

# **R11i, Implementing Oracle HRMS**

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# Preface

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## Profile

### Before You Begin This Course

Before you begin this course, you should have the following qualifications:

- Thorough knowledge of Oracle Release 11i Navigation
- Working experience with Salary Administration practices within your organization
- Working experience with Total Compensation Elements setup for US Payroll
- Working experience with Total Compensation Elements for Human Resources practices within your organization
- Working experience with Compensation entry and reporting practices at your organization
- Working experience of Human Resource Departments
- Working experience with Total Compensation Elements setup for HR and Total Compensation Elements setup for UK or US Payroll
- Thorough knowledge of HRMS Business requirements at your organization
- Working experience with *Oracle HRMS Applications R11i*

### Prerequisites

- Total View in Oracle HRMS - 14552GC10
- Understand your own organizations Human Resource business functions and procedures

### How This Course Is Organized

*R11i Implementing Oracle HRMS and Oracle Payroll (US)* is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

## Related Publications

### Oracle Publications

Title	Part Number
Using Oracle HRMS - The Fundamentals (US)	A73315-01
Managing Compensation and Benefits	
Using Oracle HRMS (US)	A77144-01
Implementing Oracle HRMS (US)	A75314-01
Using Oracle HRMS - The Fundamentals (UK)	A73289-01
Managing Compensation and Benefits	
Using Oracle HRMS (UK)	A73293-01
Implementing Oracle HRMS	A73313-01
Managing Compensation and Benefits Using Oracle HRMS (US)	A77144-01
Managing Total Compensation	
Managing People Using Oracle HRMS R11i (US)	A73314-01
Using Oracle HRMS-The Fundamentals R11i (US)	A73315-01
Implementing Oracle Self-Service Human Resources/SSHR	A73299-01
Customizing, Reporting and System Administration Using Oracle HRMS	A73296-01

### Additional Publications

- System release bulletins
- Installation and user's guides
- *read.me* files
- *Oracle Magazine*



# Typographic Conventions

## Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The <b><i>algorithm</i></b> inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: <code>debug.set ('I', 300);</code> Directory: <code>bin (DOS), \$FMHOME (UNIX)</code> Filename: Locate the <code>init.ora</code> file. Password: User <code>tiger</code> as your password. Pathname: Open <code>c:\my_docs\projects</code> URL: Go to <code>http://www.oracle.com</code> User input: Enter <code>300</code> Username: Log on as <code>scott</code>
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address ( <i>but</i> Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do <i>not</i> save changes to the database. For further information, see <i>Oracle7 Server SQL Language Reference Manual</i> . Enter <code>user_id@us.oracle.com</code> , where <i>user_id</i> is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish.  This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the <code>SELECT</code> command to view information stored in the <code>LAST_NAME</code> column of the <code>EMP</code> table.

Convention	Element	Example
Arrow	Menu paths	Select File—> Save.

Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

## Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	When-Validate-Item
Lowercase	Column names, table names	SELECT last_name FROM s_emp;
	Passwords	DROP USER scott IDENTIFIED BY tiger;
	PL/SQL objects	OG_ACTIVATE_LAYER (OG_GET_LAYER ( 'prod_pie_layer' ) )
Lowercase italic	Syntax variables	CREATE ROLE <i>role</i>
Uppercase	SQL commands and functions	SELECT userid FROM emp;

## Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select Invoice > Entry > Invoice Batches Summary.
2. (M) From the menu, select Query > Find.
3. (B) Click the Approve button.

### Notations :

(N) = Navigator

(M) = Menu

(T) = Tab

(I) = Icon

(H) = Hyperlink

(B) = Button

## Typographical Conventions in Help System Paths

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.
2. Under the General Ledger entry, expand Journals.
3. Under Journals, select Enter Journals.
4. Review the Enter Journals topic that appears in the document frame of the help system window.

## Getting Help

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.

### To display help for a current window:

1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.

3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help.

## **Searching for Help**

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's Back button to return to the list of titles and try another.

# **Work Structures**

## **Chapter 1**



# Work Structures

HRMS Release 11i

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### Module Overview

- This module covers the work structures contained in Oracle HRMS and how you can set them up to match your own business needs



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### Module Units

- Unit 1 - Overview of Enterprise Work Structures
- Unit 2 - Defining Common Data
- Unit 3 - Setting up Business Groups, Locations and Organizations
- Unit 4 - Representing Financial Report Structures
- Unit 5 - Representing Legal & Government Reporting Structures (US)
- Unit 6 - Representing Grades and their Relationship to Pay
- Unit 7 - Representing Jobs and Positions
- Unit 8 - Setting up Workers' Compensation (US)

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# Overview of Enterprise Work Structures

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### Unit Objectives

**At the end of this unit you should be able to:**

- **Recognize different types of enterprise business model and explain how to represent these in Oracle HRMS**
- **Identify the enterprise model that most closely resembles your own**
- **Describe the work structure components of the employee assignment and understand their use in Oracle HRMS**



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### Unit Overview

- Every enterprise has its own individual 'culture', which is reflected in the organization of work and the management of people within the enterprise
- Culture is also reflected in the reward systems, the business processes and the control systems that operate within the enterprise



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### Identifying Different Enterprise Models

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### **Oracle HRMS** **An Information Model**

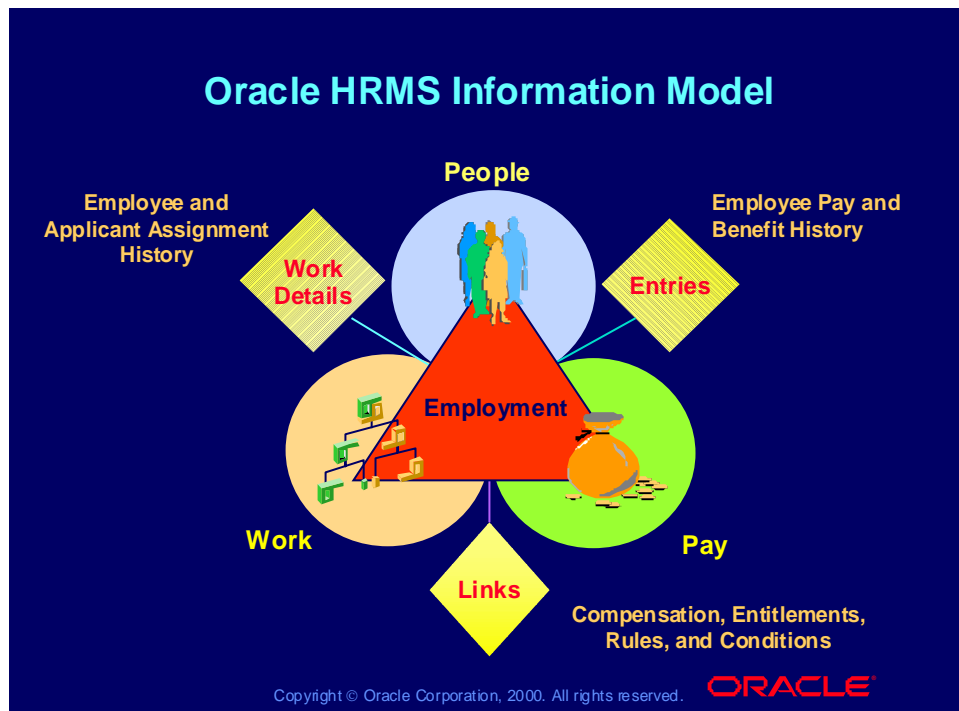
- **With Oracle HRMS you create an information model to represent your own enterprise**
  - **Work**
  - **Pay**
  - **People**
- **People are deployed and compensated using the model you setup**

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# Oracle HRMS Information Model

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### Typical Types of Enterprise

- To simplify this section we are going to consider three typical types of enterprise and their characteristics
  - Project Based
  - Rule Based
  - Hybrid

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### **Project Based Enterprise Characteristics**

- **Typical in consulting, construction, small manufacturing or software companies**
  - **Loosely structured operating groups**
  - **Rapidly changing structures in response to changing business opportunities**
  - **People are hired and deployed for their skills**
  - **Reward systems are usually personal**
  - **Individuals are usually more important than roles**

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### **Project Based Enterprise System Needs**

- **Flexibility to represent and change organizational structures and work groups**
- **Flexibility in defining and assigning roles to people**
- **Ability to show multiple activities**
- **Ability to define and manage competence-centric business processes**
- **Flexibility in the compensation management framework to handle individual compensation plans**

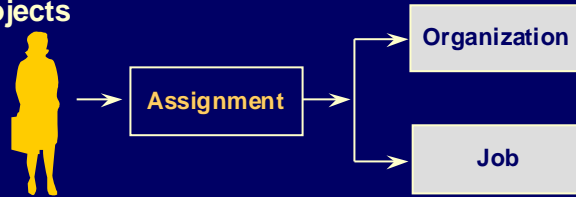
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### Project Based Enterprise Solution

**Consider using a combination of Organizations and Jobs for the flexibility you need.**

- Use Organizations for detailed reporting groups
- Use Jobs to define roles independent of any specific organization. Person changes organization but keeps the same job.
- Use Elements to record time spent on specific projects



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## Rule Based Enterprise Characteristics

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### **Rule Based Enterprise Characteristics**

- **Typical in Government agencies, Education, Health Care, Public Sector, and non-profit agencies**
  - **Highly structured operating groups**
  - **Posts exist independently of people**
  - **Positions are controlled, with detailed approvals for budgeting and reporting**
  - **Employees hired and assigned to specific positions**
  - **Rewards usually associated with the position**
  - **Roles usually more important than individuals**

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### **Rule Based Enterprise System Needs**

- **Ability to define and control positions independently of people**
- **Ability to manage some information about positions across organizations**
- **Ability to assign multiple people to one position or one person to many positions**

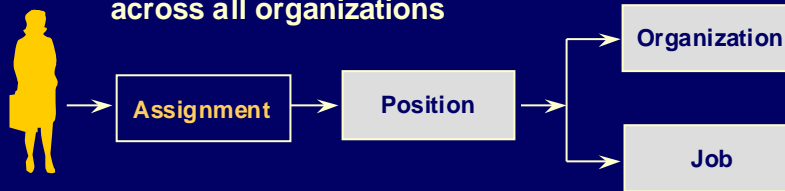
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### Rule Based Enterprise Solution

Consider using **Positions** to represent the detailed work structures you need

- **Positions enable more detailed management information and reporting than jobs alone**
  - Use Orgs to show departmental level information
  - Use Jobs to represent common types shared across all organizations



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### **Hybrid Enterprise Characteristics**

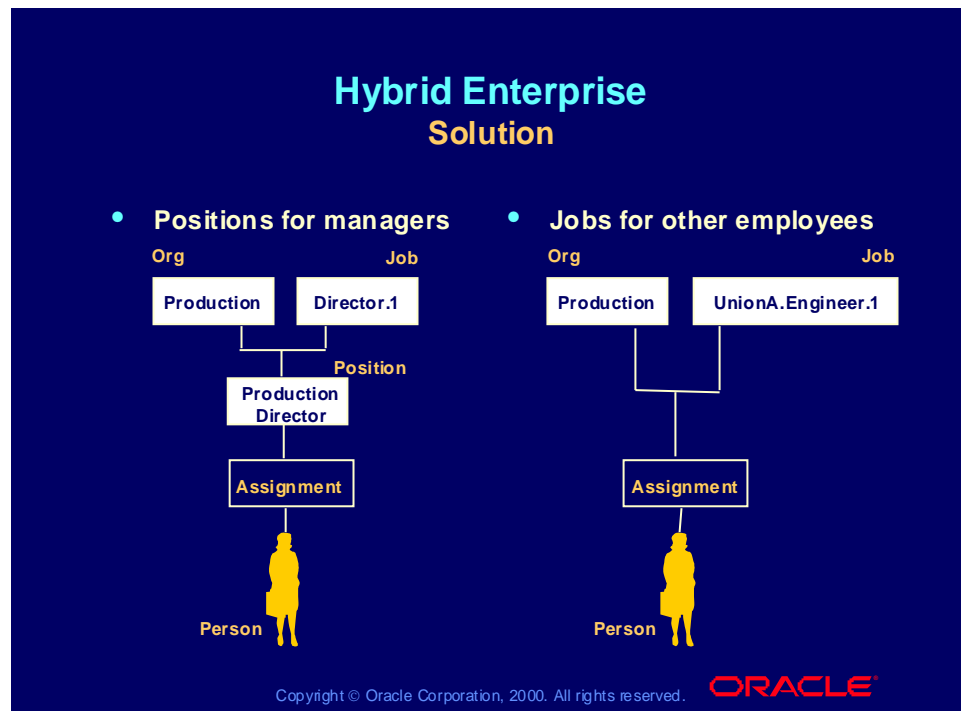
- **Typical in large manufacturing, or larger commercial enterprises**
- **Share characteristics of both project and role based types of enterprise models**
  - **Typically management and administrative roles are fixed**
  - **Other roles managed more flexibly**

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# Hybrid Enterprise Solution


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## Polling Question

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**Polling Question** 

**True or False**

**Project Based enterprises typically need to define and change organization structures quickly and easily**

**True** **False**

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**Answer**



### **True or False**

**Project Based enterprises typically need to define and change organization structures quickly and easily**



**True**

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### Polling Question



Which type of enterprise model does the following example most closely resemble?

Salary budgets are calculated every year from an approved cost for each post in an organization. The cost and headcount allocation of each post is approved when the post is created and then re-assessed every year.

- A. Project Based
- B. Rule Based
- C. Hybrid

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### Answer



Which type of enterprise model does the following example most closely resemble?

Salary budgets are calculated every year from an approved cost for each post in an organization. The cost and headcount allocation of each post is approved when the post is created and then re-assessed every year.

- A. Project Based
- B. Rule Based
- C. Hybrid

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# Understanding Work Structure Components

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## Objective

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### Objective

**At the end of this lesson, you should be able to:**

**Describe the work structure components of the employee assignment and understand their use in Oracle HRMS**



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### Overview

- **Work structures provide the framework for managing work assignments for people**
- **In Oracle HRMS there are several structures you can configure to model the organizations, jobs, positions, grades, payrolls and other employee groups that exist in your own enterprise**



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### Work Structures

- **Work Structures are independent of the people who work in the enterprise**
- **They include:**
  - **Enterprise and employer structures such as business groups and legal entities**
  - **Work roles for employees such as Jobs and Positions**
  - **Grade structures with related pay rates**
  - **Payroll Groups with processing calendars**
  - **User defined groups such as unions or pension groups**

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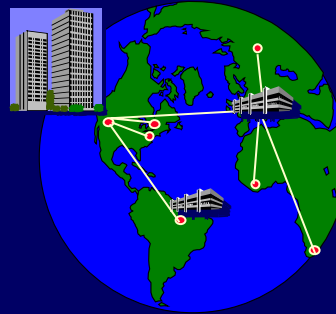
## Work Structures Representing the Employer

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### Work Structures Representing the Employer

Oracle HRMS lets you model:

- A single company with all of its offices in one country
- An international company with offices overseas but with a single reporting structure
- A multi-national company with subsidiary companies, each with its own reporting and management structures

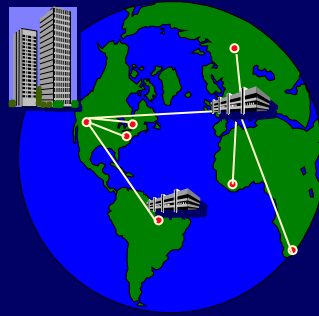


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### Business Groups in Oracle HRMS

- A Business Group defines a complete set of HR data for operations and processing
- Linked with one legislative processing area for HR, payroll, and benefits regulations
- May correspond to a single company, or in large enterprises, to a holding company or corporation



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### The Startup Business Group

- Oracle HRMS comes with one predefined Business Group
  - This is for users of Oracle Applications who do not intend to use HR.
- You should setup a new Business Group with your own choice of default information

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### Business Groups

- By default, all employees receive an assignment to the business group you choose when you sign-on.
- When you enter assignment details to internal organizations such as divisions or departments, you replace the default assignment.
- The employee continues to exist within the business group
  - Personal, work and pay details are regulated by the legislation of the business group.

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## One or Many Business Groups Reasons

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### One or Many Business Groups Reasons

- You want a copy of your live system with example records for training or testing purposes
- You are a holding company with a number of subsidiary companies
  - Each subsidiary has its own structures, employees, and compensation and benefit policies
- You acquire or merge with another company
  - You want to manage separate structures and processes during a transition phase

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### One or Many Business Groups Oracle HRMS

- Oracle HRMS provides legislative support for HR and payroll associated with a business group
- Set up one or many business groups according to the operating needs of your own enterprise
- If you operate in many countries you might want to define a different business group for each country
  - Different job and grade definitions
  - Different policies for compensation and operations
  - Different languages for all information

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## One or Many Business Groups Options

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### One or Many Business Groups Options

- If you operate in many countries but have only a small number of employees in each country
  - Include all employees in one business group
  - Use flexfields to capture additional local data
  - Process local payrolls through third-party systems



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## One or Many Business Groups Options

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### One or Many Business Groups Options

- Operations in countries with large numbers of employees
  - Setup a business group for each major operating country
  - Setup an 'other' group for all other employees.
  - Process some payrolls with Oracle and others through third-party systems



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## Locations

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### Locations

- Define locations for each physical site where your employees work
  - Local or international
  - Specific to one business group or shared across all
- In some legislation's, work locations determine taxability rules
- Define locations for external organizations
  - Tax authorities, insurance and benefits carriers



1400 First Street  
New York  
USA

33 Eastcheap  
London  
United Kingdom

150 Victoria Street  
Melbourne  
Australia

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### Organizations

- An **organization** is any smaller work group than a business group
  - Companies
  - Departments or Divisions
  - Operating Units
- Define as many separate organizations as you need within each Business Group
- Organizations can be internal or external
  - E.g. recruiting agencies and insurance carriers

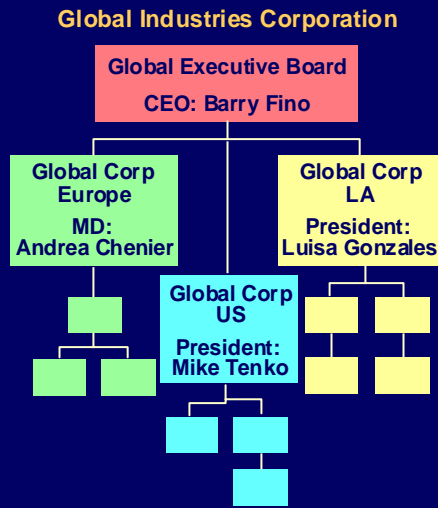
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## Work Structures Organization Hierarchies

### Work Structures Organization Hierarchies

- Use hierarchies to group organizations and to show management reporting lines
  - In a hierarchy each organization has one parent
  - Unlimited number of hierarchies
- Use hierarchies when running reports to include a group of organizations
- Use hierarchies to define security



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### Locations

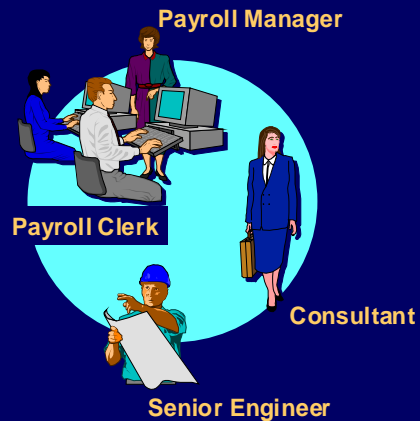
- In Oracle HRMS you set up each physical site where your employees work as a separate location
- You can maintain addresses of external organizations (i.e., employment agencies, tax authorities, and insurance or benefit carriers)
- Location Types:
  - **Global** - available across all Business Groups
  - **Business Group** - only available in one Business Group

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### Jobs and Positions

- Use **Jobs** or **Positions** to represent the different roles that a person can perform in your enterprise
- Oracle HRMS provides two options to suit the needs of different enterprises



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### Using Jobs or Positions

- Do you manage **People** or **Positions**?
  - Fixed or Flexible Roles
  - May be more than one employee in the same role
- If role continues to exist after the employee leaves then think about **Positions**
- If role ceases or is re-evaluated when the employee leaves then think about **Jobs**



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### **Additional Information for Jobs and Positions**

- Oracle HRMS lets you hold additional types of information for both Jobs and Positions.
- Predefined types of information include:
  - Valid grades
  - Job Evaluation details
  - Work Choices
  - Competence or Skill Requirements
- An unlimited number of user-defined types
  - Extra Information Types

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### Jobs

- **Jobs** are generic roles within a Business Group
- They are independent of any single organization
  - Exist for all organizations
  - For example. The jobs Manager and Consultant could occur in many organizations
- Oracle HRMS lets you define your own job structure and then enter details for each job in your enterprise

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### Job Key Flexfield

- Define your own job structure as a key flexfield
- Up to 30 segments
  - Validation on each segment
- Define individual jobs as a combination of segment values
- You decide if each segment is required or optional



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### Positions

- Position is a specific role, or function, that exists in one, and **only one**, organization
- Positions show more management reporting detail than organizations alone
- Position definition includes **Job** and **Organization**
  - Use job to show common job types and information across organizations
  - Use fewer organizations to show groups of positions and employees. E.g. Department level.

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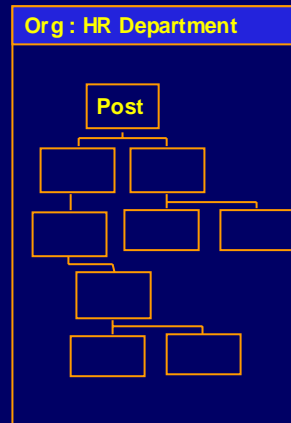
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## Work Structures Positions and Organizations

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### Work Structures Positions and Organizations

- Use Positions to show specific posts within an Organization
  - Typical in Public Sector, Government, Education and Health
  - Typical in large enterprises to show management positions
- Use Position Control functionality to manage positions



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### Position Hierarchies

- **Use Hierarchies to show management reporting lines between positions**
  - More detail than Organization Hierarchies
  - In a hierarchy each position has one parent
- **Unlimited number of hierarchies**
  - Dates and versions
  - Copy and manage multiple versions
- **Use hierarchies to control user access to records**
  - Security Profiles
  - Reports

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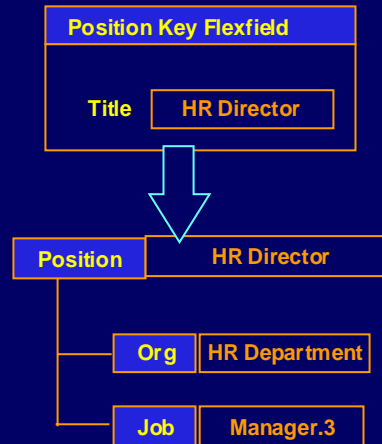
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## Position Key Flexfield

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### Position Key Flexfield

- Define your own position structure using a key flexfield
- Up to 30 segments
  - Validation on each segment
- Define each position as a combination of segment values
  - Simplest option is one segment with no validation for 'Title'



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### Security Based on Work Structures

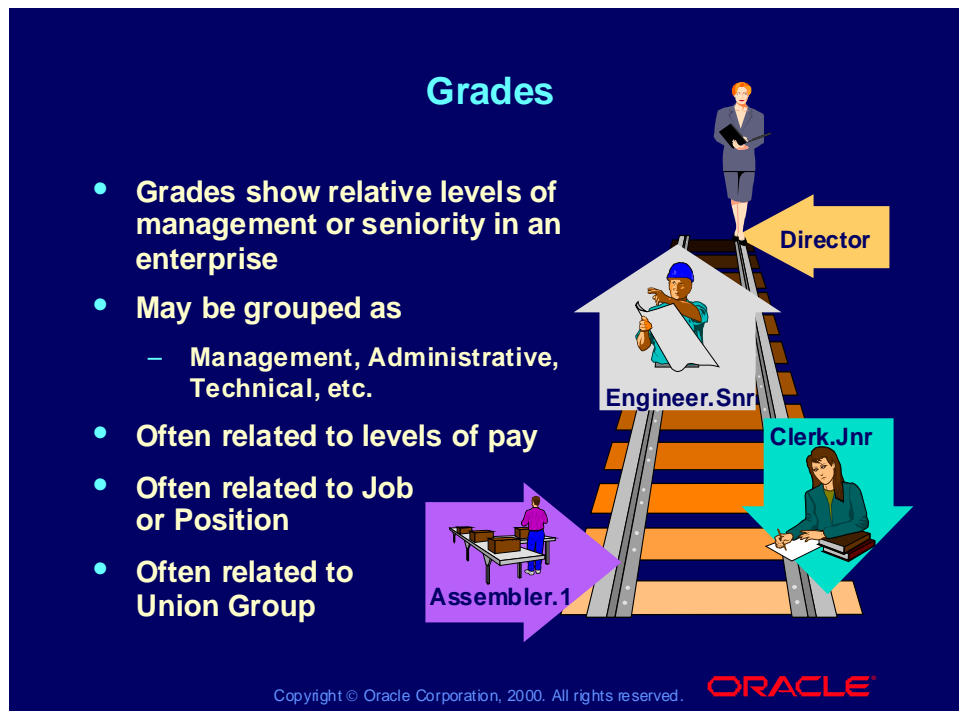
- With Oracle HRMS you define the rules for who has access to personal information through a **Security Profile**
- You define security profiles based on organization and/or position hierarchies.
  - You can also use payroll group in the definition
- The combination of Security Profile and Responsibility control the records that an application user can see
  - Organizations, Positions and People

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# Grades

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### **Work Structures** **Grades and Pay**

Oracle HRMS supports direct and indirect relationships between grades and pay

- **Direct**
  - Use **Grade Rates**
  - Maximum, Minimum, and Mid-point values
- **Indirect**
  - Use **Pay Scales**
  - Progression Points and Values
  - Grade Steps and increments

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### Work Structures Grade Rates

- Each Grade has a value or a range of values

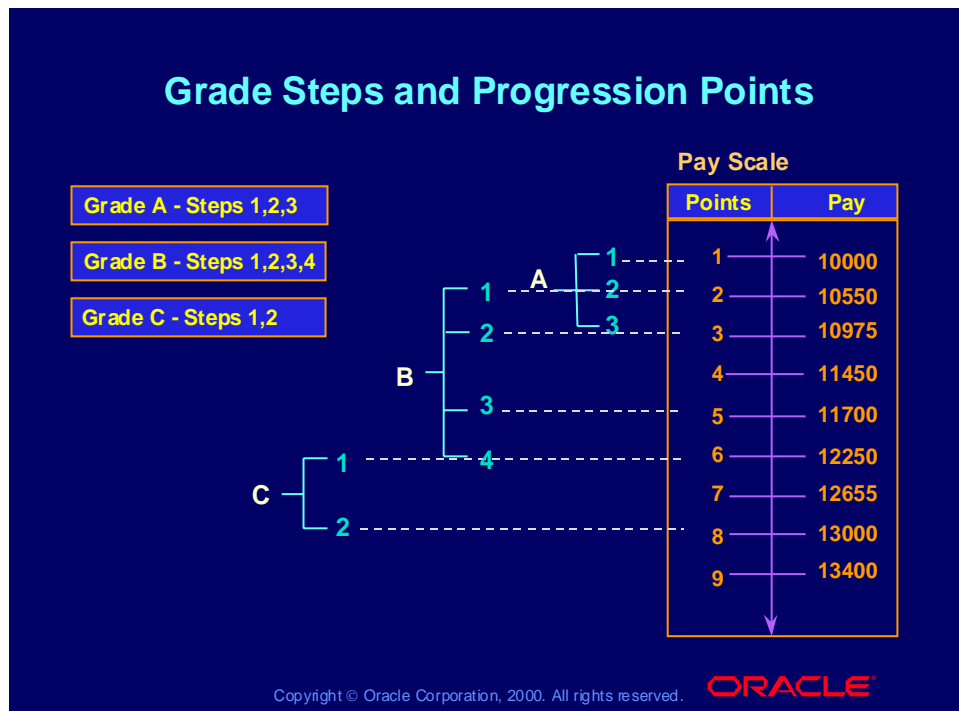
Grade	Value	Minimum	Midpoint	Maximum
A.1	25000	20000	30000	40000
A.2	27000	23000	33000	43000

- Often used in performance related pay processes
  - Salary Administration
  - Units may be money, hours, numbers
  - Comparative calculations

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## Grade Steps and Progression Points



### Pay Scales

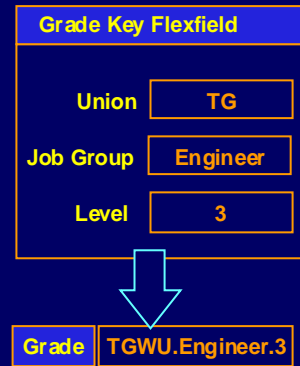
- Define Pay Scales to show indirect relationships between grades and pay
  - Unlimited number of scales
  - Unlimited number of points and values
  - Sequence for progression
- Define a value for every point
  - Money, Hours, Number
- Define Grade Steps in sequence
  - Select a point for each step
  - Define a 'ceiling' point to stop automatic increments

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### Grade Key Flexfield

- Define your own grade structure using a key flexfield
- Up to 30 segments
  - Validation on each segment
  - Required or Optional
- Define each grade as a combination of segment values



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### Payroll Groups for HR Users

- **HR only users can define payroll groups:**
  - For compensation eligibility rules
  - For interfacing to third-party payrolls
  - For security
- **Payrolls define the frequency of payment for groups of employees**
  - Define a payroll calendar within the tax year provided by legislation
  - Use pay period options provided by legislation

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### People Groups

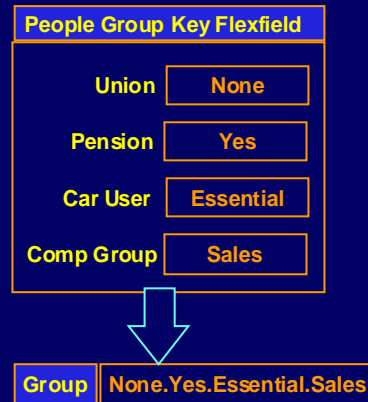
- **Locations, Organizations, Jobs, Positions, Grades and Payrolls are predefined structures for grouping people**
- **Need flexibility to define other types of group in Oracle HRMS**
  - For reporting and analysis
  - To define eligibility for compensation
  - To extend key assignment details
- **Typical examples include Union, Pension, Bonus Eligibility, Car Eligibility, etc.**

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### People Group Key Flexfield

- Define your own segments using a key flexfield structure
- Up to 30 segments
  - Validation on each segment
  - Required or Optional
- Enter values for each segment on the Assignment window
  - You don't define a key combination



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## Polling Question

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### Polling Question



- Which of the following are work structure components?
  - Organizations
  - Paid Time Off
  - Jobs
  - Positions
  - Grades
  - Assignments
  - Payrolls
  - Other groups

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### Answer



- Which of the following are work structure components?
  - Organizations
  - Paid Time Off
  - Jobs
  - Positions
  - Grades
  - Assignments
  - Payrolls
  - Other groups

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## Polling Question

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### Polling Question



### True or False

**With Oracle HRMS you must always define Positions before you can enter employees**



**True**



**False**

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**Answer**



### **True or False**

**With Oracle HRMS you must always define Positions before you can enter employees**



**False**

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## Polling Question

---

### Polling Question



### True or False

**An employee can be assigned to more than one position but a position can have only one employee assigned to it.**



**True**



**False**

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**Answer**



### **True or False**

**An employee can be assigned to more than one position but a position can have only one employee assigned to it.**



**False**

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### Unit Summary

In this unit you should have learnt how to:

- Recognize different types of enterprise business model and explain how to represent these in Oracle HRMS
- Identify the enterprise model that most closely resembles your own
- Describe the work structure components of the employee assignment and understand their use in Oracle HRMS



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### Defining Common Data

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### Unit Objectives

**At the end of this unit you should be able to :**

- **Understand Key and Descriptive Flexfield**
- **Understand Extra Information Types**
- **Define Lookups and Values**
- **Enable Currencies and Enter Exchange Rates**



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### Unit Overview

- This unit concentrates on the common types of data that exists in the Oracle HRMS products and how to set them up
- These are not associated with a specific functional area



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### Flexfields in Oracle HRMS

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### Overview



- **Key and Descriptive Flexfields are common to Oracle Applications.**
- **Let you define the structure of unique identifiers for your own key information**
- **Let you extend the types of information you can hold in HRMS without changing code.**
  - Available as soon as you make the definitions
  - Automatically upgraded
- **This lesson deals with special considerations for HRMS Key Flexfields.**

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### Key Flexfields in Oracle HRMS

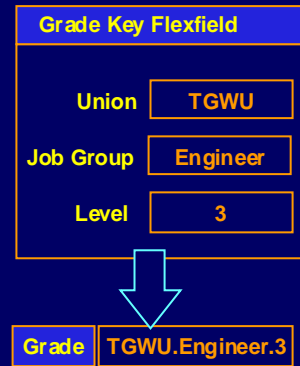
- HRMS uses key flexfield structures to let you configure your own unique names for work structures:
  - Job, Position and Grade
- HRMS also uses key flexfield structures to let you capture additional information:
  - People Group and Cost Allocation
  - Personal Analysis, (Special Information Types)

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### Standard Features

- One key structure for each Business Group
  - Unlimited structures for Personal Analysis
- Up to 30 segments in each structure
  - Validation on each segment using a Value Set
- The combination of segment values creates a unique key

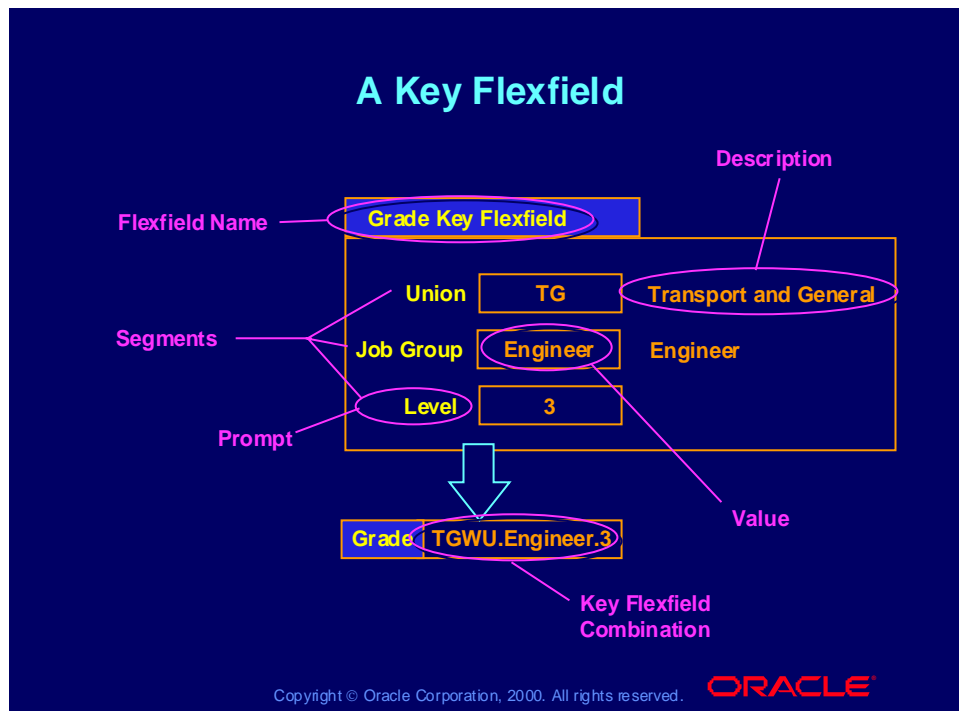


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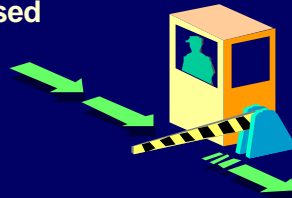
## A Key Flexfield

---



### Cost Allocation and Flexfield Qualifiers

- **Cost Allocation uses flexfield qualifiers to control the level at which users can enter values for each segment:**
  - Payroll, Link, Organization, Assignment, Entry and Balancing
- **Combinations are created even when the segments are not displayed.**
  - Combination Rules are not used
- **Each segment must have at least one qualifier**
- **Each qualifier must have at least one segment**



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### Soft-Coded Legislation Key Flexfield

- **Legislation-specific information for HRMS**
  - **Predefined by HRMS product development**
  - **Flexfield structure linked to the legislation of your business group**
- **Uses qualifiers to control entry of values**
  - **Business Group: Organization window**
  - **Payroll: Payroll window**
  - **Employee Assignment: Assignment window**

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### Bank Details Key Flexfield

- Legislation specific structures for local bank account information
  - Predefined by HRMS product development
  - Flexfield structure linked to the legislation of your business group
  - Appears in Organizational Payment Method and Personal Payment Method windows

#### **Warning!**

**Do not modify the definitions of predefined flexfields.  
Changes may invalidate your support agreement  
with Oracle and make it difficult to upgrade your system.**

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### Steps for Defining a Key Flexfield

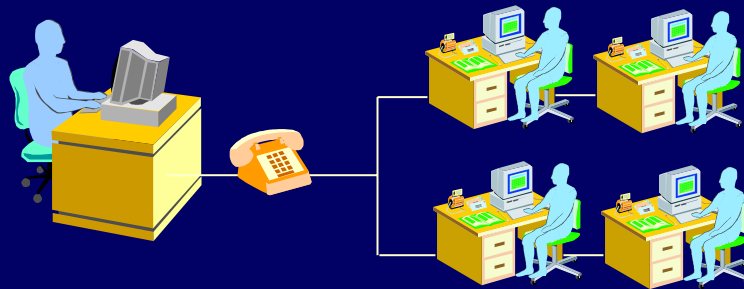
1. Register validation tables, (if required)
2. Define value sets with validation rules
3. Define flexfield structure and segments
  - Associate value sets with segments
  - Enable qualifiers for costing segments
4. Define values for any independent and dependent value sets
5. Define aliases or cross validation rules
6. Generate database items for individual segments, (if required in FastFormula or QuickPaint)

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### Instructor Demonstration 1-a

- The purpose of this demonstration is to show how to set up the People Group key flexfield.
- Observe as your instructor demonstrates.



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### Practice 1-a

- Following the instructor demonstration set up the People Group key flexfield using the information supplied
- Prefix the structure with your initials




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## Practice 1-a Navigation Path

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### Practice 1-a Navigation Path



**Navigate to the Key Flexfield Segments window using the System Administrator responsibility:**

**(N) Application > Flexfield > Key > Segments**

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### Online Help

For details on how to complete the Key Flexfield Segment Window please refer to the on line Help path :

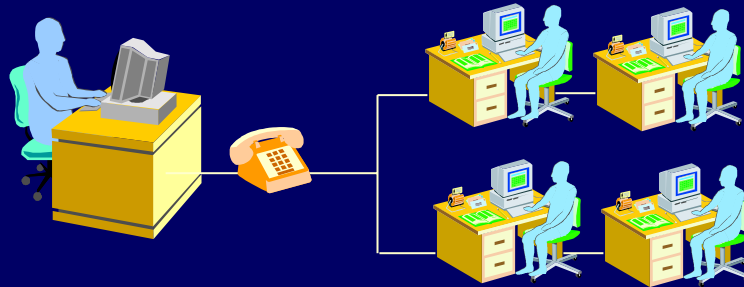
Applications Help Library > Applied Technology > Oracle Applications  
Flexfield > Key Flexfields Segments Window > Defining Segments

## Instructor Demonstration 1-b

---

### Instructor Demonstration 1-b

- The purpose of this demonstration is to show how to set up the Personal Analysis key flexfield.
- Observe as your instructor demonstrates.



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## Practice 1-b

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### Practice 1-b

- Following the instructor demonstration set up the Personal Analysis key flexfield using the information supplied
- Prefix the structure with your initials




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## Practice 1-b Navigation Path

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### Practice 1-b Navigation Path



**Navigate to the Key Flexfield Segments window using the System Administrator responsibility:**

**(N) Application > Flexfield > Key > Segments**

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### Online Help

For details on how to complete the Key Flexfield Segment Window please refer to the on line Help path :

Applications Help Library > Applied Technology > Oracle Applications  
Flexfield > Key Flexfields Segments Window > Defining Segments



# Defining Descriptive Flexfields

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## Objectives

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### Objectives

**At the end of this lesson, you should be able to do the following:**

- **Define descriptive flexfield segments**
- **Register reference fields for context sensitive segments**
- **Explain how to register tables for validation**
- **Define value sets**
- **Define segment values for any descriptive flexfield**



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### Descriptive Flexfields in Oracle HRMS

- Oracle HRMS provides predefined windows and fields to collect data
- Use descriptive flexfields to define your own additional information
- Up to 30 additional fields available in every window
  - User Descriptive Flexfields
- Plus unlimited Extra Information Types for
  - Locations, Jobs and Positions
  - People and Assignments
  - 30 segments for each Type you define

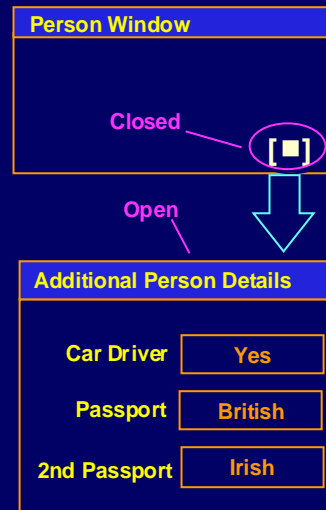
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## Standard Features

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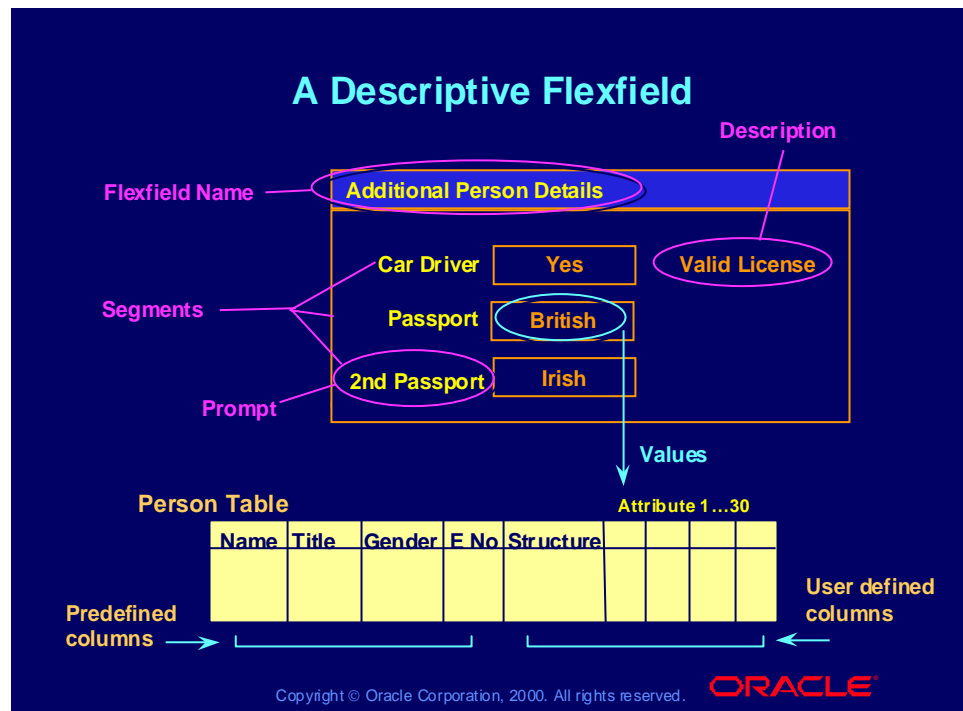
- One descriptive structure for each record
- Unlimited Types for Extra Information
- Up to 30 segments in each structure
  - Validation on each segment using a **Value Set**



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## A Descriptive Flexfield



### Descriptive Flexfields in Several Windows

- Some descriptive flexfields are available in more than one window. For example:
  - Additional Person Details**
    - Person and Applicant QuickEntry and Contact
  - Additional Evaluation Details**
    - Evaluation window for Jobs and for Positions

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### Descriptive Flexfields and Business Groups

- **Descriptive flexfield definitions apply to all business groups in the same instance**
  - **Use context sensitive segments if you want different segments by business group**
  - **Use Extra Information Types if you want different sets of information by Business Group**

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## Descriptive Flexfields With Predefined Data

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### Descriptive Flexfields With Predefined Data

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address
Location Address	HR_LOCATIONS	Location

- **Address Styles and some validation rules are predefined for many countries**

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## Protected Descriptive Flexfields

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### Protected Descriptive Flexfields

Title	Table Name	Window Title
Further Element Information	PAY_ELEMENT_TYPES_F	Element
Further Assignment Information	PER_ASSIGNMENT_EXTRA_INFO	Assignment
Further Payment Method Information	PAY_ORG_PAYMENT_METHODS_F	Organizational Payment Method
Further Person Information	PER_PEOPLE_F	Person
Further Job Information	PER_JOBS	Job
Org Developer DF	HR_ORGANIZATION_INFORMATION	Organization

- **Used by Product Development to deliver standard functionality or data for HRMS**
  - **You cannot change these definitions**

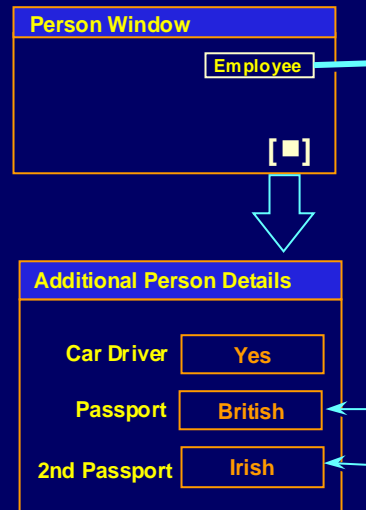
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## Context Sensitive Descriptive Flexfields

### Context Sensitive Descriptive Flexfields

- Make segments sensitive to the value in another field
- Use a predefined Reference Field, or prompt users to enter a value
  - E.g. Passport details for Employees only
- Define flexfield structures for specific reference field values
  - Global and context sensitive segments
  - Maximum number of segments is still 30



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### Steps for Defining a Descriptive Flexfield

1. Register validation tables, (if required)
2. Define value sets with validation rules
3. Register reference fields, (if required)
4. Define flexfield structure/context and segments
  - Associate value sets with segments
  - Enable qualifiers for costing segments
4. Define values for any value sets
5. Generate database items for new fields, (if required in FastFormula or QuickPaint)

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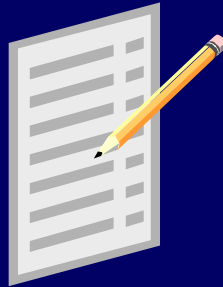
## Practice 2-a Key and Descriptive Flexfields Overview

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### Practice 2-a

#### Key and Descriptive Flexfields Overview

- This practice reinforces your knowledge of flexfields and their features.
- Following the details on flexfields answer the questions below.



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1. What are the six key flexfields in Oracle HRMS and which one can have many structures in one business group?
2. Which of the six key flexfields belong to the Payroll product?
3. How many segments can you define in the HRMS key flexfields?
4. Which user key flexfield uses qualifiers and what do the qualifiers do?
5. What is the difference between descriptive and key flexfields?
6. What system feature determines the validation of values in a segment?
7. What are the four types of predefined validation? What does each of them represent?
8. What are the additional features of key flexfields?
9. What is the purpose of cross-validation rules?
10. What is the purpose of shorthand aliases?
11. What is the purpose of flexfield value security?
12. What is the purpose of dynamic insertion?

### Extra Information Types in Oracle HRMS

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### Objectives

**At the end of this lesson, you should be able to do the following:**

- **Define Extra Information Types**
- **Describe the differences between Extra and Special Information Types**
- **Add Extra Information Types to a Responsibility**



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### Overview



- **Extra Information Types** are a feature of Oracle HRMS that let you add new types of information not just new fields
  - Unlimited number of Types of information
  - Up to 30 segments per type
  - Implemented using descriptive flexfields so you can add these without code changes
- **Similar to Special Information Types for Person**
  - Access window from a taskflow button
  - More security features
  - Available for other entities

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### Overview

- You can define Extra Information Types for the following entities:
  - Locations
  - Organizations
  - Jobs
  - Positions
  - People
  - Assignments



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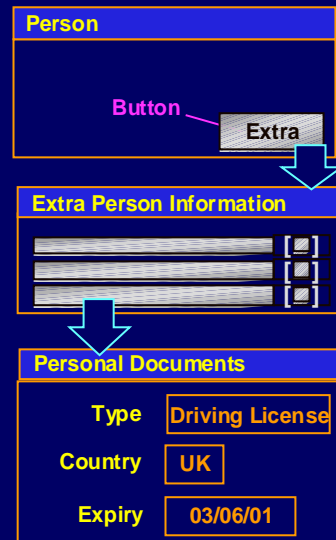
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## Standard Features

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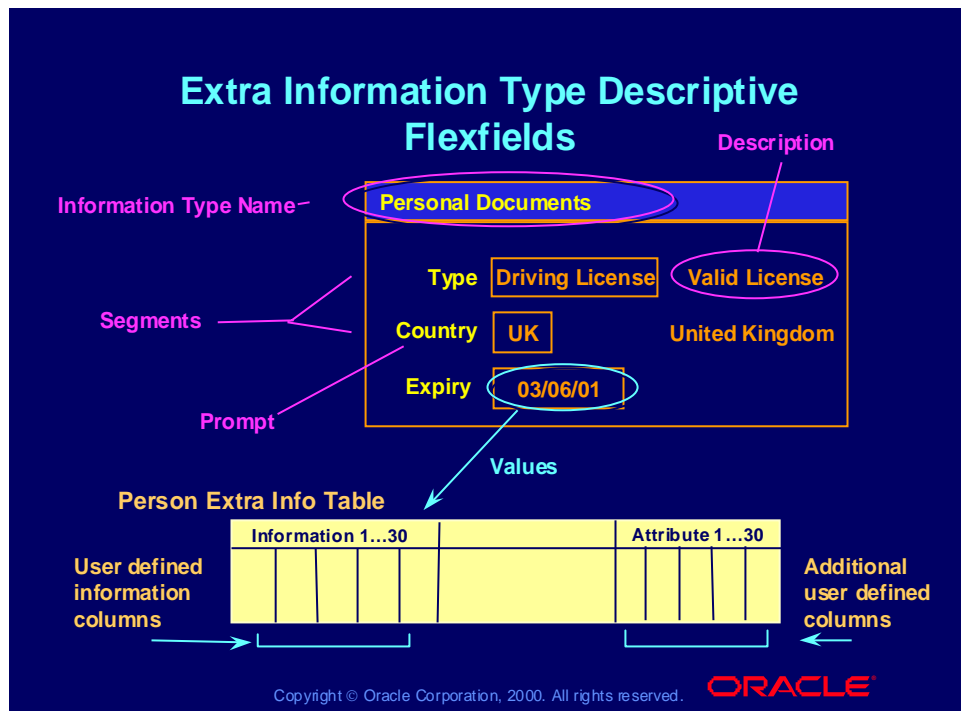
- **Unlimited Types for Extra Information**
  - One structure per type
- **Up to 30 segments in each structure**
  - Validation on each segment
- **Multiple entries for each type of information**



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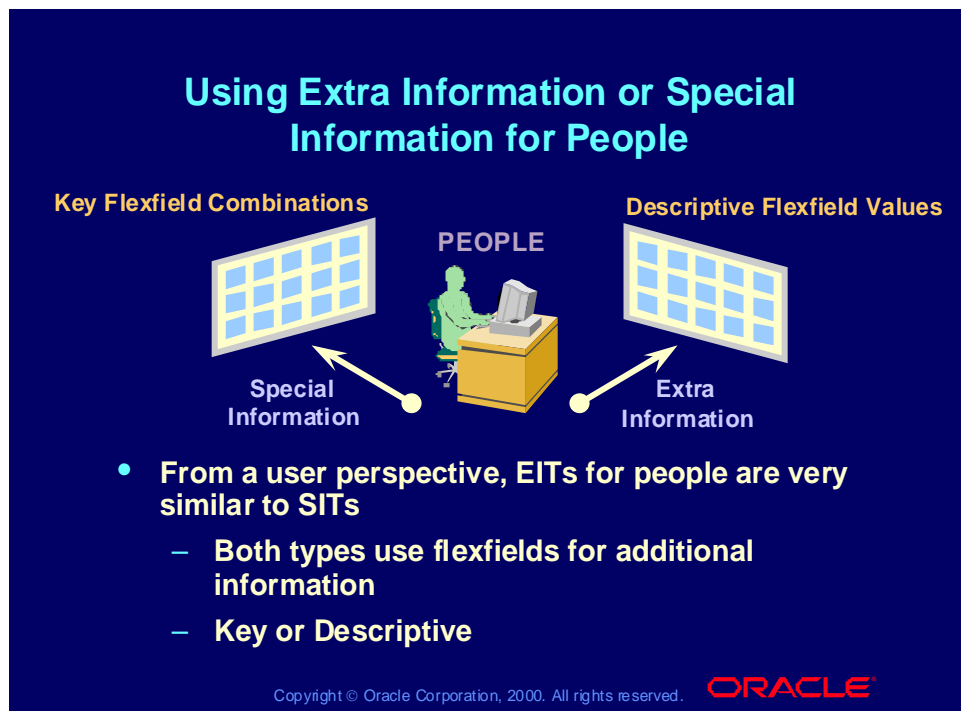
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## Extra Information Type Descriptive Flexfields



## Using Extra Information or Special Information for People

---



### Security



- Both types use additional windows to display fields
  - Multiple records of the same type
  - Taskflowed windows
  - CustomForm security lets you restrict types to display
- EITs also have security by Responsibility
  - Control access to a set of EITs
  - Copy definitions between responsibilities
  - Simplifies administration of security

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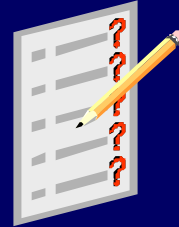
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## Steps for Registering Extra Information Types

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### Steps for Registering Extra Information Types

- Define the Extra Information Type
- Register each EIT
- Set up responsibility level security
- Define additional security, (if required)
  - CustomForm restrictions
  - New taskflow nodes
  - Define/change taskflows



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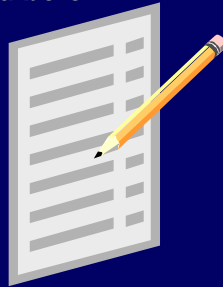
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## Practice 3-a Extra Information Types

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### Practice 3-a Extra Information Types

- This practice reinforces your knowledge of Extra Information Types (EIT's ) and their features.
- Following the details on EIT's answer the questions detailed below.



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### Questions

1. Explain what an Extra Information Type is?
2. Name the 6 important entities in HRMS that have EITs.
3. Give some examples of when you might consider using EITs?
4. What access restrictions can you impose on EITs?
5. EITs and Special Information Types both exist for extending personal information in Oracle HRMS. What performance advantages do EITs have over Special Information Types?

### Defining Lookups and Values

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### Objectives

**At the end of this lesson you should be able to:**

- Define lookup values for predefined lookup types
- Define lookup types and values for validation



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### Overview

- Lookups are common to all Oracle Applications
- Predefined list of values validation for specific fields. Title, Nationality, etc.
  - Add your own values to predefined lists.
  - Add your own lookups and values for fields that you define.



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### User Access Levels

#### System

- All values in the list are predefined by Oracle

#### Extensible

- Some predefined values are provided
- You can add values to the list

#### User


- Define new lookup types to validate fields you define during the implementation process
  - Flexfield segments
  - Element Input Values

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## Polling Question


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**Polling Question** 

**True or False**

You can add your own list of values to any field that has a lookup type.

**True**

**False**

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**Answer**



### **True or False**

**You can add your own list of values to any field that has a lookup type.**



**False**

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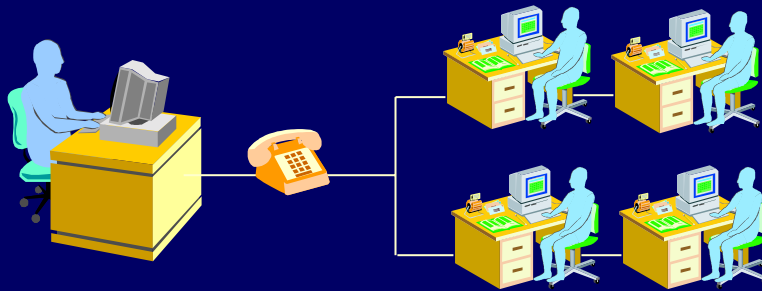
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## Instructor Demonstration 4-a

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### Instructor Demonstration 4-a

- The purpose of this demonstration is to show how to define Lookup Types and Values
- Observe as your instructor demonstrates



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### Practice 4-a

- **Following the Instructor Demonstration, define Lookup Types and Values using the information supplied**



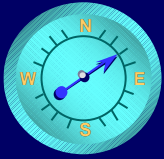
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## Practice 4-a Navigation Path

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### Practice 4-a Navigation Path



**Navigate to the Lookup window using the local version of the Super HRMS Manager responsibility**

**(N) Other Definitions > Lookup Tables**

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### Online Help

For details on how to complete the Lookup window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Organization Management > Employee Management> Extend Oracle HRMS > How To > Lookups and User Defined Tables > Adding Lookup Types and Values

# Managing Currencies and Exchange Rates

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### Objectives

**At the end of this lesson, you should be able to:**

- Enable currencies for HRMS product use
- Define exchange rates



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### Overview

- For any international or global operation you need the ability to enter compensation and other monetary information in different currencies
- For payroll calculations and financial reporting you need the ability to maintain exchange rates in a consistent manner



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### Typical Requirements

- You have employees living in one country and working temporarily in another.
- You want to record specific earnings or deductions in local currencies
- You also want to pay these employees a fixed amount into a bank account in their home currency and the remainder in a local currency
- You want to guarantee that all conversions to Euro-currencies are correctly calculated



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### Enabling Currencies in Oracle HRMS

- All major currencies are predefined with Oracle Applications (using ISO standard codes)
- Enable the base currency for each business group
  - The currency for all payroll calculations
  - Default for all money types of information
- Enable as many other currencies as you need
  - Money values for compensation and benefits
  - Non-legislative information balances in payroll
  - Payment methods for employees

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### Exchange Rates in Oracle HRMS

- Oracle HRMS uses exchange rate values stored in the General Ledger Daily Rates tables
  - Conversions in payroll calculations and payment
  - Conversions in standard reports
- You select the exchange rates to use for payroll
- You select the exchange rate to use in reports

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### Exchange Rate Variations

- Choose if you want to use the same rates as GL or define a special rate for payroll
  - For example if you set values every day for GL but want to set a value for payroll on a fixed date once a month because of the frequency of processing in a week or month.



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### Steps to Enable Currencies

Use the System Administrator responsibility

(N) Application > Currency

- 1 To enable an ISO currency, Query the currency
- 2 Select the Enabled check box
- 3 Specify the period in which this currency can be used
  - If you do not enter a start date, this currency is valid immediately, and if you do not enter an end date, it is valid indefinitely
- 4 Save your work

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### Currency Precision

- Precision is the number of digits to the right of the decimal point
  - Must be greater than or equal to zero
  - Default is two
- This does not affect any calculations in Oracle Payroll
  - FastFormula lets you choose the precision during calculation
  - If you return the result to a money type field then precision of the output currency applies

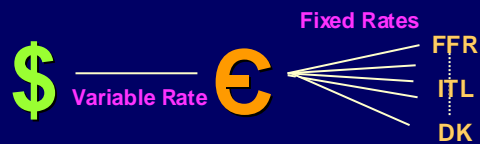
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### Exchange Rates

- If you record or report in more than one currency you will need to enter exchange rates
- Euro Currencies
  - Set up exchange rates to the Euro
  - Do not set up rates directly to any Euro currency

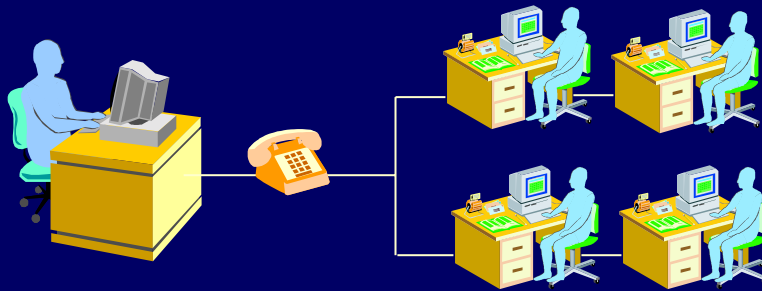


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### Instructor Demonstration 5-a

- The purpose of this demonstration is to show how to define an exchange rate
- Observe as your instructor demonstrates



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### Practice 5-a

- **Following the Instructor Demonstration, define an exchange rate using the information supplied**




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## Practice 5-a Navigation Path

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### Practice 5-a Navigation Path



**Navigate to the Daily Rates window using the local version of the Super HRMS Manager responsibility**

**(N) Payroll > GL Daily Rates**

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### Online Help

For details on how to complete the Daily Rates window please refer to the online Help path :

Applications Help Library > Oracle Financial Applications > Oracle General Ledger > Multi Currency > Entering Daily Rates

### Work Structures - Case Study

- Review the business scenario in the Instructor Demonstrations and Solutions section and answer the questions that follow the scenario



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### Unit Summary

In this unit you should have learnt how to :

- Understand Key and Descriptive Flexfields
- Understand Extra Information Types
- Define Lookups and Values
- Enable Currencies and Enter Exchange Rates



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## Setting up Business Groups, Locations, and Organizations

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### Setting up Business Groups, Locations, and Organizations

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### Unit Objectives

**At the end of this unit you should be able to :**

- **Create a Business Group**
- **Define Locations**
- **Define and Change Organizations**
- **Create and Change Organization Hierarchies**
- **Describe the use of ADE**



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### Unit Overview

**This unit concentrates on the practical steps and the detailed information you need when setting up Business Groups, Locations, and Organizations**



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# Creating a Business Group

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### Representing Your Enterprise

- Before you build your work structures you need to consider how your enterprise is structured
- Do you need one or more business groups?
- Do all of your operating businesses share common HR policies or data standards for:
  - Recruitment
  - Competencies
  - Compensation
  - Career management
  - Succession planning

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### The Business Group

- The largest organizational unit you set up in Oracle HRMS to represent your enterprise is the **Business Group**
  - Holds all data and rules specific to the legislative and cultural needs of one country
  - Contains details of other work structures, compensation plans and people, (- internal and external)
  - Acts as the default organization for all new employees and applicants

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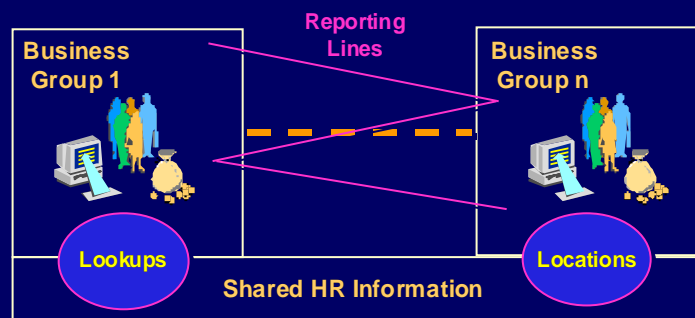
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## Sharing Information

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### Sharing Information

- Some information can be shared across business groups or be defined in one at a time
  - Lookups and Locations



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### In Release 11i.2

#### **HR:Cross Business Group** user profile option to enable sharing

- Set up hierarchies between organizations in different business groups
  - Show reporting lines across geographical boundaries
- Enter relationships between people across Business Groups
  - Supervisors
  - Recruiters
  - Event Participants
  - Contacts and Dependents

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### Initial Tasks



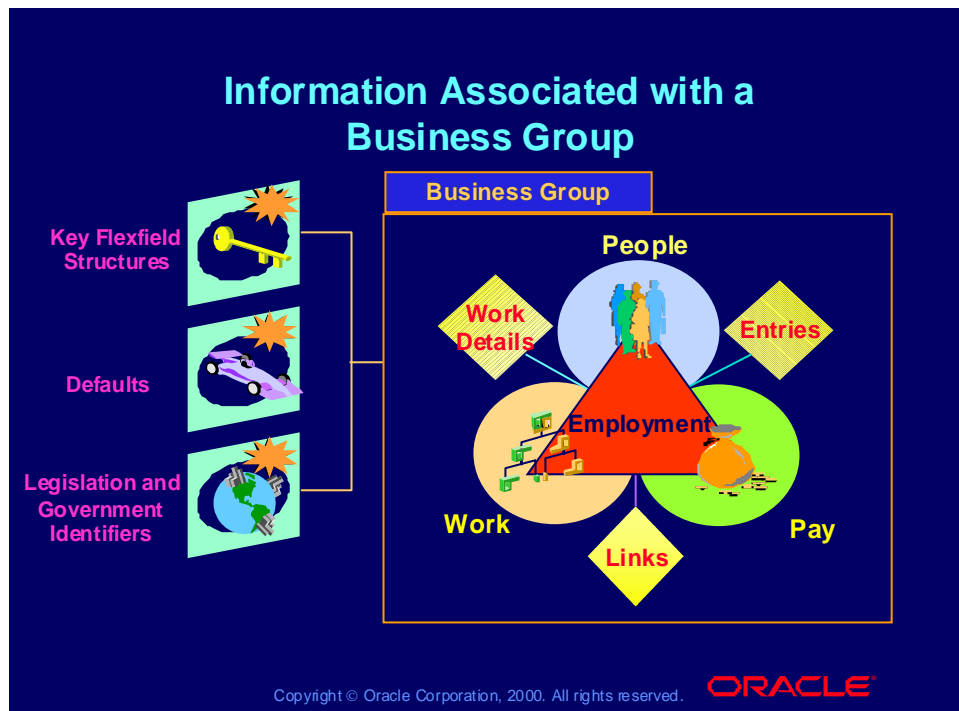
- When you sign on to Oracle HR and choose a responsibility you automatically choose the business group associated with that responsibility
- Predefined responsibilities are associated with the predefined 'Setup' business group when you install the products
  - Use this when you first sign on
  - Create a new business group
- Change profiles for the default responsibilities to give access to the new business group
- Then do all other setup

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## Information Associated with a Business Group

---





### Standard Information

- When you create a business group you enter certain types of information that are used as defaults for other things within the business group
- For example
  - Currency
  - Budget values for non-monetary measures (e.g., headcount, FTEs)
  - Standard Work Hours and Frequency

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### Standard Information (U.S. only)

- For HR reporting of VETS-100 and ADA, the U.S. version of Oracle HR has two additional types of information:
  - **Reporting Categories**  
Enter Full-Time, Part-Time, Non-Temporary categories to be included in government reporting
  - **Reporting Statuses**  
Enter assignment statuses to be included in reports. E.g. Active or Paid Leave.

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### Employee and Applicant Numbers

#### Choose from

- **Automatic**
  - Number generated in sequence by the system
- **Manual Entry**
  - User enters any alphanumeric combination
- **National Identifier**
  - Copy from the national identifier field
- **You can change from automatic to manual, but not from manual to automatic**
- **You cannot use a national identifier for applicants**

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## Polling Question

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### Polling Question



What is the largest organizational unit you set up to represent your enterprise?

- A. ... Location**
- B. ... Organization**
- C. ... Business Group**
- D. ... Other**

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### Answer



What is the largest organizational unit you set up to represent your enterprise?

- A. ... Location
- B. ... Organization
- C. ... Business Group**
- D. ... Other

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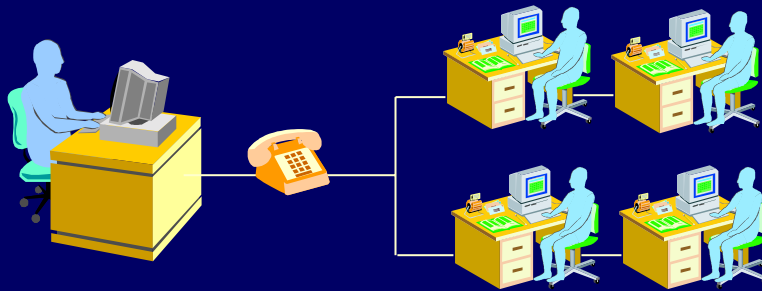
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## Instructor Demonstration 2-a

---

### Instructor Demonstration 2-a

- The purpose of this demonstration is to show how to create a business group
- Observe as your instructor demonstrates



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### Practice 2-a

- Following the instructor demonstration, create a business group using the information supplied



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## Practice 2-a Navigation Path

---


### Practice 2-a Navigation Path



**Navigate to the Organization window using your local Super HRMS Manager Responsibility:**

**(N) Work Structures > Organization > Description**

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### Online Help

For details on how to complete the Organization Window please refer to the online Help path:

Applications Help Library > Oracle Applications > Oracle HRMS > Oracle HRMS Global > How To > Create Organizations > Enter Business Group Information

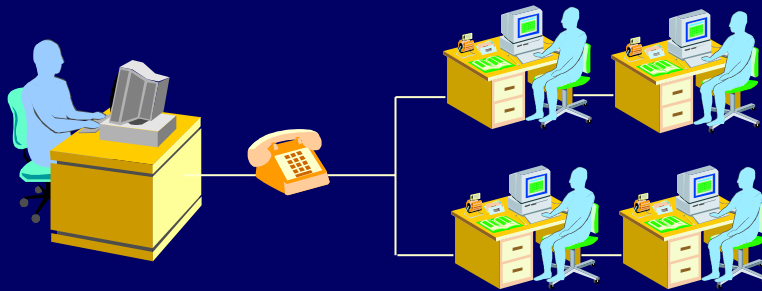


## Instructor Demonstration 2-b

---

### Instructor Demonstration 2-b

- The purpose of this demonstration is to show how to grant access to a new business group
- Observe as your instructor demonstrates



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## Practice 2-b

---

### Practice 2-b

- Following the instructor demonstration, grant access to the business group created earlier using the information supplied



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### Security

The security model in Oracle HRMS means that you must grant a user access to a business group before you can define any details within that business group.

### Set User Profile Options

You must set at least two user profile options for this new Responsibility.

If you are using standard security - Security Groups Enabled = No, then you must assign the Security Profile to the Responsibility and the Responsibility to a User as System Administrator

If you are using Security Groups Enabled = Yes, then you must assign the Security Profile and the Responsibility to a User as the Super HRMS manager.

## Practice 2-b Navigation Path

---

### Practice 2-b Navigation Path



**Navigate to the Responsibilities window using the System Administrator responsibility:**

**1. (N) Security > Responsibility > Define**

**Navigate to the System Profile Values window using the System Administrator responsibility:**

**2. (N) Profile > System**

**Navigate to the Users window using the System Administrator responsibility:**

**3. (N) Security > User > Define**

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### Online Help

1. For details on how to complete the Responsibilities window please refer to the on line Help path:  
Applications Help Library > Applied Technology > Oracle Applications System Administration > Overview of Oracle Applications > Responsibilities Window
2. For details on how to complete the System Profile Values window please refer to the on line Help path:  
Applications Help Library > Applied Technology > Getting Started > Overview of Oracle Applications > Setting Profile Options > System Profile Values Window
3. For details on how to complete the Users window please refer to the on line Help path:  
Applications Help Library > Applied Technology > Oracle Applications System Administration > Overview of Oracle Applications > Users Window

### Creating Locations

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### Overview

- **Locations are the actual work sites of your employees**
  - Internal addresses
  - External addresses for tax authorities, agencies, etc.
- **Shared across business groups or specific to one**



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### Address Validation for US and Canada

- If you have licensed Vertex validation then addresses will be validated against a table containing all cities with a population of greater than 200 people
- Additional window to extend list of valid cities



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### Closing Down a Location

- You can make a location 'inactive' to prevent users from selecting it for organizations, positions or assignments
  - Enter an inactive date
- You can delete locations, only if they have never been referenced elsewhere.
  - Typically you would make them inactive

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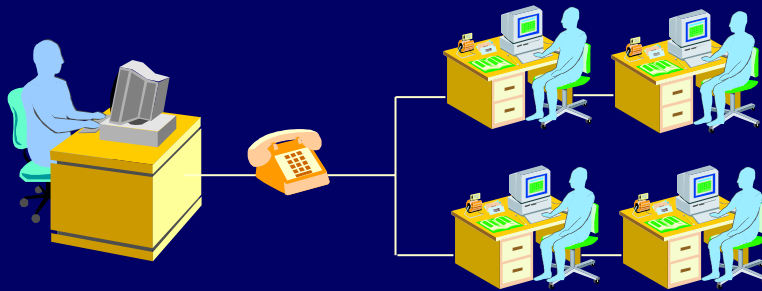
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## Instructor Demonstration 3-a

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### Instructor Demonstration 3-a

- The purpose of this demonstration is to show how to create a location.
- Observe as your instructor demonstrates.



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### Practice 3-a

- Following the instructor demonstration, create a location using the information supplied



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## Practice 3-a Navigation Path

---

### Practice 3-a Navigation Path



**Navigate to the Location window using your local Super HRMS Manager responsibility**

**(N) Work Structures > Location**

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### On-line Help

For details on how to complete the Location Window please refer to the on line Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Organization Management > How To > Setup Organization Management > Locations

# Creating Organizations

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### Overview

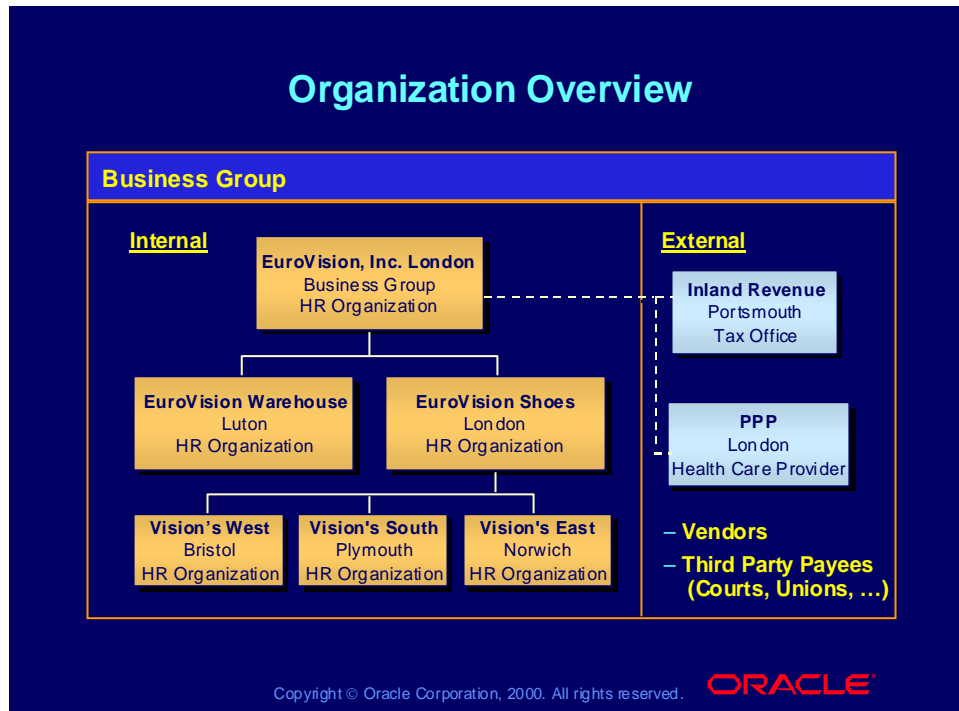
- **Organizations represent the divisions, departments, or other operational groups in which your employees work**
  - Internal or External to your enterprise
- **Organizations are linked in hierarchies to show reporting groups and for security definitions**
- **Shared with Purchasing, Inventory, Manufacturing and Projects**



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## Organization Overview



### Organization Classifications

- **Predefined classifications control how an organization is used in Oracle HRMS**
  - **Business Group, HR Organization, Benefits Carrier, Training Provider, etc.**
- **Selecting a classification controls the additional information you can enter**
  - **Uses Extra Information Types**
- **Define your own classifications and extra information types**

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## Standard HRMS Classifications

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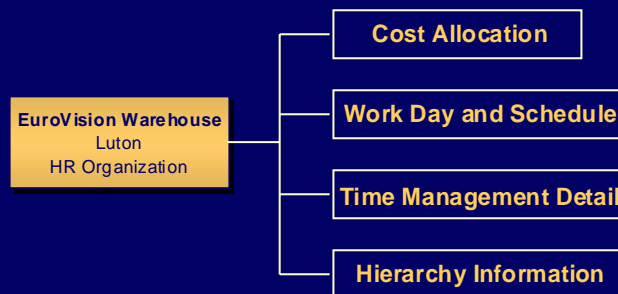
### Standard HRMS Classifications

<b>Affirmative Action Plan (AAP)</b>	An organization that arranges employees by the affirmative action plans that cover them
<b>Beneficiary Organization:</b>	A beneficiary of an employee's benefit plan
<b>Benefits Carrier</b>	The group that administers the company's benefit plan
<b>Business Group:</b>	The highest level organization in Oracle HRMS
<b>Corporate Headquarters:</b>	The Headquarters for government-mandated reporting
<b>Government Reporting Entity</b>	Equivalent to an employer identification number
<b>HR Organization</b>	An organization where you will assign employees
<b>Payee organization:</b>	An external organization that receives third-party payments from an employee, for example, a court-ordered payment
<b>Reporting Establishment:</b>	An establishment against which you run reports. (This may be a single physical location, a complex of work sites in a locality, or all the sites in a geographic area).
<b>Workers' Compensation Carrier:</b>	The group that administers the company's workers' compensation plan

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### Additional Organization Information

- You can record additional organization information that is important to your enterprise



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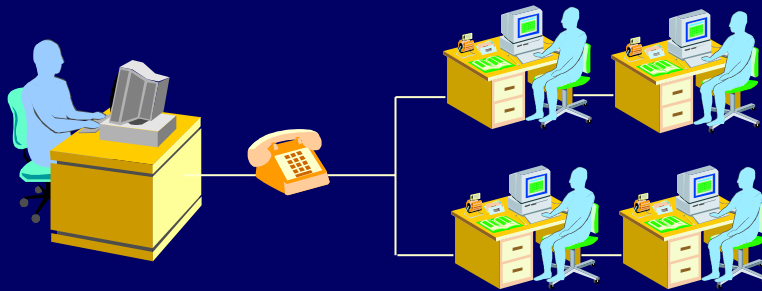


## Instructor Demonstration 4-a

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### Instructor Demonstration 4-a

- The purpose of this demonstration is to show how to create an organization.
- Observe as your instructor demonstrates.



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### Practice 4-a

- Following the instructor demonstration, create an organization using the information supplied



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## Practice 4-a Navigation Path

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### Practice 4-a Navigation Path



**Navigate to the Organization window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Organization > Description**

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### Online Help

For details on how to complete the Organization window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Organization Management > How To > Create Organizations > Create an Organization

### End Dates on Organizations

#### End-Dating an Organization

- Enter a 'Date To' on an organization to end it
  - Prevents it from being available for employee assignments, but keeps a history of the organization

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### Deleting Organizations

**To completely remove an organization from your system you must first remove any related data:**

- 1. Delete all employee assignments to the organization, at any date**
- 2. Delete the organization from all hierarchy versions**
- 3. Disable all organization classifications in the Organization window**
- 4. Delete the organization in the Organization window.**
- 5. Save your changes**

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### Creating Organization Hierarchies

- Define hierarchies for:
  - Management reporting structures
  - Security
  - Purchasing approvals
  - Government mandated reporting
  - Project Accounting

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## Polling Question

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### Polling Question



### True or False

An organization can belong to any number of hierarchies but it can have only one parent in each hierarchy.



**True**



**False**

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**Answer**



### **True or False**

**An organization can belong to any number of hierarchies but it can have only one parent in each hierarchy.**



**True**

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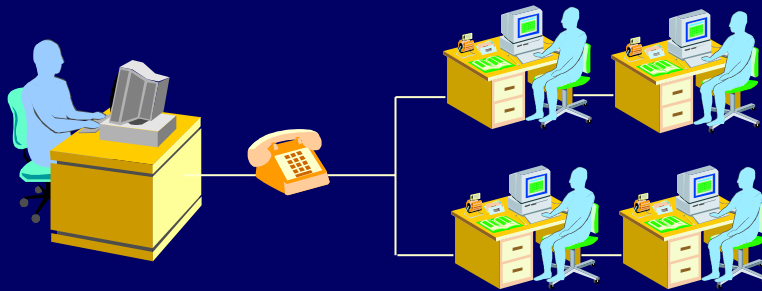


## Instructor Demonstration 4-b

---

### Instructor Demonstration 4-b

- The purpose of this demonstration is to show how to create an organization hierarchy.
- Observe as your instructor demonstrates.



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## Practice 4-b

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### Practice 4-b

- Following the instructor demonstration, create an organization hierarchy using the information supplied



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## Practice 4-b Navigation Path

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### Practice 4-b Navigation Path



**Navigate to the Organization Hierarchy window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Organization > Hierarchy**

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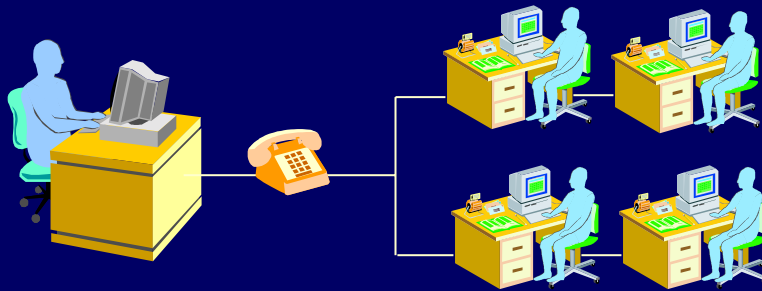
### Online Help

For details on how to complete the Organization Hierarchy Window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS >  
Oracle HRMS Global > Organization Management > How To >  
Create Organization Hierarchies > Create Organization Hierarchies

### Instructor Demonstration 4-c

- The purpose of this demonstration is to show how to assign employees to organizations.
- Observe as your instructor demonstrates.



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### Practice 4-c

- **Following the instructor demonstration, assign an employee to an organization using the information supplied**



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## Practice 4-c Navigation Path

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### Practice 4-c Navigation Path



**Navigate to the People window using your own Super HRMS Manager responsibility:**

**(N) People > Enter and Maintain**

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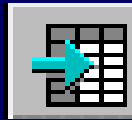
### Online Help

For details on how to complete the People Window please refer to the online Help path :

Oracle HRMS Global > Employee Management > How To > Manage Personal Information > Enter a New Person

### Application Data Exchange (ADE)

- **A desktop utility that lets you**
  - **Export HR information to word processor or spreadsheet tools**
  - **Manipulate information in common desktop tools**
  - **Import updated information back to the HR system using supported APIs.**



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## Three Modes of Working with ADE

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### Three Modes of Working with ADE

#### Standalone Mode

- Launch ADE from the desktop and connect directly to Oracle HRMS
  - Use applications security to sign-on

#### Application Mode

- Call ADE from any applications window using the icon in the application toolbar
  - Synchronized security with current login

#### Letter Request Mode

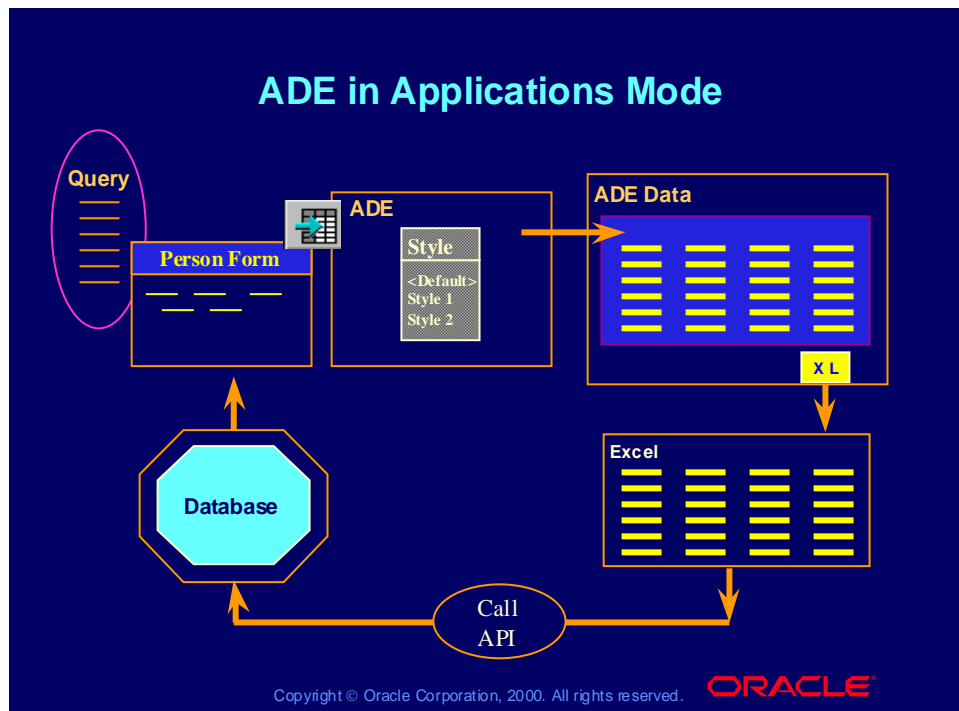
- Call ADE using the Merge button in the Request Letter window for recruitment and enrollment letters

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## ADE in Applications Mode



### Using ADE

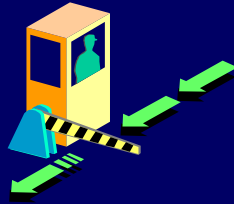
- Query data in any application window
- Export data to ADE and then to desktop application
- Manipulate data in local mode
- Upload modified data back to HRMS using supported APIs

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### ADE Security

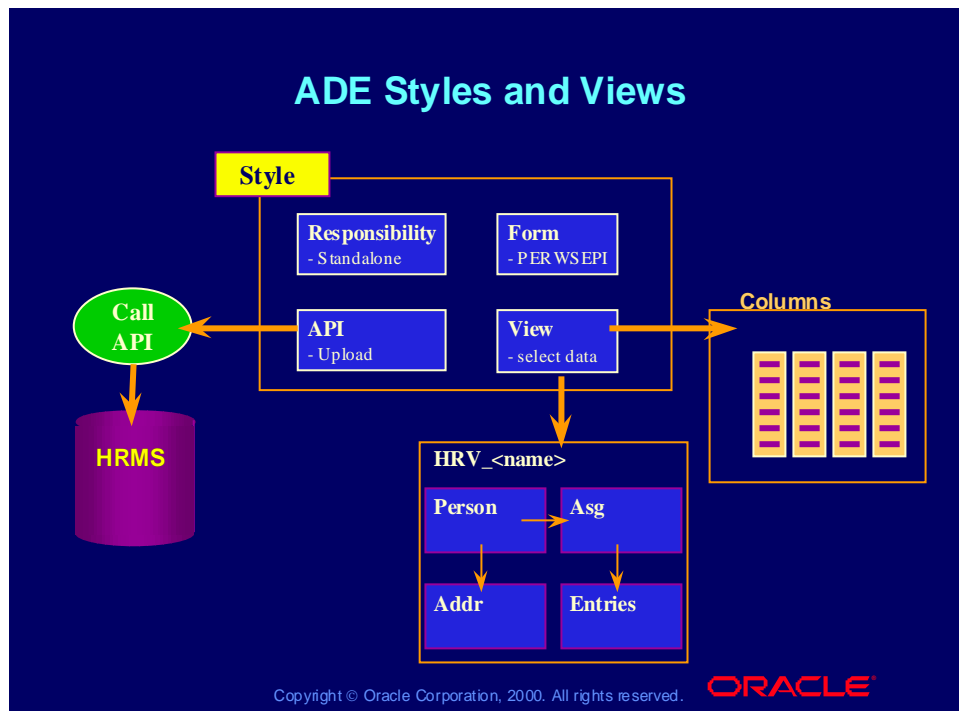
- An administrator can define styles for specific forms and control access so that only users with a specific responsibility can use them
- Security profile restricts access to data
  - Use views to vary scope of data in export.  
Default is all the fields in the form



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## ADE Styles and Views



## Unit Summary

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### Unit Summary

In this unit you should have learnt how to :

- Create a Business Group
- Define Locations
- Define and Change Organizations
- Create and Change Organization Hierarchies
- Describe the use of ADE



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### Representing Financial Reporting Structures

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### Overview

- HR management reporting requirements are usually covered through the use of Business Groups, Organizations, Positions and Hierarchies
- You also need to map your financial reporting requirements onto the Oracle HR work structures
- Typically this is the mapping of cost centers and account codes for budget planning and analysis



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## Objectives

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### Objectives

**At the end of this lesson you should be able to:**

**Describe how financial reporting structures in the general ledger map to management work structures in Oracle HRMS**

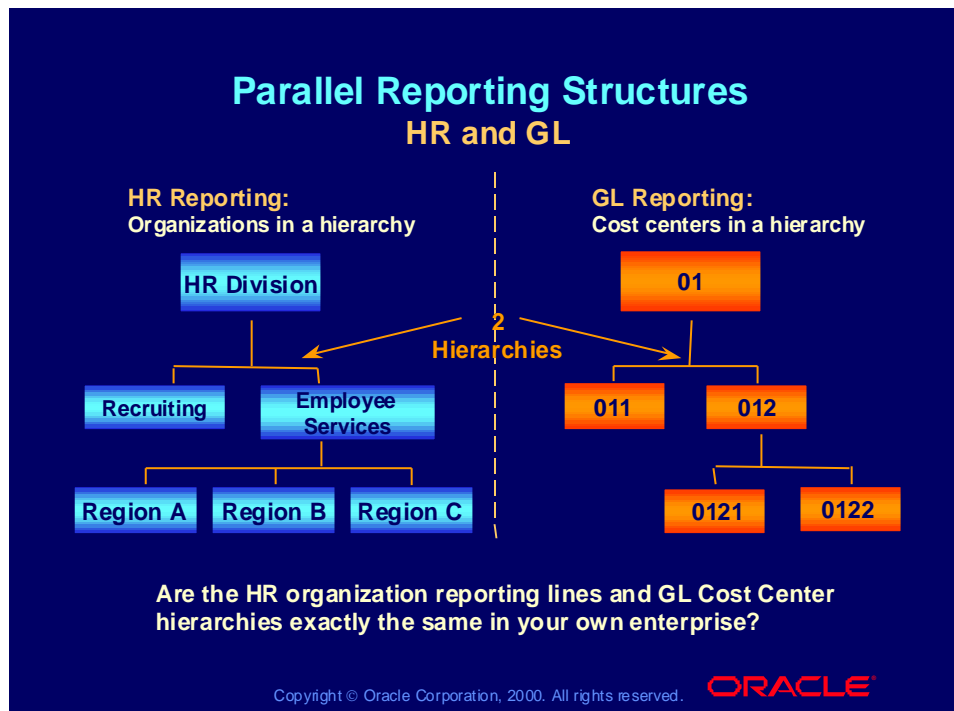


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## Parallel Reporting Structures HR and GL



## Parallel Reporting Structures Similar but Not the Same

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### Parallel Reporting Structures Similar but Not the Same

Differences may result if:

- HR management needs go to a lower level than cost centers.
  - A department with one cost center, but many reporting units, and all share same cost center
- A manager manages one department that includes many cost centers, administered for individual posts or employees.
- HR creates organizations with no cost centers to simplify management reporting or security, or because all costs are assigned at employee level

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## Integration It's okay to be different!

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### Integration

**It's okay to be different!**

- Oracle Applications support the needs of different types of enterprises by having a flexible cost allocation model
- Define your specific requirements for HR as segments in the Cost Allocation key flexfield and for GL in the segments of the GL Accounting Flexfield

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### **Integration** **Understanding the Other Side**

- **Map segments between the two configurations.**  
For example, Cost Center segment in HR to Cost Center segment in GL.
  - **Budget and Costing processes in HRMS will accumulate cost details in HR and transfer summary information to the correct GL segments**
  - **Usually dependent on Payroll or Benefits processing to produce actual values to transfer.**

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## Cost Allocation Key Flexfield

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### Cost Allocation Key Flexfield

- Define your own segments using a key flexfield structure
- Up to 30 segments
  - Validation on each segment
  - Can share value sets with GL
- Allocate costs within HR
  - Payroll, Link, Org, Assignment and Entry
  - No key combination in HR

Cost Allocation Key Flexfield	
Company	Vision US
Account Code	Salaries
Cost Center	7350 - HR Dev
Project	Self-Service

Qualifiers control where a user can allocate values for each segment

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## Multi-Orgs and Business Groups Similar but Not the Same

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### Multi-Orgs and Business Groups

#### Similar but Not the Same

- Multi-Org is the GL function for maintaining separate sets of books for different operating companies
- Business Group is the HR function for maintaining separate operating companies
- Both HR and GL have to support:
  - Multiple companies operating in a single country
  - Multiple companies operating in different countries
  - Both

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## Multi-Orgs and Business Groups Similar but Not the Same

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### Multi-Orgs and Business Groups

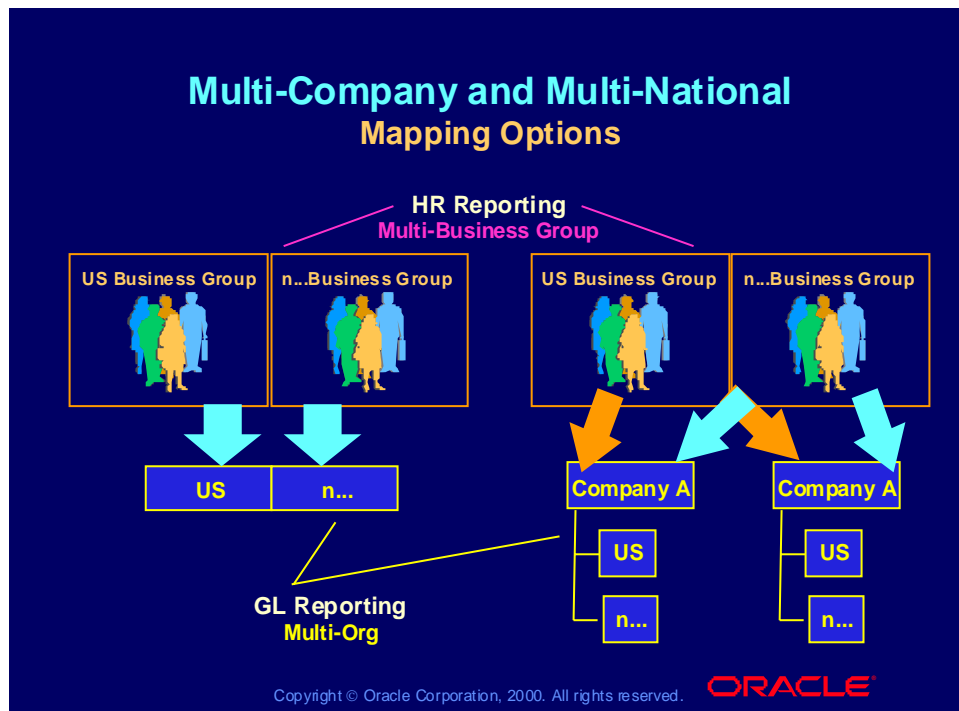
#### Similar but Not the Same

- Oracle Applications provides the flexibility to let you meet your requirements for both financial and HR reporting within each functional area without compromising
- your ability to represent HR management structures
  - your ability to consolidate financial information on a multi-company, multi-national basis

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## Multi-Company and Multi-National Mapping Options





### Mapping Options

- When you define your Cost Allocation key flexfield you decide which segments map to the segments of each set of books
  - Choose set of books then individual segment
- Oracle HR holds the allocation of cost information
  - You do not see Cost Center hierarchy information in HR. The hierarchy of cost centers is part of GL.

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### Costing Considerations

#### HR but not Payroll

- You can record cost codes, but not accumulate actual values

#### HR with Payroll but not GL

- You can accumulate actual values, but must create your own transfer to GL process
  - Still must run the Transfer to GL report to mark cost results as transferred

#### Other Cost Information

- Oracle HRMS can process labor distribution costs for Projects, that is not transferred directly to GL.

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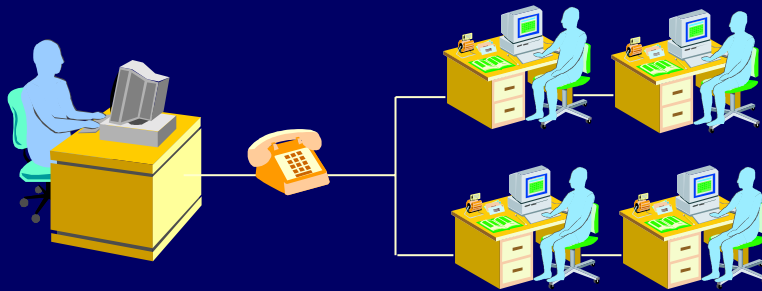
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## Instructor Demonstration

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### Instructor Demonstration

- The purpose of this demonstration is to show you where to enter cost center information.
- Observe as your instructor demonstrates.



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## Unit Summary

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### Unit Summary

**In this unit, you should have learned how to:**

**Describe how financial reporting structures in the general ledger map to management work structures in Oracle HRMS**



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## Representing Legal and Government Reporting Structures (U.S.)

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### Representing Legal and Government Reporting Structures (U.S.)

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### Objectives

**At the end of this unit you should be able to :**

- Describe the different ways that Oracle HRMS can support Government Reporting Entity information
- Classify an organization as a Government Reporting Entity
- Set up Reporting Establishments
- Set up a Headquarters Hierarchy



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### Overview



- A **Government Reporting Entity (GRE)** is an organization grouping that national, regional, and local governments recognize as the employer.
- An employer who:
  - issues pay to employees
  - withholds taxes from employee pay
  - is and is liable for taxes and tax reporting
  - provides other government-mandated reporting, EEO, ADA etc.

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### Identifying GRE's

- You should already know the details of the GRE structures in your own enterprise.
- Each GRE has a unique EIN
- If your enterprise has only one **Employer Identification Number (EIN)** then your Business Group and GRE are the same organization
  - The EIN is a 9-digit number issued by the Internal Revenue Service
- If not, then you will need to set up additional GREs and reporting hierarchies
  - You can associate several GREs together as a Tax Group

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## One Company - One Employer - One GRE

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### One Company - One Employer - One GRE

**All employees work at or from a single establishment**

- Define one establishment hierarchy to produce an establishment report
- The top organization is likely to be the business group
  - Classify the business group as a GRE
  - Classify the business group as a Reporting Establishment



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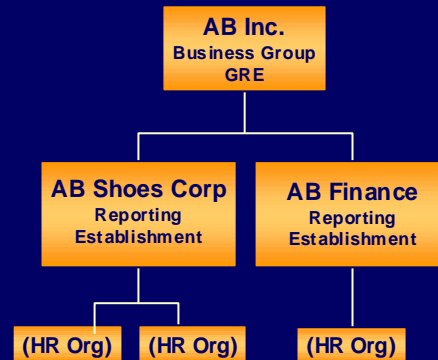
## Many Employers - Many GREs

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### Many Employers - Many GREs

Employees work in multiple establishments with one GRE

- Define multi-level hierarchy
  - Create new organizations if necessary
- The top organization can be a business group or a GRE



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## Multi-Establishment Hierarchies

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### Multi-Establishment Hierarchies

Reporting Establishment	AB, Inc. GRE	AB Distributors Detroit, GRE
AB, Inc., Headquarters	500	
AB Manufacturing	1,500	
AB Distributors Detroit		955
AB Finance Dayton	1,000	45

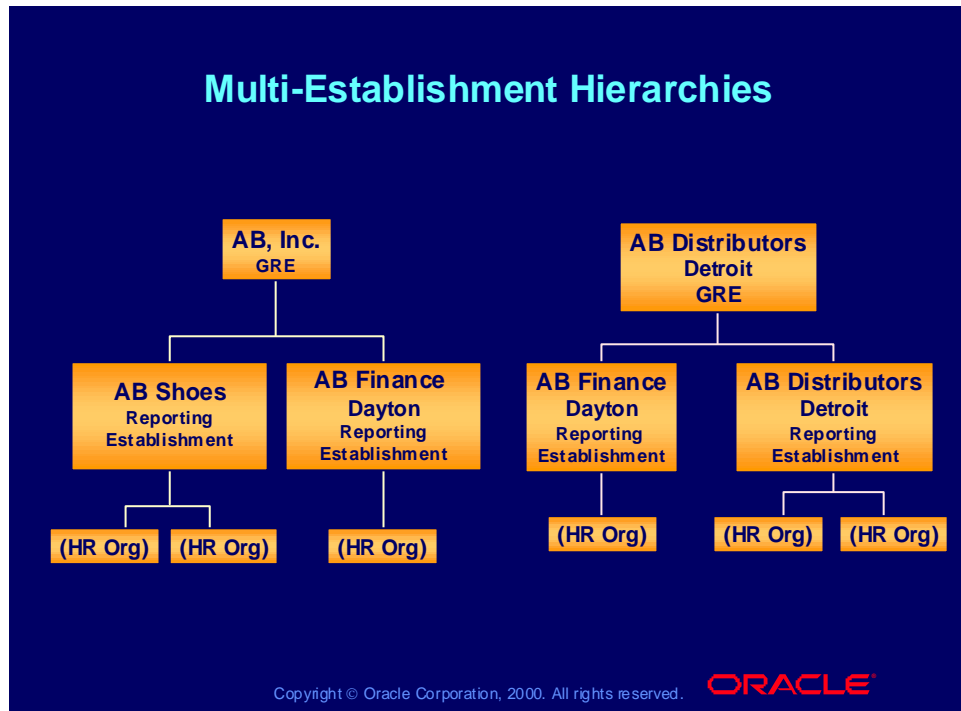
- For reporting purposes, this enterprise needs a second multi-establishment hierarchy and a headquarters hierarchy
- It is a legislative requirement that multi-establishment enterprises identify one establishment as their headquarters

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## Multi-Establishment Hierarchies

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## Headquarters Hierarchy for Multi-Establishment Companies

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### Headquarters Hierarchy for Multi-Establishment Companies

#### A single establishment company

- Use the top organization as a parameter for the Headquarters Report
- Do not build a separate headquarters hierarchy

#### Multi-establishment company

- Only one organization can be classified as a Corporate Headquarters in a business group
- Reports using Headquarters Hierarchies include all employees covered by the hierarchy
- Use an existing organization or create a GRE for reporting purposes
  - Use same EIN as the operational GRE

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## Headquarters for Multi-Establishment Companies

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### Headquarters for Multi-Establishment Companies

- **Top organization must be classified as:**
  - GRE
  - Reporting Establishment
  - Corporate Headquarters
- **Optionally classify as:**
  - HR Organization for employees to have assignments to this organization

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## Defining Organization Information for Government Mandated Reporting

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### Defining Organization Information for Government Mandated Reporting

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## Lesson Objectives

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### Lesson Objectives

**At the end of this lesson, you should be able to:**  
**Set up reports for government reporting agencies**



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### Overview

- Employers must prepare a number of reports for submission to various government authorities to ensure legislative compliance
- In Oracle HRMS, you can organize and maintain the information needed to produce these reports



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### Mandated Government Reports

- Equal Employment Opportunity (EEO)
- Affirmative Action Plan (AAP)
- Federal Contractor Veterans Employment (VETS-100)
- Americans with Disabilities Act (ADA)
- Occupational Safety and Health Administration (OSHA)
- New Hire Report



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### Reporting Categories and Statuses

- Some reporting, (i.e., VETS-100 and ADA), covers only non-temporary, full-time or part-time employees
- You identify these employees, by registering reporting categories and statuses for the business group
- **Reporting categories**
  - User extensible lookup type 'Employment Categories'
- **Reporting statuses**
  - User extensible 'Assignment Statuses' that identify non-terminated employees

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### Classifying Organizations as GREs

- **Identify Organizations that are designated as GREs**
  - GREs must be reported separately
  - Enter the unique EIN for each GRE
  - A GRE can include employees from several establishments, and an establishment can include employees in several GREs
- **A GRE whose employees all work at the same establishment is a reporting establishment**

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## Classifying Organizations as Reporting Establishments

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### Classifying Organizations as Reporting Establishments

- **Establishments** may be:
  - a single physical location
  - a set of worksites in a locality
  - all the sites in a large geographic area
- Identify existing organizations that are establishments or Define new organizations for complex grouping
  - Classify organizations as Reporting Establishments

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### Overriding Establishment Hierarchies

- Reports that use establishment hierarchies can take exceptional cases into account
- You can enter an override reporting establishment at the assignment level for any employee
  - When a process finds an override, it counts the employee as part of the override reporting establishment

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## Classifying an Organization as the Corporate Headquarters

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### Classifying an Organization as the Corporate Headquarters

- For multi-establishment companies you must identify a single headquarters organization
  - Classify as Corporate Headquarters
- Define a new reporting organization if existing organizations do not satisfy this need.

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### Setting Up Non-AAP Establishment Hierarchies

- A reporting establishment can **never** be subordinate to another reporting establishment
- In a non-AAP establishment hierarchy, a GRE/reporting establishment can be the top organization,
  - Or reporting establishments can be subordinate to a GRE and optionally, to HR Organizations

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### AAP Reporting

- **AAP reporting requires breakdown of employees by the affirmative action plans covering them, instead of breakdown by establishment**
- **To meet this requirement, classify the an organization as an AAP Organization**

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### AAP Establishment Hierarchies

- Establishment hierarchies constructed for AAP reporting are exceptional
  - Establishments appear as subordinates of the AAP organizations that represent the affirmative action plans
  - AAP organizations, (which may also be reporting establishments), can:
    - appear at various levels in the hierarchy
    - **can** be subordinate to other AAP organizations,(which may also be reporting establishments).

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### **EEO-1 Reporting Checklist**

- 1. Enter report submission information for each GRE.**
- 2. Enter an EEO job category for each job.**
- 3. Ensure that each employee has on record: a gender, ethnic origin, and assignment.**
- 4. Identify the types of EEO-1 reporting that each GRE must submit.**
- 5. Define the reporting organizations.**
- 6. Build the establishment hierarchies.**
- 7. Enter establishment overrides for employees.**

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### **AAP Reporting Checklist**

- 1. Ensure that each employee has on record: a gender, ethnic origin, GRE, and job.**
- 2. Determine salary codes and grades.**
- 3. Define lines of progression.**
- 4. Enter job group names.**
- 5. Associate each job with an EEO category, salary code, line of progression, and job group.**
- 6. Define an AAP organization for each plan.**
- 7. Determine and build the establishment hierarchies.**

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### **VETS-100 Reporting Checklist**

1. Register reporting categories and statuses for your business group.
2. Enter the necessary GRE reporting information.
3. Record EEO job categories.
4. Ensure appropriate veteran status and assignment to a job, employment category, and GRE.
5. Identify and define the necessary reporting organizations.
6. Determine and build the establishment hierarchies.
7. Enter establishment overrides for employees.

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### ADA Reporting

- Register employees as disabled when you enter other personal information about them
- Maintain information about particular types of disabilities using the Disabilities window
- The report presents this disability information, including comments
  - The report can also display essential requirements of the job or position, if you maintain these requirements in the database

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### **ADA** **Requests for Accommodation**

- The ADA encourages employers to make reasonable accommodations that enable employees with disabilities to work
- Use the Disability Accommodations window to record information about employee requests for accommodations

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### **OSHA** **Recording Information**

- **Use Special Information Types to record the information needed for OSHA**
  - **Description of each injury or illness, with date, place, and circumstances**
  - **Physical effects and effects on the employee's ability to work, (Nonfatal incidents)**
- **Separate activities at the same location are treated as separate reporting establishments**
  - **For example, a manufacturing facility and a sales office in the same building are treated as distinct establishments**

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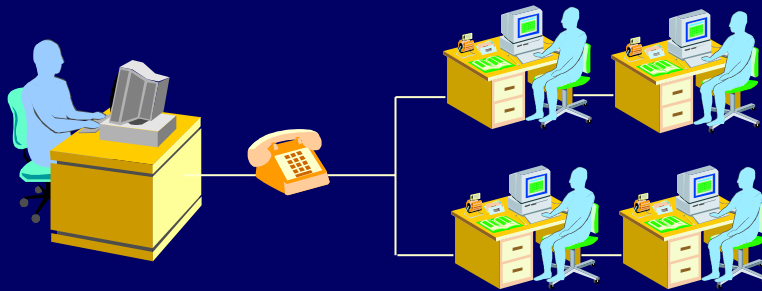


## Instructor Demonstration 2-a

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### Instructor Demonstration 2-a

- The purpose of this demonstration is to show how to classify HR organizations.
- Observe as your instructor demonstrates.



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### Practice 2-a

- **Following the Instructor Demonstration, classify HR organizations using the information supplied**



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## Practice 2-a Navigation Path

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### Practice 2-a Navigation Path



**Navigate to the Organization window using the US Super HRMS Manager responsibility:**

**(N) Work Structures > Organization > Description**

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### Online Help

For details on how to complete the Organization window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Organization Management > How To > Create Organizations > Create an Organization

## Summary

---

### Summary

**In this lesson, you should have learned how to:  
Set up reports for government reporting agencies**



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### Unit Summary

In this unit you should have learnt how to :

- Describe the different ways that Oracle HRMS can support Government Reporting Entity information
- Classify an organization as a Government Reporting Entity
- Set up Reporting Establishments
- Set up a Headquarters Hierarchy



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## Representing Grades and their Relationship to Pay

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### Representing Grades and their Relationship to Pay

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## Objectives

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### Objectives

**At the end of this unit you should be able to :**

- **Define Grades**
- **Define Grade Rates, Pay Scales and Scale Rates**



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## Overview

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### Overview

**This Unit concentrates on how to define Grades with Rates or Pay Scales in Oracle HRMS**



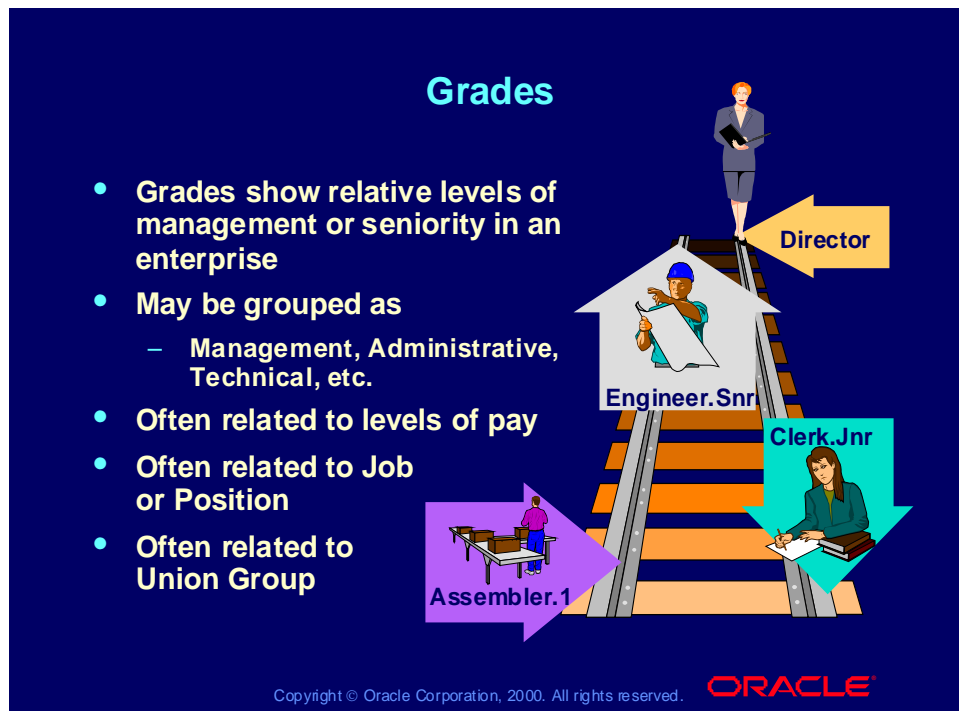
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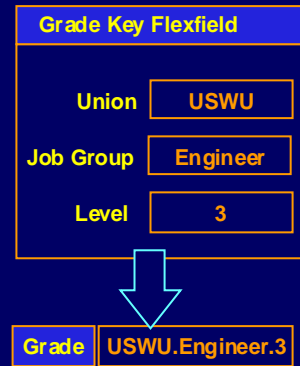
## Grades

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### Grade Key Flexfield

- Define your own grade structure using a key flexfield
- Up to 30 segments
  - Validation on each segment
- Define each grade as a combination of segment values



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### **Grade Key Flexfield Structure** **Simple or Complex**

- In its simplest form, a grade can be a single character, or number, in a logical sequence
  - A, B, C
- By adding a second segment to the grade name, you can identify sub-grades.
  - A.1, A.2, A.3, and A.4
  - B.1 and B.2
- A more complex structure could be used to distinguish grades for different staff groups
  - Manual.A.1, Manual.A.2, Clerical.C.1 and Clerical.C.2

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### Grade Key Flexfield Checklist

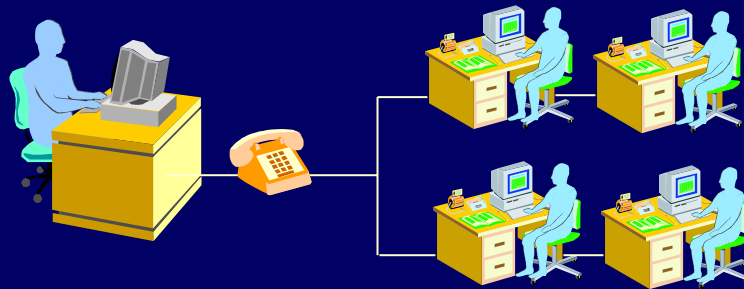
- **Define Value Sets**
  - Decide if you need lists of values for simple lists
  - The Grade window is usually restricted access and a list of values adds maintenance costs
- **Define Key Flexfield Structure and Segments**
  - Enter Yes for Allow Dynamic Inserts to allow users to define grades in the Grade window
- **Define Values**
- **Define Cross Validation Rules (if required)**
- **Define Aliases (if required)**

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### Instructor Demonstration 1-a

- The purpose of this demonstration is to show how to set up the Grade key flexfield.
- Observe as your instructor demonstrates.



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### Practice 1-a

- Following the instructor demonstration set up the Grade key flexfield using the information supplied
- Prefix the structure with your initials




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## Practice 1-a Navigation Path

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### Practice 1-a Navigation Path



**Navigate to the Key Flexfield Segments window using the System Administrator responsibility:**

**(N) Application > Flexfield > Key > Segments**

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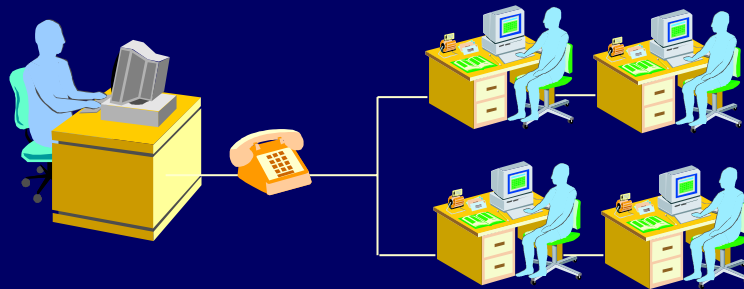
### Online Help

For details on how to complete the Key Flexfield Segment Window please refer to the on line Help path :

Applications Help Library > Applied Technology > Oracle Applications  
Flexfield > Key Flexfields Segments Window > Defining Segments

### Instructor Demonstration 1-b

- The purpose of this demonstration is to show how define a grade.
- Observe as your instructor demonstrates how to define a grade.



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### Practice 1-b

- Following the Instructor demonstration, define a grade using the information supplied



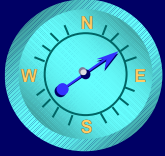
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## Practice 1-b Navigation Path

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### Practice 1-b Navigation Path



**Navigate to the Grade window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Grade > Description**

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### Online Help

For details on how to complete the Grade window please refer to the on line Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Enterprise Modeling > How To > Grades and Pay > Define a Grade

### Defining Grade Rates and Pay Scales

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### Grades and Pay Direct or Indirect

Oracle HRMS supports direct and indirect relationships between grades and pay

- Direct
  - Use **Grade Rates**
  - Fixed value, or
  - Maximum, Minimum, and Mid-point values
- Indirect
  - Use **Pay Scales**
  - Progression Points and Values
  - Grade Steps and increments

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## Grade Rates

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### Grade Rates



- Each Grade has a value or a range of values

Grade	Value	Minimum	Midpoint	Maximum
A.1	25000	20000	30000	40000
A.2	27000	23000	33000	43000

- Often used in performance related pay processes
  - Salary Administration
  - Units may be money, hours, numbers
  - Comparative calculations

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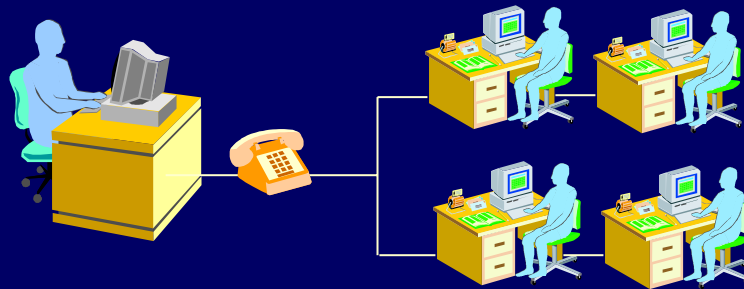
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## Instructor Demonstration 2-a

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### Instructor Demonstration 2-a

- The purpose of this demonstration is to show how define a Grade Rate.
- Observe as your instructor demonstrates.



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### Practice 2-a

- Following the Instructor demonstration, define a Grade Rate using the information supplied.



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## Practice 2-a Navigation Path

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**Practice 2-a Navigation Path**



**Navigate to the Grade Rate window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Grade > Grade Rate**

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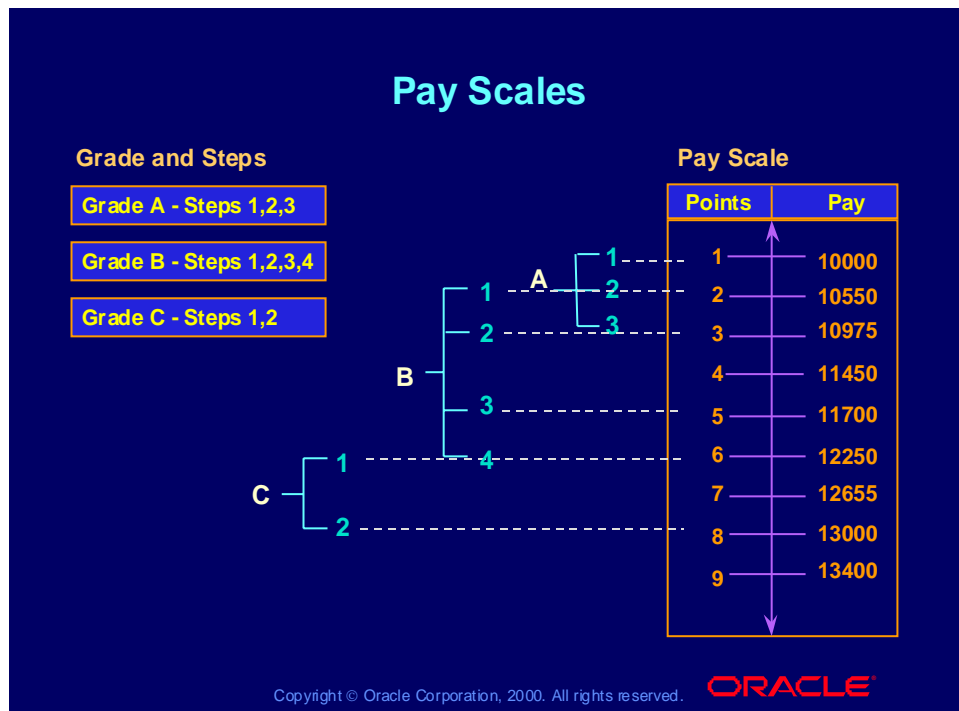
### Online Help

For details on how to complete the Grade Rate Window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Enterprise Modeling > How To > Grades and Pay > Define a Grade Rate



# Pay Scales



### Pay Scale Characteristics

- One pay scale of points and values is used to establish the actual pay for many different grades or employee groups
- Each point in the pay scale has a single value
- Grades can have a number of distinct steps, with each step given a single point in the pay scale
- An employee assignment includes Grade and Step
  - The step and point value determine salary or actual pay for the employee

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### Pay Scales

- Pay Scales show indirect relationships between grades and pay
  - Unlimited number of scales
  - Unlimited number of points and values
  - Use sequence to define progression
- Define a value for every point
  - Money, Hours, Number
- Define Grade Steps in sequence
  - Select a point for each step
  - Steps can skip points in the scale
  - Define a 'ceiling' point to stop automatic increments within grade

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### Pay Scale Checklist


1. Define Pay Scale
  - Points in sequence
2. Define Scale Values
3. Define Grades
4. Define Grade Steps and Points
  - Enter ceiling point for automatic incrementing
5. Enter Grade and Step for an employee
  - Employee assignment information
6. Run incremental process when required
  - Default process is based on a fixed date

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## Polling Question

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**Polling Question** 

**True or False**

Grades are related to pay.

**True** **False**

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## Answer

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**Answer**



**True or False**

**Grades are related to pay.**



**True**

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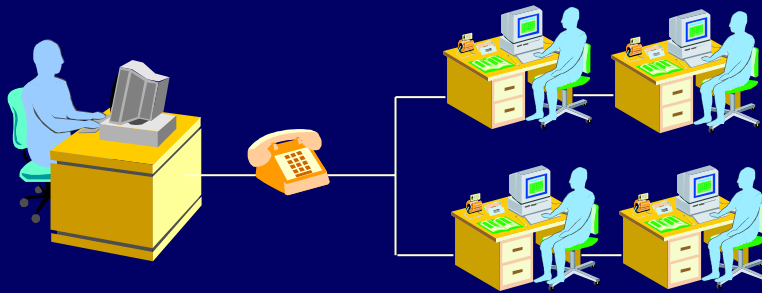
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## Instructor Demonstration 2-b

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### Instructor Demonstration 2-b

- The purpose of this demonstration is to show how to define a Pay Scale
- Observe as your instructor demonstrates



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### Practice 2-b

- Following the instructor demonstration, define a Pay Scale using the information supplied



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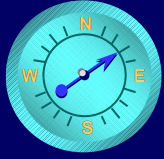
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## Practice 2-b Navigation Path

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### Practice 2-b Navigation Path



**Navigate to the Pay Scale window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Grade > Pay Scale**

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### Online Help

For details on how to complete the Pay Scale Window please refer to the online Help path :

Oracle HRMS Global > Enterprise Modeling > How To >  
Grades and Pay > Define a Pay Scale

## Unit Summary

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### Unit Summary

In this unit you should have learnt how to :

- Define Grades
- Define Grade Rates, Pay Scales and Scale Rates



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# Representing Jobs and Positions

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### Objectives

**At the end of this unit you should be able to :**

- **Define Jobs and Positions**
- **Define and Change Position Hierarchies**
- **Change Job and Position Definitions**
- **Perform Mass Move Updates**



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### Overview

- Every enterprise defines roles to represent how employees work
- In Oracle HRMS, you can use Jobs or Positions or a combination of both, to define roles

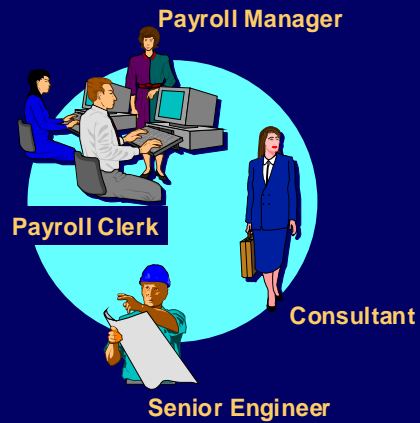


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### Jobs and Positions

- Use **Jobs** or **Positions** to represent the different roles that a person can perform in your enterprise
- Oracle HRMS provides two options to suit the needs of different enterprises



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### Using Jobs or Positions

- Do you manage **People** or **Positions**?
  - Fixed or Flexible Roles
  - May be more than one employee in the same role
- If role continues to exist after the employee leaves then think about **Positions**
- If role ceases or is re-evaluated when the employee leaves then think about **Jobs**



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### **Additional Information for Jobs and Positions**

- Oracle HRMS lets you hold additional types of information for both Jobs and Positions.
- Predefined types of information include:
  - Valid grades
  - Job Evaluation details
  - Work Choices
  - Competence or Skill Requirements
- An unlimited number of user-defined types
  - Extra Information Types

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### Jobs

- **Jobs** are generic roles within a Business Group
- They are independent of any single organization
  - Exist for all organizations
  - For example. The jobs Manager and Consultant could occur in many organizations
- Oracle HRMS lets you define your own job structure and then enter details for each job in your enterprise

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### Job Key Flexfield

- Define your own job structure as a key flexfield
- Up to 30 segments
  - Validation on each segment
  - Required or Optional
- Define individual jobs as a combination of segment values



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### Job Key Flexfield Checklist

- **Define Value Sets**
  - Decide if you need lists of values for simple lists
  - The Job window is usually restricted access and a list of values adds maintenance costs
- **Define Key Flexfield Structure and Segments**
  - Enter Yes for Allow Dynamic Inserts to allow users to define grades in the Job window
- **Define Values**
- **Define Cross Validation Rules (if required)**
- **Define Aliases (if required)**

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### **Job Key Flexfield Structure** **Simple or Complex**

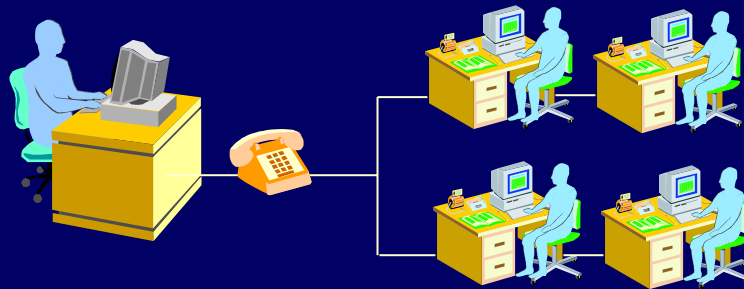
- A job can be a one or two segment name
  - Typical if you use Positions
  - Manager., Manager.Senior, Consultant., Consultant.1, etc.
- Adding more segments you extend the types of information you use to define a job
  - Useful if you use Jobs as the primary roles in your enterprise
  - Manual.A.1.ShiftB, Manual.A.2.ShiftA, Clerical.C.1. and Clerical.C.2.

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### Instructor Demonstration 1-a

- The purpose of this demonstration is to show how to set up the Job key flexfield.
- Observe as your instructor demonstrates.



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## Practice 1-a

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### Practice 1-a

- Following the instructor demonstration set up the Job key flexfield using the information supplied
- Prefix the structure with your initials




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## Practice 1-a Navigation Path

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### Practice 1-a Navigation Path



**Navigate to the Key Flexfield Segments window using the System Administrator responsibility:**

**(N) Application > Flexfield > Key > Segments**

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### Online Help

For details on how to complete the Key Flexfield Segment Window please refer to the on line Help path :

Applications Help Library > Applied Technology > Oracle Applications  
Flexfield > Key Flexfields Segments Window > Defining Segments

## Practice 1-a Flexfield Details

---

### Practice 1-a Flexfield Details

- **Segment 1**
  - **Segment Name = Job Name**
  - **Validation Type = Independent**
  - **Segment Values**

Value	Description
Manager	Manager
President	President
Associate	Associate
Sales	Sales

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## Practice 1-a Flexfield Details

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### Practice 1-a Flexfield Details

- **Segment 2**
  - **Segment Name = Job Code**
  - **Validation Type = Dependent**
  - **Segment Values**

Value	Value
Manager	Executive
President	Shoe
Associate	Stock
Sales	Sales

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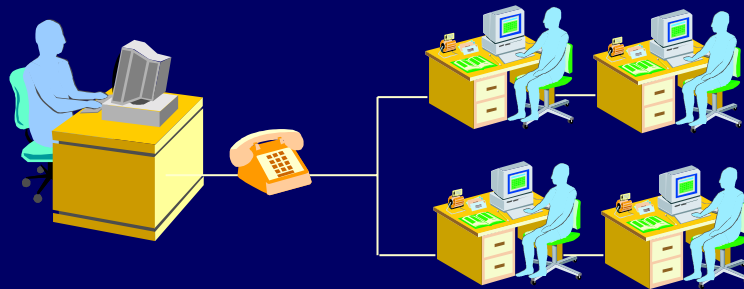
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## Instructor Demonstration 1-b

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### Instructor Demonstration 1-b

- The purpose of this demonstration is to show how to define a Job
- Observe as your instructor demonstrates



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### Practice 1-b

- **Following the instructor demonstration define a Job using the information supplied**




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## Practice 1-b Navigation Path

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### Practice 1-b Navigation Path



**Navigate to the Job window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Job > Description**

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### Online Help

For details on how to complete the Job Description Window please refer to the on line Help path:

Oracle HRMS Global > Enterprise Modelling > Jobs and Positions > How To > Define a Job

### Practice 1-b Job Details

- **Create the following jobs for the business group:**
  - **Manager**
  - **Vice President**
  - **Associate.Shoe**
  - **Associate.Stock**
  - **Sales**

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### Positions

- Position is a specific role, or function, that exists in one, and **only one**, organization
- Positions show more management reporting detail than organizations alone
- Position definition includes **Job** and **Organization**
  - Use job to show common job types and information across organizations
  - Use fewer organizations to show groups of positions and employees. E.g. Department level.

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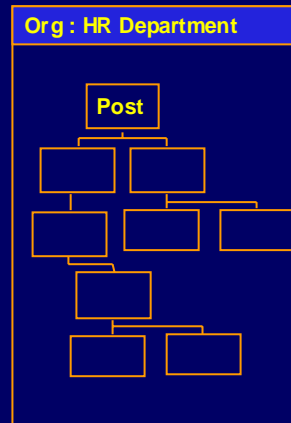
# Positions

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## Positions



- Use Positions to show specific posts within an Organization
  - Typical in Public Sector, Government, Education and Health
  - Typical in large enterprises to show management positions
- Use Position Control functionality to manage positions



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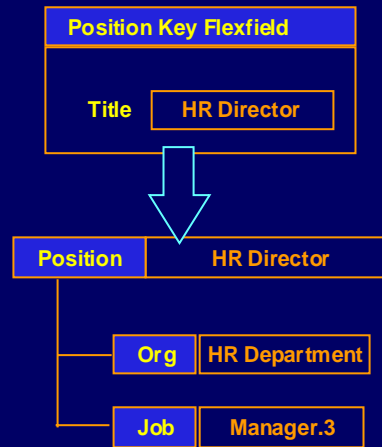
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## Position Key Flexfield

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### Position Key Flexfield

- Define your own position structure using a key flexfield
- Up to 30 segments
  - Validation on each segment
- Define each position as a combination of segment values
  - Simplest option is one segment with no validation for 'Title'



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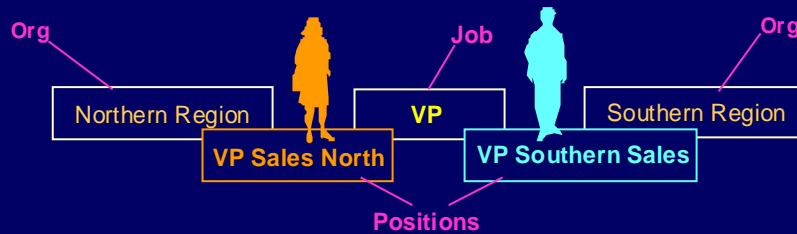


## Position Key Flexfield

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### Position Key Flexfield

- Every position in the enterprise is unique
- If every region has a Vice President, you must set up a unique position name for each VP
  - VP may be the job definition for each position
  - Use job to define shared information



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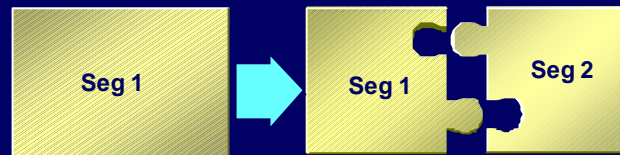
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## Key Flexfield Structure

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### Key Flexfield Structure

- When deciding on the number of segments a flexfield has, it is usually better to set up a few small segments rather than one big segment.
- For example. If position includes name, region and code, you could define 2 or 3 segments
  - Give users a greater choice in reporting using individual segments.



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### Key Flexfield Structure

- If visibility of data is very important, you might consider including additional information in the name.
- If the value can change often, you probably don't want to put it in the unique identifier
  - Consider using one of the other options for additional information.
  - Extra Information Types or descriptive flexfield may be more suitable.



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### Polling Question



**A Position is a specific occurrence of ....**

- A. ... of several Jobs, fixed in one organization**
- B. ... of one Job, fixed within one business group**
- C. ... of one Job, fixed within several organizations**
- D. ... of one Job, fixed within one organization**

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### Answer



**A Position is a specific occurrence of ....**

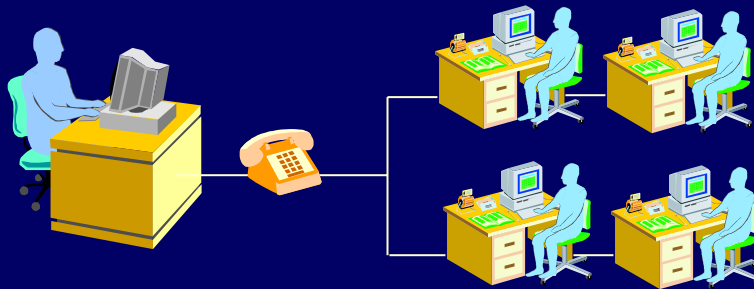
- A.** ... of several Jobs, fixed in one organization
- B.** ... of one Job, fixed within one business group
- C.** ... of one Job, fixed within one organization
- D.** ... of one Job, fixed within several organizations

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### Instructor Demonstration 1-c

- The purpose of this demonstration is to show how to set up the Position key flexfield
- Observe as your instructor demonstrates



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### Practice 1-c

- Following the instructor demonstration set up the Position key flexfield using the information provided
- Prefix the structure with your initials



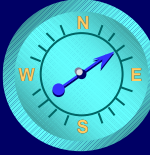
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## Practice 1-c Navigation Path

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### Practice 1-c Navigation Path



**Navigate to the Key Flexfield Segment window using the System Administrator Responsibility:**

**(N) Application > Flexfield > Key > Segments**

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### Online Help

For details on how to complete the Key Flexfield Segment Window please refer to the on line Help path :

Applications Help Library > Applied Technology > Oracle Applications  
Flexfield > Key Flexfields Segments Window > Defining Segments



## Practice 1-c Flexfield Details

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### Practice 1-c Flexfield Details

- **Segment 1**
  - **Segment Name = Position Name**
  - **Validation Type = Independent**
  - **Segment Values**

Value	Description
Chief Executive Officer	
Vice President	
Senior Warehouse	
Shoe Manager	

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### Practice 1-c Flexfield Details

- **Segment 2**
  - **Segment Name = Region**
  - **Validation Type = Independent**
  - **Segment Values**

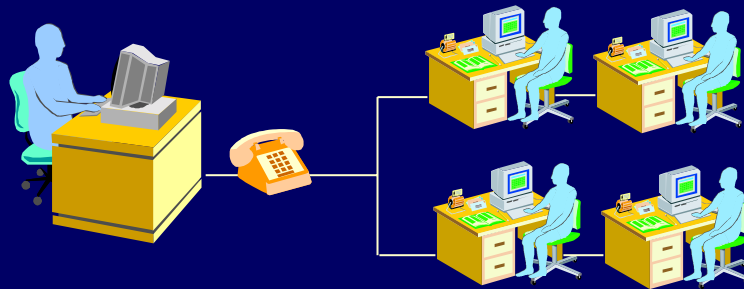
Value	Description
N	North
S	South
E	East
W	West

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### Instructor Demonstration 1-d

- The purpose of this demonstration is to show how to define a Position.
- Observe as your instructor demonstrates this.



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### Practice 1-d

- **Following the Instructor demonstration define a Position using the information supplied**



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## Practice 1-d Navigation Path

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### Practice 1-d Navigation Path



**Navigate to the Position window using your local Super HRMS Manager responsibility:**

**(N) Work Structures > Position > Description**

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### Online Help

For details on how to complete the Position window please refer to the on line Help path:

Applications Help Library > Oracle HRMS Applications > Oracle HRMS >  
Oracle HRMS Global > Enterprise Modeling > Jobs and Positions >  
How To > Define a Position

### Practice 1-d Position Details

- Create the following positions within an organization:
  - Vice President, North
  - Shoe Manager, West
  - Shoe Manager, South
  - Shoe Manager, East

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### Position Hiring Status

- Hiring status determines what changes you can make to the position definition and whether you can include it in any assignments

#### Eliminated or Deleted

- You cannot change the position

#### Proposed

- You can change the start date

#### Active

- You can change only the start date before you make any other updates to the position

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### Position Hierarchies

- **Use Hierarchies to show management reporting lines between positions**
  - More detail than Organization Hierarchies
  - In a hierarchy each position has one parent
- **Unlimited number of hierarchies**
  - Dates and versions
  - Copy and manage multiple versions
- **Use hierarchies to control user access to records**
  - Security Profiles
  - Reports

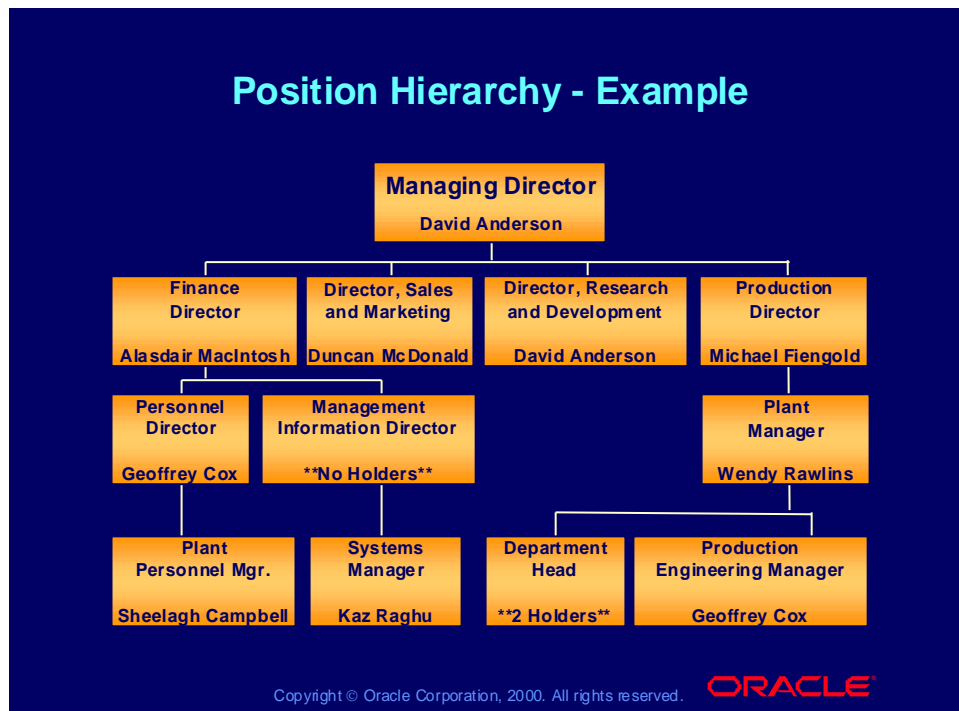
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## Position Hierarchy - Example

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### Defining and Changing Position Hierarchies

- Positions can belong to any number of hierarchies but can appear only once in any hierarchy
- Use the Position Hierarchy window or the Hierarchy Diagrammer to define and change hierarchies
  - Optionally, add new positions to hierarchies from the Position window.
- To change the top position in an existing hierarchy use the Position Hierarchy window
  - Query the hierarchy
  - Query the new top position
  - Make the old top position report to the new

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### Hierarchy Diagrammers

- A graphical tool to define and change hierarchies using 'drag-and-drop' actions
  - Not an organization charting and reporting tool. Consider using a partner application, like OrgPublisher.
- Updates to the database are immediate
  - Reflected in the forms, in reports, and any security processes

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### **Additional Information for Jobs and Positions**

- **With Oracle HRMS you can enter several additional types of information for jobs or positions:**
  - **Work Choices**
  - **Job Evaluation**
  - **Skills**
  - **Valid Grades**
  - **User defined Extra Information Types**

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### Work Choices

- **Work choices specify deployment conditions for the job or position.**
- **These can also be entered for employees or candidates to assist in succession planning.**
- **Choices include:**
  - **Willingness to work in all locations, to relocate, to travel or to hold a passport**
  - **Specific countries or locations of travel**
  - **Length of time the person must perform the job or position**

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### Changing Job and Position Definitions

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### Changing Definitions

- **Positions are DateTracked** so that you can maintain a complete history of changes to your positions over time
- **Jobs are dated** so that you can start and end definitions
  - No DateTracked history
- **Position Hierarchy versions** are dated so that you can have multiple versions at the same time



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### Changing Details

- **Ending a Job or a Position will automatically end valid grade definitions**
  - Removing the end date will reopen valid grades with the same original end date
- **You cannot end Jobs that are currently in use in assignments or positions**
- **You can change the Status of a position**
- **If you want to record the source of changes to a position, use the Amendment Information fields from the Additional Detail tab**
  - Useful for Public Sector and Position Control

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### Mass Move Updates

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## Objectives

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### Objectives

**At the end of this lesson, you should be able to:**  
**Plan and execute a mass move of positions**



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### Overview

- Mass Move allows you to manage the movement of positions as a result of reorganization and simultaneously to update employee records
- Mass move functionality is only available if you use Positions



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### Reorganization

- If you use positions, you should try to keep the definition of organizations as broad as possible
  - Reduce the duplication of information
  - Simplify the processes of reorganization
- Reorganization usually means changing organizations, positions and hierarchies
  - You cannot change organization for a position
  - You must end one and create a new position
  - Mass Move functionality supports this process

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### Moving Assignments

- **You can create new positions using existing positions**
  - In the same organization or a different one
  - You can change the valid grade, location, and standard conditions of the positions
- **You can move a group of assignments to different positions**
  - In the same organization or a different one
  - North American users can also change the GRE/Legal Entity of an assignment

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### Considerations Before a Mass Move

- What is the effective date for the change?
- What are the source and target organizations?
  - May be the same or different
- What are the source and target positions
  - Do you want to deactivate the source position?
  - If the target positions are new, do you want to copy location and standard conditions from the source position, target organization, or Business Group?
  - What about valid grades and GRE/Legal Entity details?

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### Considerations Before a Mass Move

- Which assignments should transfer from the source positions to the target positions?
- What should happen to the grade of any assignment changed during the move?
- What should happen to the location, standard conditions and GRE/Legal Entity of assignments changed during the move?

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## Polling Question

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### Polling Question



### True or False

Mass move functionality is available regardless of whether you are using Positions.



**True**



**False**

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**Answer**



**True or False**

**Mass move functionality is available regardless of whether you are using Positions.**



**False**

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### Unit Summary

In this unit, you should have learned how to:

- Model Jobs and Positions
- Define and Change Position Hierarchies
- Change Job and Position Definitions
- Perform Mass Move Updates



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## Setting Up Workers Compensation (U.S.)

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### Setting Up Workers Compensation (U.S.)

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## Objectives

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### Objectives

**At the end of this lesson you should be able to :**  
**Set up Workers' Compensation**



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### Overview



- This lesson concentrates on the setup of Workers' Compensation, (WC), information for Insurers, Codes and Rates
- If you are using Oracle Payroll you will have predefined elements and fastformulas to do the calculations for Workers Compensation
- **Workers Compensation Information** stores information. This is processed for each employee
  - **Workers Compensation** stores the WC premium calculated during processing of each employee

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### WC Insurers

- **Monopolistic states** require you to use their own agency as your insurer
- **Competitive states** allow you to choose between private insurers and the state agency to fund WC programs



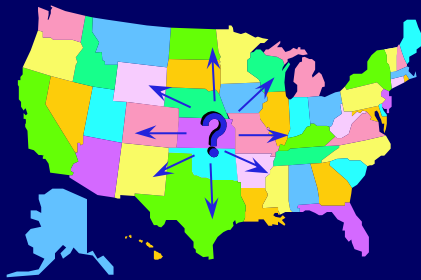
State  
Government

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### WC Codes and Rates

- You associate a state's WC codes with an insurer's default rates
  - Default rates apply when no location is specified



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### Workers' Compensation Liability

- **Maintain specialized information to determine your liability**
- **Associate your jobs with state WC work classification codes**
- **Associate state WC classification codes with WC insurance premium rates**



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## Additional Elements/Modifications Required

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### **Additional Elements/Modifications Required**


- **Consider additional WC elements, new formulas, or formula modifications if your enterprise has:**
  - **Multiple GREs in different states, with different insurers**
  - **Employees working in states with unique rules governing the makeup of employees' payroll exposure or in states with nonstandard modifiers for the WC premium calculation**
  - **GREs in Washington or Oregon where employees as well as employers must pay WC premiums or fees**

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## Polling Question

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**Polling Question** 

**True or False**

Default rates apply when no location is specified.



**True** **False**

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## Answer

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**Answer**



**True or False**

**Default rates apply when no location is specified.**



**True**

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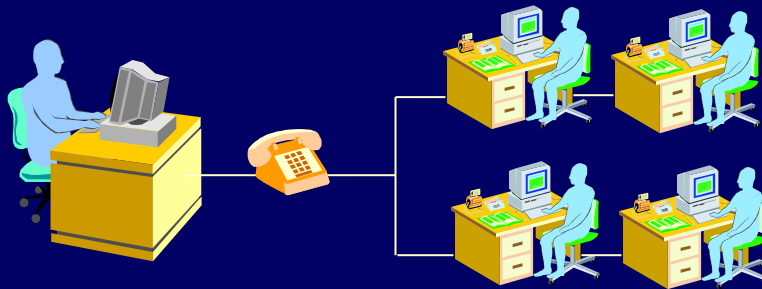
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## Instructor Demonstration 1-a

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### Instructor Demonstration 1-a

- The purpose of this demonstration is to show how to setup Workers Compensation Codes and Rates
- Observe as your instructor demonstrates



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### Practice 1-a

- **Following the Instructor demonstration setup Workers Compensation Codes and Rates using the information supplied**




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## Practice 1-a Navigation Path

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### Practice 1-a Navigation Path



**Navigate to the Workers Compensation Rates window using the US Super HRMS Manager Responsibility:**

1. (N) Work Structure > Job > Workers Compensation Rates

**Navigate to the Workers Compensation Codes window using the US Super HRMS Manager Responsibility:**

2. (N) Work Structure > Job > Workers Compensation Rates

**Navigate to the Organization window using the US Super HRMS Manager Responsibility:**

3. (N) Work Structures > Organization > Description

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### Online Help

1 & 2 For details on how to complete the Workers Compensation Rates and Codes Windows please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS US > Payroll Definition > Workers Compensation > How To > Entering WC Codes, Exposure Rules and Surcharges

3. For details on how to complete the Organization window please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Organization Management > How To > Create Organizations > Create an Organization

## Summary

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### Summary

**In this lesson you should have learnt how to :  
Set up Workers' Compensation**



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