**Name Styles**

The name style determines these things:

- Which components of a person’s name to display. For example, one country may display first name and last name while another may display the middle name too.
• What’s the order of display of the components
• Which components are required and which are optional. For example, title may be optional in some countries.

The legal employer sets the legislative context for the person record. So, if the legal employer is a Canadian legal entity, the Canadian name style is used. When a country-specific name style doesn’t exist, a universal name style (last name, first name, title, and middle names) is used.

Note: A person’s contacts have the same name style as the person for whom they’re contacts.

Name Formats
A name format is an arrangement of the name components.

• The format is an arrangement of these name components: first name, last name, and title. You can choose from these predefined name formats: Display name, List name, Full name, and Order name.
• The format can differ based on the display context. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global or Local
The profile option HR: Local or Global Name Format controls whether users see local names or global names. The profile option HR: Local or Global Name Format controls whether users see local names or global names by default. Global names use one name format. Users who manage people across countries may want to see the names displayed consistently so may use global names for example. Users who view or manage persons in a single country may prefer to see local names.

Person-Name Languages
Each enterprise has a global-name language. Person names appear in this language by default. When you create a person record, you can define what language to use for the local name. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the language.

Let’s look at an example:

• The global-name language for the enterprise is American English.
• You set the local-name language in a person record to Japanese. Users whose HR: Local or Global Name Format profile option is set to Japanese see the person’s name in Japanese.
• All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person’s name in American English. Users can set preferences to select the language in which they want to see person names displayed.

Person Identifiers for External Applications
A person identifier captures third-party payroll identifier or the time device badge identifier details from an external application for a person or an assignment. You can configure person identifiers to capture additional information, for example, to track a person’s parking pass identifier, or track a person’s previous Human Resources system person identifier. You add, modify and delete person identifiers using the Manage Person Identifiers for External Applications task in the Person Management work area.

It is optional whether you want to associate a person identifier with an assignment because the person may have only one identifier in an external application. For example, a company assigns a badge to a person that grants access to all the
company's buildings. The person may have multiple assignments in the organization, but have only one badge and one number in the building access system.

Related Topics

- Extracting Payroll-Related Data: Critical Choices

Delete Person Data

You can't delete a person although you can delete some of the person data because a person is referenced from several applications.

Details such as phone numbers, email addresses, and profiles related to a person can be deleted without restrictions. You can't delete person names and person legislative data although you can delete compensation and work relationships data generated from a process.

You can delete the following person data (with restrictions):

- Employment
- Person and user details
- Person Number
- Salary and compensation
- Benefits

Delete Compensation and Benefits Data for a Person

You must delete compensation data, if it exists before you delete a person.

Deleting Workforce Compensation Data

If the Transfer Workforce Compensation Data process wasn’t run.

1. In the Compensation work area, click the **Administer Workers** task.
2. Make the worker ineligible

Deleting Individual Compensation Data

You delete element entries or stock awards posted to the stock table to delete individual compensation awards.

- Deleting Element Entries
  a. In the Person Management or Payroll Calculations work area, click the **Manage Element Entries** task.
  b. Delete all prior and future-dated element entries created for awarded individual compensation plans.

- Deleting Stock Awards Posted to the Stock Table
  a. In the Compensation work area, click the **Manage Stock Grants** task.
  b. Search for the worker.
  c. Delete all stock records.
Deleting Total Compensation Statement

Use the following steps to delete the total compensation statement.

1. In the Compensation work area, click the Purge Statements task.
2. Select the Statement Definition Name.
3. Select the worker whose statement you want to delete.
4. Run the Purge Statements process for all statements generated for the invalid worker.

Deleting Salary Data

Use the steps given below to delete salary data.

1. In the Person Management or Compensation work area, click the Manage Salary task.
2. Search for the invalid worker
3. Delete the salary, starting from the latest record to the earliest one. Corresponding element entries are also deleted.

Deleting Benefits Data

You can’t cancel a work relationship if there is an active benefits relationship associated with it. You must delete a person’s benefits before you cancel the work relationship.

• Deleting a Benefit Relationship when a Life Event isn’t Created
  a. In the Enrollment work area, click the Benefit Relationship task.
  b. Search for the person.
  c. Delete the benefit relationships
  d. Cancel the work relationship.

• Deleting a Benefit Relationship when a Life Event is Created
  a. In the Enrollment work area, click the Person Life Events task.
  b. Search for the person.
  c. Delete any life events on the Potential Life Events tab.
  d. Click the Benefit Relationship task and delete the benefit relationships.
  e. Cancel the work relationship

• Deleting a Benefit Relationship when Enrollment Records Exist
  a. In the Enrollment work area, click the Person Life Events task.
  b. Search for the person.
  c. On the Life Event tab, void and back out the life event. Click Save.
  d. In the Evaluation and Reporting work area, click the Processes tab, run the Purge Backed-out or Voided Life Event Data process.
  e. In the Enrollment work area, click the Benefit Relationship task.
  f. Delete the benefit relationships.
  g. Cancel the work relationship.
Delete Employment Data

You can delete work relationships, employment terms, and assignment details using the Cancel Work Relationship action (in the Manage Work Relationship page) if the person doesn’t have any payroll, benefits or compensation results, and direct reports. However, you can delete or cancel a work relationship only if there is another active primary work relationship.

Canceling a Work Relationship

1. In the Person Management work area, search and select the worker, and click the Manage Work Relationship task.
2. Click Actions and select Cancel Work Relationship.
3. Click Submit.

You can’t access the person from the search results once you cancel the person’s work relationship. If you try to rehire the person by entering the same name, date of birth, and national ID, the person is identified as existing and available for selection in the hire process.

Deleting User Information

The Cancel Work Relationship action automatically removes a user’s roles except the user account, which remains active.

You must manage roles using other applications if they’re assigned outside of Oracle Human Capital Management application. You can use Oracle Identity Manager, Microsoft Active Directory, and so on to manage these user roles. You must verify that the person has no other work relationships. If there are other active work relationships, then you must retain the user account but if there are no other active work relationships, then you can disable the user account outside of Oracle HCM to prevent the user from logging in to the application.

Delete Person Number

You delete a person because you want to use the associated person number. You can update the details of the person for whom you want to use the specific person number. You can’t delete a person’s person number but you can update the number if the person number generation method is set to Manual. The original person number is then available for reassignment to another person.

You can change the person number generation method to Manual if it’s set otherwise.

Changing the Person Number Generation Method

1. In the Setup and Maintenance work area, click the Manage HCM Information task.
2. Click the Go to Task icon.
3. Click Edit and select Correct.
4. Note the current Person Number Generation Method, as you must reset the value once done with the procedure.
6. Click Submit.
7. In the Person Management work area, search for the person and click the Manage Person task.
8. Change the person number and click Submit.
9. Once you change the person number, reset the Person Number Generation Method back to the original value following steps 1-6.

Since the person number is a unique identifier, it’s recommended that you cancel the work relationship and create the new person with a new person number.
Delete Person Mailing Address

You can delete a person's address, including the primary mailing address using the Manage Person task in the Person Management work area.

When you hire a worker, you have the option of not providing a mailing address.

Note the following:

- You can delete a person's primary mailing address even if it's the only mailing address.
- If there are multiple mailing addresses and you want to delete the primary mailing, you must first identify another address as primary before deleting the current address.
- If there are multiple mailing addresses of which one address has an effective end date as of the current date, you must first delete this address before deleting the primary mailing address.

FAQs for Person Records

What's the difference between global names and local names?
The following table outlines the difference between Global names and Local names.

<table>
<thead>
<tr>
<th>Name Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Names</td>
<td>Are in a format and language that can be understood throughout a multinational enterprise.</td>
</tr>
<tr>
<td>Local Names</td>
<td>Are understood by users in a single country, but may not be understood throughout a multinational enterprise. You can have only one local name at a time. Select the local-name language that is most appropriate for your primary assignment and reporting requirements. For example, if your home country is Sweden, you may enter a local name in the Swedish language and format.</td>
</tr>
</tbody>
</table>

What happens if I change the local-name language of a person's name?
A person can have only one local name at a time.

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

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

What's the primary mailing address?
The address used by default for correspondence.
The home address is automatically the primary mailing address. To use a different address as the primary mailing address:

1. Create the new address. This can be of any type; you need not define it as a mailing address.
2. Edit the primary mailing address to select the new address.

**Note:** If you create a mailing address, that address doesn't automatically become the primary mailing address; you must still select the new address as the primary mailing address.

Personal Information

Reviewing Your Personal Information

Video

**Watch:** In this video tutorial, you will learn how to review and quickly update your personal information, including addresses, emergency contacts, and pay details. You will also learn how to view other personally relevant information, such as your compensation and benefit details and to collaborate with your colleagues using tools you are already familiar with. The content of this video is also covered in text topics.

Procedure

You can review and quickly update your personal information including addresses, emergency contacts, pay details, compensation, and benefit details. Use the following procedure to review and update your personal information.

To review and update your personal information:

1. On the Home page, click **Navigator > Personal Information.**
2. On the My Details page, click **Edit** to update your contact information and mailing address. The address components are validated as per the geography validation and are completed automatically based on the ZIP code selection.
3. Click the **Employment Details** tab to view your employment history.
4. Click the **My Documents** tab to add or modify your documents, such as visas and licenses.
5. Click the **Benefits** tab to view your benefit enrollment and costs.
6. Click the **Payroll** tab to view your payslips and payment methods.
7. Click the **Compensation** tab to view your salary information.
8. Click **Save and Close.**
Change Your Photo

You can change your photo using the My Details page in the Personal Information work area. When you upload your photo, you can view it in your public information page, Directory search results, and the global header. You can have only one profile photo at a time.

You can also update your photo using the My Photo page in general preferences. Click your user image or name in the global header and go to Personalization - Set Preferences - My Photo.

Change a Photo

To change your photo:

1. In the Personal Information work area, click **Update Photo** (camera icon) in the user image or name, or the My Photo page in general preferences. The Update Photo icon appears when you hover over your image or name.
2. Click **Browse** to select and upload photo.
3. When changing the photo,
   - Ensure that the file size is less than 2 megabytes.
   - Upload a photo in any format, but the typical format is either a .png or .jpeg file
   - Ensure that the photo dimensions are 90 x 120 pixels to help reduce the distortion of photo. If the photo is not 90 x 120 pixels, it’s recommended to maintain a 3 x 4 aspect ratio.
4. Click **Save and Close**.

Networking at Work: Explained

Using the network at work capabilities, you can:

- Follow people
- Post your person spotlight updates to your wall in Oracle Social Network

Follow People

Following a person enables you to see activity about that person in your Overview page in Oracle Social Network. You can follow people from multiple places within Oracle Social Network. Outside of Oracle Social Network, the Follow action is available in multiple places in the HCM application:

- In the Search Person page, a Follow icon is displayed for each person displayed in the search results.
- When you select a person in the directory search results, you’re taken to the person’s spotlight page. A person’s spotlight displays the Follow action.

Post Person Spotlight Updates to Oracle Social Network

When you update Areas of Interest, Bookmarks, Me details, and Areas of Expertise in your person spotlight, the updates are automatically posted to your wall in Oracle Social Network. This is true only if integration with Oracle Social Network is enabled in the network at work settings.
Feedback: Explained

You can give feedback to others throughout your organization. All workers and managers can manage feedback by opening the Feedback dialog box from:

- Person spotlight - On the Public Information page, and using the Feedback action on the Employment Information page
- Person smart navigation - Click Feedback on the Information page and the Actions menu

In addition, you can create and manage feedback in the following business processes:

- Performance management
- Talent review
- Succession management

Create and Manage Feedback

You can create feedback for yourself or any other person to whom you have data security access. You can edit and delete feedback that you create.

Set Visibility

Feedback visibility is determined by:

- The visibility setting on the feedback itself
- Data security

You can make feedback visible to:

- Everyone - A public note visible to any person in the organization
- Managers only - Managers in the hierarchy of the worker about whom the Feedback is created
- Managers and the worker - Managers in the hierarchy of the worker, and the worker who receives the feedback
- Only Me - A private note created by an author about the author or another person and visible only to the author

HR specialists can view all feedback except that with the Only Me visibility setting.

Feedback visibility is also determined by data security; you can only create or see notes for people whom you have authorization to view.

Hide Feedback

A person who receives feedback and the HR specialist who has administrative oversight of the person can hide feedback, if the content isn’t appropriate. The person who hides the note can unhide the note, but no one else can unhide it. The note author can view the note and see that it’s hidden.

Notify Workers and Managers

You can configure the application to notify workers and their managers when workers receive feedback. Use the Manage Talent Notifications task to enable or disable notifications sent to the manager or worker. The settings affect all workers and managers throughout the application.

This table lists the visibility settings and the roles that receive notification for each setting.
Manage Feedback in Talent Management Business Processes

The table shows the Talent Management business processes in which you can manage feedback and details about where and how to do so.

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Feedback Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance management</td>
<td>You can manage feedback from performance documents pages. The feedback is in the context of the person, and not limited to the performance document.</td>
</tr>
<tr>
<td>Talent review</td>
<td>Feedback is called Notes in the talent review business process. Feedback that originates as a talent review Note is designated as such in the Feedback dialog box. Only notes created within talent review meetings appear in the meetings. However, in the person spotlight, all notes and feedback appear. You can manage notes from the following pages:</td>
</tr>
<tr>
<td>Succession management</td>
<td>You can manage feedback in the person spotlight which you can open from the following pages:</td>
</tr>
<tr>
<td></td>
<td>• Succession Plans page</td>
</tr>
<tr>
<td></td>
<td>• Select Candidates page used when creating a succession plan</td>
</tr>
<tr>
<td></td>
<td>• In talent pools, on the Select Members page used when creating a pool</td>
</tr>
</tbody>
</table>

Related Topics

- Person Spotlight

Comparing Items

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile. You can compare items in the Profiles work area and on the talent review dashboard.

Selecting Items

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items.
Controlling Results

Data sets control which attributes are displayed for each item in the comparison. For example, you must select the School Education data set to display and compare a person's education details.

The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. HR specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you're either a line manager or an HR specialist.

Performance Information in Comparison Results: Explained

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

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

FAQs for Personal Information

Can I add additional data sets to the comparison?
No, you can only select from the list of data sets available for an item type.

Can I compare all of the person's assignments?
No, you can compare only the primary assignments of a person.

How are the differences between comparison attributes identified?
The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon.

When the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. The comparison, however, doesn't display the differences for values that lie within the range. For example, consider that you're comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison doesn't display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

How is risk of loss assessed?
Line managers and human resource specialists enter the risk of loss information in a person's profile manually; there is no automated risk assessment process. They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings.
What happens if I remove the comparison base?
The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

What’s the difference between performing a best-fit analysis and comparing profiles?
Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications.

Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

To compare or perform a best-fit analysis, use the Compare action in the smart navigation.

Can I delete a person record?
No, but you may be able to cancel work relationships. If you cancel a person’s only work relationship, and the person has no contact relationships, the person record:

- Is identified as associated with a canceled work relationship.
- Doesn’t appear in directory searches.

Do I need to enter national identifiers for all my contacts?
No, you don’t. You’re required to enter national identifier information for those contacts with whom you have a personal relationship. You can have a personal relationship with the following type of contacts: spouse, domestic partner, child, adopted child, foster child, and domestic partner child.

Can I add multiple national identifiers of the same type for a country?
Yes, you can provided the date of issue of the national identifier is after the expiration date of the existing national identifier. This means that the validity period of the national identifiers must not overlap. You add national identifiers using the Manage Person task in the Person Management work area.

Can I remove a contact from a person’s record?
Yes, you can. If you delete the contact, the contact’s own person record continues to exist, but the contact relationship between the contact and person whose record you’re updating is purged. If you end date the contact relationship, the contact no longer appears in the person record from the specified date, but the history of the contact relationship is still available.

Can I edit the personal information of a worker’s contacts?
Yes, the Human Resources Specialist and the Human Resources Analyst can edit the personal information for a person’s contact even if the person security profile excludes related contacts, if they have the PERCONTACT_PERSON_PII_MANAGEMENT_DUTY role assigned to their job role. Click the Go to the Manage Person for contact link in the Edit Contact page to edit personal information of a person’s contact.

Can workers manage their own contacts?
Yes. Workers can manage their contacts directly in the Personal Information work area. For example, workers can do the following:

- Edit existing contacts
- Create new contacts
- Identify emergency contacts
You can view the history of changes made to a contact relationship. To manage dependents and beneficiaries, workers edit the benefits information in the Personal Information work area.

**How can I designate a contact as a statutory dependent?**
You can specify whether a contact is a statutory dependent when you perform the following transactions:
- Edit My Details: Contacts
- Add a Contingent Worker
- Add a Nonworker
- Add a Pending Worker
- Hire
- Create Work Relationship
- Manage Person > Contact

The **Statutory Dependent** field is used in legislative processes and reports. This field isn’t displayed by default unless delivered by a specific Oracle Localization. Otherwise, it can be configured to display on the pages using page composer.

**What’s the purpose of the relationship start date on the self-service contact page?**
The relationship start date is the date when the relationship takes effect. For example, if you specify your spouse as a contact, enter your marriage date as the relationship start date.

If you enter a relationship start date, which is earlier than the person’s hire date, the application changes the **Contact Effective Start Date** to the person’s earliest effective start date. This is because a relationship cannot be earlier than the effective dates of the two related person records. However, a point to note is that the relationship start date is not stored in the database.

**What’s a disability disclosure?**
You can disclose any disability using the Personal Information work area. You can also specify if you have any specialized equipment requirements and add supporting documents as attachments. Currently you can disclose disabilities for Japan, the UK, and the US.

**FAQs for Information Sharing**

**What happens if I share information?**
You can share personal information with both internal recipients (people within the enterprise) and external recipients (people outside the enterprise) who otherwise have no access to this information. You share information using the Information Sharing task in the Personal Information work area.

Internal recipients receive a notification with a link to the line manager version of your person spotlight, which includes contact details, biographical and employment information, skills and qualifications, compensation details, goals, and performance details. A recipient’s access to the information doesn’t expire, but you can revoke it.

External recipients see only the information that you select for sharing. Each external recipient receives an email with a link to the shared information. Their access to this information expires at a time that you specify.

If you’re a line manager, you can share the information of people who report to you with both internal and external recipients. The approval of the people whose information you’re sharing is required.
What's the purpose of sharing person information?
When you're transferring to a different legal entity, the destination legal employer may not be able to initiate your transfer because they don't have access to your records in the source legal entity. Either you or the releasing line manager can share your information with the receiving line manager or Human Resource Specialist, enabling them to initiate the transfer. Similarly, you can share selected information with external persons or organizations, for example to complete a mortgage or loan agreement. Use the Information Sharing action in the Personal Information work area to share information.

What happens if the information changes after I share it with an external recipient?
External recipients receive an email with a link to the shared information. Any changes to the shared information are also accessible to external recipients. For example, if you share your information with an external recipient on June 1 and the recipient views it on June 5, they see the information effective as of June 5. If the worker was terminated on June 3, for example, no information is available to the recipient.

Why can't I select which information to share with internal recipients?
After you share your information with internal recipients, they can view all your information by accessing your person spotlight. However, external recipients can see only the information that you select for sharing. Each external recipient receives an email with a link to the shared information. The information that you can share externally is also limited.

Do recipients of shared information have unlimited access to it?
No. Internal recipients retain access to the line manager version of your person spotlight until you revoke their access. External recipients' access to the shared information is controlled by the expiration date. You can also revoke access explicitly using the Information Sharing task in the Personal Information work area.

Can I initiate a transfer if I do not have access to the person’s information?
No. You can initiate the transfer only after obtaining access to the person’s information. Either the person or the releasing line manager can share the person’s information with you. A person or the person's line manager can share the person's information by accessing the Information Sharing action in their portraits.
5 Employment Information

Assignments

Work Relationships

A work relationship defines how a person and legal employer are related.

Human resource (HR) specialists can create a work relationship by selecting the person in the Person Management work area and then selecting the Manage Employment task. Line managers can select their employee on the My Team or Directory page and then select the Manage Employment task.

Worker Types

The worker type you select when creating a work relationship determines the type of work relationship.

<table>
<thead>
<tr>
<th>Worker Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent Worker</td>
<td>A nonemployee, for example, contract worker or temporary worker.</td>
</tr>
<tr>
<td>Pending Worker</td>
<td>A person who will be hired as an employee or contingent worker and for whom you create a person record prior to the hire or start date. When the hire is finalized, you convert the pending worker to the proposed worker type. A rehire is another example of a pending worker since their person record already exists in the application. See the Rehires section for more information.</td>
</tr>
<tr>
<td>Nonworker</td>
<td>A person having a nonwork relationship with a legal employer, for example, a volunteer or retiree. The work relationship defines the details of the association.</td>
</tr>
<tr>
<td>Employee</td>
<td>A regular worker who doesn’t belong to any of the other worker types.</td>
</tr>
</tbody>
</table>

Primary Work Relationship

The primary work relationship and assignment are the most significant for a person in terms of working hours, assignment status, pay, benefits, and many other aspects. When you need information about a person from a single work relationship, you look at the primary work relationship. For example, when you need a single worker type for a person for reporting purposes, the primary work relationship provides it.

Here are some facts about primary work relationships:

- A person can have only one primary work relationship. All other work relationships are nonprimary.
- A person’s first work relationship is the primary relationship by default. An exception is the pending worker work relationship that’s created as nonprimary by default.
- When a person has multiple work relationships, the overall primary assignment is the primary assignment in the primary work relationship.
• If a person has multiple work relationships, you can’t terminate the primary work relationship until you select a
different primary relationship. This restriction exists because a person can’t be without a primary work relationship at
any time.

Rehires
When a person leaves the organization, you terminate their work relationship. The work relationship becomes inactive but
the person record remains active. So when you rehire the person, the application identifies the person and lets you select the
existing person and create a pending work relationship.

Related Topics
• Worker Types

Assignments
An assignment provides information about a person’s role such as job, position, pay, compensation, managers, working
hours, and location.

HR specialists can create and manage assignments from the Person Management work area. Line managers can create
and manage assignments for their team members from the My Team work area. Let’s take a look at these aspects of
assignments.

Work Relationship
A work relationship must have at least one assignment. Your legal employer may allow multiple assignments in one work
relationship.

Primary Assignment
You can access a person's information from a single assignment which is their overall primary assignment. If you need
information from a single assignment, you use the overall primary assignment. For example, some government reports are
based on one assignment only.

You must identify one assignment as the primary assignment in each work relationship. When a person has multiple work
relationships, the overall primary assignment is the primary assignment in the primary work relationship.
In this example, assignment C is the overall primary assignment because it’s the primary assignment in the primary work relationship.

Assignment Number
You can assign assignment numbers either manually or automatically. Assignment numbers are automatically generated by prefixing the person number with these characters: E (for employee), C (for contingent worker), N (for nonworker), P (for pending worker). For example, if the person number is 45678 and you hire the person as an employee, their assignment number would be E45678. Subsequent assignments of same type have suffix numbers, for example E45678-2, E45678-3. The suffix-number sequence is global and ensures that assignment numbers are unique in the enterprise. If you assign numbers manually, you must ensure they’re unique in the enterprise.

Assignment Name
The assignment name isn’t displayed on the assignment, but you can display it using personalization. Here’s how the assignment name is populated:

- If the user doesn’t enter a name specifically, the job name is used as the assignment name.
- If job name is the same for multiple assignments, the job name is appended with the assignment sequence.
- If there’s no job name, the assignment number is itself used as the name.

You can edit assignment names.

Assignment Status
The status determines whether the assignment is active, inactive, or temporarily suspended. It also controls whether the assignment is eligible for payroll processing.

Some assignment actions you take automatically change the assignment status. For example, when you create an assignment, its status is set automatically to Active - payroll eligible. You can change this status if you want.
Contract and Collective Agreement
Assignments can include contract details for information purposes, which some legal employers require.
You can link a collective agreement with an assignment if the bargaining unit, country, and legal employer of the collective agreement and assignment are same. If you created a collective agreement without a legal employer or bargaining unit, you can link the collective agreement with any assignment within the same country.

Examples of Creating Multiple Work Relationships for a Person
When you create a person record, you also create that person's first work relationship. Once a person record exists, you can create additional work relationships with the same or different legal employers. You create a person record in the New Person work area. You manage work relationships in the Person Management work area. Let's look at some valid combinations of work relationships.

Multiple Work Relationships of Different Types with a Single Legal Employer
These work relationships can exist at the same time with the same legal employer because they're of different types.

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

Multiple Work Relationships of the Same Type with Multiple Legal Employers
These work relationships can exist at the same time, even though they’re all of the same type, because each is with a different legal employer.

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

Multiple Work Relationships of the Same Type with a Single Legal Employer
These work relationships can exist with the same legal employer, even though they’re of the same type, because they’re sequential. If you create the second work relationship before the first is terminated, it will fail.
Multiple Work Relationships of Different Types with Multiple Legal Employers

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

<table>
<thead>
<tr>
<th>Work Relationship Type</th>
<th>Legal Employer</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>11 October, 2010</td>
<td>17 March, 2011</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>19 July, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation A</td>
<td>12 December, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation A</td>
<td>12 December, 2010</td>
<td>31 December, 2011</td>
</tr>
<tr>
<td>Contingent Worker</td>
<td>Corporation B</td>
<td>14 September, 2010</td>
<td>None</td>
</tr>
<tr>
<td>Employee</td>
<td>Corporation C</td>
<td>10 May, 2011</td>
<td>None</td>
</tr>
<tr>
<td>Nonworker</td>
<td>Corporation C</td>
<td>15 February, 2011</td>
<td>None</td>
</tr>
</tbody>
</table>

Worker Numbers

A worker number is an optional identifier for employee and contingent worker work relationships. A person with more than one such relationship may therefore have multiple worker numbers.

Human resource (HR) specialists can enable worker numbers at the enterprise and legal employer levels, using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks.

When You Enable Worker Numbers

Worker numbers become mandatory in all employee and contingent worker work relationships. If you enable the worker number at both the enterprise and legal employer levels, then the setting at the legal employer takes precedence.

Ways to Allocate Worker Numbers

You can allocate worker numbers in these ways:

- Manually
- Automatically from a global sequence
- Automatically from a legal-employer sequence

You can select different number allocation methods for different legal employers. If you use a legal employer sequence, worker numbers may not be unique in the enterprise. You can’t change an automatically allocated worker number.
Worker Numbers for Rehires
If you use a global sequence, the worker number doesn’t change when you do these actions.

- Rehire in the same legal employer.
- Rehire in a different legal employer.
- Globally transfer to a different legal employer.

If you use a legal employer sequence, the worker number doesn’t change when you rehire in the same legal employer. However, the worker number changes when you rehire in a different legal employer or globally transfer to a different legal employer.

Work Measures
Work measures are ways of accounting for a worker’s time on an assignment. Work measures are of two types: FTE and Headcount.

You can use Oracle Transactional Business Intelligence (OTBI) to see information about work measures.

Standard Working Hours
Standard working hours are usually those of a full-time worker. You define them for the enterprise, the legal employer, the department, or the position. Working hours, which are the same as standard working hours by default, are defined for the assignment.

**Note:** If you define standard working hours for more than one work structure, the application uses this hierarchy to derive standard working hours: Position > Department > Legal Employer > Enterprise

Working hours and standard working hours may remain the same. For example, if an employee is working the department’s standard working hours, standard working hours and working hours are the same. For part-time workers, there is usually a difference between standard working hours and working hours. Where there is a difference, you update the working hours for the assignment.

You can specify the assignment working hours these ways:

- Fixed hours: Enter the total hours for a week in the Working Hours field.
- Variable hours: In the Assignment Hours Details window, enter the worker’s availability for each day. For example, you can specify the start and end time of the worker’s shift or the number of hours in the shift.

FTE
The FTE for a worker is calculated by dividing the assignment working hours by standard working hours. For example, if the assignment working hours are 20 and the standard working hours are 40, the FTE for the assignment is 0.5. If there are no standard working hours for the enterprise, legal employer, position, or department, then an assignment has no FTE.

Headcount
The headcount value of a primary assignment in a primary work relationship is 1 and 0 for all other assignments.

When You Edit Work Measures
In general, you don’t need to edit work measures. However, you may want to enter a FTE value if no default value appears.
Automatic Calculation of Work Measures

By default, work measures are calculated automatically for the worker when there's a change in the standard working hours. The change in standard working hours can happen because of a change in position, department, or legal employer.

In certain cases, you may not want the work measures to be automatically calculated. For example, you override the FTE value of a contingent worker to zero. However, you don’t want this manual override to be automatically recalculated when there’s a change in the worker’s department. To retain the overridden value, you must clear the Calculate FTE and headcount automatically check box on the worker’s assignment.

This check box is hidden out-of-the-box for all flows except the Change Working Hours flow. By default, the value of the Auto Calculate Work Measures attribute is Y. When the attribute value is Y or Null, the application automatically calculates work measures. If you change this value to N by clearing the check box, the application doesn’t automatically calculate work measures and retains the user entered value.

Note: The value of the attribute is stored in the CALCULATE_WORKMEASURE_FLAG column of the PER.Assign_Work.Measures_F table against the FTE row. For example, the table stores these values when the value of FTE and Headcount is 1 and the Calculate FTE and headcount automatically check box is selected:

<table>
<thead>
<tr>
<th>Assignment Number</th>
<th>Unit</th>
<th>Value</th>
<th>CALCULATE_WORKMEASURE_FLAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment 1</td>
<td>FTE</td>
<td>1</td>
<td>Y</td>
</tr>
<tr>
<td>Assignment 1</td>
<td>Headcount</td>
<td>1</td>
<td>Null</td>
</tr>
</tbody>
</table>

Eligible Jobs

An eligible job is an additional job for which the worker is eligible in addition to the worker’s current job. You add eligible jobs using the Manage Eligible Jobs task in the Person Management work area. If you are a line manager, you can add eligible jobs using the My Team page.

You can use this feature to track the additional jobs. The additional jobs can also be used to report time on the time sheet. Use the value set ORA_PER.EMPL.ELIG_JOBS when configuring the time sheet to display eligible jobs.

Relief Type

The relief type governs the job filtering and rate override options for the additional jobs. By default, when you add a new eligible job, the relief type is Derived.

- Derived - You need to set the start date, end date and select a job that is mapped to the job family of the assignment job.
- Manual - You can attach any job even outside the job family of the assignment job. If you add a job under this relief type then you must enter the rate and frequency along with start date and end date.
Eligible Jobs Example
The following scenarios explain how additional jobs can be tracked based on the relief type.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Action</th>
</tr>
</thead>
</table>
| Bob Price is Supervisor at Acme Inc. He is being given an additional responsibility of Manager, a position in the same job family for a period of two months till a new person is hired. | • Select relief type as Derived.  
• Enter the start and end dates for the additional job |

| Jenna Markum is the Vice President of the Sales division. She is asked to head the Marketing division for a period of one year. Since there is no fixed job rate for the Sales division, her payroll for the additional job must be calculated based on what is defined at the eligible job level. | • Select relief type as Manual  
• Enter the start and end dates for the additional job  
• Enter the manual rate as per the industry standards  
• Select the frequency as Weekly |

**Note**: These fields are not ready to use - Relief Type, Manual Rate, Currency, and Frequency. If you want to use the Manual relief type, then these fields should be un-hidden.

Considerations for Adding Eligible Jobs
You can add additional jobs for which a worker is eligible. You must consider the following points when adding eligible jobs for a worker.

**Job**
You can’t add an eligible job same as the one in the worker’s current assignment. You can’t add the same eligible jobs twice for the same period. The start date of an eligible job must be after the start date of the worker’s current assignment.

**Job Set and Job Family**
The jobs that you see are dependent on the job family and the relief type selected. For example, when you select the relief type as Derived for a worker whose current assignment is Consultant, then the jobs displayed are based on the job family and job set to which this job belongs.

**Relief Type**
The relief type mode can be either Manual or Derived. You need to map jobs to the appropriate job families if you want to use the Derived relief type mode. This is because the application will only display jobs that are from the same job family as the assignment job. You must specify the manual rate and frequency when the relief type model is Manual. You can add a job from the same job set as the worker’s current assignment when the relief type is Manual. You can’t select the frequency as Periodically.
Examples of Multiple Managers for an Assignment

You must define at least one line manager for an assignment. Optionally, you can add other manager types. Line managers see the line-manager version of a person’s spotlight and other restricted worker information. Other manager types can also see restricted worker information if their roles have the required security access.

Let’s see some examples of assignments that need multiple managers.

Matrix Management in an Engineering Company

An engineering company uses a matrix management structure. An engineer reports to the lead engineer for everyday functional guidance and to the operational manager for project assignment and tracking.

In this example, you define the lead engineer as the line manager and the operational manager as the project manager. This is because the lead engineer interacts with the team members every day and evaluates their progress. The project manager’s role is restricted to assigning projects and tracking project completion.

Temporary Project Managers in a Service Company

A service company assigns workers to third parties to deliver contracted services. Each worker has a manager whose primary task is to help the worker find their next assignment. The manager is common for all of the worker’s assignments. You define this manager as a line manager.

The worker also has a temporary project manager who manages a particular assignment but may not manage all of the worker’s assignments. You define the project manager as an additional manager (for example, as a project manager) in relevant assignments.

Managers in a Global Company

A global company is organized functionally and workers report to a functional manager who may be in a different time zone. You define the functional manager as the line manager for the assignment.

For day-to-day administrative purposes, such as approving leave or absence, each worker also has an administrative manager. You define this administrative manager as an additional manager for the assignment.

How Line Managers Are Synchronized Using Position Hierarchy

You can enable position synchronization for the enterprise or legal entity, and synchronize the line manager value in the assignment with the position. You can synchronize using either the position tree or the HCM position hierarchy. Let’s look at how line managers are synchronized using the HCM position hierarchy.

Synchronize Line Manager for a New Assignments

You create a new assignment and specify the position when you do any of these actions:

- Hire
- Add Assignment
- Temporary Assignment
- Change Legal Employer
- Create Work Relationship
• Global Transfer
• Global Temporary Assignment
• Local and Global Transfer

The line manager for the new assignment is synchronized based on the position hierarchy. Direct reports are also assigned using synchronization, and displayed in the Add Direct Reports section. Here’s how the synchronization happens:

• The incumbent in the parent position is assigned as the line manager for the new assignment.
• If there are any incumbents in the child positions, they are added as direct reports of the line manager. If there is already an existing manager in the child position, this value is ignored and replaced with the new manager.
• If the new manager is hired for the same position as the existing manager, then the current manager will remain.

### Synchronize Line Manager for Existing Assignments

When you change the position in an existing assignment, the line manager is synchronized based on the position hierarchy. Direct reports are reassigned based on the synchronization, and displayed in the Reassign Directs section. Here’s how the synchronization happens:

![Flowchart showing synchronization process]

**Note:** If a parent position doesn’t exist or there are no incumbents in all the parent positions in the hierarchy, then you can manually reassign the direct reports to other managers.

**Related Topics**

• Position Synchronization
• Synchronize Person Assignment from Position Process
Examples of Hire Date Changes

Let’s look at some examples of when you can change a person’s hire date and what’s the outcome of the change.

Future Assignment Changes Don’t Exist

Vijay Singh is hired on 1-Jan-2010. He has no future assignment changes.

<table>
<thead>
<tr>
<th>Hire Date</th>
<th>Changed Hire Date</th>
<th>Changed Work Relationship Start Date</th>
<th>Changed Assignment Start Date</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2009</td>
<td>1-Jan-2009</td>
<td>1-Jan-2009</td>
<td>When you change the hire date to an earlier date, the start date changes for the employment (work relationship and assignment) and person records.</td>
</tr>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2011</td>
<td>1-Jan-2011</td>
<td>1-Jan-2011</td>
<td>When you change the hire date to a future date, the start date changes for the employment and person records.</td>
</tr>
</tbody>
</table>

Future Assignment Changes Exist

Vijay Singh is hired on 1-Jan-2010 and has a future assignment change on 1-Jan-2011. Assignment changes include actions such as promotion, adding an assignment, and adding a temporary assignment.

<table>
<thead>
<tr>
<th>Hire Date</th>
<th>Assignment Change</th>
<th>Changed Hire Date</th>
<th>Changed Work Relationship Start Date</th>
<th>Changed Assignment Start Date</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2011</td>
<td>1-Jan-2009</td>
<td>1-Jan-2009</td>
<td>1-Jan-2009</td>
<td>When you change the hire date to an earlier date, the start date changes for the employment (work relationship and assignment) and person records.</td>
</tr>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2011</td>
<td>1-Jan-2012</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>You can’t change the hire date to a date that’s later than the date of the first assignment change. You need to delete the assignment change first.</td>
</tr>
</tbody>
</table>

Note: This change isn’t possible.
Work Relationship is Terminated

Vijay Singh is hired on 1-Jan-2010. He has a nonprimary work relationship that was created on 1-Jan-2011 and terminated on 1-Jan-2012. You won’t be able to change the hire date for this work relationship because it’s terminated.

Future Dated Work Relationship Exists

Vijay Singh is hired on 1-Jan-2010 and he has a future dated work relationship on 1-Jan-2011.

<table>
<thead>
<tr>
<th>Hire Date</th>
<th>Work Relationship Start Date</th>
<th>Assignment Start Date</th>
<th>Nonprimary Work Relationship Termination Date</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2010 (primary)</td>
<td>1-Jan-2010</td>
<td>Not applicable</td>
<td>You can change the hire date of the primary work relationship to an earlier date but not to a date later than the nonprimary work relationship start date. You need to cancel the future dated work relationship to move the hire date to the future.</td>
</tr>
<tr>
<td></td>
<td>1-Jan-2011 (nonprimary)</td>
<td>1-Jan-2011</td>
<td>1-Jan-2012</td>
<td>You can change the hire date of the nonprimary work relationship to a future date but not to a date earlier than the primary work relationship start date.</td>
</tr>
</tbody>
</table>

Note: A person must at least have one active primary work relationship.

Rehired in the Same Legal Employer

Vijay Singh is hired on 1-Jan-2010 and terminated on 31-Dec-2010. He is again rehired in the same legal employer on 1-Jan-2012.

<table>
<thead>
<tr>
<th>Hire Date</th>
<th>Work Relationship Start Date</th>
<th>Assignment Start Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2010 (original work relationship)</td>
<td>1-Jan-2010 (original assignment)</td>
<td>You can move the hire date for the rehired work relationship to a future date. However, you can’t move the hire date earlier than the end date of the original work relationship. This is because the person already has the same work relationship type with the legal employer. A person can have only one active work relationship with any legal employer for a given person type.</td>
</tr>
<tr>
<td></td>
<td>1-Jan-2012 (rehired work relationship)</td>
<td>1-Jan-2012 (rehired assignment)</td>
<td></td>
</tr>
</tbody>
</table>
Hired As a Pending Worker

Vijay Singh is hired as a pending worker on 1-Jan-2010.

<table>
<thead>
<tr>
<th>Pending Worker Creation Date</th>
<th>Pending Worker Work Relationship Start Date</th>
<th>Pending Worker Assignment Start Date</th>
<th>Proposed Start Date of Work Relationship</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2010</td>
<td>1-Jan-2010</td>
<td>1-Feb-2010</td>
<td>You can change the pending worker work relationship start date to earlier than the proposed work relationship start date but not later than the proposed work relationship start date.</td>
</tr>
</tbody>
</table>

Multiple Assignment Changes Exist on the Hire Date

Vijay Singh is hired on 1-Jan-2010 and an assignment change was done for him on the same date.

<table>
<thead>
<tr>
<th>Hire Date</th>
<th>Assignment Change Date</th>
<th>Work Relationship Start Date</th>
<th>Assignment Start Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2010</td>
<td>1-Jan-2010</td>
<td>1-Jan-2010</td>
<td>1-Jan-2010</td>
<td>If there are multiple assignment changes on the hire date, you can’t change the hire date. You need to remove the assignment change to change the hire date.</td>
</tr>
</tbody>
</table>

FAQs for Assignments

What happens if I change a person’s primary work relationship?
These are the changes that happen.

- The previous primary work relationship automatically becomes a nonprimary work relationship.
- The primary assignment in the new primary work relationship becomes the person’s overall primary assignment. If the new primary work relationship contains any future-dated assignments, the change in primary status is propagated to the future records.
- The new primary work relationship and overall primary assignment is the main source of work-related and analytic information and reporting.
- The person’s worker type may change. For example, the person may become an employee from a contingent worker if the new work relationship is an employee one.
What happens if I cancel a work relationship?

The application automatically does these actions:

- Deletes the work relationship and any associated assignments, and payroll, benefits, and compensation records.
- Removes Roles allocated to the person for this work relationship, whether manually or automatically.
- Reinstates the person’s status prior to the creation of the work relationship, if the person has other work relationships or contact relationships.

If you cancel a person’s only work relationship and no contact relationships exist, the person becomes a canceled worker. However, the application retains the person record. Such records are excluded from general person searches.

Note: You can’t cancel a work relationship that has a current, past, or future-dated termination. If any assignments in a work relationship are included in a payroll run, you can terminate the work relationship but you can’t cancel it.

Where do person types come from?

Person types, can sometimes be referred to as user person types. They are subcategories of the predefined system person types, such as employee and nonworker. Each system person type has a single person type by default, which has the same name as the system person type. Your enterprise can define additional person types for each system person type. For example, for the system person type nonworker your enterprise could define the person types intern, retiree, volunteer, and counselor.

How can I create an assignment if the person type I need isn’t in the list?

If the missing person type is valid for the worker type, you must update the list of person types. For example, if the worker type is employee and you want to use the person type trainee, you must update the list of employee person types.

If the missing person type isn’t valid for the worker type, you must either create a new work relationship or update an existing work relationship of the relevant type. For example, to use the person type volunteer, you create the assignment in a nonworker work relationship if volunteers are classified as nonworkers.

Can I end any assignment?

Yes, but with these restrictions:

- You can’t end the primary assignment in a work relationship. Instead, you must identify a different assignment as the primary assignment before terminating the original assignment.
- You can’t end the only assignment in a work relationship; instead, you must end the work relationship.

What happens when I select a different line manager for an assignment?

The new line manager gets control of the assignment.

- The new line manager gains access to the assignment on the specified date. For example, the new manager sees this assignment in management hierarchies and can see the line manager version of the person’s spotlight.
- From the specified date, the managed person sees the new manager’s name in reporting hierarchies and other information about this assignment.
- If notifications are used at your enterprise, the new line manager, managed person, and you may be notified automatically of this change.
Why are some values completed automatically when I create assignments?

If you use positions, the selected position supplies the following values automatically: job, department, location, grade, ceiling step, payroll, salary basis, probation period, manager, working hours, working-hours frequency, start time, and end time.

If you don’t use positions, these things happen:

- The location is inherited from the department.
- The standard working hours, working hours, and working-hours frequency are inherited from the department, legal employer, or enterprise. Values specified for the department override those specified for the legal employer, and values specified for the legal employer override those specified for the enterprise.

If you edit the source attributes of inherited values (for example, you update the salary basis of a position), the changes don’t copy automatically to the assignments. However, you can edit the inherited values to match the updated source attributes.

If you change the business unit on assignments, the organization, job, position, grade, and job values are automatically set to null.

How can I access inactive assignments?

Switch between active and inactive work relationships and assignments for the person using the Employment Tree on the Manage Employment page.

Alternatively, find current inactive assignments for a person by searching for the person. The person search returns all the person’s current assignments, regardless of their status.

If the assignments are inactive because of a termination, you must select the option in the advanced search to include terminated work relationships in the search results. Otherwise, inactive assignments in terminated work relationships don’t appear in the search results.

How can I correct the start date of an assignment or temporary assignment that I added?

You can’t change this date directly on the assignment page. You need to delete the newly created assignment itself and add the assignment or temporary assignment again on the date you want.

Areas of Responsibility

How You Assign Areas of Responsibility

You can assign a worker a responsibility and identify the scope of the responsibility. For example, you can assign a worker the Human Resources (HR) Representative responsibility and define the scope as people in a specific organization or department hierarchy. The worker then appears as a HR representative in the Work Contacts list of those people. To assign responsibilities, use the Manage Areas of Responsibility task in the Person Management work area.

Assigning an area of responsibility doesn’t affect the person records the representative can see. Access to records is controlled through security. Your security administrator can set up security profiles using areas of responsibility.

What Happens if Scope Overlaps

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

**Integrating with Checklists**

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

**Integrating with Sensitive Transactions**

Certain future-dated terminations may be identified as sensitive and hidden from everyone until an appropriate time. You can use responsibilities for such terminations to identify who should receive notifications involving the termination. Any conflicts involving sensitive terminations are handled by routing the actions to a person with an HR Representative responsibility.

**Related Topics**
- Sensitive Terminations

**Examples of Setting Scope of Responsibility**

Let’s look at some examples of how you can define the scope of a responsibility.

**Based on Assignment Information**

Gail Williams is a Human Resources (HR) representative in Vision Corporation, UK. You assign her the HR representative responsibility and set the scope of her responsibility to application developers based in Reading in the UK.

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

**Based on Name**

Terry Smith is a benefits representative in Vision Corporation, UK. You assign him the benefits representative responsibility and set the scope of his responsibility to workers whose names are within an alphabetic range (A to L).

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

Grace Miller is a payroll representative in Vision Corporation, US. You assign her the payroll representative responsibility and set the scope as external training staff in Vision Corporation, US.

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

FAQs for Areas of Responsibility

What happens if I don't record a person's areas of responsibility?
The person doesn't appear in the Work Contacts lists of people for whom the person holds an area of responsibility.

What happens if I reassign a responsibility?
The responsibility you reassign is immediately visible in the assignment record of the person to whom it's reassigned. The From Date of the responsibility is the current date, and there's no To Date. Here's what happens in the assignment record of the person from whom the responsibility is being removed. The current date becomes the To Date if there's currently no To Date. Otherwise, the existing To Date remains unchanged.
The scope of the responsibility remains the same. The change is visible in the Work Contacts list of affected people when the records are next viewed.

What's the recruiting responsibility type?
You can assign the recruiting responsibility to a person and define the scope of responsibility to secure job requisitions based on specific recruiting attributes. These attributes include job family, job function, recruiting location hierarchy, recruiting organization hierarchy, and recruiting type.

📌 Note: The recruiting responsibility type and recruiting attributes are for use with a future enhancement.
Overview of the Workforce Lifecycle

The workforce lifecycle covers all stages of a person’s association with the enterprise. Human Resource (HR) specialists and line managers perform various tasks in this workforce lifecycle. Let's see what are the key tasks in a person’s workforce lifecycle.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire people</td>
<td>Hire employees, contingent workers, nonworkers, and pending workers. As a part of this task, you also create the person’s first work relationship with the enterprise.</td>
</tr>
<tr>
<td>Get people onboard</td>
<td>Manage and track the onboarding tasks assigned to new hires.</td>
</tr>
<tr>
<td>Promote and transfer workers</td>
<td>Promote workers. Transfer workers within the same legal employer or to a different legal employer.</td>
</tr>
<tr>
<td>Manage worker contracts</td>
<td>Manage contract information in worker assignments.</td>
</tr>
<tr>
<td>Calculate seniority dates</td>
<td>Calculate a person’s seniority in the enterprise using seniority dates.</td>
</tr>
<tr>
<td>Terminate workers</td>
<td>Terminate an employee’s work relationship.</td>
</tr>
<tr>
<td>Manage direct reports</td>
<td>Add and reassign line reports and reports of other types such as project reports and mentees.</td>
</tr>
</tbody>
</table>

Hire People

Examples of Person Records

You create a person record when you:

- Hire an employee
- Add a contingent worker
- Add a nonworker
- Add a pending worker
- Add a contact to the record of another person

Person records continue to exist even when people leave a company. If a person gets rehired, you simply create a new work relationship with the new legal employer on that same person record.
Scenario

Here are some examples of when and how to create person records:

- You’re hiring Alex as a contingent worker. Alex has never worked in your company before. He hasn’t been an emergency contact, dependent, or beneficiary of another employee in your company. So his person record doesn’t exist.

  You must create a person record for Alex and a work relationship with his legal employer.

- You’re hiring Sonia who was previously employed by your company. Sonia’s person record already exists. When you hire her the application pulls out her person record and asks you to confirm that she’s the same person.

  To rehire Sonia, you create a new work relationship with the new legal employer on the existing person record.

- You’re hiring Arturo who has been a volunteer mentor in your company for some time. Arturo will continue working as a volunteer after he’s hired.

  Arturo already has a person record. To hire him you just need to create a new work relationship. Arturo now has two work relationships with the same legal employer.

- You’re hiring Mary who’s an emergency contact of another employee. Although Mary has never worked in the company before, she has a person record because she’s a contact of another employee.

  If there’s enough detail in her person record to identify her, you only need to create her a new work relationship with the legal employer. If not, you create a new person record too.

Rehiring a Worker

**Watch:** This tutorial shows you how to rehire a worker. The content of this video is also covered in text topics.

Rehire a Worker

You create a person record and a work relationship in Oracle HCM Cloud when you hire an employee. When you rehire an ex-worker, you create a new work relationship because the person record already exists in the application. This procedure explains how to rehire a worker. You rehire a worker using the Hire an Employee task in the New Person work area.

Prerequisites

The worker record already exists in the application.

Specifying Basic and Personal Information

To specify basic and personal information:

1. In the New Person work area, click the **Hire an Employee** task.
2. Select **Hire** in the Hire Reason field.
4. Enter the last and first name.
5. Enter the national identifier details.
6. Click **Next**.
**Note:** The application displays a list of person records, including contacts, contract employees, and previous employee, that match the information provided in the new person record.

7. Select the person record from the Matching Person Records list and click Continue
8. Verify the home address and email address.
9. Click Next.

### Specifying Employment Information

To specify employment information:

1. Select the I-9 Status. This determines the new person’s work relationship.
2. Select the business unit and the job for which you are hiring.
3. Select if the person is paid a fixed salary or on an hourly basis in the Hourly Paid or Salaried field.
4. Select the person’s manager in the Manager Details section.
5. Click Next.

### Providing Compensation and Other Information

To provide compensation and other information:

1. Enter the Salary Basis and the Salary Amount.
2. Add the required roles for the new person. By default, the employee role is assigned.
3. Click Next and review the information provided
4. Click Submit on the Review page to complete the rehiring. You can add any missing information by searching for the person in the Person Management work area.

### Hiring an Employee

**Video**

Watch: This tutorial shows you how to hire an employee. The content of this video is also covered in text topics.

**Worked Example**

You create a person record and a work relationship in Oracle HCM Cloud when you hire an employee. In this example, you will hire an employee, Jennifer Grace to the US1 Legal Entity.

The following table summarizes the key decisions for this scenario:

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What should be Jennifer’s salary range?</td>
<td>Jennifer’s salary range must be between 40000 to 70000 dollars annually.</td>
</tr>
<tr>
<td>Will Jennifer be working from home?</td>
<td>Yes. Although Jennifer’s work location is Chicago, but Jennifer will be working from home in Dallas. This information is crucial in processing her payroll.</td>
</tr>
<tr>
<td>What roles should be assigned to her?</td>
<td>Employee</td>
</tr>
</tbody>
</table>
Decisions to Consider | In this Example
--- | ---

Perform the following tasks to create Jennifer’s person record:

**Specify Basic Details**

1. In the New Person work area, click the **Hire an Employee** task.
2. On the Hire an Employee: Basic Details page, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire Date</td>
<td>6/8/17</td>
</tr>
<tr>
<td>Hire Reason</td>
<td>Hire to fill vacant position</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>US1 Legal Entity</td>
</tr>
<tr>
<td>Last Name</td>
<td>Grace</td>
</tr>
<tr>
<td>First Name</td>
<td>Jennifer</td>
</tr>
<tr>
<td>Gender</td>
<td>Female</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>3/12/69</td>
</tr>
</tbody>
</table>

3. Click the **Add Row** icon in the National Identifiers section.
4. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>National ID Type</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>National ID</td>
<td>555-55-5555</td>
</tr>
</tbody>
</table>

5. Click **Next** to access the Hire an Employee: Personal Details page.

**Provide Personal Details**

1. On the Hire an Employee: Personal Details page, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1</td>
<td>113, Wyatt</td>
</tr>
<tr>
<td>City</td>
<td>Dallas</td>
</tr>
<tr>
<td>State</td>
<td>TX</td>
</tr>
</tbody>
</table>
If you enter the ZIP code, the application automatically populates the city, state, and county. If there is more than one valid address, all the addresses that are valid for the selected ZIP code are displayed.

2. Click the **Add Row** icon in the Phone Details section.
3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Home Phone</td>
</tr>
<tr>
<td>Country Code</td>
<td>United States</td>
</tr>
<tr>
<td>Area Code</td>
<td>555</td>
</tr>
<tr>
<td>Number</td>
<td>853-2301</td>
</tr>
</tbody>
</table>

4. In the Legislative Information section, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status</td>
<td>Single</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>White</td>
</tr>
</tbody>
</table>

5. Click **Next** to access the Hire an Employee: Employment Information page.

### Specify Employment Information

1. On the Hire an Employee: Employment Information page, select **Not Started** from the **I-9 Status** list.
2. On the Assignment tab, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>US1 Business Unit</td>
</tr>
<tr>
<td>Person Type</td>
<td>Employee</td>
</tr>
<tr>
<td>Job</td>
<td>Buyer</td>
</tr>
<tr>
<td>Grade</td>
<td>Prof03</td>
</tr>
<tr>
<td>Department</td>
<td>Procurement US</td>
</tr>
</tbody>
</table>
### Oracle Global Human Resources Cloud

#### Using Global Human Resources

**Chapter 6**

**Hire and Manage Workers**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Chicago</td>
</tr>
<tr>
<td>Working at Home</td>
<td>Yes</td>
</tr>
<tr>
<td>Worker Category</td>
<td>White Collar</td>
</tr>
<tr>
<td>Assignment Category</td>
<td>Full time regular</td>
</tr>
<tr>
<td>Hourly Paid or Salaried</td>
<td>Salaried</td>
</tr>
</tbody>
</table>

3. In the Manager Details section, select **Roth, Calvin** from the **Name** list.
4. Click **Create** in the Payroll Details section to assign Jennifer to a payroll.
5. Select **Semimonthly** from the **Payroll** list
6. Click **Next** to access the Hire an Employee: Compensation and Other Information page.

### Add Compensation and Other Information

1. In the Salary Information section, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Basis</td>
<td>US1 Annual Salary</td>
</tr>
<tr>
<td>Salary Amount</td>
<td>48000</td>
</tr>
</tbody>
</table>

When you enter the salary, the salary range and compensation ratio are automatically displayed based on the selected grade, if this information is defined when creating the grade.

2. By default, the employee role is assigned to the user.
3. Click **Next** to access the Hire an Employee: Review page.
4. On the Hire an Employee: Review page, review the new hire information and approvers for Jennifer’s person record, and click **Submit**. Jennifer’s person record will created when all required approvals are received.
5. In the Warning dialog, click **Yes**.
6. In the Confirmation dialog, click **OK**.

### How You Create a Work Email

In the person record, you can add up to two work email addresses or add none at all. The work email address is stored in the Oracle Identity Store but you can manage it using the security console.

#### Things to Remember

- If you have the required access, you can change the primary work email address in the security console. If not, you need to contact your administrator for the change.
- Any changes made in the security console reflect back in the HCM pages
- To add a secondary work email address, you must add a lookup value to the EMAIL_TYPE lookup type.
• You can change the secondary work email addresses in the HCM pages but you can’t change the primary work email address.

How You Specify Work Phones

A person can have only one primary phone. Typically, employees see others' phone details only if it’s work related and primary. If you specify a nonwork phone as primary then workers can’t see the phone details.

Who can see which phone number is controlled by Oracle’s virtual private database policy, which can’t be changed

Access Security and Privileges

You can see a coworker’s work and nonwork phone numbers if your role has these privileges

• Manage person phones data
• View person phones data
• Report person phones data

It’s important to understand these phone lookup codes since the virtual private database policy relies on the lookup codes:

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>W1</td>
<td>Work Phone</td>
</tr>
<tr>
<td>W2</td>
<td>Second Work Phone</td>
</tr>
<tr>
<td>W3</td>
<td>Third Work Phone</td>
</tr>
<tr>
<td>WF</td>
<td>Work Fax</td>
</tr>
<tr>
<td>WM</td>
<td>Work Mobile Phone</td>
</tr>
</tbody>
</table>

If you want to change the phone type, keep in mind the lookup code and how the VPD policy works with that lookup code. Lookup codes starting with W indicate the phone number is public and can be viewed by all. Lookup codes not starting with W indicate the phone number is private and can be seen only by people with the required privileges.

How You Convert Pending Workers

You can convert pending workers to employees or contingent workers in these ways:

• Manually
• Automatically

**Manually:** Use the Convert Pending Worker page in the New Person work area. The hire details are populated using the details from the person’s pending worker record. You can edit these details and add any additional information before converting.
If you're a human resources specialist, you can use the **Quick Convert** option in the Actions menu to convert pending workers. You can directly convert a pending worker to the proposed worker type without reviewing the hire details or going through an approval process.

If you cancel the conversion, or the pending worker record is rejected, the record remains in the application. You need to resume the transaction from your Worklist notification.

**Automatically**: Use the scheduled process, Convert Pending Workers Automatically in the Scheduled Processes work area. The process includes all those pending worker records that have the Include for Automatic Conversion option set to Yes. You specify whether to include a pending worker record in automatic conversion or not when you create the pending worker. You can change this setting later by editing the pending worker record. You can also change the setting for multiple pending workers at one time. On the New Workers to Process page, select the relevant pending worker records and select either of these options:

- Include in Automatic Conversion
- Exclude from Automatic Conversion

Candidates from Oracle Taleo Recruiting Cloud Service aren’t included in the automatic conversion if there were errors during import.

**Automatic Conversion of Pending Workers**

When you want to automatically convert pending workers, you can run the Convert Pending Workers Automatically process using available conversion criteria. HR specialists can run this process from the Scheduled Processes work area. If you don't select any criteria, then all conversion criteria will be selected by default.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion Date</td>
<td>Enter the conversion date. The conversion date can be the same as the proposed start date of the pending worker, or number of days before or after this date.</td>
</tr>
<tr>
<td>Proposed Worker Type</td>
<td>Select if the conversion is to contingent worker or employee. If you have both then run separate instances for each type.</td>
</tr>
<tr>
<td>Country</td>
<td>Select the country for automatically converting pending workers.</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>Select the legal employer for automatically converting pending workers.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>Select the business unit for automatically converting pending workers.</td>
</tr>
<tr>
<td>Department</td>
<td>Select the department for automatically converting pending workers.</td>
</tr>
<tr>
<td>Location</td>
<td>Select the location for automatically converting pending workers.</td>
</tr>
</tbody>
</table>
Let's look at how you can use the conversion criteria in the process.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>InFusion enterprise has pending workers spread across legal employers in different time zones. The pending workers must be converted at the beginning of the proposed start date.</td>
<td>• Schedule the process separately for each legal employer that’s in a different time zone.</td>
</tr>
<tr>
<td>InFusion has many pending workers of the type Employee and rarely pending workers of the type Contingent Worker.</td>
<td>• Schedule two instances of the process, one for the employee worker type, and the other for the contingent worker type.</td>
</tr>
<tr>
<td>InFusion has many pending workers in some locations, business units, or legal employers, and very few in others.</td>
<td>• Schedule two instances of the process: one that runs daily for the selected location, business unit and legal employer with many pending worker; another that runs on a periodic basis for the selected location, business unit, and legal employer with few pending workers.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Employment Configuration Options

**Work Relationships**

A work relationship defines how a person and legal employer are related.

Human resource (HR) specialists can create a work relationship by selecting the person in the Person Management work area and then selecting the Manage Employment task. Line managers can select their employee on the My Team or Directory page and then select the Manage Employment task.

**Worker Types**

The worker type you select when creating a work relationship determines the type of work relationship.

<table>
<thead>
<tr>
<th>Worker Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contingent Worker</td>
<td>A nonemployee, for example, contract worker or temporary worker.</td>
</tr>
<tr>
<td>Pending Worker</td>
<td>A person who will be hired as an employee or contingent worker and for whom you create a person record prior to the hire or start date. When the hire is finalized, you convert the pending worker to the proposed worker type. A rehire is another example of a pending worker since their person record already exists in the application. See the Rehires section for more information.</td>
</tr>
<tr>
<td>Nonworker</td>
<td>A person having a nonwork relationship with a legal employer, for example, a volunteer or retiree. The work relationship defines the details of the association.</td>
</tr>
<tr>
<td>Employee</td>
<td>A regular worker who doesn’t belong to any of the other worker types.</td>
</tr>
</tbody>
</table>

---

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Chapter 6
Hire and Manage Workers

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Primary Work Relationship
The primary work relationship and assignment are the most significant for a person in terms of working hours, assignment status, pay, benefits, and many other aspects. When you need information about a person from a single work relationship, you look at the primary work relationship. For example, when you need a single worker type for a person for reporting purposes, the primary work relationship provides it.

Here are some facts about primary work relationships:

- A person can have only one primary work relationship. All other work relationships are nonprimary.
- A person's first work relationship is the primary relationship by default. An exception is the pending worker work relationship that's created as nonprimary by default.
- When a person has multiple work relationships, the overall primary assignment is the primary assignment in the primary work relationship.
- If a person has multiple work relationships, you can't terminate the primary work relationship until you select a different primary relationship. This restriction exists because a person can't be without a primary work relationship at any time.

Rehires
When a person leaves the organization, you terminate their work relationship. The work relationship becomes inactive but the person record remains active. So when you rehire the person, the application identifies the person and lets you select the existing person and create a pending work relationship.

Related Topics

- Worker Numbers
- Examples of Creating Multiple Work Relationships for a Person

Examples of Creating Multiple Work Relationships for a Person
When you create a person record, you also create that person's first work relationship. Once a person record exists, you can create additional work relationships with the same or different legal employers. You create a person record in the New Person work area. You manage work relationships in the Person Management work area. Let's look at some valid combinations of work relationships.

Multiple Work Relationships of Different Types with a Single Legal Employer
These work relationships can exist at the same time with the same legal employer because they're of different types.

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

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

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

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

These work relationships can exist with the same legal employer, even though they’re of the same type, because they’re sequential. If you create the second work relationship before the first is terminated, it will fail.

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

Multiple Work Relationships of Different Types with Multiple Legal Employers

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

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

You select a worker type when you create a new person record or work relationship. Because a person can have multiple work relationships of multiple types simultaneously, a person can have multiple worker types at once. You create a new person in the New Person work area. You manage work relationships in the Person Management work area.

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

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

On 1st March, 2011 this person is:

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

Identifying a Single Worker Type

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

Person Names and Languages

You can define how to display people’s names in the application and in which language. You can define whether to display a person’s name in the global or the local language.

Person name has two parts, style and format.

Name Styles

The name style determines these things:

- Which components of a person’s name to display. For example, one country may display first name and last name while another may display the middle name too
- What’s the order of display of the components
- Which components are required and which are optional. For example, title may be optional in some countries.
The legal employer sets the legislative context for the person record. So, if the legal employer is a Canadian legal entity, the Canadian name style is used. When a country-specific name style doesn’t exist, a universal name style (last name, first name, title, and middle names) is used.

**Note:** A person’s contacts have the same name style as the person for whom they’re contacts.

### Name Formats

A name format is an arrangement of the name components.

- The format is an arrangement of these name components: first name, last name, and title. You can choose from these predefined name formats: Display name, List name, Full name, and Order name.
- The format can differ based on the display context. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

### Global or Local

The profile option HR: Local or Global Name Format controls whether users see local names or global names. The profile option HR: Local or Global Name Format controls whether users see local names or global names by default. Global names use one name format. Users who manage people across countries may want to see the names displayed consistently so may use global names for example. Users who view or manage persons in a single country may prefer to see local names.

### Person-Name Languages

Each enterprise has a global-name language. Person names appear in this language by default. When you create a person record, you can define what language to use for the local name. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the language.

Let’s look at an example:

- The global-name language for the enterprise is American English.
- You set the local-name language in a person record to Japanese. Users whose HR: Local or Global Name Format profile option is set to Japanese see the person’s name in Japanese.
- All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person’s name in American English. Users can set preferences to select the language in which they want to see person names displayed in.

### How Person Records Are Matched

When you create a person record, the application searches if a record already exists with the same details.

### How Matching Records Are Identified

The application searches based on the last name, first character of the first name, date of birth, and national ID, to find matches. If any two of these criteria produce a match, the record is identified as a match.

- When at least one national ID value is the same in both records.
- When at least two criteria match and one criteria is missing.
- Person records in which the national IDs don’t match still appear as matching records if the last name, the first character of the first name, and the date of birth are the same.
Note: If you’re a line manager, the application doesn’t display those matching records that have a national ID.

Examples of Matching Person Records

You’re an HR specialist creating this person record:

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

The application compares these details with those in existing person records and displays these matching person records:

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

Let’s see how these people details match:

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Reason for Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer Tyler</td>
<td>The national ID is the same as John Ward.</td>
</tr>
<tr>
<td>Juana Ward</td>
<td>• Same last name and DOB as John Ward</td>
</tr>
<tr>
<td></td>
<td>• Their first names start with same character</td>
</tr>
<tr>
<td>Josie Ward</td>
<td>• Same last name as John Ward</td>
</tr>
<tr>
<td></td>
<td>• First name starts with the same character</td>
</tr>
</tbody>
</table>

Because these two criteria match, the absence of DOB in Josie’s record is ignored.

Examples of Employment Information for Nonworkers

Some employment information is marked as required for all workers and nonworkers. The amount of additional information that you must provide in nonworker assignments depends on the nonworker type. You add employment information for nonworkers using the Add a Nonworker task in the New Person work area.

Nonworker Who Receives No Payments

Ellen Woods is a volunteer in your organization; a government body meets her expenses. She receives no payments from the legal employer, but does report to a manager there. All other information is optional.
Nonworker Who Receives Payments

Todd Granger is a retiree. When Todd retired, you terminated his employee work relationship with the legal employer and created a new, nonworker work relationship with the same legal employer. As a retiree, Todd receives payments from the legal employer. Therefore, Todd’s assignment must contain payroll information. The assignment status and person type values on the assignment must also allow payments to be made. All other information is optional.

Nonworker Who Has Other Work Relationships

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

FAQs for Hire People

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

When you create a person record, a user account is created automatically if automatic creation of accounts is enabled. If a user account isn’t created automatically, then an authorized user can create it on the Security Console or using SCIM (REST) APIs. You can link the account to the person record using the Manage User Account or Create User page.

What’s a pending worker?

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

A pending worker is a person who’s yet to start employment and doesn’t have a person record in the application. You create a pending worker record with a date that’s effective before the hire date.

You convert a pending worker to the proposed worker type when the new hire is confirmed. For example, when a new employee’s hire is completed, you convert the pending worker record to an employee record. The pending-worker functions provide greater control of the hiring process than hiring an employee or adding a contingent worker with a future start date.

Note: A person who already has a person record can’t be a pending worker.

Can I enter more information about an emergency contact?

Yes, you can. You need to update the contact’s person record to enter additional information such as an address or a national ID. A person record is created automatically when you submit the associated employee or nonworker record.

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

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

When you create a person’s record, you can identify an emergency contact for the person.

When you edit a person’s record, you can add more contacts, any of which can be an emergency contact. If you want to identify a person’s contact as a beneficiary or dependent, you need to edit the person’s benefits information.
How can I create multiple nonworker roles for a person?
You can create separate assignments for each nonworker role in the same nonworker work relationship. You can select a nonworker person type for each assignment. For example, a nonworker could have three assignments with a single legal employer, two as a paid volunteer, and one as a retiree.

Why can't I see the person number for this new person record?
Based on your enterprise settings, the person number is generated after the Add Person transaction is approved. For example, once the transaction is approved, you can see the person number on the Manage Person page.

Why can't I see the current manager when I am adding a person as a direct report?
This is because the person doesn’t have a manager currently.

Get New Hires Onboard

How You Manage New Hire Tasks
As a line manager or human resources (HR) specialist, you need to manage your new hire’s tasks. Here’s where you manage onboarding tasks:
- If you’re a line manager, go to My Team > Onboarding > My Tasks
- If you’re a HR specialist, go to My Client Groups > Onboarding > My Tasks

Your Tasks
As a line manager or HR specialist, you may need to do onboarding tasks for your employees. You can track these tasks on the My Tasks page.

Your Employees’ Tasks
On the Employees page, you can see tasks that your employees must do and tasks that others must do for them. For example, an IT department user may be assigned the task of buying a laptop for your employee.

You can see your employee’s progress on the tasks and take these actions:
- Send a reminder to the employee to act on an overdue task. Employees receive a worklist or email notification.
- Edit the due date to give the employee more time on a task.
- Add a task by either creating from scratch or selecting a task from the task library. The employee will see this task in the Incomplete Tasks section. Note that you can add tasks even after the checklist is allocated.
- View progress of tasks assigned to other users.
- View the task notes.
- View tasks that are yet to be allocated.
- Set the task to complete.
- Set the task to not applicable.
- Reassign the task.
- Remove the task.
- Reopen the task.
Onboarding Tasks

As a new hire you will have tasks to do when you join a new organization. You go to Me > Onboarding to view, track, and complete your tasks. You can select a task, view the task notes, and mark a task as complete. Your onboarding sponsor could be your line manager, HR manager, or HR representative whom you can contact for help.

Task Actions

Your onboarding could happen in steps, so in each step you will have specific tasks to do and by a specific date. So some steps are enabled and some disabled. Your tasks can be mandatory, like getting your ID card on the first day or optional like signing up for gym membership later. You may also have a locked task. A locked task is tied to another task that you need to complete first. For example, you may be required to sign a confidentiality agreement before you can update personal details in an internal website. If you’re unable to complete a task by the specified date, it’s marked overdue. Your manager can remind you about such tasks. But, whether it’s mandatory or optional, if the task remains open even after the due date it automatically moves to the next step if another step exists.

Checklists

How You Allocate Checklists

An allocated checklist is a specific instance of a checklist template. You consider the date when the record is created or approved or the date when the action record becomes effective to allocate a checklist. Human Resource (HR) specialists can access the Manage Allocated Checklists task from Quick Actions > My Client Groups. Line managers can access the task from Quick Actions > My Team.

Automatic or Manual Allocation

If the checklist is associated with an action such as new hire or transfer, the checklist is automatically allocated to workers when they experience the action. If not, you must manually assign the checklist to workers. If you associate the checklist or task with eligibility criteria, they’re allocated only if the worker meets the eligibility criteria. Task performers and owners are derived based on what you specify for each task in the checklist template.

✍ Note:
The figure shows the tasks workers perform for automatically allocated checklists for which they’re eligible.

**Task Performers and Owners**

Task performers access tasks allocated to them from either the Onboarding App or the Checklist Tasks App, depending on the checklist allocated to them. If you assign a task to multiple performers, one of the performers can claim the task by accessing the notification.

**Note:**
- If you allocate a checklist using HDL it doesn’t send notifications.
- While allocating checklists using REST the only restriction is that eligibility evaluation happens at the checklist task level and not at the checklist level.

**Related Topics**
- Checklist Templates
- Enterprise Onboarding Checklists
Considerations for Creating Checklist Templates

Task Statuses for Allocated Checklists

You can manage checklists and tasks after they’re allocated to workers, using the Manage Allocated Checklists task. Human Resource (HR) specialists can access this task from Quick Actions > My Client Groups. Line managers can access the task from Quick Actions > My Team.

These statuses indicate what progress is made on the checklist or task.

<table>
<thead>
<tr>
<th>Status</th>
<th>What it means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiated</td>
<td>The checklist and the tasks in the checklist are automatically set to Initiated when you allocate the checklist.</td>
</tr>
<tr>
<td>Completed</td>
<td>The checklist or task is complete based on the criteria specified in the Completion Date field. On completion, the task doesn’t disappear from the allocated checklist or the worklist. You will need to manually delete it.</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>The checklist or task is marked as not applicable because it’s wrongly allocated to a person. A task performer or owner can mark a wrongly assigned task as not applicable.</td>
</tr>
<tr>
<td>Outstanding</td>
<td>The checklist or task isn’t complete by the target date.</td>
</tr>
<tr>
<td>Other Task Statuses</td>
<td>Other statuses to indicate tasks are in progress or are suspended because resources aren’t available.</td>
</tr>
</tbody>
</table>

How You Manage Checklists and Tasks

When you leave or are transferred, you may be allocated a checklist of tasks that you or others have to do. Typically, you will be notified that a checklist task needs your attention. You can go straight to the task from the notification. As an employee, you use the Checklist Tasks app or Quick Actions menu to act on the task.

Current Tasks

On this page, you can find the tasks assigned to you and the ones you need to complete for others. Each task shows a due date. You can mark a task as complete or not applicable or see the notes for more information. For example, request new location details for transferred employee.

In-Progress Checklists

On this page, you can see those checklists that are allocated to you and are still in progress. Within each checklist you can see tasks that you must complete and those that others must complete. You can prioritize and act on tasks that are pending or overdue in these checklists. For example, a transfer checklist or promotion checklist.

Completed Checklists

On this page, you can see your completed checklists.
FAQs for Checklists

How do changes in the checklist template affect allocated checklists?
Changes you make in a checklist template don’t affect allocated checklists because each allocated checklist is a specific instance of the checklist template. Similarly, changes you make in allocated checklists don’t affect the checklist template.

Where can a performer view details of the person to whom the task is allocated?
Task performers can see all enterprise onboarding tasks through the Onboarding app and other checklist tasks using the Checklist Tasks app.

Promote and Transfer People

Promoting People

Video

Watch: This tutorial shows you how to promote a worker. The content of this video is also covered in text topics.

Example
You’re a human resources (HR) specialist promoting Stacey from a senior consultant to director of learning in the Learning US department. Her manager will remain the same.

The promotion involves these changes for Stacey:

- New job and grade
- Increased salary

Let’s look at the steps to update the key values for this promotion. For other fields, you can use the default values.

Select Stacey and the Promotion Action
1. On your home page, select My Client Groups > Person Management.
2. Search for Stacey Kaufman and select her record.
3. In the Edit drop-down button, select Update.
4. In the Update Employment window, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start Date</td>
<td>Select the date the transfer takes effect.</td>
</tr>
<tr>
<td>Action</td>
<td>Promotion</td>
</tr>
<tr>
<td>Action Reason</td>
<td>Performance</td>
</tr>
</tbody>
</table>
5. Click **OK** to proceed.

### Update Employment Information

1. In the Job Details section, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job</td>
<td>Director of Learning</td>
</tr>
<tr>
<td>Grade</td>
<td>Prof04</td>
</tr>
</tbody>
</table>

2. Click **Review** to review the changes.
3. Click the arrow corresponding to Role Requests. In the Roles window, Stacey is automatically assigned the line manager’s role because of her new position as director.
4. Click **OK**.
5. Click **Submit** when you’re done with the changes.
6. Click **Yes** when you’re prompted, and then click **OK**.

### Change Salary

1. Click the panel drawer and select **Manage Salary** in the Compensation section.
2. In the Person Information section, click **Propose New Salary**.
3. In the Propose New Salary window, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Select the date the new salary takes effect.</td>
</tr>
<tr>
<td>Action</td>
<td>Promotion</td>
</tr>
<tr>
<td>Reason</td>
<td>Performance</td>
</tr>
</tbody>
</table>

4. Click **OK** to proceed.
5. In the New Salary section, click the calculator icon to adjust the salary.
6. In the Analyze Salary window, enter the adjustment percentage decided by Stacey's manager.
7. Click **OK** and then click **Continue**.
8. Review the salary increase information. The salary increase will not take effect until all approvers listed in the Approvers section approve the increase.

### Complete the Promotion

1. Click **Submit** when you’re done with the changes.
2. Click **Yes** when you’re prompted, and then click **OK**.
3. Click **Done**.
Collaboration about Promotions

If the Promote page has a **Social** link, you can invite others to collaborate about a promotion. For example, if you’re promoting a member of your team, you can start a conversation with your human resources (HR) specialist. The conversation remains with the promotion as a historical record.

**Ways to Collaborate**

- Click **Social** on the Promote page.
- Click the **Share** button, or click **Join** if a conversation is already started.
- Click the name of the promotion to access its wall, where you can start conversations and add members. On the wall of the promotion, everyone invited can view basic attributes of the promotion and post documents and comments that all members can see.
- Use the presence indicators to see who’s available to answer your questions.

**Transfer Actions**

You can use these actions to move people within the same assignment.

<table>
<thead>
<tr>
<th>Action</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer</td>
<td>Updates the current assignment and leaves the work relationship and any other assignments unchanged.</td>
</tr>
</tbody>
</table>
| Local and Global Transfer | If you don’t change the current legal employer, the transfer is local and within the same assignment. Local transfer updates the current assignment and leaves the work relationship and any other assignments unchanged.  
If you change the current legal employer, the transfer is global and to a different legal employer. Global transfer ends the current assignment and any other assignments, and ends the current work relationship. You create a new work relationship and a primary assignment within the new legal employer. The new primary assignment has all the data from the old one by default, but you can change it.  |

You can use these actions to move people within the same legal employer.

<table>
<thead>
<tr>
<th>Action</th>
<th>How it works</th>
</tr>
</thead>
</table>
| Add Assignment          | Creates an additional assignment leaving the work relationship, primary assignment, and any other assignments unchanged. By default, the additional assignment is nonprimary.  
You end the assignment by selecting the End Assignment action.  |
| Temporary Assignment    | Creates an additional assignment and suspends the existing assignments. The work relationship remains unchanged.  
The status of the existing assignments changes to Suspended- Payroll Eligible by default. You can change this status to any other value or revert to the original status using the Change Assignment flow.  |
### Action | How it works
---|---
End Temporary Assignment | Ends the temporary assignment and reinstates the original assignments by the specified return date.

Create Work Relationship | Creates an additional work relationship and associated assignment leaving the existing work relationship, primary assignment, and any other assignments unchanged.

  - If you create an additional work relationship in the same legal employer, you must select a different worker type. This is because the application doesn’t allow two work relationships with the same worker type in a legal employer.

  - You end a work relationship by using the Terminate action.

You can use these actions to move people to a different legal employer.

### Action | How it works
---|---
Global Transfer (For HR specialists) | Ends the current assignment and any other assignments, and ends the current work relationship. You create a new work relationship and a primary assignment within the new legal employer. The new primary assignment has all the data from the old one by default, but you can change it.

  - This action differs from the Local and Global transfer action in that it enables HR specialists to manage person details as a part of the global transfer.

Change Legal Employer | Ends the current work relationship and creates a new one within the new legal employer.

  - Creates a new primary assignment and ends the old one. The new primary assignment has all the data from the old record by default, but you can change it.

Local and Global Transfer | If you don’t change the current legal employer, the transfer is local and within the same assignment. Local transfer updates the current assignment and leaves the work relationship and any other assignments unchanged.

  - If you change the current legal employer, the transfer is global and to a different legal employer.

Create Work Relationship | Creates an additional work relationship and associated assignment leaving the existing work relationship, primary assignment, and any other assignments unchanged.

  - If you create an additional work relationship in another legal employer, you have two concurrent work relationships in different legal employers.

  - You end a work relationship by using the Terminate action.

Global Temporary Assignment | Creates an additional work relationship and associated assignment in the destination legal employer and suspends the existing assignments in the source legal employer. The work relationship in the source legal employer remains unchanged.

  - You create a primary assignment for the new work relationship in the new legal employer. The status of the existing assignments in the source work relationship changes to Suspended-Payroll Eligible by default. You can change the status of the existing assignments from Suspended-Payroll Eligible to any other value. You can reverse this change in status to the original status using the Change Assignment flow.

  - You end a global temporary assignment by selecting the End Global Temporary Assignment action and specifying a return date. Consequently, the global temporary assignment is terminated and the assignments in the source legal employer are reinstated automatically on the return date.
<table>
<thead>
<tr>
<th>Action</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Global Temporary Assignment</td>
<td>Ends the temporary assignment and work relationship and reinstates the assignments with the original legal employer.</td>
</tr>
<tr>
<td>Mass Legal Employer Change (For HR specialists)</td>
<td>Transfers multiple employees from different legal employers to the same destination legal employer.</td>
</tr>
<tr>
<td></td>
<td>Ends the current work relationships for the employees and creates new ones within the destination legal employer.</td>
</tr>
<tr>
<td></td>
<td>Creates new primary assignments and ends the old ones. The new primary assignments have all the data from the old records by default, but you can change it.</td>
</tr>
</tbody>
</table>

Where are the Transfer Actions

You can find the actions in these places:

- Under **Quick Actions** on the **Home** page.
- All pages where the person smart navigation window is available.
- (For line managers) Search for your team member in **My Team** or **Directory** page, select the **Manage Employment** action, and then click **Edit > Update**.
- (For HR specialists) Search for the person in the **Person Management** work area, select the **Manage Employment** action, and then click **Edit > Update**.

What Happens to Direct Reports

When you transfer managers, they automatically keep their direct reports, even when moving to a new legal employer. But you can change that. As part of the transfer, you can reassign direct reports to other managers. You can also add new reports. And, you can add and reassign reports of other manager types, for example, project managers and resource managers.

Transferring People

**Video**

*Watch:* This tutorial shows you how to transfer a worker. The content of this video is also covered in text topics.

**Example**

You're a human resources (HR) specialist transferring Ralph Amber, working as a sales representative in the Sales West US department. You're transferring him within the same legal employer to the Sales East US department in New York.

Let's look at the steps to update the key values for this transfer. For other fields, you can use the default values.

**Selecting Ralph and the Transfer Action**

1. On your home page, select **My Client Groups > Person Management**.
2. Search for **Ralph Amber** and select his record.
3. In the **Edit** drop-down button, select **Update**.
4. In the Update Employment window, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start Date</td>
<td>Select the date the transfer takes effect.</td>
</tr>
<tr>
<td>Action</td>
<td>Transfer</td>
</tr>
<tr>
<td>Action Reason</td>
<td>Reorganization</td>
</tr>
</tbody>
</table>

5. Click **OK** to proceed.

**Update Job Information**

1. In the Job Details section, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Sales East US</td>
</tr>
<tr>
<td>Location</td>
<td>New York</td>
</tr>
</tbody>
</table>

2. Click **Review** to review the changes. If you need to make any further changes, click the **Back** button.

**Complete the Transfer**

1. Click **Submit** when you’re done with the changes.
2. Click **Yes** when you’re prompted, and then click **OK**.
3. Click **Done**.

**FAQs for Transfers**

**Can I transfer people if I don’t have access to all of their assignments?**

No. You can transfer people only if you have access to all of their assignments.

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

If a person is globally transferred using a flow other than Mass Legal Employer Change, the payroll administrator has to manually transfer the payroll. However, during a mass global transfer within the same legislative data group, the payroll is automatically transferred to the new legal employer.

**Can I use the Global Transfer action for a person with a future termination date?**

Yes, the global transfer ignores the future termination date and ends the existing work relationship a day before the start date of the new work relationship.
Can I do a global transfer for a suspended assignment?
Yes, as long as the assignment isn’t suspended because of a global temporary assignment.

Can I use the Global Transfer action for a person having a future global transfer or global temporary assignment?
No, you can’t globally transfer such a person.

Can I terminate a work relationship with an active global temporary assignment?
No, you must first end the global temporary assignment before you terminate the work relationship.

Can I cancel the work relationship of a person who's transferred to another legal employer?
No, you can’t cancel such a work relationship.

How can I correct the global transfer and global temporary assignment start dates?
You can’t change these dates directly on the assignment or Edit Work Relationship page. You must first cancel the work relationship that was created as part of the global transfer or global temporary assignment creation. This removes the global transfer and global temporary assignment records from the original assignment. You can then do the global transfer or create a global temporary assignment on the date you want.

Manage Worker Contracts

Overview of Contracts

The worker’s assignment can include contract information which is required by some legal employers. The contract details are for information only; they have no effect on processing. Legal employers can use contracts only if it’s enabled at the legal employer level and use any of these employment models:

- 2 Tier Multiple Contract - Single Assignment
- 2 Tier Single Contract - Single Assignment

You can associate a contract with an assignment by creating a new contract or selecting from existing contracts. You can use the same contract across assignments only within the same work relationship.

You can extend the contract period and manage other contract details using the Manage Contracts task. HR Specialists can access this task from the My Client Groups tab under Quick Actions. Line managers can access the task from the My Team tab under Quick Actions. Employees can view their contract information on their Employment Info page.

You can configure approvals for the Manage Contracts business process by using the Manage Contracts approval rule. You can select the type of contract whether its fixed-term, full-time, or seasonal. The values for the contract type field are populated by the user lookup CONTRACT_TYPE.

You can migrate contract data from the assignment to the contract by running the Migrate Employment Data scheduled process. You must run this process only once before you manage contracts using the Manage Contracts task.
How You Manage Contracts

You can associate a contract with an assignment and specify key information such as contract type, duration, and start and end dates. You can extend a contract and manage other details, such as adding, deleting, or editing contract extensions using the Manage Contracts task under Quick Actions.

Note: When you extend a contract, the Manage Contracts task updates the contract end date in the PER_CONTRACTS_F table. The task doesn't update the projected assignment end date in the work terms record.

Associate a Contract With an Assignment

You can associate a new contract with an assignment when doing any of these actions:

- Hire a person
- Change the legal employer
- Transfer a person globally
- Create a global temporary assignment
- Create a work relationship

Note: You can create a contract only when you do any of these actions. There's no separate task available for creating a contract.

You can associate a new contract or an existing contract with an assignment under the same work relationship when doing any of these actions:

- Add an assignment to a work relationship
- Add a temporary assignment

Extend a Contract

You can extend a contract from the Manage Contracts page by specifying the contract end date or the contract duration. However, you can’t extend a contract which doesn’t have a contract end date.

- If you enter the contract end date, the application automatically calculates the duration.
- If you enter the contract duration, the application automatically calculates the contract end date. This is done by adding the duration to the previous contract end date.

Correct Contract Extension History

You can view the history of extensions made to a contract in the contract details. This table shows the fields in the contract extension history.

<table>
<thead>
<tr>
<th>Contract Number</th>
<th>Extension Number</th>
<th>Initial Contract Start Date</th>
<th>Contract Start Date</th>
<th>Contract End Date</th>
<th>Contract Duration</th>
<th>Contract Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONT100010</td>
<td>0</td>
<td>01-Jan-2018</td>
<td>01-Jan-2018</td>
<td>31-Mar-2018</td>
<td>3 months</td>
<td>Fixed</td>
<td>Initial contract record</td>
</tr>
<tr>
<td>CONT100010</td>
<td>1</td>
<td>01-Jan-2018</td>
<td>01-Apr-2018</td>
<td>31-May-2018</td>
<td>2 months</td>
<td>Fixed</td>
<td>First extension</td>
</tr>
</tbody>
</table>
The contract start date isn’t a stored value. The application calculates the contract start date by adding one day to the contract end date of the previous extension. For the initial contract record, the contract start date is the same as the initial contract start date.

You can correct records in the contract extension history, but with a few conditions.

You can only correct the contract end date and contract duration fields for the latest contract record (second extension record in the table). This is because any changes that you make to these fields in the initial records aren’t propagated to the subsequent future records. This condition ensures that there are no gaps in the contract duration. For example, in the table if you reduce the contract duration to 1 month for the first extension, the contract end date becomes 30-Apr-2018. However, the contract end date for the second extension doesn’t automatically change to 30-Jun-2018. You can’t delete the initial contract record.

### Process to Migrate Contract Data

You must use the Migrate Employment Data process to migrate contract data from the assignment to the contract. You must run this process once before you manage contracts using the Manage Contracts task.

> **Note:** If you run the process more than once, only records having the period of service ID as null in the PER_CONTRACTS_F table are processed.

Here’s what the process actually does:

- Updates the period of service ID for workers having contracts and for whom the ID isn’t populated in the PER_CONTRACTS_F table.
- Copies the contract end date from the projected assignment end date in the work terms record to the PER_CONTRACTS_F table.

After the process is run, you can check the contract end date in the worker’s employment information. The contract end date will be populated for all the rows for which the projected end date is populated in the work terms record.

**Related Topics**

- Overview of Scheduled Processes
- Submit Scheduled Processes and Process Sets

### FAQs for Worker Contracts

**How are contract numbers generated?**

Contract numbers are automatically generated by prefixing the person number with ‘CONT’. For example, if the person number is 17040, the contract number would be CONT17040. Subsequent contracts of the assignment would have suffix
numbers, for example CONT17040-2, CONT17040-3. You can override these generated numbers and assign contract numbers manually.

**Can I add contracts information for contingent workers and pending workers?**
Yes, if the employment model that you configured supports contracts.

**Related Topics**
- Employment Model
- When to Select the Employment Model

---

## Calculate Seniority Dates

### Overview of Seniority Dates

All topics in this section pertain to version 3 (V3) of the seniority dates functionality. You can define and manage the seniority of workers using version 3 of the seniority dates functionality.

You can configure seniority dates using the Configure Seniority Dates task and a fast formula. You can manage them using the Manage Seniority Dates task.

For more information, see these white papers on My Oracle Support (https://support.oracle.com).

- Calculating Seniority Dates Using Fast Formula (2370526.1)
- Comparison between Different Seniority Dates Versions (2414630.1)
- Enabling Enterprise and Legal Employer Seniority Dates During Hire (2432162.1)
- Seniority Changes in V3 Seniority Dates (2446329.1)
- Seniority Dates Version 1 Frequently Asked Questions (2434532.1)
- Seniority Dates Version 2 (2438572.1)
- Common Use Cases Configured Using V3 Seniority Dates (2476188.1)

**Note:** If you’re using V3 seniority dates, you can’t view and manage V1 seniority dates of the legal employer and enterprise on the Manage Work Relationship page.

### Seniority Dates

Seniority date is the basis of calculation of a person’s seniority with the enterprise, department, grade, or other entity. You can see the seniority dates on the Employment Info page. In most cases, seniority dates are the same as start dates.

On the Manage Seniority Dates page, you can do these things:

- View the length of service, history, and other details for each seniority date rule.
- If the seniority date rule is configured to allow edits, you can update or correct the manual adjustment units.
Note: Any adjustments made to the seniority dates don’t go through an approval since there is no approval configuration available for the Manage Seniority Dates process.

- After making any adjustments, you can recalculate a person’s seniority using the Recalculate Seniority feature.

You can populate seniority dates for all workers by running the Calculate Seniority Dates process.

You may find that a worker’s seniority rule isn’t displaying on the Manage Seniority Dates page even though the rule is active. This may be due to these reasons:

- The rule has a filter and the worker doesn’t meet the filter criterion.
- The total length of service for the worker is zero. This could happen for example if the rule is hours-based and you haven’t loaded the seniority hours for the worker.

Related Topics
- How You Configure Seniority Dates
- Seniority Date Configuration Levels

Adjust a Seniority Date

To adjust a seniority date, you update or correct the seniority date.

When you update a person’s seniority date, you add an effective dated record for the person’s seniority rule. An effective dated split is created in the seniority record. For example, if the seniority record has an effective date of 1-Jan-2001, you change this date to 1-Feb-2001 to do an effective dated manual adjustment as of 1-Feb-2001.

When you correct a person’s seniority date, you only enter a manual adjustment value in the seniority record. If a manual adjustment value already exists for the seniority record, the application overrides that value with the new value that you enter. No new effective dated seniority record is created when you correct a seniority date. For example, if the seniority record has an effective date of 1-Jan-2001, you retain this date and only enter a manual adjustment value, such as 10 days.

You can manually adjust a seniority rule by clicking the edit icon (pencil icon) on a seniority record. By default, the seniority record displays the same effective date as the row from which the transaction was initiated.

Here’s how you can adjust a person’s seniority by updating the manual adjustment units:

1. Click the Manage Seniority Dates task under Quick Actions on the home page.
2. Search and select the person for whom you want to adjust the seniority date.
3. In the Seniority Dates section, click Edit.
4. Select the date for the seniority change.

Note: Don’t change the existing date if you’re correcting the seniority.

5. Enter the manual value for the seniority adjustment.

Note: If the seniority basis on the worker’s assignment is days, enter the adjustment in days. If it’s in hours, enter the adjustment in hours. Enter a positive number to increase seniority by moving the date back. Enter a negative number to reduce seniority by moving the date forward.
6. Add any comments.
7. Click OK.
8. Click Save.

Examples of Calculating Seniority Dates

Let's look at some examples of calculating seniority dates based on assignment and work relationship changes.

In these examples, the job seniority date is configured at these levels:

- Person
- Work Relationship
- Assignment

Calculation Based on Assignment Changes

Vijay Singh is hired in Vision IND legal employer on 1-Jan-2005. He has multiple assignments and work relationships in the enterprise. This table shows a summary of his default seniority dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
</tbody>
</table>

Here's the seniority calculation as of 1-Jan-2006:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Starting 1-Jan-2007, Vijay has a new assignment in the HCM department, but continues to perform the same job. His current assignment is end dated.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>End Assignment</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>Add Assignment</td>
<td>Vision IND</td>
<td>Assignment 2</td>
<td>Sales Consultant</td>
<td>HCM</td>
</tr>
</tbody>
</table>

Here's the seniority calculation as of 1-Jan-2008:
Calculation Based on Work Relationship Changes

On 1-Jan-2010, Vijay is transferred globally to a new legal employer but in the same department.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>End Assignment</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>Add Assignment</td>
<td>Vision IND</td>
<td>Assignment 2</td>
<td>Sales Consultant</td>
<td>HCM</td>
</tr>
<tr>
<td>1-Jan-2010</td>
<td>Global Transfer</td>
<td>InFusion US</td>
<td>Assignment 3</td>
<td>Sales Consultant</td>
<td>HCM</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2011:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>6 Years</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Sales Consultant (Vision IND)</td>
<td>5 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2009</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Sales Consultant (InFusion US)</td>
<td>1 Year</td>
<td>1-Jan-2010</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant (Assignment 1)</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant (Assignment 2)</td>
<td>3 Years</td>
<td>1-Jan-2007</td>
<td>31-Dec-2009</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant (Assignment 3)</td>
<td>1 Year</td>
<td>1-Jan-2010</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Examples of Calculating Cumulative Seniority Dates

You can configure the seniority dates rules to calculate seniority on a cumulative basis. Let’s look at some examples of calculating seniority dates based on cumulative and noncumulative seniority.

In these examples, the job seniority date is configured at these levels:

- Person
- Work Relationship
- Assignment

Calculation Based on Cumulative Seniority

Priya Krishnan has multiple assignments and work relationships in the enterprise, and the cumulative option has been turned on for all the 3 job seniority dates.

Priya Krishnan is hired in Vision IND legal employer on 1-Jan-2005. This table shows a summary of her default seniority dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2006:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
</tbody>
</table>

On 1-Jan-2007, Priya Krishnan has a job transfer in the current assignment.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>Job Change</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Business Analyst</td>
<td>ERP</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2008:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
</tbody>
</table>
### Seniority Date Level

<table>
<thead>
<tr>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>N/A</td>
</tr>
<tr>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Note:** Two seniority date records are generated at each seniority date level. This is because there’s a change in the job attribute that’s used for calculating the seniority dates.

On 1-Jan-2008, Priya Krishnan has a new assignment in a different department. However, her job changes back to her earlier job of Sales Consultant. Her current assignment is end dated.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2007</td>
<td>Job Change</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Business Analyst</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2008</td>
<td>End Assignment</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Business Analyst</td>
<td>ERP</td>
</tr>
<tr>
<td>1-Jan-2008</td>
<td>Add Assignment</td>
<td>Vision IND</td>
<td>Assignment 2</td>
<td>Sales Consultant</td>
<td>HCM</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2009:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Level</td>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Work Relationship Level</td>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Assignment Level</td>
<td>Sales Consultant (Assignment 1)</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
<tr>
<td>Person Level</td>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>31-Dec-2007</td>
</tr>
<tr>
<td>Work Relationship Level</td>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>31-Dec-2007</td>
</tr>
</tbody>
</table>
Calculation Based on Noncumulative Seniority

Priya Krishnan has multiple assignments and work relationships in the enterprise, and the cumulative option has been turned off for all the 3 job seniority dates.

Priya Krishnan is hired in Vision IND legal employer on 1-Jan-2005. This table shows a summary of her default seniority dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2005</td>
<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2006:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2005</td>
<td>N/A</td>
</tr>
</tbody>
</table>

On 1-Jan-2007, Priya Krishnan has a job transfer in the current assignment.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
<th>Department</th>
</tr>
</thead>
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<tr>
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</tr>
<tr>
<td>1-Jan-2007</td>
<td>Job Change</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Business Analyst</td>
<td>ERP</td>
</tr>
</tbody>
</table>

Note: Job seniority dates are configured to be cumulative, therefore, the job seniority equals 1 year in the current assignment plus 2 years in the previous assignment.
Here’s the seniority calculation as of 1-Jan-2008:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job - Person Level</td>
<td>Sales Consultant</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
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<td>Job - Work Relationship Level</td>
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</tr>
<tr>
<td>Job - Person Level</td>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Business Analyst</td>
<td>1 Year</td>
<td>1-Jan-2007</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Note:** Two seniority date records are generated at each seniority date level. This is because there’s a change in the job attribute that’s used for calculating the seniority dates.

On 1-Jan-2008, Priya Krishnan has a new assignment in a different department. However, her job changes back to her earlier job of Sales Consultant. Her current assignment is end dated.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
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<td>ERP</td>
</tr>
<tr>
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<td>ERP</td>
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<tr>
<td>1-Jan-2008</td>
<td>Add Assignment</td>
<td>Vision IND</td>
<td>Assignment 2</td>
<td>Sales Consultant</td>
<td>HCM</td>
</tr>
</tbody>
</table>

Here’s the seniority calculation as of 1-Jan-2009:

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
<th>Job</th>
<th>Seniority</th>
<th>Seniority Date</th>
<th>Exit Date</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
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<td>Sales Consultant</td>
<td>2 Years</td>
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<td>31-Dec-2006</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant (Assignment 1)</td>
<td>2 Years</td>
<td>1-Jan-2005</td>
<td>31-Dec-2006</td>
</tr>
</tbody>
</table>
Oracle Global Human Resources Cloud
Using Global Human Resources

Chapter 6
Hire and Manage Workers

<table>
<thead>
<tr>
<th>Seniority Date Level</th>
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</thead>
<tbody>
<tr>
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<td>Business Analyst</td>
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<tr>
<td>Job - Person Level</td>
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<td>1 Year</td>
<td>1-Jan-2008</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Work Relationship Level</td>
<td>Sales Consultant</td>
<td>1 Year</td>
<td>1-Jan-2008</td>
<td>N/A</td>
</tr>
<tr>
<td>Job - Assignment Level</td>
<td>Sales Consultant (Assignment 2)</td>
<td>1 Year</td>
<td>1-Jan-2008</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Note:** Job seniority dates are configured to be noncumulative, therefore, the job seniority considers the length of service in the current assignment only.

---

**Hours-Based Seniority Calculation**

These dates impact the seniority calculation for an hours-based rule:

- Seniority process run date
- Attribute end date
- Seniority end date

**Seniority Process Run Date**

The date on which the Calculate Seniority Dates process was run is used in the seniority-hours calculation. The process calculates the seniority dates for workers based on the seniority rules configured in the application.

**Attribute End Date**

If there's a change in the attribute or level at which the seniority rule is configured, the attribute end date is used in the calculation. For example, let's say the rule is configured for job attribute and assignment level, and a worker has a job change. The job end date of the first job will be used in the seniority date calculation.

**Seniority End Date**

This date is used in the calculation if there's an effective-dated update on the seniority rule. For example let's say an effectivedated adjustment resulted in a new row being added for a seniority rule. The seniority end date of the previously existing row is calculated as: Start date of the newly added row - 1 day.

**Note:** The calculations are valid when the attribute end date or the seniority end date isn't set to a null or to the end of time (12-31-4712).
Seniority Date Calculation

Here’s how the seniority date for the hours-based rule is calculated.

1. Get the minimum date from these dates: Calculate Seniority Dates process run date, attribute end date, and seniority end date.
2. Reduce the length of service from the minimum date.
3. Add one day to the resulting date value in step 2.

Examples of Calculating Hours-Based Seniority

In this example, you’re an HR specialist configuring the enterprise seniority date at the person level. You are defining an hours-based seniority rule to calculate a worker’s length of service. Here’s how the hour conversion is defined:

- 8 hours in a day and 40 hours in a week
- 173.33 hours in a month (hours in a year divided by 12)
- 2080 hours in a year and 52 weeks in a year

Let’s see how to calculate the length of service for a worker Maya Singh using the hours-based seniority rule. Maya is an hourly employee and her work hours are entered in the seniority hours table (PER_SENIORITY_HOURS) every week.

Maya is hired in the Vision IND legal employer on 1-Jan-2007.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Legal Employer</th>
<th>Assignment</th>
<th>Job</th>
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</thead>
<tbody>
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<td>Hire</td>
<td>Vision IND</td>
<td>Assignment 1</td>
<td>Sales Consultant</td>
<td>ERP</td>
</tr>
</tbody>
</table>

**Seniority at the End of a Week**

Applying the rule, Maya has a seniority of 40 hours for the week ending 7-Jan-2007.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Seniority Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Jan-2007</td>
<td>7-Jan-2007</td>
<td>40</td>
</tr>
</tbody>
</table>

Here’s how the seniority is calculated:

<table>
<thead>
<tr>
<th>Length Of Service</th>
<th>Total Seniority Hours</th>
<th>How length of service is calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 Years 0 Months 5 Days</td>
<td>40</td>
<td>Total seniority hours are less than the hours defined for a month (173.33). Therefore, total seniority hours are converted into days when calculating the length of service. The length of service calculation in days is 40 divided by 8 (hours in a day).</td>
</tr>
</tbody>
</table>
Seniority at the End of 6 Months
Maya has a seniority of 1080 hours after 6 months as of 7-Jul-2007.
Here's how the seniority is calculated:

<table>
<thead>
<tr>
<th>Length Of Service</th>
<th>Total Seniority Hours</th>
<th>How length of service is calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 Years 6 Months 5 Days</td>
<td>1080</td>
<td>Total seniority hours are less than the hours defined for a year (2080), but more than the hours defined for a month (173.33). The number of months are calculated first so that the total number of seniority hours - (number of months * hours defined for the month) &lt; hours defined for the month. Therefore, the number of months in this scenario are 6. Using values in the equation: 1080 - (6 * 173.33) = 40 (this is less than 173.33). For the remaining 40 hours, a day conversion is done, which amounts to 5 days (40 divided by 8). Therefore, the final length of service is 0 years 6 months 5 days.</td>
</tr>
</tbody>
</table>

Seniority at the End of 1 Year 6 Months
Maya has a seniority of 3160 hours after 1 year and 6 months as of 7-Jul-2008.
Here's how the seniority is calculated:

<table>
<thead>
<tr>
<th>Length Of Service</th>
<th>Total Seniority Hours</th>
<th>How length of service is calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Years 6 Months 5 Days</td>
<td>3160</td>
<td>Total seniority hours are more than the hours defined for a year (2080). The number of years are first calculated so that total number of seniority hours - (number of years * hours defined for the year) &lt; hours defined for the year. Therefore, the number of years in this scenario is 1. Using values in the equation: 3160 - (1 * 2080) = 1080 (this is less than 2080). For the remaining 1080 hours, a month conversion is done, which amounts to 6 months. Then, a day conversion is done that amounts to 5 days.</td>
</tr>
</tbody>
</table>

Note: For hours-based seniority rules, the seniority date is calculated by reducing the total length of service from the seniority calculation process run date.
Process to Calculate Seniority Dates

Use the Calculate Seniority Dates process to calculate the seniority dates for workers based on the seniority rules configured in the application. Use the Scheduled Processes work area to schedule and run the process.

You must run the Calculate Seniority Dates process regularly to calculate the seniority dates for workers.

Process Parameters

**Person Number:** This parameter filters the person numbers which are to be included in the ESS process for processing. You can run this process for more than one person by entering the person numbers separated by commas. For example, use this format: Person Number 1,Person Number 2,Person Number 3. Don’t enter leading or trailing space, or special characters. If you want to run this process for all persons, don't enter any value.

**Seniority Date Code list:** This parameter filters the seniority dates rules for which the ESS process needs to be run. If we pass the parameter as null, the ESS process will run for all the active rules in the application.

**Past N Days:** This parameter indicates the last number of days in which the data is changed for the person. The parameter scans these tables to find any data changes:

- PER_ALL_ASSIGNMENTS_M
- PER_ASSIGN_GRADE_STEPS_F
- PER_SENIORITY_HOURS

The parameter analyzes the LAST_UPDATE_DATE column of these tables and compares it with the days passed in the parameter for processing.

> **Note:** Workers who have no changes to their assignment, grade step, or seniority hours in the past N days are excluded from the calculation. But you can recalculate seniority for a specific worker using the **Recalculate Seniority** option on the Manage Seniority Dates page.

**Legal Employer:** This parameter filters the person records based on the legal employer specified.

**Union:** This parameter filters the person records based on the union specified.

**Include Terminated Work Relationships:** This parameter checks the status of the work relationship. If you pass the value Y as the parameter, the process will detect the work relationships that are currently active. When you modify the data in an inactive work relationship and pass the value N, the application won't process the assignments in this work relationship. You notice this behavior even though the assignment records are modified in the past N days.

Related Topics

- Overview of Scheduled Processes
- Submit Scheduled Processes and Process Sets
FAQs for Seniority Dates

What's the source for the seniority hours used in calculating hours-based seniority?
The source is the hours loaded in the PER_SENIORITY_HOURS table.

How can I load hours in the seniority hours table?
By using HCM Data Loader. For more information, see the Oracle Human Capital Management Cloud Integrating with HCM guide on Help Center at https://docs.oracle.com/en/cloud/saas/index.html

Can I use assignment or standard working hours when calculating hours-based seniority?
No. To calculate hours-based seniority, you must load hours in the PER_SENIORITY_HOURS table using HCM Data Loader.

Can I build OTBI reports for seniority dates?
No, there is no subject area in OTBI for seniority dates. However, you can build custom reports using BI Publisher.

Why can't I calculate V3 seniority dates by running the Populate Seniority Dates process?
The Populate Seniority Dates process is used to calculate version 2 (V2) seniority dates after the initial conversion. You must run the Calculate Seniority Dates process to calculate the V3 seniority dates.

Terminate Work Relationships

Terminations

When you terminate a person’s work relationship, you end all of the person’s assignments. Human resources (HR) specialists can terminate people by selecting them in the Person Management work area, selecting Manage Work Relationship, and clicking Edit > Terminate. Line managers can terminate their workers by selecting the Terminate action on the My Team page.

Here’s what happens when you terminate a work relationship:

- The work relationship and the assignments become inactive the next day after the termination.
- User access and roles are revoked after the termination date. But you can change this. You can revoke the person’s access earlier or much later than the termination date.
- The enterprise and legal employer service periods end on the termination date. The person becomes an ex-employee for the legal employer.
- If you use Oracle Payroll, the payroll administrator gets a notification about the termination, which is the administrator’s cue to terminate the person’s payroll

**Note:** If the person has many work relationships and you want to terminate all of them, you must terminate the primary one last.
Termination Dates

- Termination notification date is the date the initiator notifies the other party of the termination. For example, a worker notifies an employer of his resignation or an employer notifies a worker of a layoff.
- Termination date is the worker’s last date of employment. This defaults to the notification date plus the notice period specified in the assignment. You can override this default when entering the termination.

Ending a Single Assignment

- If the work relationship has many assignments and you want to end one of them, you end the specific assignment and don’t terminate the work relationship.
- If the work relationship has a single assignment and you want to end it, you terminate the work relationship itself.

What Happens to Direct Reports in a Termination

When you terminate managers, the direct reports are automatically reassigned to the terminated manager’s manager.
This flow chart shows how direct reports are reassigned if position synchronization is enabled:

What Happens to Payroll in a Termination
When you terminate employees with eligible earnings, such as bonuses or vacation payouts after their termination date, you must associate them with a nonrecurring element.

Related Topics
- Employment Model
About Reversing Terminations

When you reverse a termination, any work relationships and assignments previously ended are restored with the statuses prior to the termination. If a primary work relationship or assignment became non-primary during the termination, it’s changed back to primary when you reverse the termination.

To reverse a termination, use the Manage Work Relationship task in the Person Management work area. In the Actions list, select View Termination > Reverse Termination.

What Happens to Roles and User Access

- Any roles automatically provisioned to the person at termination (Beneficiary, for example) are automatically deprovisioned.
- Any roles deprovisioned either manually or automatically at termination are provisioned again.
- If the person’s user account was disabled at termination, it’s re-enabled.

Changes Before and After Termination

If any employment-related actions or changes took place before the termination, they’re applied back when you reverse the termination. But any future-dated changes taking place after the termination aren’t restored. Let’s say the employee’s department was end-dated after his termination and all employees were relocated to another department. The reversal of the termination restores the end-dated department and not the new department. It’s important to manually verify the employment data after reversing a termination and make the required changes.

Restriction for Reversing a Termination

You can’t reverse a termination if the same legal employer has rehired the worker at the same time. Let’s say you terminated an employee on April 15 and rehired the employee with the same legal employer on May 1. You try to reverse the termination on May 15. You can’t do so because this causes the person to have two concurrent employee work relationships with the same legal employer.

Sensitive Terminations

Any future-dated termination with a deferred processing date is considered a sensitive termination. Sensitive terminations change the way concurrent transactions are processed.

You can’t start a transaction for a person if the person has a concurrent transaction pending approval. But if the concurrent transaction is a sensitive termination, then you can start the transaction because the presence of a sensitive transaction can’t be disclosed.

How to Handle Data Conflicts

Data conflicts may arise because of allowing concurrent transactions while a sensitive termination exits. If the conflicts can’t be resolved automatically, they’re routed to a person with a Human resources (HR) representative responsibility. Let’s look at an example to understand how data conflicts are handled.
A line manager entered a transfer for a worker when the worker had a sensitive termination that was pending approval. The sensitive termination is now approved. As the worker’s HR representative, you may come across these data conflicts:

- The transfer is pending approval and the start date of the transfer is later than or the same as the termination date. The application automatically rejects the transfer and notifies you.

- The transfer is pending approval and the start date of the transfer is earlier than the termination date. You get a notification asking you to withdraw the transfer because the worker is already terminated. If you choose not to withdraw the transfer, you get a notification again when the transfer is approved. You need to reenter the transfer so that the transfer details are reflected in the inactive assignment created by the termination.

- The transfer is submitted and the start date of the transfer is later than or same as the termination date. You get a notification that you must delete the transfer and reenter the termination. You must reenter the termination because the data changed (due to the transfer) after entering the termination.

- The transfer is submitted and the start date of the transfer is earlier than or the same as the termination date. You receive a notification that you must reenter the termination. You must reenter the termination because the data changed (due to the transfer) after entering the termination.

Considerations for Hiding Terminations

Let’s say you entered a termination in the application but want to hide it from public view for some time because the termination is sensitive. You can do so in two ways: You can either hide the termination or defer the processing of the termination.

Hiding the Termination

Use the Termination Display option to hide the termination for a specific period after the termination date. During this period, the termination details aren’t shown on the employee’s person spotlight page. The details are visible only to those people who have access to the terminated person’s record.

Deferring Processing of the Termination

You use the Deferred Processing option typically to hide terminations with a future-effective date. Let’s say the termination date is April 15 but you’re entering the termination on April 1. You want to submit the termination on April 1 but defer processing until the termination date (April 15) because this is an involuntary termination. The person you’re terminating has access to functionality that exposes the termination to the person. If you defer processing until April 15, the termination will be hidden from everyone except the initiator, approvers, and notification recipients, until that date.

**Note:** If the termination must go through approval and the deferred processing date is reached before the approval date, then processing is deferred until final approval.

Terminating a Work Relationship

**Video**

**Watch:** This tutorial shows you how to terminate a work relationship. The content of this video is also covered in text topics.
Example
You're a human resources (HR) specialist terminating John Adam’s work relationship. John wants to resign from his part time job of Analyst at the Data Center due to personal reasons.
Let’s look at the steps to update the key values for this termination. For other fields, you can use the default values.

Selecting John and the Terminate Action

1. On your home page, select My Client Groups > Person Management.
2. Search for John Adams and select his work relationship record with the Analyst job.
3. Click the Tasks panel drawer and then select Manage Work Relationship in the Personal and Employment section.
4. In the Manage Work Relationship page, select the Analyst assignment in the Employment Tree area.
5. In the Actions drop-down button, select Terminate.

Example

1. In the Action list, select Resignation.
2. In the Reason list, select Personal Reasons.
3. In the Notification Date field, select the date you want to notify John about the termination.
4. In the Termination Date field, select the actual date when you want to terminate John’s work relationship.
5. In the Rehire Recommendation section, select Yes in the Recommended for Rehire list.
6. Click Review to review the changes.

Analysis
Before terminating the work relationship, check whether John has direct reports. If yes, reassign them to another manager using the Change Manager action.

Complete the Termination

1. Click Submit when you’re done with the changes.
2. Click Yes when you’re prompted, and then click OK.
3. Click Done.

How Line Manager Synchronization Happens During Termination
When Position Hierarchy Is Used

When the application reassigns direct reports of a terminated manager, the line manager value is updated for all direct reports, including active and suspended assignments. This topic explains how the line manager value is synchronized during termination if you enable synchronization using HCM position hierarchy.

How Line Manager Is Synchronized
When you terminate a manager with direct reports, the Reassign Directs section on the Manage Employment page displays the direct line reports in read-only mode. The line manager for the direct reports is synchronized based on the following conditions:

- If the position has multiple incumbents, the other incumbent is the new manager.
• If no other incumbent exists in the position, the incumbent in the parent position is the new manager. If the parent position doesn’t have an incumbent either, the application checks for an incumbent one level up in the hierarchy or until it finds an incumbent.

• If the parent position has multiple incumbents, the incumbent with the longest tenure is the new manager.

• If a parent position doesn’t exist or there are no incumbents in all the parent positions in the hierarchy, you can manually reassign the direct reports to other managers.

Related Topics
• Synchronize Person Assignment from Position Process

FAQs for Terminate Work Relationships

Can I terminate a work relationship if there are future-dated employment changes?
For human resources specialists: Yes, provided the future changes aren’t related to global temporary assignments. If the changes are related to global temporary assignments, you must delete them and cancel any new work relationship before terminating the current work relationship. In general, all future-dated changes are lost when you terminate the work relationship.

For line managers and workers: No, you can’t terminate a work relationship if future-dated changes exist.

Can I terminate the source work relationship from which a global temporary assignment is created?
No. You must first end the global temporary assignment before terminating the source work relationship.

Why don’t I see all termination actions and reasons when terminating a work relationship with a global temporary assignment?
Only actions related to ending a global temporary assignment are available when terminating such a work relationship.

How are data conflicts arising from a termination handled?
The application may not identify and resolve all data conflicts arising from a termination. You must verify the data and manually resolve any pending conflicts. For example, you must manually reassign any checklist tasks assigned to the terminated person or cancel any training scheduled for the person.

How are data conflicts arising from a termination handled?
The application may not identify and resolve all data conflicts arising from a termination. You must verify the data and manually resolve any pending conflicts. For example, you must manually reassign any checklist tasks assigned to the terminated person or cancel any training scheduled for the person.

What happens if I revoke user access from a person with multiple active work relationships?
The person loses roles provisioned automatically for assignments in this work relationship only. The person keeps roles that were:

• Provisioned manually
• Acquired automatically for other work relationships
If the person has roles at termination, then the user account remains active. Otherwise, it’s suspended automatically.

**What's the impact of entering a rehire recommendation during a termination?**
The rehire recommendation is for information purposes only and doesn’t determine whether a person can be rehired.

## Add and Reassign Direct Reports

### How You Reassign Direct Reports

You add or reassign a manager’s direct line reports and other report types such as project reports, resource reports, or mentees when you do the change location, change manager, create work relationship, hire, promote, transfer, or termination actions. You reassign direct reports using the Manage Direct Reports task in the Person Management or My Team work areas.

You can add all or reassign selected reports. When you reassign reports, there are changes at the assignment level for each report.

For example, this is how you can reassign John Smith’s reports and mentees on his transfer:

- Three of his reports to the same new line manager
- Fourth report to a different line manager
- Two of his mentees to a different mentor

Some of John’s existing reports may continue to report to him in his new department.

You can reassign reports as of the same effective date or different effective dates. For example, John Smith’s date of transfer is 1st October, 2018 and you want to reassign his direct reports on 15th September, 2018. You reassign his existing direct reports with an effective date of 15th September, 2018. The new direct reports you add are approved when the parent transaction is approved.

### How You Select the Manager

You can select the same new manager for all the reports or a different new manager for each report. If most directs are being reassigned to the same new manager, you can select this person as the new manager by default for all the reports, and later reassign selected directs to different managers.

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

### Areas of Responsibility

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

> **Note:** You can’t use the Manage Direct Reports task to assign new roles to managers during the reassign process. Instead, use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task in the Setup and Maintenance work area to manage the assignment of roles. You must assign manager roles for people who didn’t have reports before the reassign process.
How You Reassign Direct Reports for Terminations and Resignations

If a line manager resigns or is terminated you must reassign their direct line and other report types to new managers before you approve the resignation request or terminate the work relationship. When you reassign direct reports, the reassignment is effective after the termination date plus one day with changes at the assignment level for each report.

Whether it’s termination, correction of termination, or resignation you can reassign only direct line reports in these transactions. Here’s what happens if the manager has line reports:

- The Reassign Line Reports area displays, otherwise it doesn’t.
- The direct line reports are displayed as of the termination date and not the current date.

If the manager has multiple assignments, each assignment is listed separately with the direct line reports to be reassigned.

If the manager has other types of reports such as project reports, resource reports, or mentees, you must reassign those reports before the termination effective date using the Manage Direct Reports task.

Related Topics
- Employment Configuration Options

How You Reassign Direct Reports for Global Transfers and Global Temporary Assignments

You can add and reassign direct reports of a manager’s primary assignment when you create a global transfer or temporary assignment for the manager. You can reassign direct reports in the secondary assignment on the Manage Directs Reports page before the global transfer takes effect. You can add direct reports for the secondary assignment when you create it.

When you add or reassign direct reports, changes occur at the assignment level for each report. The manager being transferred can continue to keep some of their existing direct reports so make sure you deselect those direct reports when you reassign. You can select the same new manager for all direct reports or a different new manager for each report. If you select direct reports but don’t specify a new manager, they will continue to report to the current manager in the inactive assignment.

Examples of Direct Reports Reassignment During Global Transfer

Let’s look at some examples of how you can reassign direct reports during global transfer.

Reassign Direct Reports to the Transferring Manager

When you reassign direct reports to the transferring manager, you must deselect all reports who continue to report to the same manager in the new assignment. Use the Reassign Line Reports section on the Global Transfer: Employment Information page to reassign the direct reports.
Reassign Direct Reports to the Transferring Manager's Manager

You can reassign direct reports to the transferring manager’s manager using either of these methods:

- Automatically reassign the direct line reports using the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments scheduled process. All direct reports are reassigned to the transferring manager’s manager as of the date following the transfer.
- Manually reassign the line reports to the transferring manager’s manager during the global transfer transaction.

Reassign Direct Reports to the Transferring Manager, Other Managers, and Manager’s Manager on Different Dates

Here’s how you can reassign directs in the primary assignment:

- Reassign any direct reports before transferring the worker using the Manage Direct Reports page
- Deselect any direct reports continuing to report to the transferring manager
- Reassign the remaining direct reports to the same or different new managers
- Reassign any direct reports on specific dates using the Change Manager page

And here’s how you can reassign direct reports in the secondary assignment:

- Reassign any direct reports to new managers using the Manage Direct Reports page
- Schedule the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments process to automatically reassign any remaining direct reports to the manager’s manager. The direct reports are reassigned as of the date following the transfer.
- Reassign any direct reports on specific dates using the Change Manager page.

How You Reassign Pending Approvals and Invalid Supervisor Assignments

A manager assignment can become inactive due to the end of an assignment or work term, termination, or global transfer. So you need to reassign direct reports and correct any invalid supervisory assignments that result due to an inactive assignment. If the manager has any pending approval notifications, you must reassign those too.

You can run the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments process in the Scheduled Processes work area to reassign the direct reports and pending approval notifications of a manager who’s either terminated or globally transferred. You can skip the step of reassigning pending notifications if you want to. Here’s what the process does:

- It reassigns the direct reports of a terminated manager to that person’s line manager and also assigns any pending notifications to the line manager.
- It reassigns pending approval notifications based on the number of days you specify. For example, if you specify 30 days, the process reassigns pending approvals of workers or managers terminated in the past 30 days.
FAQs for Add and Reassign Direct Reports

What's the difference between the Change Manager and Manage Direct Reports functionality?
The difference is in the process. You can change managers of all types, but only for one worker at a time, using the Change Manager functionality. Using the Manage Direct Reports functionality, you can reassign all line reports of a manager to a new manager in a single process.

Can I reassign indirect reports of the manager from the same Manage Direct Reports task?
No, you can reassign only direct reports of the Manager.
7 Workforce Records

Overview of Workforce Records

As a part of managing workforce records, you can access the worker directory, do mass updates, and create and manage work schedules. Let’s look at the key tasks:

- Worker Directory

  All workers access public information about a person in the person spotlight.

  Line managers access information about their workers in the person spotlight, including person, employment, compensation and skills and qualification details. They can also initiate manager self-service actions from here.

  Workers access their own information in the Personal Information work area and perform employee self-service actions.

- Mass Updates

  Human resource (HR) specialists can update multiple employment records in a single request, using the mass update functionality. Examples of mass update transactions include assignment change, transfer, legal employer change, and others.

- Work Schedules

  You can create work schedules, include exceptions such as public holidays, and assign different work schedules to different workers. You can designate a work schedule as primary, which determines the worker’s availability.

Directory

Person Spotlight

You can view public information about a person in the person spotlight. The information that you see in a worker’s person spotlight depends on your security privileges.

You can access the person spotlight when you click the person’s name on these pages:

- Directory Search Results
- My Team
- Team Talent
- Team Compensation
- Person Smart Navigation
What Line Managers Can Do

Line managers can see their workers’ information in the person spotlight, and take certain actions depending on the security configuration of their role. For example, they can do these actions:

- Promote, transfer, or terminate workers
- Manage workers’ salary and compensation
- Share worker information with third parties
- Plan workers’ careers
- Specify goals for their workers
- Enter feedback for workers.

What Workers Can Do

Workers can see and change their public information in the person spotlight. For example, they can do these things:

- Change their photo
- Maintain their contact information such as phone number and e-mail address.
- Add social networks they’re subscribed to
- Add their areas of interest and expertise
- Send messages to people
- Manage their document records such as visas, licenses, and awards
- Share information with others

For all other self-service actions such as changing the address, and viewing benefits, payslips, and compensation, workers must use the Personal Information work area.

How You Manage Your Team

As a line manager, you can see your workers’ information on the My Team page in the My Team work area. You can do certain actions for your workers depending on the security configuration of your role.

Worker Information

- You can see more detailed information about your direct and indirect reports than is available in the public information page of a worker.
- You can see these worker details: employment history, competencies, careers of interest, goals, performance, succession plans for a worker, salary and compensation details. You can view the headcount and mobility analytics for your team.
- You can do these actions for your workers: transfer, promotion, termination, location and manager change, compensation and salary adjustments, and sharing worker information with selected recipients.

Requisitions, Vacancies, and Positions

You can view positions in the HCM position hierarchy along with the existing assignment manager hierarchy if position hierarchy is enabled (in the Manage Enterprise HCM Information page). You can drill down the hierarchy and see the incumbents for each position, which can be either assignments or requisitions.
People Directory
You can access the directory from your home page. You can search for and select people to view their public information. You can see a person’s organization chart, which is based on the line manager hierarchy defined in the assignment.

What the Directory Shows
The people you see in the search results and the details you see for those people depend on your security privileges. Anyone in the organization can access public information about people who are designated as public during security implementation. Line managers and human resource specialists can access more detailed information about their workers and people for whom they’re responsible respectively.

You can see more information about yourself in the directory and take actions for yourself. For example, you can maintain your talent profile, update your contacts, share your information, and participate in social connections. If you’re a manager, you can do actions for your workers such as promoting them, sharing their information, and providing them with roles.

Directory Search
Directory search is based on keyword attributes of a person record. The priority for areas of expertise, areas of interest, and talent skills is lower compared to the other fields in the person record. This ensures that the accurate person records are displayed at the top of the search results.

For example, if you search for a person by keyword "Simpson," the search results first display person records containing the word "Simpson" in the name, department, job, and so on. The person records containing the word "Simpson" in areas of expertise, areas of interest, and talent skills are displayed lower in the order.

Related Topics
• What happens if I share information
• What’s the purpose of sharing person information

Finding Colleagues Using the Directory

Video
Watch: In this video tutorial you will learn how to locate colleagues in the directory, review their expertise and interests, see where they fit in your organization and their significance to you. Collaborate with your colleagues using tools you are already familiar with. The content of this video is also covered in text topics.

Procedure
Oracle HCM Cloud enables you to access information about any employee from your organization using the Directory. The information that you see depends on your security access. Use the following procedure to find your colleagues using the Directory and view their information.

To find a colleague:
2. Enter the person name, department, job, phone, email address or any other contact information and press Enter.
3. Click the person name to view the hierarchy details including the manager and peers. You can also view other information about a person such as areas of expertise, and areas of interest on the person’s Public Information page.

4. Click the View in Organization Chart icon to graphically view where the person belongs in your organization. You can also view the hierarchy level of the person’s manager.

5. Click any person name in the hierarchy to view that person’s organization chart.

6. Click the View More Details icon in the employee card of the person to view their direct reports.

Related Topics
- Person-Record Keyword Searches

How You Create and Display Vacancies
You create and display vacancies in the organization chart. You can access the organization chart from the My Team or Directory work areas.

To Create a Vacancy
- Select the person card in the organization chart under whom you want to create the vacancy.
- Click the Actions menu in the person card and select Vacancy > Create Vacancy.

The Position field is disabled by default on the Create Vacancy page, you can enable it through page configuration. If position synchronization is enabled, the position-related fields (Job, Department, and Location) automatically inherit the values from the selected position. The number of openings isn’t automatically updated against a hire; you must manually update it whenever the vacancy is filled. You typically use the Requisition field if you’re using a third-party recruiting application and want to enter a requisition number for the vacancy; This is an optional field and is used for information purposes only.

You can update and remove any vacancies from the organization chart. You can associate an existing vacancy with yourself by editing the vacancy and changing the manager name to yourself.

To Associate a Vacancy With a Requisition
- Click the vacancy in the organization chart that you want to convert.
- Click the Actions menu and select Create Requisition.

You can enter these details for a job requisition: Recruiting Type, Primary Location, Openings, Hiring Manager, and Recruiter. The requisition number and number of openings are automatically updated from the vacancy. When you create a job requisition for a vacancy, the job requisition appears in the organization chart and the vacancy is removed. The position information in the vacancy is lost. However, you can update the job requisition in Oracle Recruiting Cloud to make any further changes.

Person-Record Keyword Searches
The application searches for keywords in these person attributes: department, person number, job name and code, position name and code, person name, primary email, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, memberships, areas of interest, and areas of expertise.
Access to Restricted Information

Line managers can access their workers' restricted information such as competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations. Restricted information is included in search results when the searcher is a line manager. For example, if a line manager searches for a language skill and a match is found in any direct or indirect reports, that information appears in the search results. However, if the match is found in public information such as areas of expertise, it appears in the search results for any user.

Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied to ensure that the source and indexed values don't differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

Name and Keyword Search

The person search uses a person's full name instead of the first name or last name. The full name definition may vary for each country. For example, the full name definition for India may be First Name Middle Name Last Name, while the full name definition for Canada may be First Name Known As Last Name Suffix. You control the definition of the full name using the Manage Person Name Formats task in the Setup and Maintenance work area.

There is an implied OR condition between the search criteria when you use keyword search. When you use the name search, there is an implied AND condition between the search criteria. For example, when you enter Chris Harper in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results. Here are some examples:

<table>
<thead>
<tr>
<th>You enter...</th>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harper Chris</td>
<td>• Jenner, Chris</td>
</tr>
<tr>
<td></td>
<td>• Harper, Smith</td>
</tr>
<tr>
<td></td>
<td>• Chris, Ray</td>
</tr>
<tr>
<td></td>
<td>• Harper, Liam</td>
</tr>
<tr>
<td></td>
<td>• Harper, Chris</td>
</tr>
<tr>
<td></td>
<td>• Harper, Christopher</td>
</tr>
<tr>
<td>Chris Harper</td>
<td>• Jenner, Chris</td>
</tr>
<tr>
<td></td>
<td>• Harper, Smith</td>
</tr>
<tr>
<td></td>
<td>• Chris, Ray</td>
</tr>
<tr>
<td></td>
<td>• Harper, Liam</td>
</tr>
<tr>
<td></td>
<td>• Harper, Chris</td>
</tr>
<tr>
<td></td>
<td>• Harper, Christopher</td>
</tr>
<tr>
<td>Chris%</td>
<td>• Jenner, Chris</td>
</tr>
<tr>
<td></td>
<td>• Black, Chris</td>
</tr>
<tr>
<td></td>
<td>• Blake, Christopher</td>
</tr>
<tr>
<td></td>
<td>• Simpson, Christy</td>
</tr>
<tr>
<td></td>
<td>• Harper, Chris</td>
</tr>
<tr>
<td></td>
<td>• Harper, Christopher</td>
</tr>
<tr>
<td></td>
<td>• Christ Johnson</td>
</tr>
<tr>
<td>Chris</td>
<td>• Jenner, Chris</td>
</tr>
<tr>
<td></td>
<td>• Black, Chris</td>
</tr>
</tbody>
</table>
You enter...

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Harper, Chris</td>
</tr>
</tbody>
</table>

• *Chris Harper*
  • Harper, Chris

Chris and Harper
  • Harper, Chris

• *Chris" "Harper*
  • Harper, Chris

Date-Effective Search

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

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

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

How You Optimize Person Search Keywords

The Oracle Text index in the PER_KEYWEORDS table is utilized for person searches in Person Management work area, and the Directory. This index may become fragmented over a period of time and may cause a delay in displaying search results.

Why You Run a Process

You run the Optimize Person Search Keywords Index process to identify the fragmented indexes and help improve the overall search performance. To launch this process, use the Navigator > Scheduled Processes > Schedule New Process button in the search results table.

⚠️ **Note:** You must run the Update Person Search Keywords process first and then the Optimize Person Search Keywords process. You can’t schedule both processes simultaneously. If you schedule them at the same time, the second process will wait for the first process to complete before it starts.

When to Run the Process

You must run the Optimize Person Search Keywords Index process daily at times of low activity with the options, Full mode and the appropriate maximum time. The default time is 180 minutes. Although, if the process is run consistently over time it may take about 10-30 minutes only. You can decide the frequency of running the process based on the size of your customer base, system usage, database usage, data loaders used, index fragmentation, and schedule of the Update Person Search Keywords process.
How You Update Person Search Keywords

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

Process to Update Person Keywords

An event is raised when the value of a keyword attribute changes, for example, if a person acquires a language skill or a different phone number. In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table. Therefore, most changes are made in PER_KEYWORDS immediately and automatically. When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.

Why You Run the Process

Although most changes to the PER_KEYWORDS table are automatic, you need to run the Update Person Search Keywords process regularly because of these reasons:

- The automatic process doesn’t apply future-dated changes to the PER_KEYWORDS table.
- The process ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

How to Schedule the Process

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

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

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

Running the Update Person Search Keywords process refreshes the whole PER_KEYWORDS table. Therefore, you must run the process at times of low activity to avoid performance problems.

Related Topics

- Person-Record Keyword Searches

Worklist Transactions

Transactions may undergo an approval process before being applied to the database. A transaction typically passes through a chain of approvers, and remains in pending status until the final approver approves it. You can access all your transactions in the Worklist.

Pending Transactions

In your worklist, you can see transactions having these statuses:

- Initiated by you
• Approved but pending because one or more approvers in the approval chain haven’t approved yet
• Returned to the previous approver
• Reviewed by you as a notification recipient

This list also includes transactions routed to any approval groups that you belong to, even though you may not have approved the transactions. You can edit a pending transaction and do the same actions as those available in your worklist or notification summary. You can approve, reject, or return a transaction to the previous approver. You can also withdraw a transaction after initiating it. For example, you may want to withdraw a new hire transaction after initiating it, because of budget constraints.

Other Transactions
You can view transactions that you saved for later, and those that aren’t pending with you anymore, such as your approved and rejected transactions. You can suspend transactions that you have initiated or approved. A suspended transaction remains inactive until you resume the transaction. However, the suspend and resume actions are only available to users having the role BPMWorkflowSuspend.

FAQs for Directory

Why can't I see the roles that I want to request for myself?
Before you can request a role:
• The role must appear in a role mapping where it’s Self-requestable.
• At least one of your assignments must match all conditions, such as job and location, in the role mapping.

Typically, an application administrator or IT security manager creates and maintains role mappings.

Why does my keyword search not return the expected results?
Keywords are indexed attributes copied automatically from real-time person records to a keywords table and organized for efficient searching.

Additional Information:
• Keywords are copied only when your enterprise runs the keyword-refresh process in some cases.
  ◦ Depending on how frequently your enterprise runs this process, some recent changes to person records may not appear in keyword-search results.
• Keyword searches return a result only if you have security access to the information in which the keyword is found.
  ◦ For example, if your keyword search is procurement and a match occurs in a person’s competencies, the person appears in the search results only if you have security access to the person’s competencies information.
• You may be able to include an effective as-of date in the search criteria.
  ◦ When date-effective values such as work location are copied to the keywords table, their history isn’t copied.
  ◦ Only the latest change is stored in the keywords table.
When you enter both a keyword value and an effective as-of date, the search results include only those assignments for which the keyword value in the keywords table matches the keyword value on the effective as-of date.

Why do some people appear more than once in the search results?
Each search result relates to an assignment. Any person who has multiple assignments can appear more than once in the search results.
If the search criteria include assignment attributes, such as department or job, only those assignments that satisfy all the search criteria appear in the search results.

What’s a matrix chart?
A matrix chart displays dotted line relationships. The chart displays employees by manager type (for example, project manager, line manager, and functional manager) in a tabular format. It lists the employees as rows and manager types as columns.

What’s the difference between rejecting and withdrawing an approval transaction?
The effect of these actions is the same: the transaction is not applied to the database.
The difference is in who can do which action. Only the initiator of a transaction can withdraw the transaction. Only the current approver in the approval chain can reject the transaction.

Why was my saved transaction deleted?
This maybe because an identical transaction initiated for the person by another user was applied to the database.

What’s a calendar event message?
Calendar events identify dates, such as public holidays, on which the standard work patterns of a workforce are likely to be disrupted. Calendar event messages appear in the calendars of people affected by a calendar event. For example, a message about a Spanish public holiday could appear in the calendars of workers in Spain. Users can then understand why workers in Spain are unavailable on that date. You create calendar event messages using the Manage Planned Schedule tab in the Time Management work area.

Why didn’t a calendar event message appear in the calendars of all workers in an organization or location?
If you use work schedules and a person is affected by a calendar event, you must include the calendar event in the person’s primary schedule or schedule assignment as an exception to the schedule. Otherwise, even though the person belongs to the organization or location affected by the calendar event, no calendar event message appears.

Mass Updates

Mass Updates
You can update multiple employment records at the same time. For example, you can transfer all workers in a department to another department as part of a company reorganization. You go to My Client Groups > Mass Updates to do a mass update.
Assignment Changes
You can do a mass assignment change to update multiple assignments at once. The type of assignment changes include transfer, promotion, location change, position change, and others.

Assignments with Future Changes
Assignments you select in the mass update process can include future dated changes or changes that are effective on the same date as the mass update. You can include or exclude assignments with such future dated changes in the mass update. If you include assignments with future changes, you need to manually modify those records that have an effective date of change later than the mass update date to resolve any conflicts. For those assignments with changes that coincide with the date of the mass assignment change, the previous assignment changes are retained and the mass update is applied as the last change.

Related Topics
• Guidelines for Using Desktop Integrated Excel Workbooks

How You Make Mass Assignment Changes Using a Spreadsheet
If you need to update many assignments at once, you can download the data from the Verification page into a spreadsheet and make the changes offline.

You need to do these things before downloading the data to a spreadsheet:

• Install the Oracle ADF 11g Desktop Integration desktop client
• Enable the Trust access to the VBA project object setting in Microsoft Excel

If you added any attributes on the Changes page using personalization, they will be hidden when you download the data into a spreadsheet. You can display these attributes using Unhide feature in Microsoft Excel. You can check in and verify the data in the spreadsheet multiple times while making revisions. After the final check in, you need to go to the Review page to submit the changes.

Note: The mass update transaction gets automatically saved when you go to the Verification page. The current changes overwrite the earlier mass update in this process and you can’t restore the earlier changes even if you cancel the current transaction

Related Topics
• Guidelines for Using Desktop Integrated Excel Workbooks

Mass Update Statuses
After you do a mass update you can monitor the status of the update on the Manage Mass Updates page. Let’s see what each status means:

<table>
<thead>
<tr>
<th>Status</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiated</td>
<td>Mass update process has started. The status is automatically set to Initiated when you create a mass update.</td>
</tr>
</tbody>
</table>
### Status and What It Means

<table>
<thead>
<tr>
<th>Status</th>
<th>What It Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting user verification</td>
<td>Mass update changes are awaiting verification.</td>
</tr>
<tr>
<td>Awaiting user verification - exported</td>
<td>You exported the mass update rows to a spreadsheet.</td>
</tr>
<tr>
<td>Awaiting user verification - imported</td>
<td>You made changes to the spreadsheet and checked it in, it's awaiting verification.</td>
</tr>
<tr>
<td>Completed</td>
<td>Mass update is complete.</td>
</tr>
</tbody>
</table>

### Create a Mass Transfer

You want to transfer all workers from the Applications Support department to the Global Support department, within the same legal employer. Since there are many workers, you want to do a mass transfer.

Let's look at the steps to update the key values for this mass transfer.

#### Create a Mass Transfer

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

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

2. Click **Next**.

#### Select the Population

1. On the Create Mass Assignment Change: Population page, click **Select and Add** to open the Select and Add: Persons page.
2. Click **Advanced** to open the Advanced Search page.
3. Select the Applications Support department and click **Search**.
4. Select all the rows in the search results.
5. Click **OK** to display the search results in the Selected Persons region.
6. Click **Next**.

#### Enter the Changes

1. On the Create Mass Assignment Change: Changes page, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Global Support</td>
</tr>
</tbody>
</table>
2. Click **Next**.

### Verify the Changes

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

### Mass Legal Employer Change

You can change the legal employer for many workers at once using the Create Mass Legal Employer Change task in the Mass Updates work area. You can even transfer multiple workers from different legal employers to the same legal employer.

You can’t do a mass legal employer change in these scenarios:

- A future dated global transfer or global temporary assignment change exists for an employee.
- A pending transaction is awaiting approval that involves an assignment change for an employee.
- The work relationship start date of an employee is the same as the effective date of the mass legal employer change.

### Payroll Changes

You can automatically transfer a worker’s payroll frequency to their new employment record if the mass global transfer is within the same legislative data group.

### Performance Goal and Document Related Changes

You can move performance goals and documents to workers' new assignments with a legal employer. You can either move all of the workers’ performance goals and documents associated with all review periods, or you can select only current and future review periods and leave historic performance goals and documents associated with the inactive assignments. Here are a couple of things that happen during the mass legal employer change:

- If a worker has the same performance goals, goal plans, or performance documents associated with multiple assignments within the same work relationship, only the performance goals and documents associated with the primary assignment will be moved to the new assignment created by the Mass Legal Employer Change process. The performance goals and documents associated with secondary assignments will remain associated with those for further processing, canceling, or deleting.

- Eligibility profiles aren’t changed by the Mass Legal Employer Change process. So if the eligibility profiles used for performance goals and documents include inactive assignments then when the process runs and moves the performance goals and documents to the new assignment the inactive assignments will continue to be eligible for the same performance goals and documents. Eligibility profiles would need be updated to exclude the inactive assignments to prevent these being created again.
Salary Changes
You can copy the salary from the primary assignment of the previous work relationship if both these conditions are met:

- The legal employers involved in the transfer have the same legislative data group.
- The worker’s salary basis type is the user entered salary amount.

How You Select People
When you search for people to include in the mass update, the search results can display a maximum of 500 records. Remember to save the records each time on the Create Mass Legal Employer Change: Population page until you save the entire population. If any people you select already have work relationships in the new legal employer, they’re excluded during the mass update.

⚠️ Note: If you change the destination legal employer or effective date, or exclude future termination, the population you selected will be reset.

Mass Legal Employer Change Statuses
After you do a mass legal employer change you can see the status of the mass update on the Manage Mass Updates page.

<table>
<thead>
<tr>
<th>Status</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiated</td>
<td>The mass legal employer change process started. The status is automatically set to initiated when you create a mass legal employer change.</td>
</tr>
<tr>
<td>Awaiting mass update apply process</td>
<td>The mass legal employer changes are being applied.</td>
</tr>
<tr>
<td>Completed with errors</td>
<td>The mass legal employer change process completed with errors.</td>
</tr>
<tr>
<td>Completed with warnings</td>
<td>The mass legal employer change process completed with warnings.</td>
</tr>
<tr>
<td>Completed</td>
<td>The mass legal employer change process is complete.</td>
</tr>
</tbody>
</table>

Create a Mass Legal Employer Change
You want to transfer all workers from the Enterprise Applications business unit to the Technical Applications business unit. Both these legal employers belong to the same legislative data group. Since this legal employer change involves many workers, you want to do a mass update.
Let’s see the values you need to enter for this change.

Create a Mass Legal Employer Change
1. Click Navigator > Mass Updates to open the Manage Mass Updates page.
2. On the page, click the Tasks panel drawer, and then click Create Mass Legal Employer Change to open the Create Mass Legal Employer Change: Basic Details page and enter these values.
Select the Population
1. On the Create Mass Legal Employer Change: Population page, click **Select and Add** to open the Select and Add: Person dialog box.
2. Select the Enterprise Applications Business Unit legal employer, and then click **Search**.
3. Select the first row in the search results, and then press CTRL+A to select all the rows.
4. Click **OK** to display the search results in the Selected Persons region.
5. Click **Next**.

Enter the Changes
1. On the Create Mass Legal Employer Change: Changes page, and enter these values

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Salary</td>
<td>Yes</td>
</tr>
<tr>
<td>Building</td>
<td>New Pleasanton Campus</td>
</tr>
<tr>
<td>Move Performance Goals and Documents</td>
<td>Yes</td>
</tr>
<tr>
<td>Payroll Definition</td>
<td>No value</td>
</tr>
</tbody>
</table>

*Note:* When you transfer workers within the same legislative data group and don’t specify a value, the payroll definition is automatically copied to the new legal employer.

2. Click **Next**.

Review the Changes
1. On the Create Mass Legal Employer Change: Review page, review the current and proposed values.
2. Click **Submit**, and then click **OK**.
FAQs for Mass Updates

Can I make changes in the mass update after submitting it?
No, but you can save the mass update for later, and edit or delete the mass update any time before submitting it. You can manage mass updates in the Mass Updates work area.

What are the worker and assignment category tags in a mass update?
When you select a worker or assignment category in the Job Details section of the Create Mass Assignment Change page, you can see tags displayed next to the fields. These tags specify the legislations associated with the selected category and have the following meaning:

- Tags with + prefixes: Indicate that the selected category only applies to the legislations with the + prefix. For example, Tags +FR,+IE,+NZ indicate that the selected category only applies to France, Ireland, and New Zealand.
- Tags with - prefixes: Indicate that the selected category applies to all legislations except the legislations with the - prefix. For example, Tags -FR,-IE,-BR indicate that the selected category applies to all legislations except France, Ireland, and Brazil.
- Tags with + and - prefixes: If the tags contain a combination of + and - prefixes, the first prefix is considered and the rest is ignored. For example, Tags +FR,-IE,-BR indicate that the selected category only applies to France, Ireland, and Brazil.

How can I create a supplemental batch during a mass legal employer change?
You can create a supplemental batch after you have corrected the warnings or failures for workers added during the mass legal employer change. The count of the warnings or failures are displayed in the Manage Mass Updates page. You can create the batch from the Errors and Warnings dialog box that appears when you click the count link. You can use the supplemental batch to resubmit the mass legal employer change process for the workers who weren’t transferred because of warnings or failures. Additionally, you can add new workers when you create a supplemental batch.

Work Schedules

How an Employee's Schedule Is Determined
You can set up employee work time in different ways. An employee’s official schedule for a selected time period is automatically determined using this information:

- Current schedule or work hours
- Calendar events and work schedule resource exceptions
- Absence entries
Search Order

This flow chart shows you the order that the application searches for an employee’s schedule, before applying it to the assignment.

1. Published schedule
2. Employment work week
3. Primary work schedule
4. Standard working hours

Schedule found?

Assign the schedule to the employee

Schedule not found?

Assign default hours to the employee

Published Schedule (Workforce Management)

The published schedule is built using the employment work week, primary work schedule, or standard working hours for each employee. It can also be built using published schedules from other scheduling applications. The published schedule shows applicable calendar events and absences.

Employment Work Week

The employment work week is configured on the employee’s employment record. Schedules built from the work week also show applicable calendar events and absences.

Primary Work Schedule

The primary work schedule is linked to one of these levels. Schedules built from the work schedule also show assigned calendar events and resource exceptions, as well as applicable absences.

1. Primary assignment of the worker
2. Position
3. Job
4. Department
5. Location
6. Legal Employer
7. Enterprise

The process moves through the schedule hierarchy in the specified order and stops as soon as it finds a primary schedule. This example hierarchy shows primary work schedules associated with three levels.

Departments 1 and 3 don’t have primary schedules. So, the primary schedule at the enterprise-level applies to all those employees, with one exception. One employee in department 3 has a schedule for their primary assignment. That primary assignment schedule applies instead of the enterprise-level schedule. Department 2 has a primary schedule, and it applies to all employees in that department.

All employee schedules are affected by the calendar events and resource exceptions that exist in the primary work schedule, regardless of level. They’re also affected by any absences they report during the selected time period.

Standard Working Hours

The standard working hours are defined on the employee’s primary assignment. Schedules built with these hours also show applicable calendar events and absences.

Default Hours

If the application doesn’t find a schedule, it uses the default hours 8:30a to 5:00p.

Options to Configure Exceptions in Schedules

When you create a work schedule, you can include exceptions, such as public holidays or training sessions. You can then determine their affect on worker availability using that schedule. Include any of these exceptions in a work schedule:
<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Event</td>
<td>An exception for a single event on a single day, or across multiple days, such as a public holiday or training event.</td>
</tr>
<tr>
<td>Calendar Event Category</td>
<td>An exception for all calendar events that compose the event category, such as all UK public holidays.</td>
</tr>
<tr>
<td>Resource Exception</td>
<td>An exception for all of the workers associated with the work schedule. For example, all workers associated with the Night Shift schedule are scheduled to attend a training event and so aren’t available for their regular work.</td>
</tr>
</tbody>
</table>

**Work period** exceptions show on the Time work area calendar when either or both of these display options are enabled: Employment schedule and My schedule. **Off period** exceptions don’t.

## Create and Assign a Work Schedule

This example demonstrates how to create and assign a work schedule composed of shifts, patterns, and calendar events. The work schedule is for a support department in India and spans the calendar year. The department has 2 shifts during the week. The day shifts are Monday through Wednesday from 9:00 AM to 5:00 PM. The night shifts are Thursday and Friday from 5:00 PM to 1:00 AM. The work schedule starts with the day shift. All support workers are eligible for all public holidays. In this example, 1 support worker, Vijay Singh, is scheduled to attend the Advance Communication Skills training on February 8. His work schedule must indicate that he is unavailable on that day.

### Task Summary

Create and assign a work schedule using this basic process:

1. Create calendar events in the **Public Holiday** category.
2. Create the day and night shifts.
3. Create a weekly work pattern composed of the day and night shifts.
4. Create a work schedule composed of the weekly work pattern and a **Public Holiday** calendar event category exception.
5. Assign this work schedule to the **Support IN** department.
6. Assign this work schedule to Vijay Singh and add the training calendar event exception, indicating that he is unavailable during the training.

### Prerequisites

Make sure that these tasks are complete. The tasks are in the Setup and Maintenance work area, Workforce Deployment offering, Workforce Information functional area.

1. Ensure that the geographic hierarchy that you created for your enterprise contains a country node for **India**. Use the Manage Geographic Trees task to confirm that the country node exists or create it.
2. Ensure that the **Support Workers** eligibility profile exists and identifies all workers in your support department. Use the Manage Eligibility Profiles task to confirm that they profile exists or create it.
Creating Calendar Events
Complete this task in the Setup and Maintenance work area, Workforce Deployment offering, using the Workforce Information functional area.

1. In the Workforce Information section, click Manage Calendar Events.
2. On the Manage Calendar Events page, click Create.
3. On the Create Calendar Event page, complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the public holiday, such as Gandhi Jayanti</td>
</tr>
<tr>
<td>Category</td>
<td>Public Holiday</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date when the public holiday starts, such as October 2 12:00 AM</td>
</tr>
<tr>
<td>End Date</td>
<td>The date when the public holiday ends, such as October 2 11:59 PM</td>
</tr>
<tr>
<td>Short Code</td>
<td>A code to identify the public holiday, such as GANJAY</td>
</tr>
<tr>
<td>Hierarchy Type</td>
<td>Geographic</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>The geographic hierarchy that you created for your enterprise, such as Enterprise Locations</td>
</tr>
</tbody>
</table>

4. In the Coverage section that displays the selected geographic hierarchy, expand the hierarchy and select the India node.
5. Click Include.
6. Click Submit.
7. On the Confirmation dialog box, click OK.
8. To add other calendar events, repeat steps 2 through 7.
9. Click Done.

Creating Shifts

1. In the Workforce Information section, click Manage Work Shifts.
2. Create the 2 shifts by completing these steps twice.
   a. On the Manage Work Shifts page, Create icon menu, select Create Time Shift.
   b. On the Create Time Shift dialog box, complete the fields for 1 of the shifts, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Day Shift Value</th>
<th>Night Shift Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Day Shift</td>
<td>Night Shift</td>
</tr>
<tr>
<td>Start Time</td>
<td>09:00 AM</td>
<td>05:00 PM</td>
</tr>
<tr>
<td>Duration</td>
<td>8 Hours</td>
<td>8 Hours</td>
</tr>
<tr>
<td>Shift Detail Type</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
c. Click **Save and Close**.

3. On the Manage Work Shifts page, click **Done**.

**Creating a Workday Pattern**

1. In the Workforce Information section, click **Manage Workday Patterns**.
2. On the Manage Work Workday Patterns page, click the **Create** icon menu, select **Create Time Workday Pattern**.
3. On the Create Time Workday Pattern dialog box, complete the fields, as shown in this table:

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

4. Add the 2 workday pattern details by completing these steps twice.

   a. In the Workday Pattern Details section, click the **Add Row** icon.

   b. Complete the fields for 1 of the patterns, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Day Shift Value</th>
<th>Night Shift Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Day</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>End Day</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

5. Click **Save and Close**.

6. On the Manage Work Workday Patterns page, click **Done**.

**Creating a Work Schedule**

1. In the Workforce Information section, click **Manage Work Schedules**.
2. On the Manage Work Schedules page, click **Create**.
3. On the Create Work Schedule page, complete the general fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Work Schedule for Support</td>
</tr>
<tr>
<td>Category</td>
<td>Work</td>
</tr>
<tr>
<td>Type</td>
<td>Time</td>
</tr>
<tr>
<td>Effective From Date</td>
<td>January 1 of the current year</td>
</tr>
<tr>
<td>Effective To Date</td>
<td>December 31 of the current year</td>
</tr>
</tbody>
</table>
4. Add the pattern by completing the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Name</td>
<td>Weekly Work Pattern</td>
</tr>
</tbody>
</table>

5. Add the exception by completing the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Calendar event category</td>
</tr>
<tr>
<td>Name</td>
<td>Public holiday</td>
</tr>
</tbody>
</table>

6. Add the **Support_Workers** eligibility profile.
7. Click **Submit**.
8. On the Manage Work Schedules page, click **Done**.

**Assigning the Work Schedule to a Department**

1. In the Workforce Information section, click **Manage Work Schedule Assignment Administration**.
2. On the Manage Work Schedule Assignment Administration page, search for and click **Work Schedule for Support**.
3. On the Edit Work Schedule Assignment Administration: Work Schedule for Support page, in the Resource Assignments section, click the **Add Row** icon.
4. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Type</td>
<td>Department</td>
</tr>
<tr>
<td>Name</td>
<td>Support IN</td>
</tr>
<tr>
<td>Start Date</td>
<td>January 1 of the current year</td>
</tr>
<tr>
<td>End Date</td>
<td>December 31 of the current year</td>
</tr>
<tr>
<td>Primary</td>
<td>Yes</td>
</tr>
</tbody>
</table>

5. Click **Submit**.
6. On the Confirmation dialog box, click **OK**.
7. On the Manage Work Schedule Assignment Administration page, click **Done**.

**Modifying the Work Schedule of a Worker**

1. Click **Navigator > Person Management**.
2. On the Person Management: Search page, search for and click the worker, such as **Vijay Singh**.
3. On the Tasks panel tab, click **Manage Work Schedule Assignment**.
4. On the Manage Work Schedule Assignment page, click the **Add Row** icon.
5. Complete the fields in the Schedules section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Work Schedule for Support.</td>
</tr>
<tr>
<td>Start Date</td>
<td>January 1 of the current year</td>
</tr>
<tr>
<td>End Date</td>
<td>December 31 of the current year</td>
</tr>
<tr>
<td>Primary</td>
<td>Yes</td>
</tr>
</tbody>
</table>

6. In the Exceptions section, click the **Add Row** icon.
7. Complete the fields, as shown in this table:

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

8. Click **Submit**.

**Related Topics**
- Work Schedule Types

**FAQs for Work Schedules**

**What's a primary work schedule?**
Schedule that the application uses to determine the worker’s availability.

Only primary schedules determine worker availability. For example, you want to assign two schedules for different time periods to a worker’s primary assignment. If you want those schedules to determine the worker’s availability for those time periods, you must select both schedules as primary. You manage work schedules using the **Manage Work Schedule Assignment** task in the Person Management work area.

If you assign only a single work schedule, that schedule automatically determines worker availability.

**When do calendar events affect workers?**
When you include that event as an exception in a work schedule and assign it as a primary work schedule to the worker’s assignment. However, if no work schedule exists for the worker’s assignments, then the calendar events that cover the worker’s location or department apply.
How do I change exceptions in work schedules for individual workers?

When you assign a schedule to a worker using the Manage Work Schedule Assignment page, you can change how the exceptions affect that worker’s availability. For example, you added a calendar event as an exception that affects all workers. A particular worker must remain available to handle critical customer queries, so you change the worker’s availability for that exception.
8 Base Pay

Overview

View and adjust workers’ base salary. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes. They can:

- View a worker’s salary basis and change it, subject to security and other constraints.
- Adjust base pay by adjusting:
  - Amount
  - Percentage
  - Compa-ratio
  - Other salary factors
- View salary history, as well as graphical analysis of current and new salary.

To manage base pay, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Dashboard - Manager Resources</td>
</tr>
<tr>
<td></td>
<td>My Client Groups - Person Management</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>My Client Groups - Person Management</td>
</tr>
</tbody>
</table>

Examples of Full-Time Salary and Annualized Salary Calculations

The following scenarios illustrate how the application calculates annual salary and annualized full-time salary. The scenarios use standard working hours, worker’s working hours and full-time equivalent (FTE), salary amount, annualization factor, and frequency.

This topic lists the common assumptions and calculations for the following three scenarios:

- Worker’s hours equal the standard working hours
- Worker’s hours are less than the standard working hours
Worker’s hours are greater than the standard working hours

Assumptions

All of the examples assume the following:

• Legal employer standard working hours per week is 40.
• Currency is US dollars (USD).
• FTE is calculated by dividing the worker’s working hours per week by the standard working hours per week.
• Annualization factor for hourly workers represents the Legal Employer Standard Working Hours per Week x Weeks per Year.

The standard working hours, working hours, and FTE come from the worker’s employment record. You can view it using the Manage Employment task in the Person Management work area. The annualization factor and the frequency for the salary come from the salary basis associated with the worker’s salary record.

Worker’s Hours Equal the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker’s standard working hours</td>
<td>40</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
<tr>
<td>Annualization factor</td>
<td>2080</td>
</tr>
<tr>
<td>Base Pay</td>
<td>15 USD</td>
</tr>
</tbody>
</table>

Calculation:

• Annual salary: 15 x 2080 = 31,200 USD
• Annualized full-time salary: 15 x (2080/1) = 31,200 USD

Worker’s Hours Are Less Than the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker’s standard working hours</td>
<td>20</td>
</tr>
</tbody>
</table>
Calculation Input | Value
---|---
FTE | 0.5

Annualization factor | 2080

Base Pay | 15 USD

Calculation:
- Annual salary: 15 x 2080 x 0.5 = 15,600 USD
- Annualized full-time salary: 15 x (2080/1) = 31,200 USD

The following table shows the inputs for this scenario for a monthly rate:

Calculation Input | Value
---|---
Worker's standard working hours | 20

FTE | 0.5

Annualization factor | 12

Base Pay | 5,000 USD

Calculation:
- Annual salary: 5,000 x 12 = 60,000 USD
- Annualized full-time salary: 5,000 x (12/0.5) = 120,000 USD

The following table shows the inputs for this scenario for an annual rate:

Calculation Input | Value
---|---
Worker's standard working hours | 20

FTE | 0.5

Annualization factor | 1

Base Pay | 50,000 USD

Calculation:
- Annual salary: 50,000 x 1 = 50,000 USD
- Annualized full-time salary: 50,000 x (1/0.5) = 100,000 USD
Worker’s Hours Are Greater Than the Standard Working Hours

The following table shows the inputs for this scenario for an annual rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker’s standard working hours</td>
<td>48</td>
</tr>
<tr>
<td>FTE</td>
<td>1.2</td>
</tr>
<tr>
<td>Annualization factor</td>
<td>1</td>
</tr>
<tr>
<td>Base Pay</td>
<td>20,000 USD</td>
</tr>
</tbody>
</table>

Calculation:
- Annual salary: is $20,000 \times 1 = 20,000\ USD$
- Annualized full-time salary: $20,000 \times (1/1.2) = 16,667\ USD$

Related Topics
- How Many Salary Bases to Create

Edit Salaries in the Integrated Workbook

You can edit salary data using an integrated Microsoft Excel workbook. You can edit salaries, but you can’t change the associated salary bases.

Download Salaries

You download salaries in the Compensation work area.

1. In the tasks panel tab, click Download Salaries.
2. Select the relevant download parameters. Be sure to include the latest salary start date and local currency if you plan to upload your changes.
   
   The currency shown comes from the input value of the payroll element associated with the salary basis.
3. Click Preview Download to view the data that matches your download parameters.
4. Click Prepare in Workbook to generate the workbook and populate it with the data that matches your download parameters.

Edit Salary Data

You can change values in cells with a white background. The workbook adds a symbol in the Changed field to mark the rows where you changed values in one of the white cells. If you enter a new base salary, you also need to enter a new salary
start date. Make sure that the new base salary and current base salary are different. Otherwise, you get errors when you upload your changes.

The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have less than five active salary components, only the column cells for those components have values. If you have more than five active salary components, the workbook includes columns and values for only the first five components.

Upload Salary Changes

When you’re done, click Upload. The application uploads only those rows that are marked as Changed. It ignores any changes in cells without a white background.

⚠️ Caution: Don’t select the Upload and then immediately download option when prompted during an upload. The data that you uploaded immediately downloads back into the workbook, hiding any errors that occurred during the upload.

Validate Changes

Open the Manage Salaries page, then search for and select a person whose salary you updated.

Resolve Errors

The upload process automatically updates the Status field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application.
2. Sets the workbook row status to Upload Failed
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click Update Failed in the Status field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

- Guidelines for Using Desktop Integrated Excel Workbooks
- What's the difference between Export to Excel and desktop integration for Excel
- Set Up Desktop Integration for Excel
- Troubleshoot Desktop Integration for Excel

FAQs for Base Pay
What's a salary basis?

The salary basis determines the period in which base pay is expressed, specifies whether salaries can be itemized with components, and identifies any associated grade rate for salary validation. A worker's salary basis generally remains constant, however it can change. For example:

- A worker changes from an individual contributor to a manager. The salary basis changes from hourly to annual.
- A union contract amendment mandates itemizing a worker’s pay rate. The hourly salary basis that does not use components changes to an hourly salary basis that uses components.

How can I edit multiple salaries at one time?

Use the integrated workbook in the Compensation work area to view and edit salaries for multiple persons. Follow these steps:

1. Use the Export Salaries task to set your export parameters.
2. Click Prepare in Workbook in the Edit Preview section to generate the workbook.
3. Make your edits in the workbook.
4. Upload your changes into the application database.
9 Individual Compensation

Overview

Award variable compensation to individual workers outside of the regular compensation cycle, such as a spot bonus, education reimbursement, or car allowance. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- Award ad hoc bonuses, allowances, and other compensation.
- Initiate and update recurring payments.
- View a worker’s compensation history to help determine if an award is deserved and to view past award amounts.

To manage Individual compensation, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Dashboard - Manager Resources</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>My Client Groups - Person Management</td>
</tr>
</tbody>
</table>

Examples of Salary Growth Rate Calculations

The following examples show how the application calculates the average annual salary growth rate and the cumulative salary growth rate. The examples show calculations over three and five year periods. This information appears in compensation history and in salary analytics.

Scenario

The following table shows the salary change information for both examples.

<table>
<thead>
<tr>
<th>Year</th>
<th>Starting Salary</th>
<th>Ending Salary</th>
<th>Annual Growth Rate</th>
<th>Three Year Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>38,000</td>
<td>41,000</td>
<td>7.89</td>
<td>NA</td>
</tr>
<tr>
<td>2011</td>
<td>41,000</td>
<td>43,000</td>
<td>4.88</td>
<td>NA</td>
</tr>
</tbody>
</table>
### Average Annual Growth Rate

Average annual growth rate is the statistical average of the total percentage increase from January to December of each full year. To calculate this average, the application sums the annual growth rate of all the years in the calculation period and divides by the number of years.

The following table shows the calculation using the scenario data.

<table>
<thead>
<tr>
<th>Period</th>
<th>Average Annual Growth Rate</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three year</td>
<td>8.05</td>
<td>((13.95+10.20+0.00)/3 = 8.05)</td>
</tr>
<tr>
<td>Five year</td>
<td>7.38</td>
<td>((7.89+4.88+13.95+10.20+0.00)/5 = 7.38)</td>
</tr>
</tbody>
</table>

### Cumulative Growth Rate

Cumulative growth rate is the total percentage of salary change over the period. To calculate the cumulative rate, the application:

1. Determines the amount of the salary increase for the period by subtracting the period starting salary from the period ending salary
2. Calculates the cumulative rate by dividing the salary increase amount by the starting salary

The following table shows the calculation using the scenario data.

<table>
<thead>
<tr>
<th>Period</th>
<th>Cumulative Growth Rate</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three year</td>
<td>25.58</td>
<td>((54,000-43,000)/43,000 = 25.58)</td>
</tr>
<tr>
<td>Five year</td>
<td>42.10</td>
<td>((54,000-38,000)/38,000 = 42.10)</td>
</tr>
</tbody>
</table>
FAQs for Individual Compensation

Why does the history displayed on the Manage Compensation page differ from what I see in compensation history?

The Prior Compensation section on the Manage Compensation page shows the full individual compensation history for a worker for the past five years. Compensation history includes only individual compensation for the payroll elements that you add to the Manage Compensation History page.

What's the difference between Other Compensation and Prior Compensation sections?

The Other Compensation section on the Manage Compensation page includes all current individual compensation awards for a worker, including active recurring plans. Current awards are those whose effective end dates are greater than or equal to the current date.

The Prior Compensation section shows up to five years of previous compensation. Recurring awards appear as prior compensation when their end date is earlier than the current date. These plans are view-only.
Personal Contributions

Overview

View your compensation information and manage your enrollments and contributions for company-sponsored savings and charitable plans using the **Me > Personal Information** work area. Use the Compensation tab to:

- View information about your salary and any company stock grants.
- Open total compensation statements, which consolidate your compensation information for easy review and printing. The type of information that statements contain varies depending on how your company configures compensation. Not all users can view compensation statements.

Use the Compensation tab on the More Information dialog box to complete the following tasks. To open the dialog box, click the **More Information** icon on your image:

- Manage personal contributions
- View total compensation statements
Workforce Deployment Analysis

Overview of Analyze Workforce Deployment

The Analyze Workforce Deployment business process enables line managers and human resource (HR) specialists to view statistical and employment-related information for individual workers and the workforce. HR specialists and line managers can perform actions for individual workers.

The business activities of this process are:

- **Generate Workforce Deployment Intelligence**
  In the Workforce Predictions work area, line managers view system-generated predictions of high performance and voluntary termination for their direct and indirect reports. In the Worker Predictions work area, line managers perform what-if analyses.

- **Evaluate Workforce Deployment Performance**
  OTBI provides the ability to report on HCM and can deliver such reports using dashboards, Infolets, or email. Alternatively you can embed them into the HCM Cloud transactions.

Generate Workforce Deployment Intelligence

How High Performance is Predicted

System-generated performance predictions can help you to validate your own assessments of employees. Performance predictions, in conjunction with voluntary-termination predictions, enables you to avert the voluntary terminations that are the most damaging to the enterprise.

Settings That Affect Performance Predictions

Performance predictions are based on data from all employees. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining (ODM) and predicts voluntary termination. You can manage predictive models using the Manage Predictive Models task in the Setup and Maintenance work area.

You can perform data collection either for the enterprise or for a specified manager assignment. However, the data-mining stage of the process is always performed on all of the latest available data.

The process has no default schedule. You are recommended to run the process weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high; otherwise, run the process at least monthly. Schedule the process at a time of low system activity to avoid performance impacts.
How Performance Is Predicted

Performance is predicted as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes, such as:
   - Time in grade
   - Current job
   - Latest salary increase
   - Performance rating
   - Number of sickness absences in the previous year

   The attributes of interest include those most likely to show a correlation with high performance. In some cases, simple values, such as manager name are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

   Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a model for predicting employee performance.

3. ODM makes performance predictions for current employees according to the predictive model. For example, if performance is high in a particular job and grade, current employees with that job and grade may have a greater likelihood of high performance than workers in other jobs and grades.

   Each prediction relates to an employee assignment. For employees with multiple assignments, multiple performance predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

Performance predictions are available for both teams and individual assignments.

- Team predictions show the average predicted performance for the team. They also show, for each factor, such as current performance rating or length of service, the percentage of employee assignments for which the factor is the main contributory factor.

- Individual predictions show the predicted performance for the employee assignment. The values of relevant factors, such as previous performance, and the relative contribution that each factor makes to the prediction, also appear.

How Voluntary Termination Is Predicted

People are often the enterprise’s greatest asset, and their loss can be expensive for many reasons. System predictions can make you aware of potential issues and their likely causes so that you can address them. For example, if an employee whose performance is predicted to be high is also identified as likely to leave voluntarily, you can consider changes to relevant factors, such as grade or location, to reduce the risk. Voluntary predictions appear on the Workforce Predictions work area.

Settings That Affect Prediction of Voluntary Termination

Predictions of voluntary termination are based on existing data from all work relationships. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining and also predicts performance.

You can perform data collection either for the enterprise or for a specified manager assignment; however, the data-mining stage of the process is always performed on all of the latest available data.
The process has no default schedule. You are recommended to run the process:

- Weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high
- At least monthly if the volume of transactions isn’t high

Schedule the process at a time of low system activity to avoid performance impacts.

**How Voluntary Termination Is Predicted**

Each prediction is a percentage value, which is the predicted probability of voluntary termination. It is calculated as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes. The attributes include, for example, time in grade, current job, latest salary increase, performance rating, and number of sickness absences in the previous year. The attributes of interest include those most likely to show a correlation with voluntary termination. In some cases, simple values, such as manager name, are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

  Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a predictive model that captures the differences between employees who have terminated voluntarily and all other employees.

3. ODM makes predictions of voluntary termination for current employees according to the predictive model. For example, if voluntary termination is high in a particular job and department, current employees with that job in that department may have a greater risk of voluntary termination than workers in other jobs or departments.

Each prediction relates to an employee assignment. For employees with multiple assignments, multiple voluntary-termination predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

These predictions enable you to identify employees at highest risk of voluntary termination. The absolute risk of voluntary termination for the high-risk group may still be low in percentage terms, but relative to that for other groups of employees, the risk is high.

Voluntary-termination predictions are available for both teams and individual assignments:

- Team predictions show the average risk for the team. They also show, for each factor, such as current salary or grade, the percentage of employee assignments for which the factor is the main risk factor.

- Individual predictions show the predicted risk for the employee assignment. The values of relevant factors, such as current salary, and the relative contribution that each factor makes to the prediction, also appear.

**Predictive Attributes**

Voluntary-termination and performance predictions are based on specific attributes from a worker’s personal, employment, absence, compensation, and talent management information, most of which are held at the assignment level. This topic identifies the relevant attributes by their factor names, as they appear in predictive analytics, and explains how each attribute value is calculated or derived.

**Person Attributes**

Person attributes are described in the following table.
### Employment Attributes

Employment attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current legal employer</td>
<td>Legal employer from the assignment</td>
</tr>
<tr>
<td>Current enterprise</td>
<td>Current enterprise</td>
</tr>
<tr>
<td>Worker category</td>
<td>Worker category from the assignment</td>
</tr>
<tr>
<td>Length of service</td>
<td>Worker’s enterprise service in years</td>
</tr>
<tr>
<td>Time since last probation ended</td>
<td>Number of months since completion of the worker’s latest probation period</td>
</tr>
<tr>
<td>Current assignment status</td>
<td>Status of the assignment</td>
</tr>
<tr>
<td>Legislation</td>
<td>Legislation of the legal employer</td>
</tr>
<tr>
<td>Current or most recent manager</td>
<td>Line manager of the assignment</td>
</tr>
<tr>
<td>Time with current manager</td>
<td>Number of months the worker has been reporting to the current manager</td>
</tr>
<tr>
<td>Factor Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Average time with each manager</td>
<td>Average number of months the worker has reported to each manager in all employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of manager changes in the last 5 years</td>
<td>Number of manager changes in all of the worker’s employee assignments in the last 5 years</td>
</tr>
<tr>
<td>Normal start time</td>
<td>Work start time from the assignment</td>
</tr>
<tr>
<td>Normal end time</td>
<td>Work end time from the assignment</td>
</tr>
<tr>
<td>Normal working hours</td>
<td>Expected number of hours worked each day</td>
</tr>
<tr>
<td>FTE</td>
<td>Sum of the FTE values from the worker’s current employee assignments</td>
</tr>
<tr>
<td>Current grade</td>
<td>Grade from the assignment</td>
</tr>
<tr>
<td>Time in current grade</td>
<td>Number of months between the last grade change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Average time in each grade</td>
<td>Average number of months between grade changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of different grades</td>
<td>Number of different grades for this worker in all past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Number of grade changes in the last 2 years</td>
<td>Number of different grades for this worker in all employee assignments in the last 2 years</td>
</tr>
<tr>
<td>Current department</td>
<td>Department from the assignment</td>
</tr>
<tr>
<td>Time in current department</td>
<td>Number of months between the last department change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Number of different departments</td>
<td>Number of different departments for this worker in all past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Average time in each department</td>
<td>Average number of months between department changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Current job</td>
<td>Job from the assignment</td>
</tr>
<tr>
<td>Time in current job</td>
<td>Number of months between the last job change or the start of the assignment and the current date</td>
</tr>
<tr>
<td>Average time in each job</td>
<td>Average number of months between job changes for all of the worker’s past and current employee assignments in the enterprise</td>
</tr>
<tr>
<td>Current position</td>
<td>Position from the assignment</td>
</tr>
</tbody>
</table>
### Workforce Deployment Analysis

#### Absence Attributes
Absence attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of leave taken in the previous year</td>
<td>Number of days’ leave taken in the previous year</td>
</tr>
<tr>
<td>Total enterprise leave</td>
<td>Number of days’ leave taken since the start of the worker’s enterprise service</td>
</tr>
<tr>
<td>Time since last leave</td>
<td>Number of months between the latest leave and the current date</td>
</tr>
<tr>
<td>Amount of sickness in the current year</td>
<td>Number of sickness days taken in the current year</td>
</tr>
<tr>
<td>Amount of sickness in the previous year</td>
<td>Number of sickness days taken in the previous year</td>
</tr>
<tr>
<td>Increase in sickness over previous year</td>
<td>Percentage change in the number of sickness days for the year to date compared with the previous year</td>
</tr>
<tr>
<td>Time since last sickness</td>
<td>Number of months between the latest sickness day and the current date</td>
</tr>
<tr>
<td>Number of sickness absences in the previous year</td>
<td>Number of distinct periods of sickness in the previous year</td>
</tr>
<tr>
<td>Increase in sickness absences over previous year</td>
<td>Percentage change in the number of sickness absences for the year to date compared with the previous year</td>
</tr>
</tbody>
</table>

#### Compensation Attributes
Compensation attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latest salary change</td>
<td>Latest salary change as a percentage of the annualized salary before the change</td>
</tr>
<tr>
<td>Reason for latest salary change</td>
<td>Reason for the latest salary change</td>
</tr>
</tbody>
</table>
### Talent Management Attributes

Talent management attributes are described in the following table.

<table>
<thead>
<tr>
<th>Factor Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current performance self rating</td>
<td>Worker’s current self-assessment for the assignment</td>
</tr>
<tr>
<td>Current manager performance rating</td>
<td>Manager’s current overall performance rating for the worker’s assignment</td>
</tr>
<tr>
<td>Difference between manager rating and self rating</td>
<td>Difference between the manager’s overall rating of the worker and the worker’s self-assessment</td>
</tr>
<tr>
<td>Current appraising manager</td>
<td>Name of the manager performing the evaluation of the worker</td>
</tr>
<tr>
<td>Previous manager performance rating</td>
<td>Manager’s previous overall performance rating for the assignment</td>
</tr>
<tr>
<td>Current performance rating</td>
<td>Current overall performance rating for the assignment</td>
</tr>
<tr>
<td>Change in current performance</td>
<td>Current overall performance rating for the assignment expressed as a percentage of the rating for the previous year</td>
</tr>
</tbody>
</table>

### Performance Percentages in Predictive Analytics

All performance predictions appear as percentages. To arrive at the percentage value, the predicted numeric rating from the rating model is expressed as a percentage of the maximum numeric rating in that rating model.

For example, if the predicted performance for an employee assignment is numeric rating 4, the employee’s predicted performance is presented as:

- 57.14%, if the maximum numeric rating is 7
- 80%, if the maximum numeric rating is 5
Mapping Performance Predictions to Rating Levels

In performance documents, you rate employee performance using rating levels from a rating model. To map a predicted performance percentage to a rating level, you must first map it to the numeric rating in the relevant rating model. Once you have the numeric rating, you can identify the associated rating level.

In the following example, a predicted performance of 71.5% is between numeric ratings 3 and 4, and between Good and Very Good in the rating levels.

<table>
<thead>
<tr>
<th>Performance Percentage</th>
<th>Numeric Rating</th>
<th>Rating Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>1</td>
<td>Poor</td>
</tr>
<tr>
<td>40%</td>
<td>2</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>60%</td>
<td>3</td>
<td>Good</td>
</tr>
<tr>
<td>80%</td>
<td>4</td>
<td>Very Good</td>
</tr>
<tr>
<td>100%</td>
<td>5</td>
<td>Outstanding</td>
</tr>
</tbody>
</table>

In the following example, a predicted performance of 71.5% is between numeric ratings 5 and 6, and between 10 and 14 in the rating levels.

<table>
<thead>
<tr>
<th>Performance Percentage</th>
<th>Numeric Rating</th>
<th>Rating Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.5%</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>25%</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>37.5%</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>50%</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>62.5%</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>75%</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>87.5%</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>100%</td>
<td>8</td>
<td>20</td>
</tr>
</tbody>
</table>
How Predictive Model Accuracy is Measured

You can view latest accuracy information for the voluntary-termination and performance predictive models on the Manage Predictive Models page.

Predictive Model Accuracy

The predictive models for both voluntary termination and performance are built using a subset (approximately 70%) of the available historical data. Oracle Data Mining (ODM) tests the accuracy of the models by making voluntary-termination and performance predictions for the remaining held-aside data (the 30% not used in building the predictive models). ODM then compares its predictions with actual outcomes.

The percentage accuracy of the predictive model:

- For voluntary-termination predictions, derives from the percentage of correct predictions made for all employees, both those who leave the enterprise and those who remain.
- For performance predictions, is a measure of how closely the predicted values match the actual values.

Workforce Modeling

Workforce Modeling provides managers and human resource (HR) specialists with the ability to plan, model, and execute workforce changes using a graphical tool. You base your model on either the manager hierarchy or the position hierarchy. The hierarchy starts with the top manager or position and includes assignments, positions, vacancies and requisitions. They report to the top manager or position, either directly or indirectly.

You can perform the following actions in the model:

- Promote
- Transfer
- Terminate
- Change manager
- Change location
- Add, change, inactivate, or delete positions
- Change position incumbents
- Create, change, or delete vacancies
- Create and edit Oracle Recruiting Cloud requisitions (dependent on security settings)

You can move people with or without direct reports either by dragging and dropping or using the table view and selecting a new manager. You can create vacancies in the model, and on final approval they’re added to the database. Review the impact of your planned changes using the analytics. The application uses the modeled changes to create effective dated transactions when the model is approved. Vacancies are not effective dated, therefore vacancy changes or new vacancies appear when the model is approved.

Perform position changes by dragging and dropping on the graphical hierarchy. For example, drag and drop a position including its incumbents on the hierarchy and then move an incumbent to a different position. Use the position synchronization and position defaulting features.
For the position hierarchy, you can perform the following actions for positions:

- Create
- Edit
- Inactivate or delete
- Undo inactivate
- Undo delete
- Move positions in the model
- Convert a vacancy into an open position
- Create and edit requisitions

Security and Access

Line managers and HR specialists have access to Workforce Modeling. You can access all the Workforce Modeling features if you are either an author or the top manager of a model. To access the model as the top manager, the author of the model can give you access in the model properties. HR representatives can edit the model, and other approvers can open and view the model.

The following rules define who the default approvers are:

- If all the modeled changes occur within the top manager or position’s organization, then the approvers are the author’s HR Representative, the top manager’s manager and one level of manager approval above.
- In addition to the above rule, the manager who has authority to approve all the changes and one level above, are the approvers. These approvers are in addition to the author’s HR Representative and two levels above the top manager.
- If there are any changes outside the top manager or position’s hierarchy, then a further rule requires the manager who has authority to approve all the changes and the manager one level above to approve the model.

Any role with position related privileges, for example, create, edit, or delete positions, can perform position related actions in Workforce Modeling. For HR specialists, this feature is ready to use automatically.

Statuses

The following table describes the Workforce Modeling statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>A model is in the Draft status:</td>
</tr>
<tr>
<td></td>
<td>• Until it’s submitted</td>
</tr>
<tr>
<td></td>
<td>• Once it’s edited</td>
</tr>
<tr>
<td></td>
<td>• If an approver edits a model during approval</td>
</tr>
<tr>
<td></td>
<td>• If the author withdraws a pending model</td>
</tr>
<tr>
<td>Pending</td>
<td>A model is in the Pending status after it’s submitted from the Draft, Rejected, or Returned modes.</td>
</tr>
<tr>
<td>Rejected</td>
<td>A model is in the Rejected status if an approver rejects it.</td>
</tr>
<tr>
<td>Returned</td>
<td>A model is in the Returned status if an approver requests more information.</td>
</tr>
</tbody>
</table>
Status | Description
--- | ---
Completed | A model is in the Completed status after it’s approved by all approvers. At that point, transactions are created and assignments are updated with effective dated changes.

Effects of Reorganizing

Once the newly created workforce model is approved, the relevant assignments are updated using the model effective date. Currently, notifications aren’t issued for this. Role provisioning security occurs automatically if it’s set up accordingly. For example, if the line manager role is enabled for autoprovisioning, then a user who becomes a manager is given the line manager role automatically.

> Note: Vacancy changes appear on the date the model is approved, irrespective of the model effective date because vacancies are not effective dated in HCM Cloud.

Workforce Modeling Analytics

The Workforce Modeling analytics appear on the Overview and Modeling pages for the modeled changes as of the model effective date. Use the analytics to view the impact of proposed changes to headcount, salary costs, predictive effectiveness, count of alerts and changes.

Once a model is complete, the analytics are frozen as of the date of the final approval. The Projected Worker Cost and Projected Headcount analytics don’t include information for any worker assignments that the model doesn’t have the security to see.

The following table describes the Workforce Modeling analytics.

<table>
<thead>
<tr>
<th>Analytic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changes</td>
<td>Shows the number of worker assignments with changes.</td>
</tr>
<tr>
<td></td>
<td>For example, if you move an assignment to a new manager and then to another manager and then make a job change, then all these actions count as one change.</td>
</tr>
<tr>
<td>Projected Worker Cost</td>
<td>Displays the change in the total cost for the top manager as a result of modeling. The analytic on the Overview page only displays the cost change due to modeling. The analytic on the Modeling page displays the cost due to modeling and the change due to modeling.</td>
</tr>
<tr>
<td></td>
<td>Cost is based on the annualized salary and changes are only included if you have security access to the assignment.</td>
</tr>
<tr>
<td></td>
<td>For example, you can move a worker to report to you and update their salary. However, if you don’t have security access to view the worker’s salary, then any change you make to that worker’s pay in the workforce model isn’t included in the analytic.</td>
</tr>
<tr>
<td>Projected Headcount</td>
<td>Displays the change in the headcount for the top manager as a result of modeling based on the workforce measurement value of headcount.</td>
</tr>
<tr>
<td>Alerts</td>
<td>Displays the number of outstanding alerts for the model.</td>
</tr>
</tbody>
</table>
The two types of alerts are:

- Validation Error: occurs when the Oracle Fusion assignments are updated on final approval and issues exist
- Assignment Change: occurs if an assignment has changed in the live application since modeling started and that change has not yet been resolved using the synchronization dialog

Predictive Effectiveness displays the factors that were changed during modeling and that made the greatest impact on performance and voluntary termination predictions.

Predictive Effectiveness displays the impact of modeling on individual workers, managers, or on the top manager. View the factors that have the largest impact on the change in the prediction as a result of modeling and whether that impact was positive or negative. The analysis represents the impact the attribute had on the change in the prediction and whether the attribute caused the prediction to increase or decrease.

Predictive Effectiveness = Predicted performance * (100% - Predicted voluntary termination) / 2

---

### Workforce Modeling Actions

You can access Workforce Modeling actions from the following locations:

- Main page
- Worker assignment node
- Vacancy node
- Workers region in the table view
- Terminated workers region in the table view
- Vacancies region in the table view
- Holding area
- Position node
- Positions region in the table view
- Requisitions node
- Requisitions region in the table view

This table lists and describes the actions available on the Modeling page:

<table>
<thead>
<tr>
<th>Action</th>
<th>Where Available</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Worker Assignment</td>
<td>Worker Assignment Node, Chart and Holding area</td>
<td>Move or edit the modeled attributes for a worker assignment. If you change a worker’s manager, then the worker moves to that manager’s hierarchy.</td>
</tr>
<tr>
<td>Create Vacancy</td>
<td>Worker Assignment Node, Chart and Holding area</td>
<td>Create a vacancy node as a placeholder for an open headcount.</td>
</tr>
<tr>
<td>Edit Vacancy</td>
<td>Vacancy Node, Chart and Holding area</td>
<td>Edit the vacancy.</td>
</tr>
<tr>
<td>Action</td>
<td>Where Available</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Delete Vacancy</td>
<td>Vacancy Node, Chart and Holding area</td>
<td>Delete the selected vacancy node. You must confirm the deletion to remove the node from modeling.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> You cannot delete vacancies imported from Oracle Taleo Recruiting Cloud Service.</td>
</tr>
<tr>
<td>Edit Assignment</td>
<td>Modeling page</td>
<td>Select a worker assignment node in the chart, holding area, or the table and edit the assignment.</td>
</tr>
<tr>
<td>Undo and Redo</td>
<td>Modeling page</td>
<td>Select this option to undo and redo a change.</td>
</tr>
<tr>
<td>Edit Model Properties</td>
<td>Modeling page</td>
<td>Edit the model details.</td>
</tr>
<tr>
<td>Synchronize</td>
<td>Modeling page</td>
<td>Run the synchronization process to update any information that has changed in the live application.</td>
</tr>
<tr>
<td>Terminate</td>
<td>Worker Assignment Node</td>
<td>Select a termination action, reason and notification date.</td>
</tr>
<tr>
<td>Cancel Termination</td>
<td>Terminated Worker Assignment Node</td>
<td>Select this option to cancel the termination within the model.</td>
</tr>
<tr>
<td>Export to Excel</td>
<td>Terminated Workers, Workers, and Vacancies, in the table view</td>
<td>Select this option to open and save the information in a spreadsheet.</td>
</tr>
</tbody>
</table>

This table lists and describes the actions available on the Modeling page for positions:

<table>
<thead>
<tr>
<th>Action</th>
<th>Where Available</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Child Position</td>
<td>Modeling page, Position node</td>
<td>Available for existing positions only. Enter basic position information. The application creates the new position in the position hierarchy and that position reports to the position from which the action initiated.</td>
</tr>
<tr>
<td>Edit Position</td>
<td>Modeling page, Position node</td>
<td>Edit the position and if required, the parent position details. If you edit a parent position, then you also have the option to move or leave the children with the parent position.</td>
</tr>
<tr>
<td>Inactivate Position</td>
<td>Modeling page, Position node</td>
<td>Available for positions that do not have active or suspended incumbents as of the effective date or a date in the future.</td>
</tr>
</tbody>
</table>
### Considerations for Terminating Workers in Workforce Modeling

You can use workforce modeling to create or edit a model to terminate workers. You can use existing models to terminate workers, and these models can also include other planned updates, such as promotions and transfers. Any workers you terminate will display as grey in the model. The terminations affect the analytics which you can use to review the impact of your planned terminations. The termination changes are only applied to the transactional system when the model is approved.

#### Canceling Terminations

Cancel a termination, if, for example, you realize that the planned termination could harm the business or you terminated a worker as part of a planned restructure, which has been canceled. Canceling a termination also affects the analytics.

#### Analyzing Terminations

The impact of the termination or canceled termination in terms of headcount, salary cost and predicted effectiveness is calculated and displayed, providing you with immediate feedback on your modeled changes.

#### Terminating Managers with Subordinates

If you terminate a manager with subordinates, then you can decide to terminate them also. If you cancel this termination, then you must cancel the termination of each subordinate separately. If you decide not to terminate the subordinates, then the subordinates are assigned to the terminated manager’s manager. If you cancel the termination, then you must manually move each reassigned subordinate back to their original manager.

### How Synchronization Works in Workforce Modeling

Planning workforce changes can take time, and changes can occur in the live transactional application that affect the model. Therefore, Workforce Modeling runs a synchronization process that checks the attributes in the live transactional application against the attributes in the model, and makes some automatic updates, and other recommendations. The synchronization...
process ensures the assignment and vacancy information in Workforce Modeling are up to date with any changes made in
the live transactional application.

The synchronization process runs automatically when you:

- Open the model for editing.
- Open the Review page.
- Open the Approval page.

You can also run the process manually from the Actions menu on the Modeling page.

**Synchronization Rules**

When you open a saved model, the synchronization process runs automatically to review all application changes that occur
after the date the model was last updated, and on or before the model effective date. If there are any changes in the live
application, for example, one of the workers in the model has been transferred and another worker has been terminated, then
the application synchronizes each attribute using the following rules:

- If the live application has changed but the model hasn’t, then automatically update the model.
- If the same attribute has changed in the model and in the live application, and if the live application changes are
  irreversible, then automatically update the model with the live application change. Irreversible changes include any
  moves in or out of the hierarchy, such as, hires, transfers, and terminations.
- If the same attribute has changed in the model and in the live application, and you can update the live application
  change, then the application recommends the modeled value. If this scenario occurs, then the application
  recommends the model changes for all attribute updates.

**Synchronization Alerts**

When you reopen a saved model, and the synchronization process finds changes in the live transactional application and in
the model, then you can review the automatic updates and recommendations in the Alerts page. If you confirm the changes,
the application updates the analytics and the information in the hierarchy.

**FAQs for Generate Workforce Deployment Intelligence**

**What happens if I save a what-if analysis?**

The attribute values that you change for a worker while performing a what-if analysis are saved as a worker plan using a plan
name that you supply. View the associated predictions later or rerun a saved scenario by selecting the plan from the list of
saved worker plans for a worker on the What-if Analysis tab. You can also select a worker plan from the list of all worker plans
for all workers.

> **Note:** The voluntary termination and performance predictions in a worker plan are those that applied when you
last saved the what-if analysis. To update the predictions, you must rerun the scenario.

When you select a worker plan, only the attributes in the saved what-if analysis appear; attributes that you didn’t change in
the original what-if analysis aren’t saved. To make further changes to the scenario (for example, to include different attributes),
you must reset the scenario and then perform the what-if analysis.

Saving a what-if analysis has no effect on the worker’s records. If you want to make any of the changes permanent (for
example, promoting a worker), then you must do so explicitly.
What happens if I apply a what-if analysis?
The effect of any changes made to the what-if-analysis attributes on current performance and voluntary termination predictions is calculated, and new predictions appear. The attribute changes are not applied to the worker’s records; however, you can save the what-if analysis as a worker plan for later retrieval.

What’s a worker plan?
A worker plan is a saved what-if analysis for a worker. When you view worker plans, you display a list of all saved what-if analyses for all workers. Each worker plan is identified by the name you supplied when you saved the what-if analysis. The predicted performance and voluntary termination values for each scenario are those that applied when you last saved the what-if analysis. To update the predictions, you must rerun the what-if scenario.

If you have never saved a what-if analysis for a worker, then the list of worker plans includes no entry for that worker.

What happens if I move or edit a worker assignment in Workforce Modeling?
If you move a worker assignment in the organization chart, the Manager and Department fields in the Edit Assignment dialog box default to the new manager and the new manager’s department.

All the other fields show their most recent values as of the model effective date. The current values are secured to ensure that people with no access to a worker’s grade and salary can’t view them.

Why can’t I inactivate a position in Workforce Modeling?
Because the position you want to inactivate either has an active or suspended incumbent as of the effective date or in the future. To inactivate a position with incumbents, you can either move incumbents out of the position or terminate the incumbents and then inactivate the position. If you implement a model with inactivated positions, then this position will not appear in the HCM position hierarchy.

How can I convert a vacancy into a position?
Open the vacancy to edit, and review the default values for the position. The option to convert a vacancy into a position is available only if the parent of the vacancy is an incumbent of a position hierarchy. The position headcount defaults from the number of openings, therefore, if the vacancy has unlimited openings, then the position headcount defaults to 1. You create the new position and it reports to the parent position.

FAQs for Evaluate Workforce Deployment Performance

When do changes to my organization hierarchy appear?
The hierarchy is based on completed transactions. Incomplete transactions, such as transfers or new hires awaiting approval, don’t appear. However, terminations that are withheld from publication until a specified date are evident in your organization hierarchy from the termination date rather than the publication date.

Where do promotion-readiness values come from?
A person’s readiness for promotion is based on the time since the person’s last promotion relative to the average time between promotions for people in the same job or position and grade. For example, if the average time between promotions for people in the same job and grade is 5 years, a promotion appears due if the time since a person’s last promotion is within range of 5 years. If the gap is outside this range, the promotion appears as either not due or overdue. Additional factors, such
as performance and length of service, determine whether you decide to promote a person whose promotion appears due or overdue.

**Why do some people appear more than once in my organization hierarchy?**

Each entry in the hierarchy is an assignment. If a person has more than one assignment, and each assignment reports to a manager in the hierarchy, then the hierarchy contains an entry for each of the person’s assignments.

**Can I terminate a manager's whole organization in Workforce Modeling?**

Yes, when terminating a manager you can select an option to also terminate his or her subordinates. The default behavior is not to terminate a manager’s subordinates, but to automatically reassign them to the terminated manager’s manager.

**Can I update a worker's salary in Workforce Modeling?**

Yes. Edit the assignment and select the Promotion or Location Change action. You can update a worker’s salary information if the worker has a current salary record, their assignment does not have a grade ladder and if their salary basis does not use components or payroll rates.

**Can I terminate a worker outside the top manager's hierarchy in Workforce Modeling?**

You can search for workers, place them in the holding area, and then terminate them. Predefined approval rules ensure that the appropriate manager approves such changes. For example, if you terminate a worker who does not directly report to you, then the first manager in the hierarchy who you both report to, must approve the termination. The approver’s manager must also approve the change.

**Can I cancel a termination in Workforce Modeling?**

Yes you can cancel a termination. For example, if you terminate a worker in the model and then cancel that termination, there is no change in the model. You can select to cancel the termination within the model without affecting the live transactional system.
## HCM Cloud Mobile App

### Oracle HCM Cloud Mobile App

Use the Oracle HCM Cloud mobile app to access HCM cloud features on your mobile device. You can use the mobile app on Android and iOS smartphones and tablets. You use the same URL you use on your desktop to connect to the HCM Cloud application on your mobile. You only see information that’s relevant to your role when you sign in.

If you open the app on your phone, you can access only the mobile responsive features. If you open it on a tablet, you can access both classic and mobile responsive features.

> **Note:** To access the mobile responsive home page, your administrator needs to set the layout to News Feed. If this isn’t set, the home page won’t adjust to the size of your device. For more information on how to enable the News Feed home page and mobile responsive features, see the document (Document ID 2399671.1) on My Oracle Support [https://support.oracle.com](https://support.oracle.com).

The mobile app uses the preferred language you select in the desktop application. On the desktop application, you select the language for the current session on the login screen. The only exception to this is the language used by the mobile app which could be different since it’s determined by the device language.

### Configure the Oracle HCM Cloud Mobile App

The steps to install and configure the app on Android and iOS mobile devices are the same, except where indicated:

1. Download Oracle HCM Cloud Mobile from the app store or play store. On Android devices, you have to download and manually install the mobile app.
2. Accept the end user license agreement (EULA) to proceed to the sign in page. From there on, you will have the same user experience on the desktop and mobile.
3. Paste the entire HCM Cloud application URL on the Getting Started page. For example:
   - HCM Desktop URL: https://abcd100-fa.us.abc.com

   You can change this later if you want to. Alternatively, go to Settings and change the primary account host name.

> **Note:** If you can’t access the application using the mobile app, try accessing it using the mobile browser. If you still can’t sign into the mobile app, contact your HR department.

4. If you want to add more accounts, tap Settings on the Getting Started page and do these things:
   - Swipe the Multiple Accounts option to On.
   - Add the environment URLs for the other accounts.
FAQs for HCM Cloud Mobile

Can I use any third-party mobile device management software with Oracle HCM Cloud Mobile?

Your organization can use enhanced security measures like securing the app using a third-party Mobile Device Management (MDM) tool. However, there is no support for this and organizations are responsible for the related outcome if they use any third-party tool or mechanism.

What's the difference between accessing Oracle HCM Cloud on the mobile app and through the mobile browser?

The main difference is that you can use the mobile app for offline learning.
A tablet provides the same functionality and experience as in the desktop. Both mobile responsive and classic pages and menu items are available.
Chapter 13

13 HR Service Requests

Create and Edit HR Service Requests

As a Human Resources (HR) Help Desk Agent, you can create a service request (SR) on behalf of an employee.

To Create an HR Service Request

1. On the Home page, click Navigator > Help Desk > HR Service Requests to open the HR Service Requests page.
2. Click Create Service Request to open the Create Service Request page.
3. Enter a title for the SR.
4. Search and select the account associated with the SR.
5. In the Primary Point of Contact field, search and select the primary contact for the account that you selected.

![Note:](To save the SR, the account and the primary contact you select must be related to each other. Depending on your selection, these things happen:

- If you select an account, only contacts of that account are listed for search.
- If you don’t select an account, all contacts are available for search.

6. Select the severity level of the request. You can select the Critical check box to include the SR in the reporting metrics about critical SRs.
7. Search and select a category for the SR, such as Benefits or Payroll.
8. Search and select the product that’s associated with the SR.
9. Search and select the queue to which the SR is assigned.
10. In the Assigned To field, search and select the resource that owns the service request and appears as the primary member of the SR team.
11. Select a channel type through which the SR is sent to customer support.
12. Provide details for your SR in the Service Request Details field.
13. Click the Manage Attachments icon to attach any supporting documentation.
14. Click Save and Continue to continue creating the SR or click Save and Close.
15. If you click Save and Continue, the Edit Service Request page is displayed. Do steps 2 through 4 in the section Editing an HR Service Request.

To Edit an HR Service Request

1. On the Home page, click Navigator > Help Desk > HR Service Requests to open the HR Service Requests page.
2. Click the reference number for the service request that you want to edit. The Edit Service Request page is displayed.

You can use the different tabs in the page to add more information about the SR. For example, you can do these actions:

- Add additional contacts, such as your manager or HR representative from the Contacts tab.
- View existing, or add new team members to the SR resolution team from the Team tab.
Collaborate with other individuals or groups using the Oracle Social Network from the Social tab.

Search, view, and link related articles that can help with SR resolution from the Linked Articles tab.

View changes to the application data, such as the business objects that were created, updated, and deleted from the Audit History tab.

3. Click the Actions menu button to perform tasks. For example, you can do these actions:

- Obtain the URL for the SR by selecting the Get Link action.
- Assign a queue to the SR by selecting the Run Queue Assignment action.
- Update and refresh the SR milestones by selecting the Update Service Request Milestones action.

4. Click Save and Close.

Related Topics

- Use Knowledge with Service Requests

Create and Edit an HR Help Desk Queue

You can create queues to group sets of human resource (HR) Help Desk service requests (SRs). You associate active queues with the SRs to let queue members have a view of the SRs assigned to the queue.

To Create an HR Queue

1. On the Home page, click Navigator > Help Desk > HR Queues to open the HR Queues page.
2. Click Create Queue.
3. Enter the name and description for the new queue.
4. Select the Enabled check box if you want the queue to be active.

> Note: A queue must be enabled for SRs to be assigned to it. If an active queue is disabled, the SRs currently assigned to the queue aren’t affected. However, you can’t assign new SRs to the queue.

5. Click the distribution option based on how you want the SRs to be assigned to the queue. For example, you can click Manual if you want SRs to be manually assigned to the queue. Alternatively, you can click Automatic to automatically assign SRs to resources in the queue.
6. Click Save and Continue.
7. Click the Resources tab to add resources to the queue.
8. Click Add Resources.
9. Search and select the resource that you want to add.
10. Click Apply. Repeat steps 9 through 10 until all resources that you want are added to the queue.
11. Click OK.
12. Click the Resource Teams tab to add resource teams, such as HR Specialists to the queue.
13. Click Add Resource Teams.
14. Search and select the resource team that you want to add.
15. Click Apply. Repeat steps 14 through 15 until all resource teams that you want are added to the queue.
16. Click OK.
17. Click Save and Close.
To Edit an HR Queue

1. On the Home page, click **Navigator > Help Desk > HR Queues** to open the HR Queues page.
2. In the list, click the queue name that you want to edit.
3. Update the queue as required.
4. Click **Save and Close**.

To Delete an HR Queue

You can only delete a queue that contains no open SRs. Before deleting a queue, make sure that all the assigned SRs are closed or are reassigned to another queue.

1. On the Home page, click **Navigator > Help Desk > HR Queues** to open the HR Queues page.
2. In the list, click the queue name that you want to delete.
3. From the **Actions** menu button, select **Delete Queue**, and then click **Yes**.

Create Resources and Resource Teams for HR Help Desk Queues

You can add individual resources or teams such as Human Resource (HR) Specialists to a queue.

To Add Resources to a Queue

1. On the Home page, click **Navigator > Help Desk > HR Queues** to open the HR Queues page.
2. Click the queue name that you want to add resources to.
3. Click the **Resources** tab.
4. Click **Add Resources**.
5. Search and select the resource that you want to add.
6. Click **Apply** to add the resource to the queue.
7. To add more resources to the queue, repeat steps 5 through 6 until all members are added.
8. Click **OK**.

To Add Resource Teams to a Queue

1. Click the **Resource Teams** tab.
2. Click **Add Resource Teams**.
3. Search and select the resource team that you want to add.
4. Click **Apply** to add the resource team to the queue.
5. To add more resource teams to the queue, repeat steps 3 through 4 until all resource teams are added.
6. Click **OK**.
7. Click **Save and Close**.
Delegate an Employee to Create Service Requests on Behalf of a Manager

As a manager, you can delegate your role to any of your employees in your hierarchy to log Human Resources (HR) Service Requests on your behalf.

An administrator must first enable delegation for you so that you can delegate your role.

To delegate an employee to enter your service requests:

1. Sign in as a manager.
2. Navigate to Roles and Delegations.
3. On the Edit User Account Details page, scroll to the Roles and Approvals Delegated to Others region.
4. On the Roles Delegated to Others tab, click the Create icon.
5. Enter the Role Name. Your administrator should give you the role name when they enable the delegation for you.
6. Enter Start and End Dates.
7. Search for and select your delegate employee in the Delegated To drop-down list.
8. Click Save.

Your delegated employee can now create service requests on your behalf. When creating the service request, the employee can choose anyone in your employee hierarchy in the Point of Contact field of the service request.

Related Topics

- Setting Up Delegation for Users to Create HR Service Requests on Behalf of Others

FAQs for HR Service Requests

How can I reassign an HR service request?

You can reassign an active service request (SR) from the Summary tab in the Edit Service Request page. In the Assigned To list, search and select the person you want to reassign the SR.

How do I use smart text in HR service requests?

You can set up smart text when you start working on a service request (SR). Smart text helps you to quickly send a response or update without retyping text every time you work on an SR.

On the Edit Service Request page, click the arrow on the Restore Pane. To insert smart text, select the field where you want to insert smart text. Then, do one of these actions:

- Enable the SmartText icon for the field and search and select the smart text that you want to insert.
- Click the SmartText tab in the Restore Pane and search and select the smart text that you want to insert.
Related Topics

- How You Use SmartText in Service Requests
Glossary

abstract role
A description of a person’s function in the enterprise that’s unrelated to the person’s job (position), such as employee, contingent worker, or line manager.

assignment
A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker’s or nonworker’s role in a legal employer.

balancing segment
A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

beneficiary
A person or organization designated to receive benefits from a compensation plan on the death of the plan participant.

business unit
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

calendar event
A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

ceiling step
Highest step within a grade that a worker may progress to.

chart of accounts
The account structure your organization uses to record transactions and maintain account balances.

compa-ratio
Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.

contact relationship
A relationship between an employee, a contingent worker, or a nonworker and another person, who may be an emergency contact, a dependent, or a beneficiary.

contingent worker
A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.
**cost center**
A unit of activity or a group of employees used to assign costs for accounting purposes.

**country holding company**
A legal entity that acts on behalf of several divisions within an enterprise, and is the legal employer in a country.

**date-effective object**
An object with a change history. Professional users can retrieve the object as of a current, past, or future date.

**department**
A division of a business enterprise dealing with a particular area of activity.

**dependent**
A person who has a personal relationship with a participant in a compensation plan whom the participant designates to receive coverage through the plan.

**disability organization**
An organization with which employee disabilities are registered.

**division**
A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

**effective as-of date**
A date used for filtering search results for date-effective objects. For objects that match the search criteria, the search results include the physical record in effect on the specified date.

**effective end date**
For a date-effective object, the end date of a physical record in the object’s history. A physical record is available to transactions between its effective start and end dates.

**effective sequence number**
A number that identifies the order of changes made to a date-effective object in one day. On any day, the physical record with the highest number is the current record.

**effective start date**
For a date-effective object, the start date of a physical record in the object’s history. A physical record is available to transactions between its effective start and end dates.
emergency contact
Any of a person's contacts whom the enterprise can call in an emergency.

enterprise
An organization having common control over one or more legal entities.

FTE
Abbreviation for full-time equivalent, such as .5 for half-time work.

global header
The uppermost region in the user interface that remains the same no matter which page you're on.

global name
A person's name in a format and language that can be understood throughout a multinational enterprise.

grade
A component of the employment model that defines the level of compensation for a worker.

grade rate
Used to define pay values for grades in a legislative data group.

HCM data role
A job role, such as benefits administrator, associated with instances of HCM data, such as all employees in a department.

headcount
A work measure recorded on an assignment. By default, the headcount of an organization is the total of primary assignments in primary work relationships.

HR
Abbreviation for human resource.

job
A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

job role
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.
LDAP

**legal employer**
A legal entity that employs people.

**legal entity**
An entity identified and given rights and responsibilities by commercial law through the registration with country’s appropriate authority.

**legal reporting unit**
The lowest level component of a legal structure that requires registrations. Used to group workers for the purpose of tax and social insurance reporting or represent a part of your enterprise with a specific statutory or tax reporting obligation.

**legislative data group**
A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

**local name**
A person’s name in a format and language that are readily understood by users in a single country but that may not be understood throughout a multinational enterprise.

**logical record**
One or more physical records that constitute a date-effective object.

**node**
A logical term that refers to the data in a specific data source such as a product-specific table or a storage entity. A tree management solution must have established the data source.

**nonworker**
A person, such as a volunteer or retiree, who is not engaged in the core businesses of the enterprise or legal employer but who may receive payments from a legal employer. Any person who has a nonworker work relationship with a legal employer is a nonworker.

**party**
A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

**payroll statutory unit**
A legal entity registered to report payroll tax and social insurance. A legal employer can also be a payroll statutory unit, but a payroll statutory unit can represent multiple legal employers.
pending worker
A person who will be hired or start a contingent worker placement and for whom you create a person record that's effective before the hire or start date.

performance document
Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

person number
A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person's work and person-to-person relationships.

person type
A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the assignment level.

physical record
A single record, with effective start and end dates, in the history of a date-effective object. Each physical record is a row in a database table.

position
A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

rating model
A scale used to measure the performance and proficiency of workers.

role
Controls access to application functions and data.

role mapping
A relationship between one or more roles and one or more assignment conditions. Users with at least one assignment that matches the conditions qualify for the associated roles.

role provisioning
The automatic or manual allocation of a role to a user.

salary basis
Defines validation and payroll details for worker base pay. It identifies the currency and period of the quoted base pay and the factor used to annualize base pay. It optionally identifies components or rates used to itemize salary adjustments and the grade rate used to validate salary.
set
Classified and grouped reference data that organizational entities share.

tree
Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

tree structure
A set of guidelines or a framework applied to create a tree, include data, version a tree, or access a tree.

work relationship
An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

worker type
A classification selected on a person's work relationship, which can be employee, contingent worker, pending worker, or nonworker.