

R11i, Implementing Oracle HRMS

Student Guide Volume 2

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Preface

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) Managing Compensation and Benefits	A73315-01
Using Oracle HRMS (US)	A77144-01
Implementing Oracle HRMS (US)	A75314-01
Using Oracle HRMS - The Fundamentals (UK) Managing Compensation and Benefits	A73289-01
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 <i>algorithm</i> 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.

Modeling the Employment Relationship

Chapter 2

Modeling the Employment Relationship

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Overview

This Module concentrates on the Workforce Management features contained within Oracle HRMS relating to Employment Relationships.



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Module Units

The Units contained within this Module are as follows:

- Unit 1 - Introducing Employment Relationships
- Unit 2 - Representing the Workforce
- Unit 3 - Managing Employment Information
- Unit 4 - Terminating and Rehiring an Employee

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Modelling the Employment Relationship

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Objectives

Objectives

At the end of this Unit you should be able to:

- Describe the key employment concepts in Oracle HRMS
- Describe the components of the assignment
- Identify assignment statuses



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Overview

This Unit concentrates on the different key features of employment management and managing the employment relationship.



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Managing the Employment Relationship

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Overview

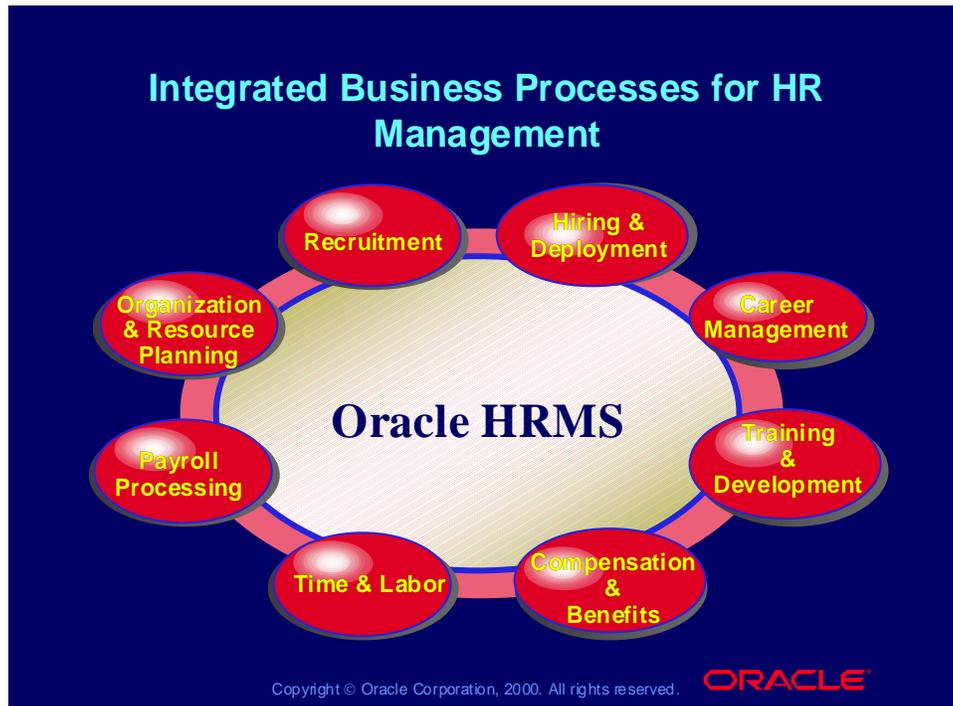
- Oracle HRMS enables you to enter and track people from when they apply for a job to the when they leave your enterprise.
- You also need to record information about what you employed the people in your enterprise to do. Oracle HRMS allows you to enter, maintain, report and inquire about all aspects of employment information.



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Integrated Business Processes for HR Management



Person Types

- There is a need to store information about different groups of people, such as, employees, applicants, and people external to your enterprise.
- The system uses person types to group people together. You can configure these types to suit your enterprise.
- You may also want to restrict access to the records of certain groups of people. This can be done using person types.

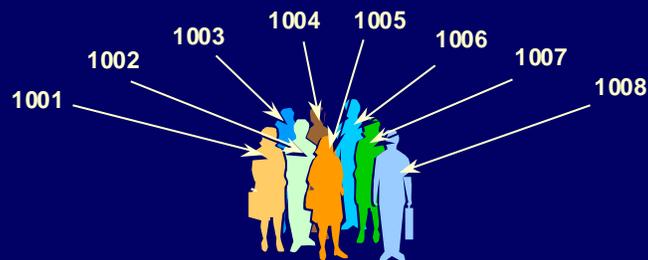
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Identifying Employees

Identifying Employees

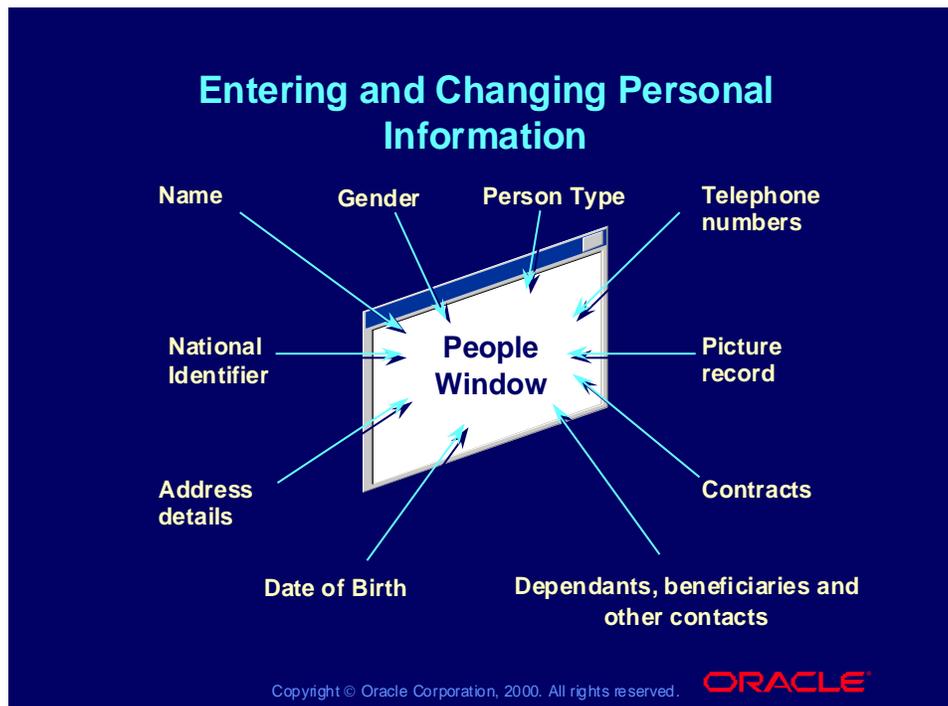
Oracle HRMS uses a unique identifier, known as an **Employee Number**, to identify every employee in your **Business Group**.



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Entering and Changing Personal Information



Entering and Changing Personal Information

Entering and Changing Personal Information

- Every enterprise must be able to record personal information for its employees, applicants and contacts.
- Oracle HRMS allows you to quickly and easily enter, update, track, inquire and report on people daily through the People window.
- This information, apart from an employee address data, is datetracked allowing you to keep an historical track of an employee's personal information.

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Addresses for Employees

- You can enter as many addresses as necessary for each person, using the Address window.
- All employees must have only one primary address on record at any point in time, but can have any amount of secondary addresses.
- An address must be given an address type such as home, weekend or business.
- Each country has its own national address style.

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Tracking Peoples Roles and Activities

There are various windows that you can use to track the roles and activities of employees and applicants.

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



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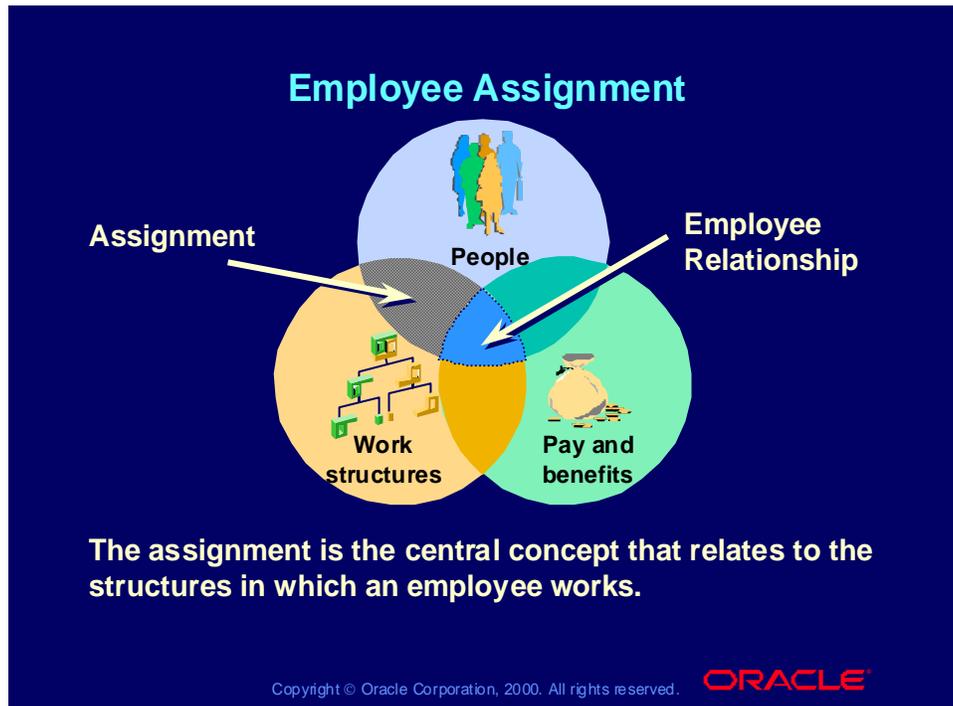
Employment Relationship and Work Related Information

- **Employment relationship is both a legal one and an operational one. Oracle HRMS addresses both these dimensions:**
 - **The legal dimension to employment relationship is represented by a contract of employment which covers periods of service.**
 - **The operational dimension is supported by the use of assignments and assignment statuses.**

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Employee Assignment



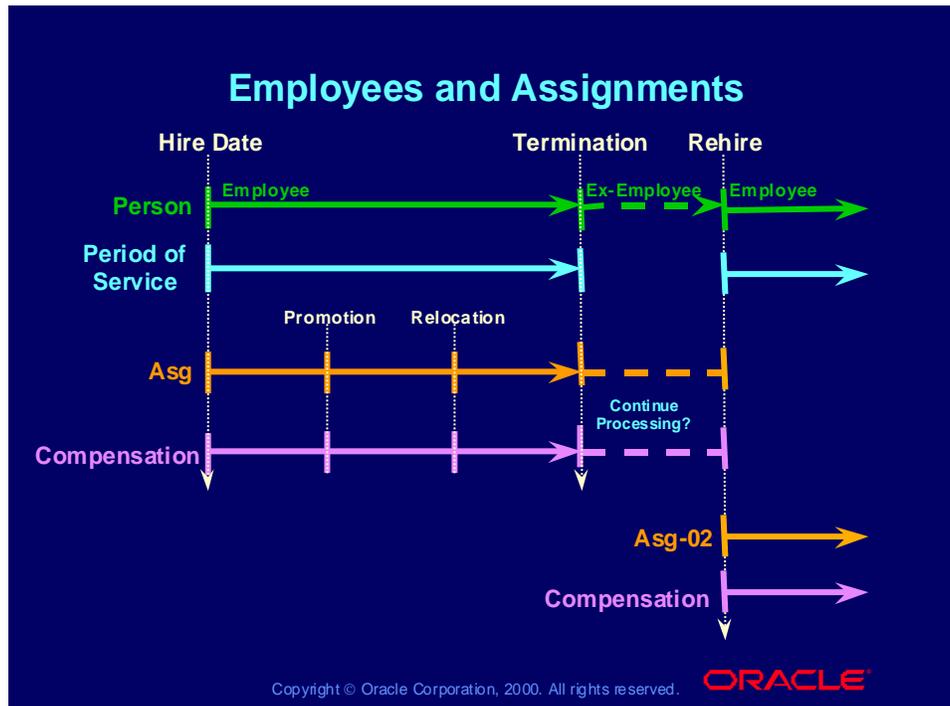
Assignments in Oracle HRMS

- Each assignment has an Employee Assignment number that uniquely identifies every assignment that exists within your Business Group.
- Assignments represent the way the employee works in the enterprise.
- The assignment includes information about:
 - Effective dates
 - Current status
 - Employment category information
 - User defined key flexfields

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Employees and Assignments



Single Assignments in Oracle HRMS

- When employees change their location, job or other attribute you record relocations, promotions, transfers and so on as changes to the existing assignment.
- These changes are datetracked so that you can view the history of changes to an assignment and can make future dated changes in advance.
- This maintains a work history for the employee.

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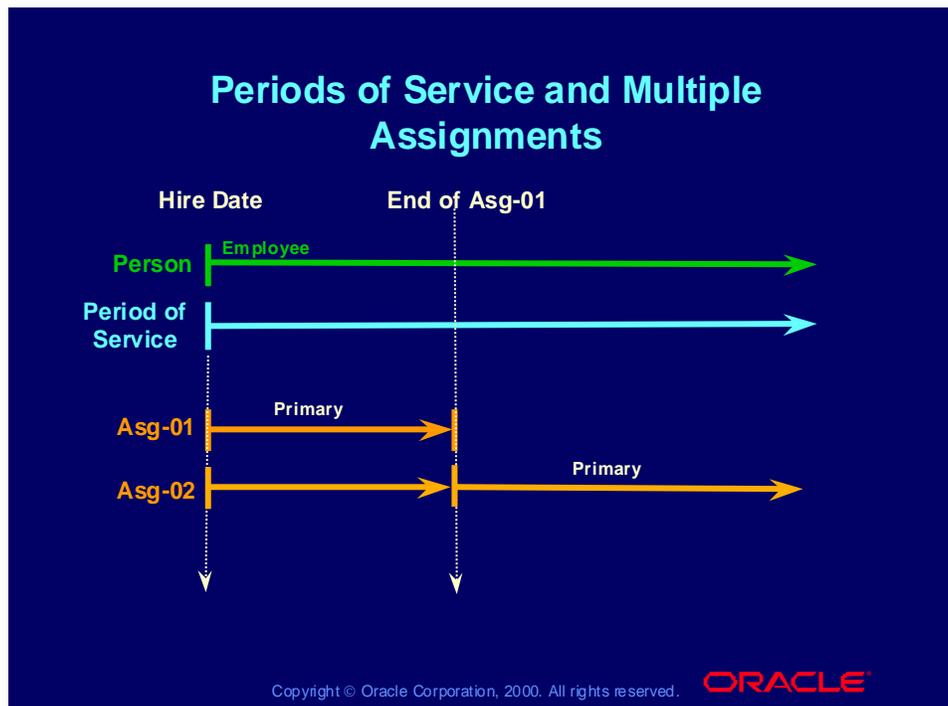
Periods of Service and Multiple Assignments

- If your enterprise permits employees to work in two or more different capacities at once and thereby become eligible for different benefits, you can enter multiple assignments for them in a single period of service.
- Only one of the assignments is the primary assignment, any others are secondary.
- An employee must have a current assignment at all times.

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Periods of Service and Multiple Assignments



Tracking Changes to an Assignment

Tracking Changes to an Assignment

- If an assignment status changes, an employee still keeps the same assignment number.
- Changes to an assignment may mean that the employee may lose eligibility for some compensation types, benefits or deductions and gain eligibility for others.
- The system generates a warning if it ends any unprocessed element entries for which the employee is no longer eligible.

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Assignment Statuses

Assignment Statuses

There are four primary system statuses for employee assignments:

- Active
- Suspended
- Terminated - further pay processing can occur
- Ended - further pay processing may not occur

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Polling Question

Polling Question 

True or False

An assignment defines the Business Group for which an employee works, the date the assignment began and its current status

True **False**

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Answer



True or False

An assignment defines the Business Group for which an employee works, the date the assignment began and its current status



True

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Ending Assignments

Ending Assignments

- Oracle HRMS does not permit an employee to exist in the system without at least one active assignment at any point in time.
- This means that, for an employee with just one active assignment, the only way to end the assignment is to terminate the employee.
- For employees with more than one active assignment, you can end all but one of their assignments by selecting an assignment status of 'End' or 'Terminate' in the Assignment window.

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Polling Question

Polling Question 

True or False

An employee must have a current assignment at all times

True **False**

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Answer



True or False

An employee must have a current assignment at all times



True

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Terminating Employees

Terminating Employees

- Where an employee has only one assignment, the only way to end that assignment is to terminate the employee and end their period of service.
- This is done using the Terminate window.



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Displaying Personal Information

Apart from the People window there are other methods within Oracle HRMS to access all the information entered about people. You can:

- Use the Find Person window or a People folder
- Use an inquiry window to view specific information
- Use QuickPaint to design a report incorporating the relevant information
- Use Manager Self Service (if available)

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Employee Development

In Oracle HRMS, you can record the following information:

- A competency profile - this is a list of the competencies held by a person and their level of proficiency in each competence
- Qualifications, including details of individual subjects, grades, licenses, status of ongoing training and tuition fees



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Employee Development

In Oracle HRMS, you can record the following information:

- Attendance's at educational establishments
- Work choices, including willingness to travel and relocate, preferred working hours, work schedule, duration within post and preferred work locations



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Polling Question

Polling Question

List the four Primary Statuses for employee assignments



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Summary

In this lesson, you should have learned how to:

- Describe the key employment concepts in HRMS
- Describe the components of the assignment
- Identify assignment and termination statuses



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Representing the Workforce

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Objectives

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

- Define System and User Person Types
- Recognize Benefits User Person Types
- Identify SubGroups of System Person Types
- Define Collective Agreements
- Set Up Bargaining Units
- Manage Contracts



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Objectives

Objectives

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

- Describe the Use of Employee Assignment Statuses in Oracle HRMS
- Define Employee Assignment Statuses
- Describe the uses of the People Group Key Flexfield in Oracle HRMS
- Set up the People Group Key Flexfield



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Overview

This Unit concentrates on how to set up the different elements that Oracle HRMS uses to represent the workforce.



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Defining Person Types

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Overview

Oracle HRMS comes with a predefined set of system person types.



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System and User Person Types

- Each person type has a predefined system and user name.
- You cannot create new system person types.
- You can change the user name but not the system name.
- You can add your own additional user person types that are mapped onto one of the system person types.

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System and User Person Types

- You should select one user name as the default for each system name.
- This is because Oracle HRMS uses the default user name in certain circumstances:
 - For instance, when an applicant is hired, the system updates the Person Type to the default for Employee
- You may have three types of employee in your enterprise which can be defined as subgroups of the employee person type.



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Predefined System and User Person Types

Predefined System and User Person Types		
User Name	System Name	Default
Applicant	Applicant	Yes
Applicant and Ex-Applicant	Applicant and Ex-Applicant	Yes
Contact	Contact	Yes
External	External	No
Employee	Employee	Yes
Employee and Applicant	Employee and Applicant	Yes
Ex-applicant	Ex-applicant	Yes
Ex-employee	Ex-employee	Yes
Ex-employee and Applicant	Ex-employee and Applicant	Yes

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User Person Types for Benefits

- In addition to system and user person types there are also predefined benefits user person types to permit multiple concurrent person types for the same person.
- Automatically created when certain life events occur in Standard or Advanced Benefits:
 - For example, when a leaving reason of retirement is entered for an employee, an OAB user person type of retiree would be created.

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Benefits User Person Types

Benefits User Person Types

There are eight predefined person types:

User Name	System Name
Retiree	Retiree
Former Spouse	Former Spouse
Surviving Family Member	Surviving Family Member
Surviving Spouse	Surviving Spouse
Former Family Member	Former Family Member
Beneficiary	Beneficiary
Dependent	Dependent
Participant	Participant

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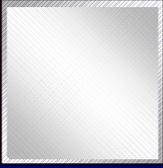
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Polling Question

Polling Question 

True or False

Benefit User Person types are automatically created when certain actions occur in Standard or Advanced Benefits

True **False**

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Answer



True or False

Benefit User Person types are automatically created when certain actions occur in Standard or Advanced Benefits



True

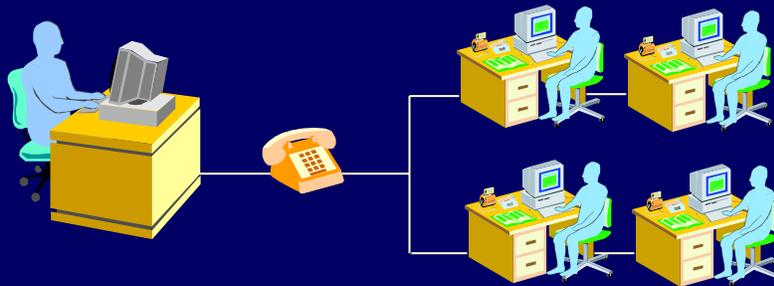
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Instructor Demonstration 1-a

Instructor Demonstration 1-a

The purpose of this demonstration is to show how to map user names to a person type system name. Observe as your instructor demonstrates how to map user names.



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Practice 1-a

- **Following the Instructor demonstration, map three user names using the information supplied.**
- **Prefix the names with your initials.**



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Practice 1-a Navigation Path

**Practice 1-a
Navigation Path**



Navigate to the Person Type Window in US Super HRMS Manager:

(N) Other Definitions > Person Types

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Online Help

For details on how to map user names, please refer to the online Help path:

Applications Help Library > Oracle HRMS Applications >
Oracle HRMS > Oracle HRMS Global > Employee Management > How To >
Employee Management Setup > Define Person Types

Summary

Summary

In this lesson, you should have learned how to:

- Define System and User Person Types
- Recognize OAB User Person Types
- Identify SubGroups of System Person Types



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Defining Collective Agreements, Bargaining Units and Contracts

Defining Collective Agreements, Bargaining Units and Contracts

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Overview



Bargaining Units

- **A bargaining unit is a legally organized group of people that has the right to negotiate with employers or employer federations on all aspects of terms and conditions on behalf of employees who are members.**
- **There are two ways to set up a bargaining unit. You can:**
 - **Define a bargaining unit by setting it up as an organization classification. This can then be used when entering a collective agreement.**
 - **Complete a Bargaining_Unit_Code lookup type. This can then be selected from the Assignment window.**

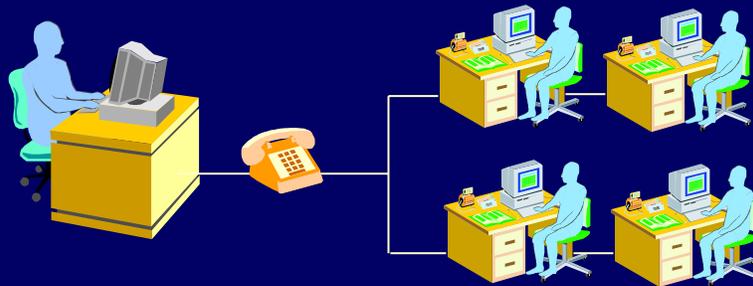
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Instructor Demonstration 2-a

Instructor Demonstration 2-a

The purpose of this demonstration is to show how to set up a Bargaining Unit. Observe as your instructor demonstrates how to set up a bargaining unit as a lookup.



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Practice 2-a

- **Following the Instructor demonstration, set up a bargaining unit as a lookup using the information supplied.**
- **Prefix the bargaining unit with your initials.**



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Practice 2-a Navigation Path

**Practice 2-a
Navigation Path**



**Navigate to the Application Utilities Lookups Window
in US Super HRMS Manager:**

(N)Other definitions > Application Utilities Lookup

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Online Help

For details on how to set up a bargaining unit as a lookup please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications >
Oracle HRMS > Oracle HRMS Global > Enterprise Modeling > How To >
Collective Agreements > Enter Collective Agreement Grades

Collective Agreements

- **Collective agreements are agreements between a bargaining unit and an employer or employer's federation that determine minimum pay rates and conditions for the employees covered by its terms.**
- **Oracle HR lets you record details of collective agreements between the employer and a bargaining unit that are recognized by organizations within your Business Group.**
- **Once a collective agreement is set up, it can be selected when setting up an employee's assignment to denote that the assignment is covered by the terms in the agreement.**

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Defining Collective Agreements

- **Steps to define a Collective Agreement:**
 - **Define a Bargaining Unit an an Organization Classification**
 - **Define an Employer as an Organization Classification**
 - **Enter a Collective Agreement**
 - **Link an Assignment to the Collective Agreement**

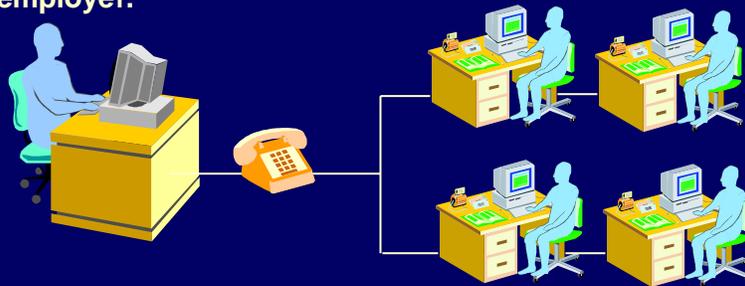
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Instructor Demonstration 2-b

Instructor Demonstration 2-b

The purpose of this demonstration is to show how to define the bargaining unit and employer in the organization window. Observe as your instructor demonstrates how to define the bargaining unit and employer.



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Practice 2-b

Practice 2-b

- Following the Instructor demonstration, define a bargaining unit and employer in the Organization window using the information supplied.
- Prefix the bargaining unit and employer with your initials.



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Practice 2-b Navigation Path

**Practice 2-b
Navigation Path**



Navigate to the Organization Window in US Super HRMS Manager:

(N) Work Structures > Organization > Description

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Online Help

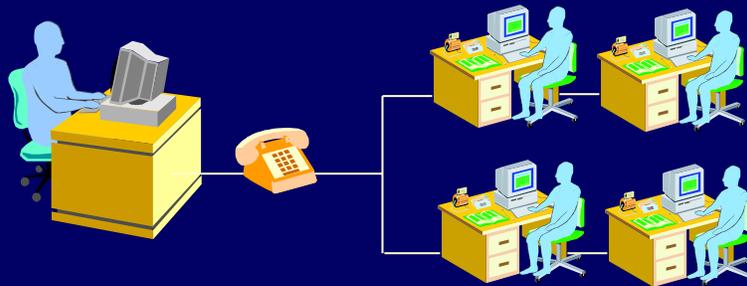
For details on how to complete the Organization Window please refer to the online Help path :

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

Instructor Demonstration 2-c

Instructor Demonstration 2-c

The purpose of this demonstration is to show how to define and enter a collective agreement. Observe as your instructor demonstrates how to enter a collective agreement.



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Practice 2-c

- **Following the instructor demonstration, define a collective agreement using the information supplied.**
- **Prefix the collective agreement with your initials.**



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Practice 2-c Navigation Path

**Practice 2-c
Navigation Path**



**Navigate to the Collective Agreements Window in US
Super HRMS Manager:**

(N) Work Structures > Collective Agreements

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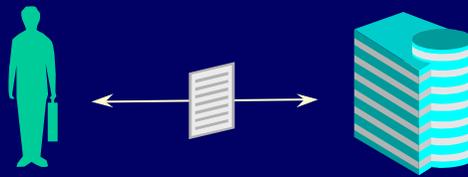
Online Help

For details on how to set up Collective Agreements, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications >
Oracle HRMS > Oracle HRMS Global > Enterprise Modeling > How To >
Collective Agreements > Set Up Collective Agreements

Contracts

- A contract of employment is an agreement between an employer and employee or potential employee.
- It defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire.



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Contracts

- You can record attributes of your employee's contracts to be used for reporting purposes.
- Each person can have multiple contracts.
- Once a contract is entered for a person you can refer an assignment to it using the Assignment window:
 - An assignment can refer to one contract only.

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Contract Statuses

- **Contract statuses define whether or not a contract is active.**
- **Contract statuses are created using the lookup type CONTRACT_STATUS.**
- **The status is represented by a prefix on the lookup code:**
 - **A– You should use this prefix for statuses that indicate a contract is active**
 - **O– You should use this prefix for statuses that indicate a contract is obsolete**
 - **If a contract status has no prefix it is assumed to mean that the contract is inactive**

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Generating and Printing Contracts

- This is done in the **Manage Contracts** window
- Only if a person has a contract reference and an assignment number can a contract be printed for them.
- A **SQL*Plus** script extracts information recorded for the assignment and this forms the basis of the contract.
- Letter types are set up and linked to **SQL*Plus** scripts using the **Letter** window accessed from the **Contract Letter Type** menu entry.

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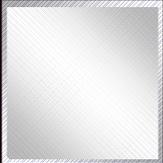
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Polling Question

Polling Question 

True or False

An assignment can refer to multiple contracts.

True **False**

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Answer



True or False

An assignment can refer to multiple contracts.



False

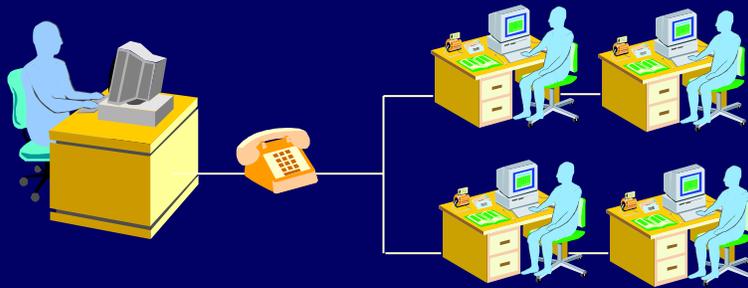
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Instructor Demonstration 2-d

Instructor Demonstration 2-d

The purpose of this demonstration is to show how to enter a contract. Observe as your instructor demonstrates how to enter a contract.



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Instructor Demo 2-d Navigation Path

**Instructor Demo 2-d
Navigation Path**



**Navigate to the Contract Window in US Super HRMS
Manager:**

(N) People > Enter and Maintain > (B)Others > Contracts

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Online Help

For details on how to enter a contract, please refer to the online Help path :
Applications Help Library > Oracle HRMS Applications >
Oracle HRMS > Oracle HRMS Global > Employee Management > How To >
Manage Personal Information > Enter Contracts

Summary

Summary

In this lesson, you should have learned how to:

- Define Collective Agreements
- Set Up Bargaining Units
- Manage Contracts



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Defining Employee Assignment Statuses

Defining Employee Assignment Statuses

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Overview

- When an employee is suspended or takes an extended leave of absence from work, you may want to record this as a change of status:
- The change may be temporary or permanent
 - This may change the way you report headcount or pay an employee
- Define your own Assignment Statuses in Oracle HR to represent the specific types of change that you want to track:
 - Common examples include Suspension With Pay, Suspension Without Pay, Paid Leave of Absence, Unpaid Sabbatical Leave, Study Leave, and so forth

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Assignment Statuses

- Define your own statuses and map these onto one of four predefined system statuses for HR:
 - Active Assignment, Suspend Assignment, Terminate Assignment and End.
- If you are also using Oracle Payroll then map each user status onto one of two predefined payroll system statuses:
 - Process, Do not Process.

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Primary Assignment Statuses

- Use the Assignment window to enter changes of status for an employee:
 - Every assignment has one primary status
 - Primary status is used for processing and reporting rules
- You can change the default names for predefined user statuses.

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Primary Assignment Statuses

- Define any number of user statuses for each system status. For example:
 - You might want to define Maternity Leave, Paternity Leave, Disability Leave, Military Leave or Education Leave and map all of these to Suspend Assignment.

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Secondary Assignment Statuses

Secondary Assignment Statuses

- Define and use secondary statuses to define subsets of primary assignment statuses for custom analysis and reporting:
 - Not associated with an HR or Payroll system status

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Secondary Assignment Statuses

Secondary Assignment Statuses

- For example, suppose Maternity Leave is available when a child is born or is adopted, and you want to track its use in these two cases. The same business rules for reporting headcount and processing payroll apply:
- To accomplish this you could set up one primary status of Maternity Leave and two secondary statuses of Maternity Birth and Maternity Adopt.
- Use the Secondary Statuses window to enter values

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Polling Question

Polling Question



True or False

When you define a secondary assignment status of **Suspend Without Pay** this will automatically stop payroll processing of an employee assignment?



True



False

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Answer



True or False

When you define a secondary assignment status of Suspend Without Pay this will automatically stop payroll processing of an employee assignment?



False

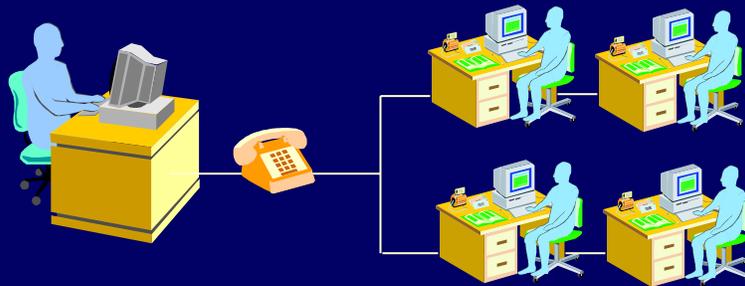
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Instructor Demonstration 3-a

Instructor Demonstration 3-a

The purpose of this demonstration is to define one user Employee Assignment status. Observe as your instructor demonstrates.



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Practice 3-a

- **Following the Instructor demonstration, define one Employee Assignment status using the information supplied.**
- **Prefix the Status with your initials.**



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Practice 3-a Navigation Path

**Practice 3-a
Navigation Path**



Navigate to the Person Type Window in US Super HRMS Manager:

(N) Work Structures > Assignment Statuses

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Online Help

For details on how to define an Employee Assignment Status please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications >
Oracle HRMS > Oracle HRMS Global > Employee Management > How To >
Employee Management Setup > Define Assignment Statuses

Summary

In this lesson, you should have learned how to:

- Describe the Use of Employee Assignment Statuses in Oracle HRMS
- Define Employee Assignment Statuses



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Defining the People Group Flexfield

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Overview

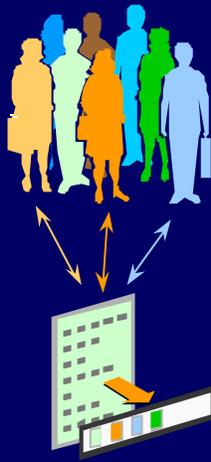
- **With Oracle HRMS you get predefined types of information that provide the details of an employee assignment:**
 - **Organization, Job, Grade, Location ...**
- **Using these you can identify groups of employees for entitlement to compensation elements or for reporting and analysis.**
- **Every enterprise has other information that is considered part of an assignment and is used for similar purposes:**
 - **Typical examples would be Pension Group, Work Shift, and Essential Car User**

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People Group Key Flexfield

People Group Key Flexfield



- Use this flexfield to define up to 30 group fields for use in the assignment window:
 - included in the assignment record
 - changes are datetracked
- Define a segment for each information group:
 - Use validation options to control user input

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System Definitions

- A key flexfield has a structure and segments.
- A Business Group has one People Group structure:
 - You can have different structures and segments for different business groups
- Although this is a *key flexfield* you do not define combinations of segments for the People Group as you do for grades or jobs:
 - Enter values for each employee assignment
- Define a structure name and one segment for People Group before you can define and use a Business Group to enter employees or applicants:
- Assignment window will error if you do not.

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Making People Group Segments Required

Making People Group Segments Required

- Before you make a segment of this flexfield required for entry, you should consider the following:
 - Required means required on the assignment and element link windows, and in report parameter definitions.
 - Required must have a default value
 - If you intend to define links based on another segment then you must also include a value for the required segment.
 - If you have many possible values for the required segment you may have to define many links.

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Polling Question

Polling Question 

True or False

You must define at least one segment for the People Group flexfield in order to be able to use the Assignment window.

True **False**

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Answer



True or False

You must define at least one segment for the People Group flexfield in order to be able to use the Assignment window.



True

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Polling Question

Polling Question

List four possible uses for the People Group key flexfield.



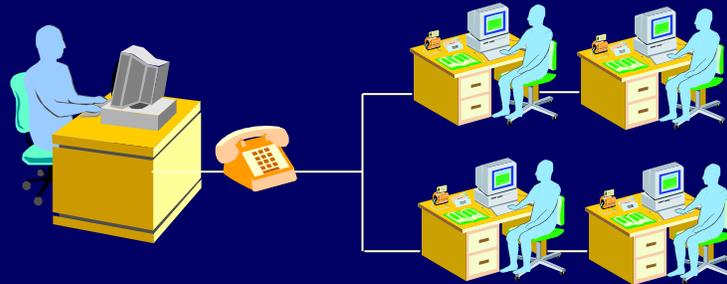
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Instructor Demonstration 4-a

Instructor Demonstration 4-a

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



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Practice 4-a

Practice 4-a

- **Following the Instructor demonstration, define two segments using the information supplied.**
- **Prefix the segments with your initials.**



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Practice 4-a Navigation Path

**Practice 4-a
Navigation Path**



**Navigate to the Key Flexfield Segments Window in
HRMS System Administration:**

(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 online Help path :

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

Summary

Summary

In this lesson, you should have learned how to:

- Set up the People Group key flexfield
- Describe what types of information can be stored in this flexfield

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Managing Employment Information

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Objectives

At the end of this Unit you should be able to:

- Enter and Maintain Employee and Assignment Information
- Enter and Maintain Information for Multiple Assignments



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Overview

This Unit concentrates on entering new employees and how the relevant information is managed by Oracle HRMS.



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Entering Employment Information

Entering Employment Information

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Overview

- Oracle HRMS lets you configure your own processes for employee hiring, deployment, development and termination:
 - Relocations, transfers, or promotions are recorded as datetracked changes to an assignment
- Use menus and taskflows to configure the sequence of windows for each process:
 - Default taskflows provided with all HRMS Responsibilities give access to **ALL** windows for personal and assignment information.

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Entering Personal Information for a New Person

Entering Personal Information for a New Person

- **Use the People window to enter hiring and personal information for a new employee:**
 - **Minimum information to enter for all categories of people is name and person type.**
 - **For employees, you must enter gender, employee number and date of birth (for assignment in payroll)**
- **Enter all legally required information:**
 - **For example. National Identifier, Visa details, Address details (for tax purposes)**

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Entering Personal Information for a New Person

Entering Personal Information for a New Person

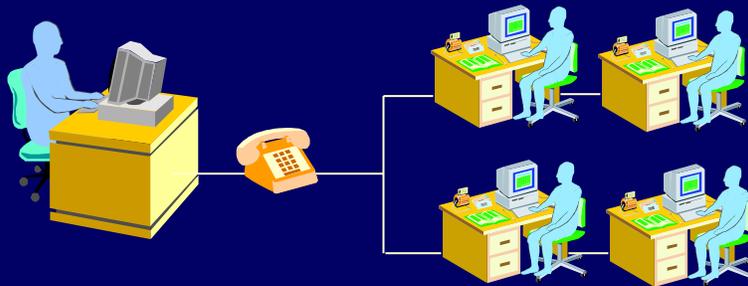
- When you enter a new person as a type of employee the system automatically creates a period of service and a default assignment to the Business Group:
- Effective start date is the hire date
 - This is known as the primary assignment
 - Assignment ID is the same as Person ID
- Use the Assignment window to update the default assignment with the correct information:
 - Such as Organization, Job, Grade, Location.

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Instructor Demonstration 1-a

The purpose of this demonstration is to show how to enter a new employee with an assignment. Observe as your instructor demonstrates.



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Practice 1-a

- Following the Instructor demonstration, enter a new employee using the information supplied.
- Enter a name of your own choice.



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Practice 1-a Navigation Path



**Navigate to the People Window in US Super HRMS
Manager:**

(N) People > Enter and Maintain

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Online Help

For details on how to enter a new employee, please refer to the online Help path :

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

Changing Assignment Information

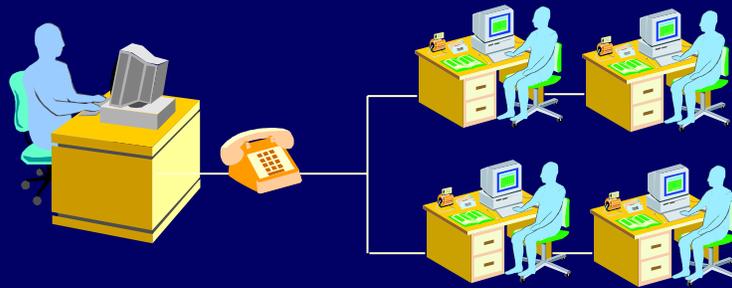
- When an employee is promoted, transferred, or moves from full-time to part-time working, you change details of the primary assignment:
- Use datetrack to maintain a history of these changes
 - Use Datetrack History to review all changes to the assignment
- When a person terminates employment use the Terminate window to end all information for the person:
 - Terminate person, assignment and compensation information.

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Instructor Demonstration 1-b

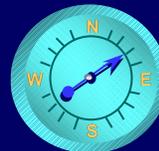
The purpose of this demonstration is to show how to change assignment information to reflect an employee promotion. Observe as your instructor demonstrates.



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Practice 1-b Navigation Path



**Navigate to the Assignment Window in US Super
HRMS Manager:**

(N) People > Enter and Maintain > (B)Assignment

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Online Help

For details on how a promotion affects the Employee Assignment please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > Solutions > The Employee Assignment

Multiple Assignments for an Employee

Multiple Assignments for an Employee

- If you have employees who work in more than one job, with separate compensation, you may want to use multiple assignments.
- Use the assignment window to enter and maintain any number of assignments for an employee:
 - Use the New Record button to create each new assignment
 - Secondary assignments have a suffix added to the ID number
 - Enter associated compensation and benefits for each new assignment
- The **Primary** checkbox is automatically unchecked.

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Polling Question

Polling Question 

True or False

A second assignment is the same as a change of assignment.

True **False**

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Answer



True or False

A second assignment is the same as a change of assignment.



False

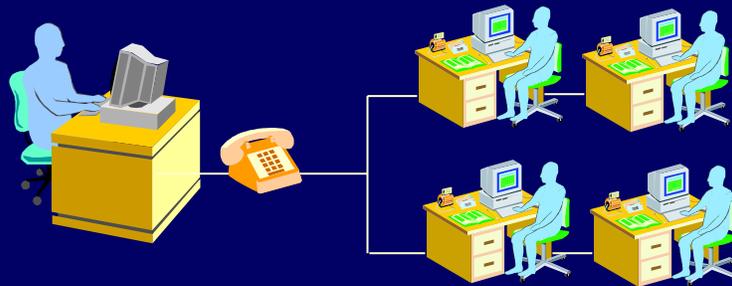
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Instructor Demonstration 1-c

Instructor Demonstration 1-c

The purpose of this demonstration is to show how to enter a secondary assignment. Observe as your instructor demonstrates.



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Practice 1-c Navigation Path

**Practice 1-c
Navigation Path**



Navigate to the Assignment Window in US Super HRMS Manager:

(N) People > Enter and Maintain > (B)Assignment

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Online Help

For details on how to enter a secondary assignment, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > How To > Employee Management on a Daily Basis > Enter an Assignment

Changing a Secondary Assignment into the Primary Assignment

Changing a Secondary Assignment into the Primary Assignment

- When you manage employees with multiple assignments you may find situations where a secondary assignment may need to be elevated to a primary assignment:
- For example. The employee is seconded to another job for a temporary period but is then promoted to that job.
- With Oracle HRMS you have a choice in the way you can show this type of change.

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Changing a Secondary Assignment into the Primary Assignment

Changing a Secondary Assignment into the Primary Assignment



- Date effectively, update the Primary checkbox on the secondary assignment.
- End the primary assignment.

OR

- End the secondary assignment .
- Update the details on the Primary assignment with the secondary assignment information.

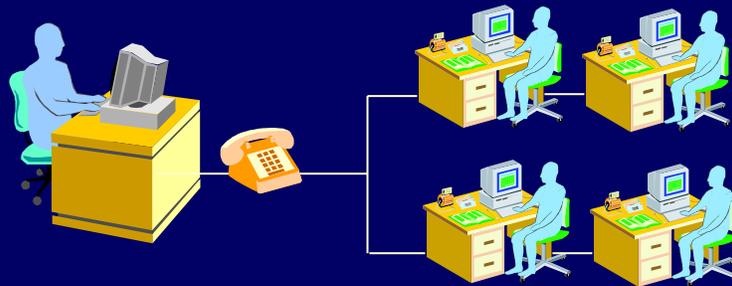
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Instructor Demonstration 1-d

Instructor Demonstration 1-d

The purpose of this demonstration is to show how to update the **Primary** checkbox on a secondary assignment. Observe as your instructor demonstrates.



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Practice 1-d Navigation Path

**Practice 1-d
Navigation Path**



Navigate to the Assignment Window in US Super HRMS Manager:

(N) People > Enter and Maintain > (B)Assignment > (T)Miscellaneous

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Online Help

For details on how to update the primary checkbox, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > How To > Employee Management on a Daily Basis > Change Primary Assignments

Summary

Summary

In this lesson, you should have learned how to:

- Enter and Maintain Employee and Assignment Information
- Enter and Maintain Information for Multiple Assignments



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Terminating and Rehiring an Employee

Terminating and Rehiring an Employee

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Objectives

Objectives

At the end of this Unit you should be able to:

- Terminate Employment for an Employee or an Assignment
- Cancel Termination
- Rehire an Employee



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Overview

This Unit concentrates on how to terminate employees from Oracle HRMS and how to rehire ex-employees.



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Terminating Employment and Rehiring

Terminating Employment and Rehiring

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Overview

- When an employee leaves your enterprise, you terminate the person record:
 - This action changes the person type to **Ex-Employee** and automatically ends all assignments for the person.
 - Continued payroll processing depends on the setup of termination assignment status. (**Process** or **Do Not Process**)
 - Continued processing of individual elements depends on termination rule definitions for each element.

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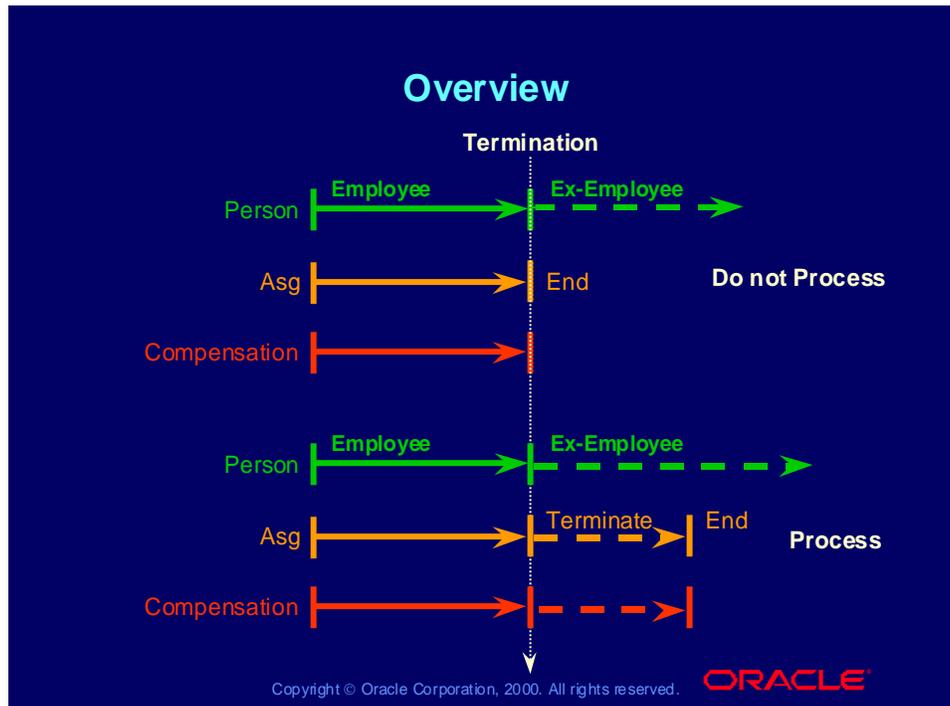
Overview

- **Records for Ex-Employees remain in the database:**
 - **Cancel** the termination to undo the changes
 - **Rehire** the person to create a new period of service
- **You cannot terminate an employee who has future-dated assignments:**
 - The termination process cannot know all the business implications of deleting future dated changes.
 - You must manually delete future dated assignment changes before you can terminate a person.

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Overview



Termination Dates

Termination Dates

Actual Date	Last day of legal employment. (HR)
Final Process Date	Last day of payroll processing (Payroll)
Last Period Date	Last day of the pay period in which actual date occurs
Projected End Date	Information only date. (Use for last working day)

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Polling Question

Polling Question 

True or False

Terminating a person will end only the primary assignment and further action is needed to end other assignments that may exist.

True **False**

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Answer



True or False

Terminating a person will end only the primary assignment and further action is needed to end other assignments that may exist.



False

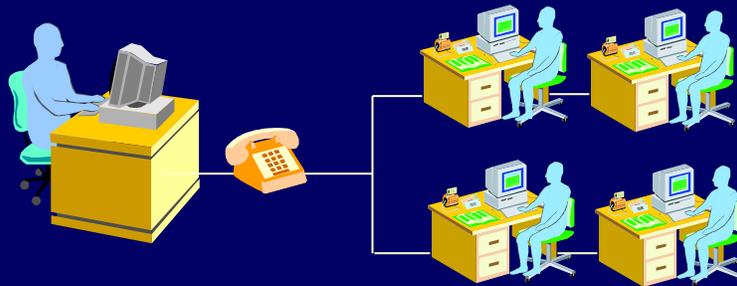
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Instructor Demonstration 1-a

Instructor Demonstration 1-a

The purpose of this demonstration is to show how to terminate an employee. Observe as your instructor demonstrates.



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Practice 1-a

Practice 1-a

Following the Instructor demonstration, use the information supplied to terminate the employee you have been working with.



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Practice 1-a Navigation Path

**Practice 1-a
Navigation Path**



**Navigate to the Terminate Window in US Super HRMS
Manager:**

(N) People > Enter and Maintain > (B)Others > End Employment

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Online Help

For details on how to enter a secondary assignment, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > How To > Employee Management on a Daily Basis > End Employment

Terminating a Single Assignment

Terminating a Single Assignment

- If you have employees with secondary assignments you may want to terminate only one of their assignments.
- Use the Assignment window to date-effectively change assignment status to **Terminate** or **End**:
 - Terminate to continue payroll processing
 - End to stop the assignment and all processing
- If you terminate the primary assignment the system automatically upgrades the first secondary assignment by number.

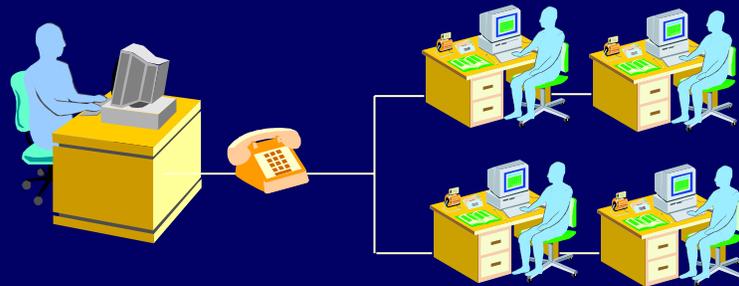
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Instructor Demonstration 1-b

Instructor Demonstration 1-b

The purpose of this demonstration is to show how to terminate one assignment for an employee with secondary assignments. Observe as your instructor demonstrates.



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Practice 1-b Navigation Path

**Practice 1-b
Navigation Path**



Navigate to the Assignment Window in US Super HRMS Manager:

(N) People > Assignment

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Online Help

For details on how to end a secondary assignment, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > How To > Employee Management on a Daily Basis > End an Assignment

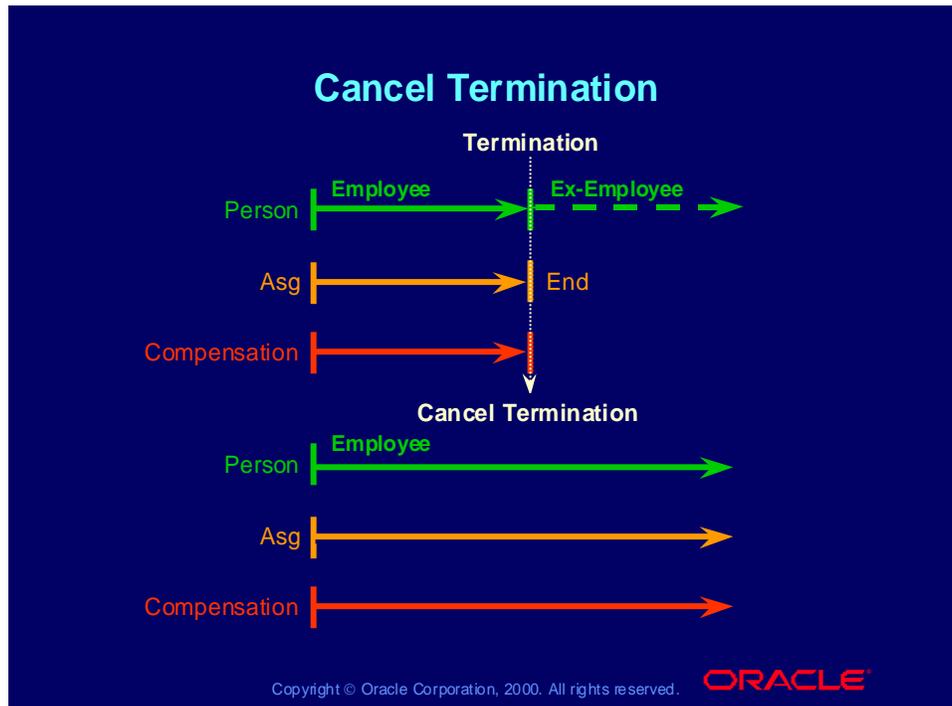
Cancel Termination Or Rehire

- **Cancel** a termination to undo the termination if the employee withdraws their resignation, or you made a mistake:
 - Use the Termination window
 - Clears down datetracked changes but cannot automatically restore any deleted information
- **Rehire** an employee when they return to the enterprise after a break in service:
 - Establish a new period of service
 - Use the person window to change Person Type to Employee with rehire date
 - Enter New assignment and compensation

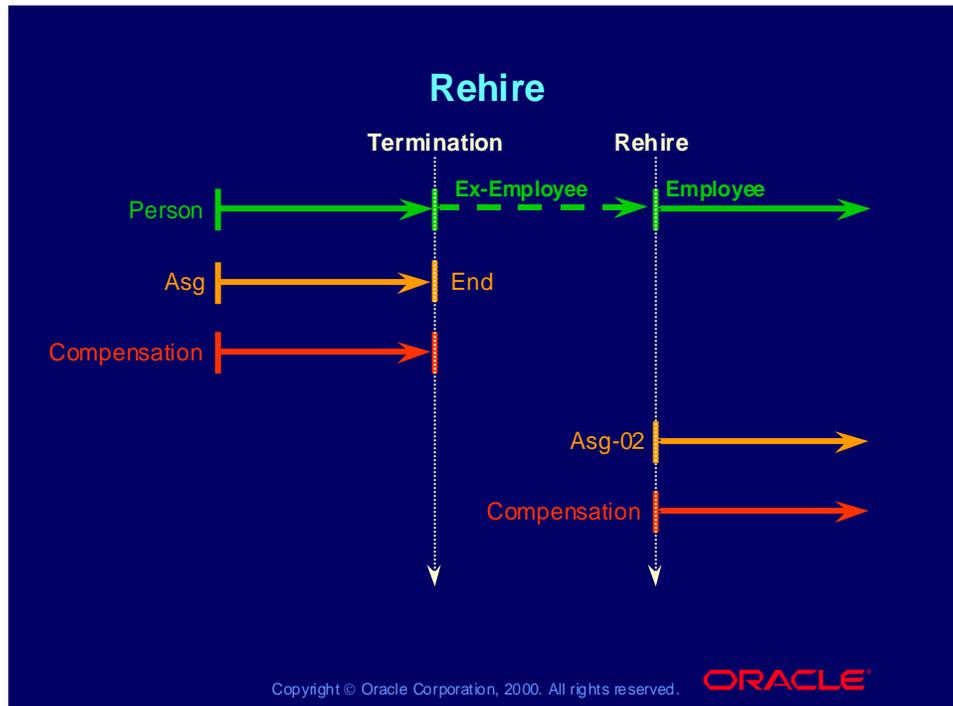
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Cancel Termination



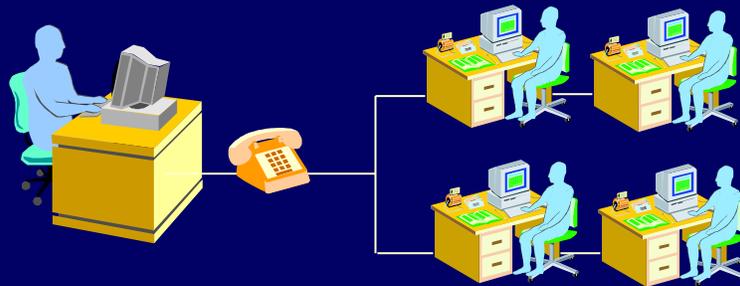
Rehire



Instructor Demonstration 1-c

Instructor Demonstration 1-c

The purpose of this demonstration is to show how to cancel the termination for an employee that you have terminated. Observe as your instructor demonstrates.



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Practice 1-c Navigation Path

**Practice 1-c
Navigation Path**



Navigate to the Terminate Window in US Super HRMS Manager:

(N) People > Enter and Maintain > (B)Others > End Employment > (B)Reverse Termination

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Online Help

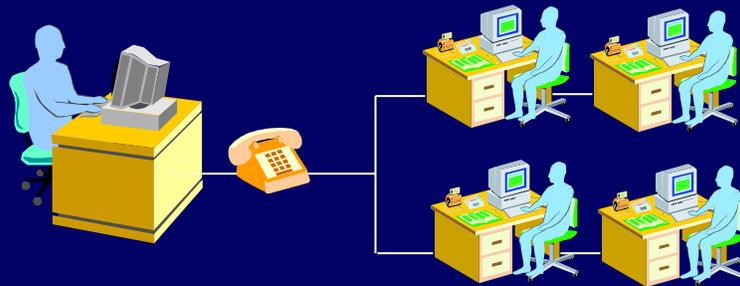
For details on how to enter a secondary assignment, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Employee Management > How To > Employee Management on a Daily Basis > Cancel a Termination

Instructor Demonstration 1-d

Instructor Demonstration 1-d

The purpose of this demonstration is to show how to rehire an employee. Observe as your instructor demonstrates.



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Practice 1-d

Practice 1-d

Following the Instructor demonstration, use the information supplied to rehire the employee that you have terminated.



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Practice 1-d Navigation Path

**Practice 1-d
Navigation Path**



**Navigate to the People Window in US Super HRMS
Manager:**

(N) People > Enter and Maintain

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Online Help

For details on how to enter a secondary assignment, please refer to the online Help path :

Applications Help Library > Oracle HRMS Applications > Oracle HRMS > Oracle HRMS Global > Recruitment > How To > Appointment > Rehire an Ex-Employee

Summary

In this lesson, you should have learned how to:

- **Terminate Employment for an Employee or an Assignment**
- **Cancel Termination**
- **Rehire an Employee**



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Introduction to Total Compensation in Oracle HRMS

Chapter 3

Introduction to Total Compensation in Oracle HRMS

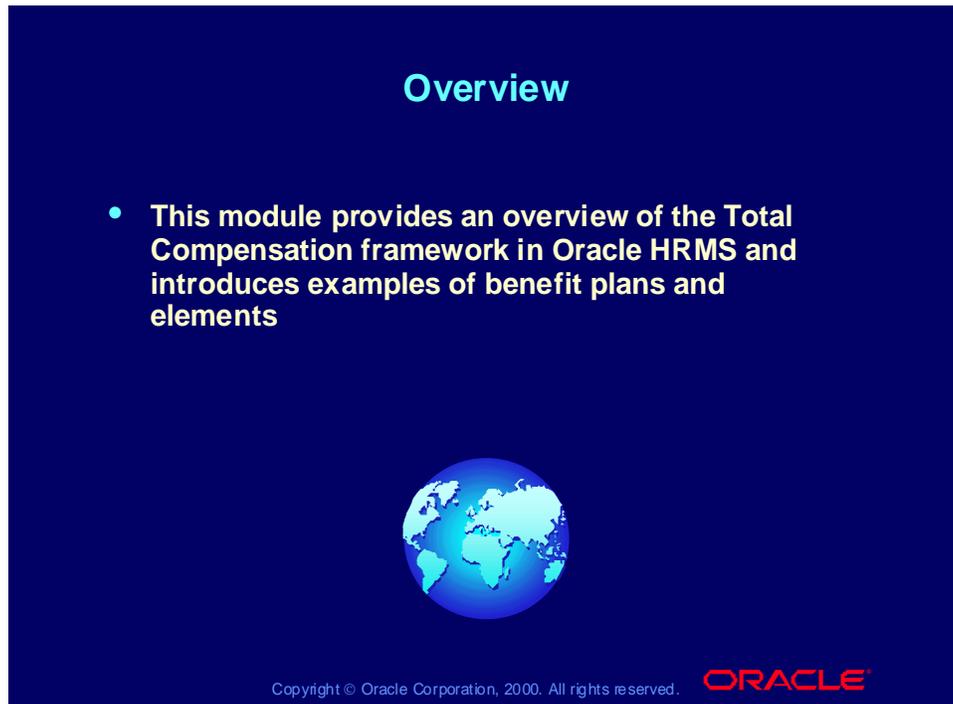
Introduction to Total Compensation in Oracle HRMS

HRMS Release 11i

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Overview



Overview

- **This module provides an overview of the Total Compensation framework in Oracle HRMS and introduces examples of benefit plans and elements**

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Overview

The module provides the student with a high level view of the subject matter which is contained within the module.

In this example the 10 Units which make up this module have been detailed.

Should a module be smaller you may wish to add text to detail an Overview of the Module. In this example detail of each Unit is more appropriately placed in the 'Unit Overview'

Note : There is likely to be the risk of duplication within the 'Module Overview' and the 'Unit Overview'. Therefore to avoid this duplication there may be a decision to make to whether the detail is placed in the 'Module Overview' or the 'Unit Overview'.

Unit in Module

The Unit contained within this module is:

- Unit 1 - Total Compensation Framework

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Total Compensation Framework

Total Compensation Framework

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Objectives

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

- Explain the framework for Compensation and Benefits setup and administration in Oracle HR, Payroll and Advanced Benefits
- Discuss the use of elements to represent different types of earnings and deductions in Oracle HRMS
- identify the predefined elements installed with Oracle HRMS products



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Overview

- **Total Compensation is the general name to describe the sum of all Compensation and Benefits types that contribute to the individual remuneration package for each employee**
- **This unit concentrates on the concepts and components of the Total Compensation Framework in Oracle HRMS products**



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Overview of Total Compensation

Overview of Total Compensation

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Objectives

Objectives

- **At the end of this lesson you should be able to:**
 - **Explain the framework for Total Compensation provided by Oracle HRMS**
 - **Explain the differences between Basic, Standard and Advanced Benefits in Oracle**



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Total Compensation

Total Compensation

“Compensation is the total package of tangible returns, including financial rewards, services, and benefits, provided by the organization to employees in return for their labor.”

“Compensation strategy is the deliberate utilization of the pay system ... through which the efforts of subunits and individuals are directed toward the achievement of an organization’s strategic objectives.”

CAHRS Cornell University

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The Oracle HRMS Solution Total Compensation Framework

The Oracle HRMS Solution Total Compensation Framework

- **Compensation Management** provides the flexibility to compensate people competitively and gives you control over your processes, to be able to run and change them quickly as well as create personalized compensation packages.
- **Benefits Management** provides a highly configurable solution that accommodates the constant changes surrounding benefits including plan design, eligibility rules, enrollment, participation, distribution and cost management.

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Total Compensation Framework in Oracle HRMS

- A framework that supports all aspects of defining, administering and processing for any type of earnings, deduction or benefit program or plan.
 - Provides user configurability
 - Reduces costs and time to implement and maintain
 - Supports complex rules of eligibility, enrollment and processing
 - Improves information for tactical and strategic analysis

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Specific Business Functions Not Just the Framework

Specific Business Functions Not Just the Framework

- **Predefined support for specific types of compensation**
 - **Salary or Wage Administration**
 - **Paid Time Off and Accruals**

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Total Compensation Framework Attract - Retain - Motivate

Total Compensation Framework Attract - Retain - Motivate

For employers

- Total compensation provides a tool to attract, retain, and motivate employees in the most cost effective manner.

For employees

- Total compensation represents the value you get from the company. Includes:
 - All pay and non-pay related benefits
 - Anything from signing bonuses to access to cappuccino machines

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Total Compensation and Benefits Common Business Needs

Total Compensation and Benefits Common Business Needs

- **Model any type of compensation or benefit**
 - Salary, wages, bonuses, health and welfare
 - Company car, wellness programs
- **Define and administer complex eligibility rules**
- **Define and administer complex enrollment rules for all types of compensation**

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Total Compensation and Benefits **Common Business Needs**

- Define and administer complex processing rules for all types of earnings or deductions
- Manage time or event-based changes
 - Period of Service or age-based
 - Change of job or location
- Deploy self-service access to employees, managers and professional users
- Operate in compliance with local contract and legal frameworks

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Typical Earnings and Benefits Types

Compensation Types

- Salaries and wages, overtime pay, bonus, stock options, location pay, shift allowances, sales commission.

Benefit Types

- Vacation and sick pay, health and welfare insurance programs, medical, dental or vision, life insurance cover, company car or car allowances.
- Benefits can also be extended to people other than employees.
 - For example, partners or dependents of employees.

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Typical Types

Other Types

- Discount purchase of computer equipment or mobile phones
- Training Credits
- Company assets
 - For example. Engineers given a laptop and phone as standard equipment that must be returned when they terminate employment.

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End-to-End Solutions **Highly Configurable**

- **Define individual plans, or programs**
 - Simple or complex
- **Define eligibility rules for individuals or groups**
 - Simple or complex
- **Define rules for administration of time or event-based changes**
 - Automatically update records
 - Use the system to manage rule combinations

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End-to-End Solutions **Highly Configurable**

- **Define administrative processes**
 - New entry, change and termination
 - Approvals and communications
- **Define payroll rules**
 - Calculations for payment or deduction
 - Taxation
 - Pay or recover payment

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Three Levels of Functionality Basic, Standard or Advanced

Three Levels of Functionality **Basic, Standard or Advanced**

- **Three distinct levels of functionality for Total Compensation in Oracle HRMS**
 - Initial focus on benefits
 - Use the same functionality for compensation
- **Supports different levels of complexity for different customer needs**
 - Choose the level of functionality that meets your business needs
 - Each level includes the ability to record information and manage payroll processing

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Basic Benefits **Basic Information**

Basic functions are included in Oracle HR

- **Define the information you want for each earnings or deduction type and link basic eligibility rules to assignment criteria**
 - **Use Elements and Links**
- **Enter actual details for each employee**
 - **Use Entries**
- **Processing of actual payments and deductions is part of Oracle Payroll**

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Standard Benefits More Complex Plans, Rules and Admin

Standard Benefits **More Complex Plans, Rules and Admin**

Standard functions are also included in Oracle HR

- Define programs and plans - not just elements
- Define complex eligibility rules
- Define rules to calculate values in HR
 - Pre-calculate values to send to Payroll
- Define complex enrollment rules
- Processing of actual payments and deductions is part of Oracle Payroll

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Advanced Benefits Life-Event Management and Flex Plans

Advanced Benefits **Life-Event Management and Flex Plans**

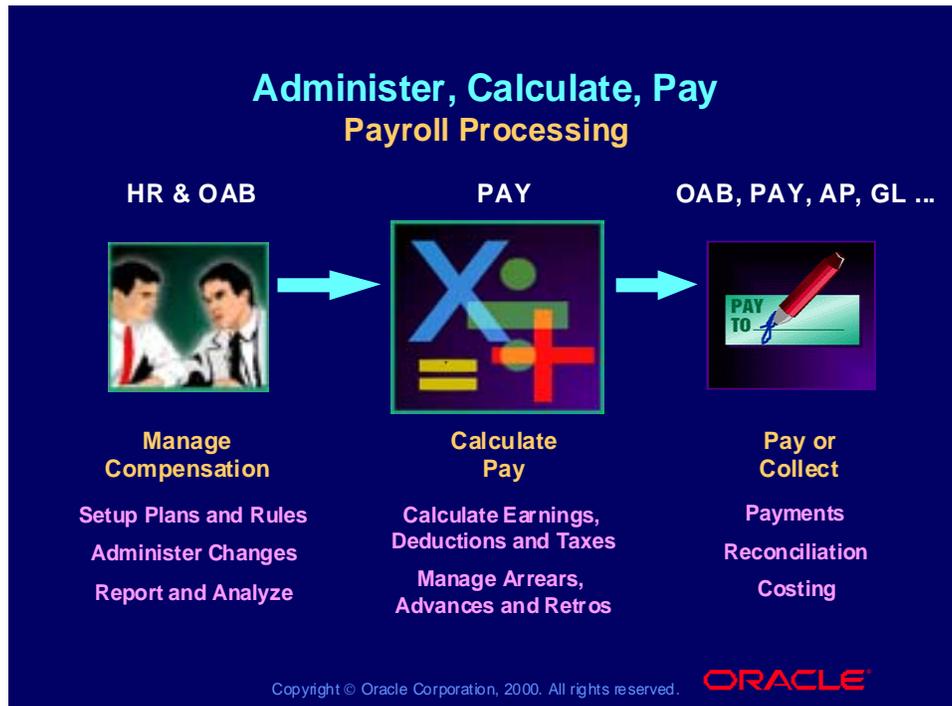
Advanced functions are part of Advanced Benefits

- **Define 'life-events' and impacts**
- **Use the system to process 'life-event' changes**
- **Setup and administer 'Flexible' or 'Cafeteria' style benefits**
- **Setup and administer Flexible Savings Plans**
- **Processing of actual payments and deductions is part of Oracle Payroll**

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Administer, Calculate, Pay Payroll Processing



Payroll **Gross to Net**

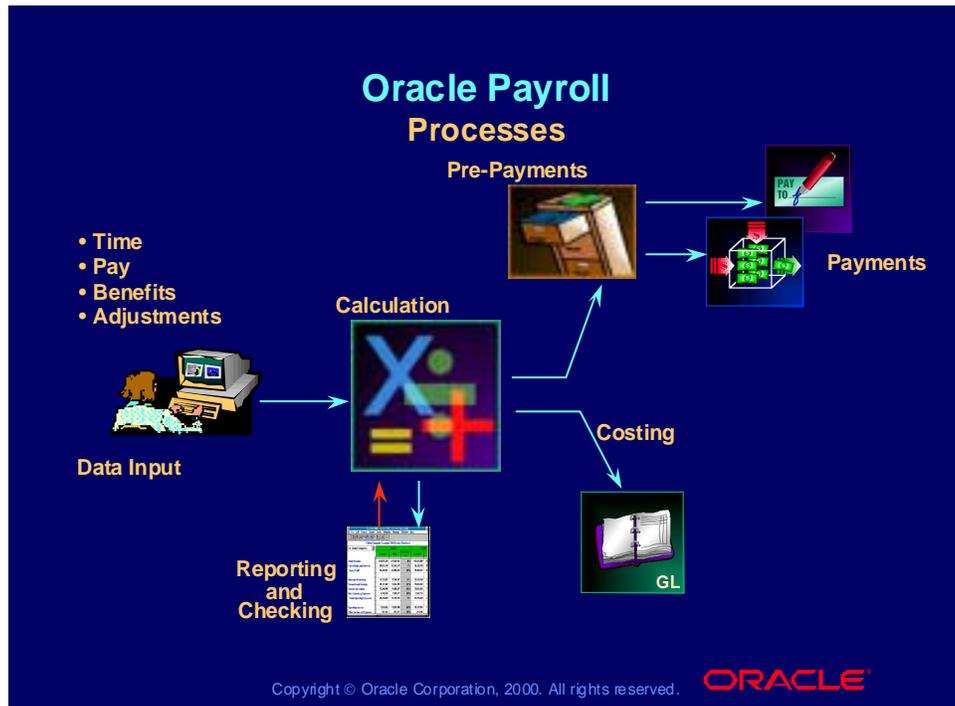
Oracle Payroll

- **A rules based payroll engine**
 - Multicurrency support for inputs and payments
- **Use FastFormula to calculate pay results**
- **Predefined tax and social insurance calculations**
- **Advanced process management**
 - No lockout of users while processing
 - Automatically scales for performance
 - Retry capability
 - Review and correct results while processing
- **Advance and RetroPay capabilities**

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Oracle Payroll Processes



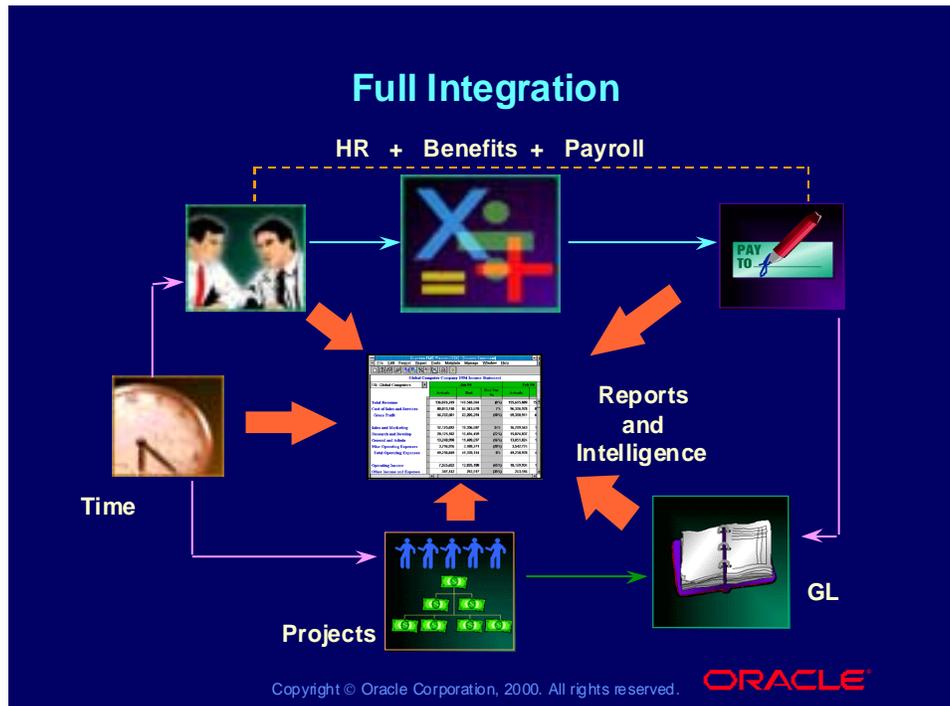
Oracle Payroll **Prepayments and Payments**

- **Other processes can run in parallel to shorten total processing time**
- **Prepayments calculates actual amount by payment type and currency**
- **Multiple payment processes**
 - **Check/Chequewriter**
 - **Magnetic Tape**
 - **Cash**

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Full Integration



Time Management

Oracle Time Management

- Define rules for management of time
 - Earnings policies
 - Shifts, rotations
 - Premium eligibility and interactions
- Generate timecards, enter retro-time
- Perform variance reporting, and falsifying-time reporting

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Time Capture

Oracle Time Capture (Available Q1 01)

- Enter and validate time information from any source to a single time store
- Configurable web front end
- Leverage standard working schedules and rules in Time Management
- Generate appropriate time information for payroll to calculate payments
- Generate appropriate time information for Projects

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Projects

Oracle Project Accounting

- Manage what your labor force is working on
- By understanding the actual currency being charged to a project you can decide to bill either actual or burdened costs to the customer
- Burden-generic way to bill the customer, employer liabilities + benefits they receive
- Project based companies include engineering or construction and consulting

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Oracle Payroll What About Adjustments?

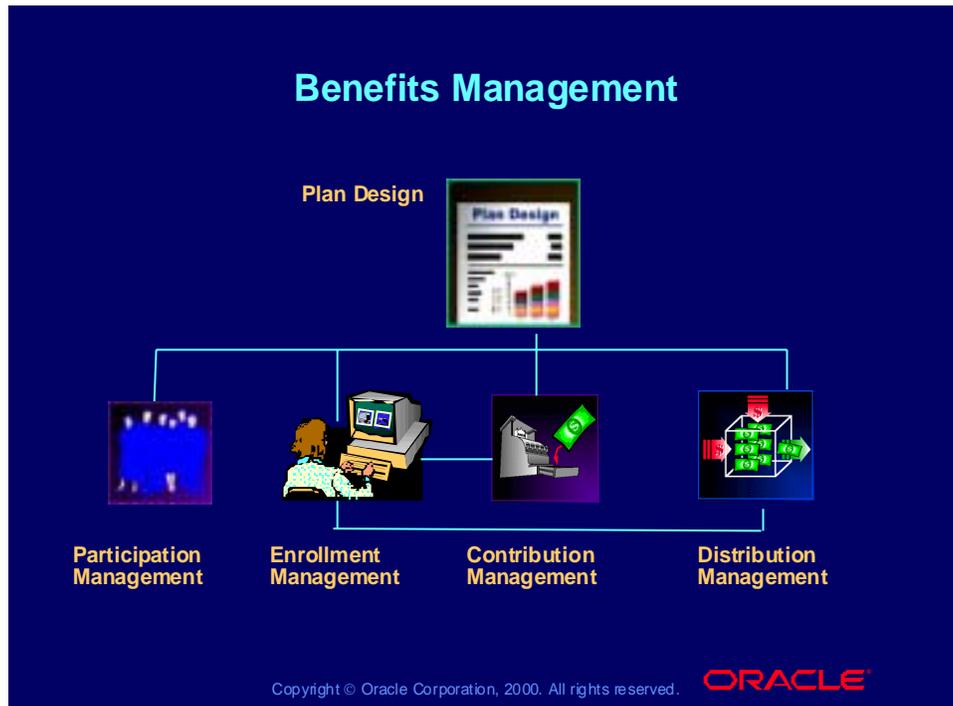
Adjust compensation before or after processing

- Make date-effective changes to update or correct details and **'Retry'**
 - Retry processing for one person, a group, or all employees
- Use **'Reversals'** to correct and re-issue payments when appropriate
- Use **'RetroPay'** to calculate differences after payment has been banked.
 - Calculate in a later pay-period
- Use **'Adjustments'** to adjust balances

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Benefits Management



Benefits Management Plan Design

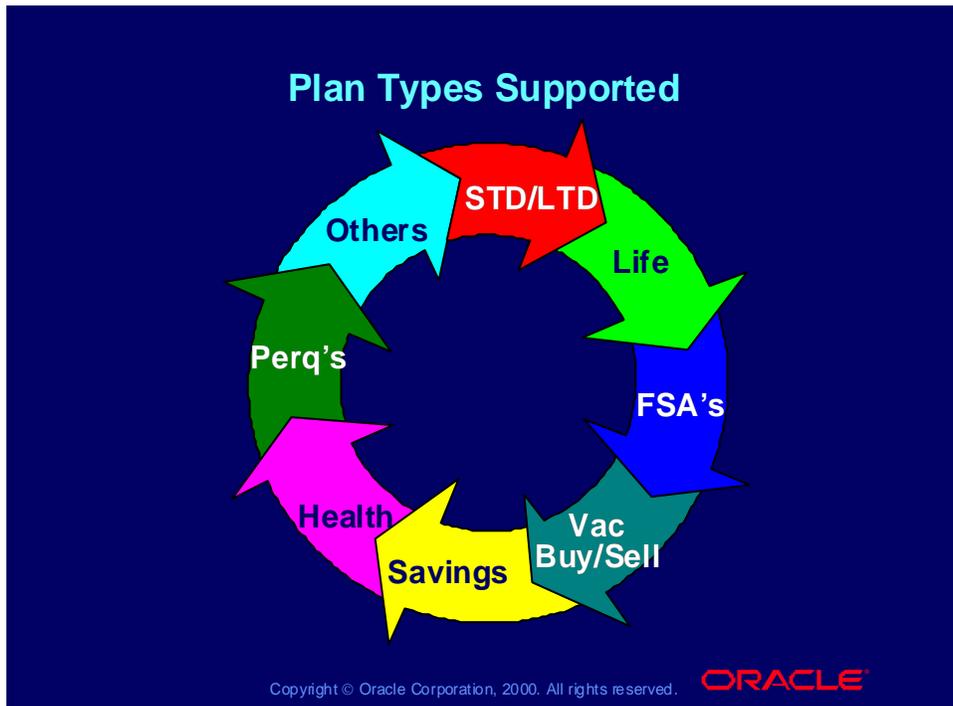
Benefits Management Plan Design

- **Plans exist individually or grouped in programs**
 - **Health and welfare programs**
 - **Savings or pension plans**
 - **Full cafeteria benefits**
- **Plans can exist at corporate level, or for specific groups, or for an individual**
- **Plan design covers all information for both administration and processing**

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Plan Types Supported



Benefits Management Participation Management

- **Defines the people who can actually participate in each plan or program:**
 - **Eligibility rules for the plans**
 - **Fixed factors or user defined rules**
- **Use Life-Event Management functions to monitor personal and work activities and manage changes to benefits as necessary**

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Benefits **Enrollment Management**

- Use plan definitions and eligibility rules with defaults to supply automatic enrollment by default
- Use web and Interactive Voice Response, (IVR), self service options to deploy the enrollment process to each employee

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Benefits Contribution Management

Benefits Contribution Management

- Control costs of plans
- Employees may contribute to benefit plans
 - Employers manage this money and distribute when necessary
 - COBRA, FSA claims, QDRO's, QMSCO's can be done with little effort
- **'What-if'** analysis can be done to plan effectively for changes to policy

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Benefits Distribution Management

Benefits **Distribution Management**

- **The employer can distribute and manage accumulated funds**
- **System Extract provides a configurable export option for interfacing to any other system.**
 - **Support for ANSI 834 format**
- **All of these processes generate reports**
 - **Identify exceptions**
 - **Control funds**
 - **Reconcile to your carriers**

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Benefits Reusable Eligibility Profiles

Benefits **Reusable Eligibility Profiles**

- **Define profiles to hold the rules of eligibility and reuse for many programs and plans**
 - Use fixed factors, define formulas or a combination of both
- **Implement policy changes quickly and simply**
 - Streamline administration and deployment
 - Improve efficiency
- **Individual eligibilities are stored**
 - Enrollment is simplified

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Advanced Benefits **Life-Event Management**

Life-event management enforces plan restrictions

- **Change enrollments when a change happens in any part of the system**
 - **User defined rules**
 - **Proactive notification to employees as soon as a life event is identified**

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Processes Supported in Oracle HR

- **Program-based enrollment for core and fixed benefits arrangements**
- **Extensive plan eligibility:**
 - **Fixed data (for example, organization, zip/postal codes)**
 - **Derived factors (for example, age, length-of-service)**
 - **Rules (through FastFormula)**
- **Flexible rate and coverage definitions: fixed and variable**
- **Non-employee participants**

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Processes Supported in Oracle HR (US)

Processes Supported in Oracle HR (US)

- Continuing benefits payments
- Spousal consents, family support orders, QDRO's
- TPA import and export facilities (ANSI 843)
- Premium reconciliation reporting
- COBRA

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- Statutory (for example, HIPAA certificates, COBRA)
- Practitioner-directed
- Management-directed

Additional Concepts in Advanced Benefits

- Life event management
- Eligibility management
- Enrollment cycle automation

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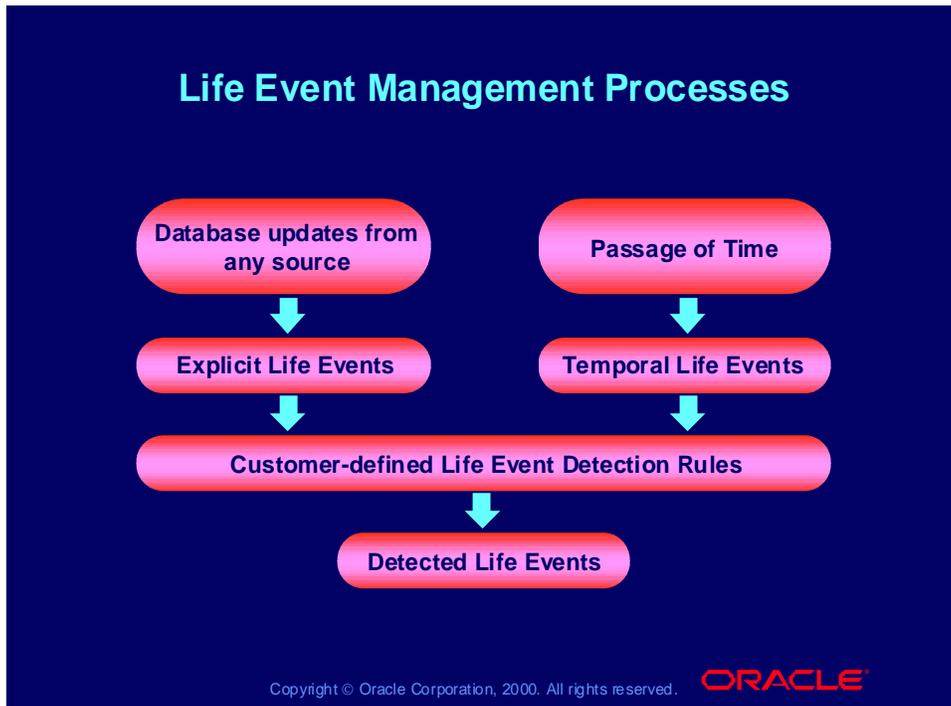
Life Event Management

- Any change impacting Benefit Participation (such as birth of a child, age attainment)
- Two types, **explicit** (birth) and **temporal** (age)
- You define how these control key benefits processes:
 - What elections can be made
 - When coverage begins/ends
 - Required communications/literature
 - Defaults
 - Enrollment window

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Life Event Management Processes



Eligibility Management Processes

Eligibility Management Processes

Detect Life Event	Fred reports birth of Pebbles
Evaluate Detected Life Event	No other life events for Fred
Derive Factors	Fred has 4.3 eons of service
Determine Eligibility	Fred is entitled to Bedrock Medical cover
Determine "Electability"	Fred can pick family coverage for Bedrock Medical
Determine Rate/Coverage Changes	N/A
Determine Communications	Fred to receive: personal fact sheet, notice of election change
Update Eligibility Info	Fred's eligibility info is stored on the database

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Enrollment Cycle Automation Processes

Enrollment Cycle Automation Processes

Perform Post-election Edits	N/A: Fred picked family coverage for Bedrock Medical
Determine Action Items	N/A: Fred specified Pebbles as a dependent
Check for Suspensions	N/A
Determine Rates & Coverage	The monthly cost to Fred for the election is 200 Stones
Determine Total/Excess CR's	The increased price tag reduces Fred's excess credits
Determine Element Entries	Fred's existing element entry will be updated
Determine Communications	Fred will receive a confirmation statement
Update Enrollment Info	

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Summary

- **At the end of this lesson you should be able to:**
 - **Explain the framework for Total Compensation provided by Oracle HRMS**
 - **Explain the differences between Basic, Standard and Advanced Benefits in Oracle**



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Elements in Oracle HRMS

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Objectives

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

- Explain the use of Elements to represent values for different types of earnings and deductions
- Explain the differences between recurring and nonrecurring types of elements
- Explain how the same elements can be used by Oracle HR, Payroll and Advanced Benefits



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Earnings, Deductions & Benefits

Given to an employee as part of their employment

- **Earnings and Deductions:**
 - Salary, Bonus, Allowances
 - Taxes, Loans
- **Benefits:**
 - Health Insurance
 - Vacation and Sick Pay
 - Company Car
- **Assignment Related Information:**
 - Tools and Equipment
 - Non-payroll information



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Elements in Oracle HRMS The Building Blocks

Elements

- Building blocks to hold the actual values for all types of benefits, earnings and deductions
 - User defined names, types and values
- Elements provide a **Basic** level of functionality
 - Capture any type of information
 - Eligibility based on assignment criteria
 - Online or batch entry options
- For more control of the types and values that can be entered use **Standard** or **Advanced** eligibility rules and processes

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How it works Define Elements

How it works
Define Elements

Inputs
Define Element
Class
Type
Inputs

- What information do you want to capture in the element?
 - Name
 - Input Values
- What validation applies on entry?
- Will you use the element with benefits administration?
- Will you use the element in payroll processing?

Enter Information

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Defining Elements Key Attributes

Defining Elements Key Attributes

- Name
- Classification and Category
- Recurring or Nonrecurring
- Input Values:
 - Up to 15 inputs
 - Pay Value for payment
 - List of Values
 - Defaults - **Hot** and **Cold**
 - Ranges - **MIN** and **MAX**
 - Formula validation
 - Error or Warning



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Recurring and Nonrecurring Types of Element

Recurring and Nonrecurring Types of Element

Recurring

- Means that the values for the entry recur in all subsequent pay periods until you change or end the entry
 - For example. You would expect a salary value to recur in all pay periods.

Nonrecurring

- Means that the entry and the values for the entry exist for one pay period only
 - For example. You would expect a bonus to exist only for the period when it is to be paid.

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Element Links

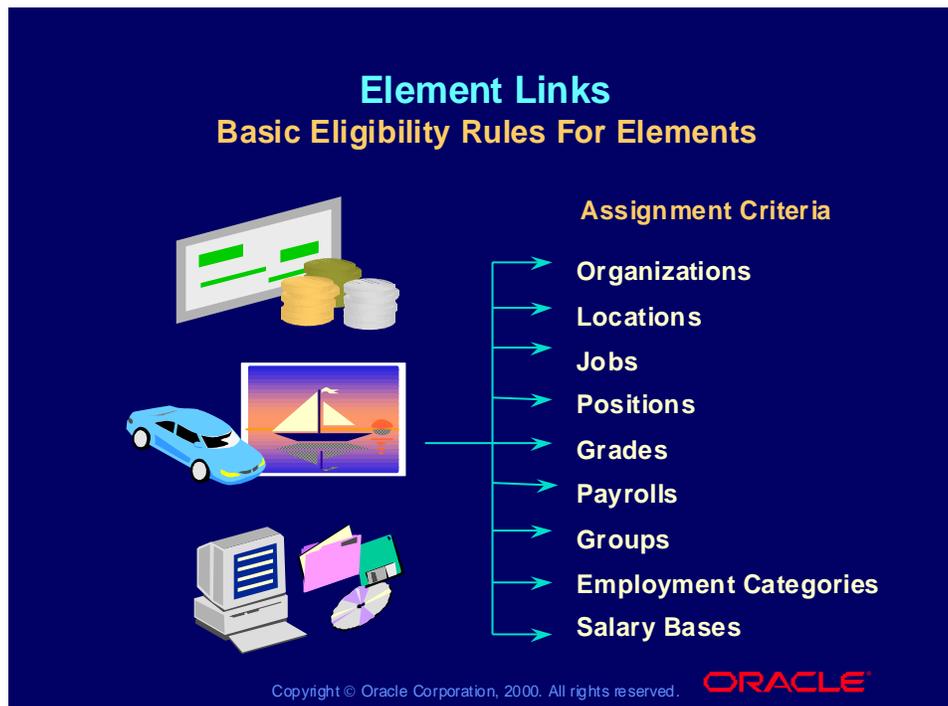


- Links provide a **Basic** level of eligibility rule based on specific work structures. For example:
 - If you define a link rule for an allowance element to a specific location then an employee can have an entry of that allowance element only when they are assigned to that location.
- An employee must be eligible for an element before you can create an entry of the element for the employee.

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Element Links Basic Eligibility Rules For Elements



How it works Define Links

How it works
Define Links

Inputs

Define Element
Class
Type
Inputs



Link Eligibility
Rules

Enter Information

- What are the rules to control who can receive this element?
 - Assignment Criteria for **Basic** rules
 - Eligibility Profiles for **Standard or Advanced** rules

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Element Links Changes to Assignment

What happens to the element entry?

- If an assignment change means that an employee loses eligibility then the system automatically end-dates the entry and all its values
- If a change means that an employee is eligible for the same element under a different rule then the system automatically updates the entry but does not end it.
- If a change does not change eligibility under the link rule then the system makes no changes to the entry

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Element Entries

- **Entry of actual values for each employee can come from different manual or automatic sources:**
 - **Online entry through the professional UI**
 - **Administrative processing of Payroll or Benefits**
 - **Spreadsheets and ADE for salary administration**
 - **Self-service for benefits enrollment**
 - **Batch Element Entry, (BEE), for timecard data**
 - **Open interfaces using supported APIs and utilities such as the DataPump**

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How it works Enter Values

How it works
Enter Values

Inputs

Define Element
Class
Type
Inputs

↓

Link Eligibility
Rules

↓

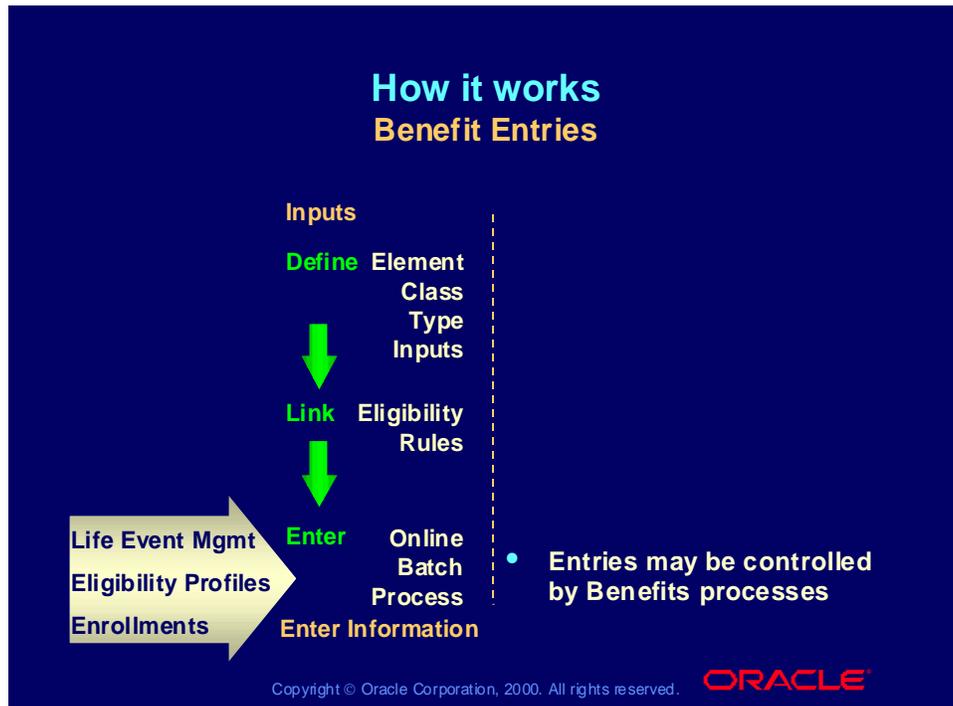
Enter Online
Batch
Process

Enter Information

- How will you enter and maintain element values for employees?
 - Benefits processing
 - Automatically when eligible
 - On line manual entry
 - Batch entry system
 - Payroll Processing

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How it works Benefit Entries



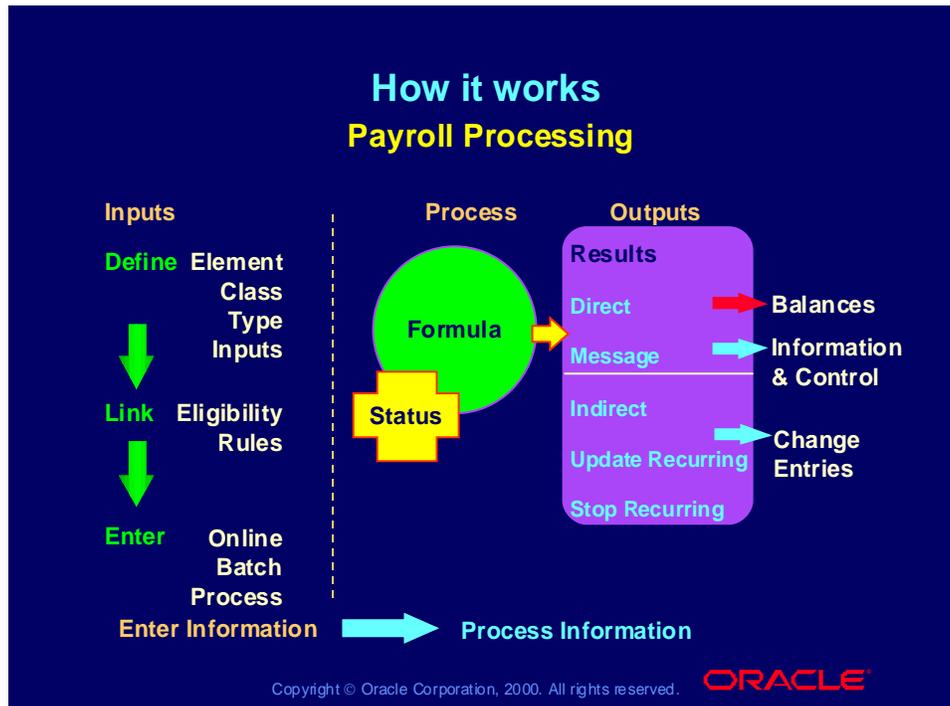
Element Entries and Processing

- **Information held in Element Entries may be the same for HR, Benefits and Payroll.**
- **Benefits Administration processing lets you manage complex eligibility and enrollment rules:**
 - **Entries are made or changed by Benefits processes**
- **Payroll formulas for each element let you calculate the actual payments or deductions that are made during each payroll run:**
 - **Entries are processed and payroll run results created**

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How it works Payroll Processing



Lesson Summary

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

- Explain the use of Elements to represent values for different types of earnings and deductions
- Explain the differences between recurring and nonrecurring types of elements
- Explain how the same elements can be used by Oracle HR, Payroll and Advanced Benefits



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Examples of Elements

Examples of Elements

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Objectives

- **At the end of this lesson you should be able to:**
 - **Discuss the predefined Elements provided with Oracle HRMS to support legislative requirements**
 - **Explain the possible differences in element definitions for use by Oracle HR, Payroll and Advanced Benefits**



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Examples of Elements

- Elements may be predefined, generated by other processes, or defined directly by users.

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Predefined Elements

- **Predefined elements are provided to support legislative requirements. These include:**
 - Tax and Social Insurance deductions
 - Court Orders or other involuntary deductions
 - Sick Pay and Vacation Pay
- **Other predefined elements are provided to assist with rapid implementation in specific legislative areas. These include:**
 - Regular Salary or Wages
 - Shift Pay
- **Refer to the User Guides or online help for full details of all predefined elements**

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Summary

In this lesson you should have:

- Discussed the predefined Elements provided with Oracle HRMS to support legislative requirements
- Understood the possible differences in element definitions for use by Oracle HR, Payroll and Advanced Benefits



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Module Summary

In this Module, you should have learnt how to:

- Explain the framework for Compensation and Benefits setup and administration in Oracle HRMS
- Discuss the use of elements to represent different types of earnings and deductions in Oracle HRMS
- Discuss how the same elements are used by HR, Payroll and Benefits and discuss any differences
- Explain the difference between recurring and nonrecurring types of elements
- Recognize the predefined elements in Oracle HRMS



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Total Compensation Elements Setup for Human Resources

Chapter 4

Total Compensation Elements Setup for Human Resources

Total Compensation Elements Setup for Human Resources

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Overview

This Module covers the setup of elements for total compensation in Oracle Human Resources



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Module Unit

Module Unit

**This Module is comprised of the following Unit:
Unit 1 - Designing Elements**

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Designing Elements

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Objectives

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

- Understand Element Classifications
- Design Elements
- Control Eligibility and Cost Elements
- Plan Methods of Entry
- Control Entry Values



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Designing Elements



Understand Classifications

- **Element Classification controls the processing sequence of your elements for taxation.**

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Designing Elements



Understand Classifications

Design Element

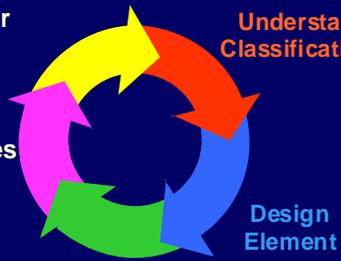
- You design elements to capture the compensation information that is important to your organization.

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Designing Elements

Designing Elements

- You define eligibility to control who can receive each component of your compensation and benefits packages.
- You cost elements to apportion their expenses according to your organization's accounting and general ledger requirements.

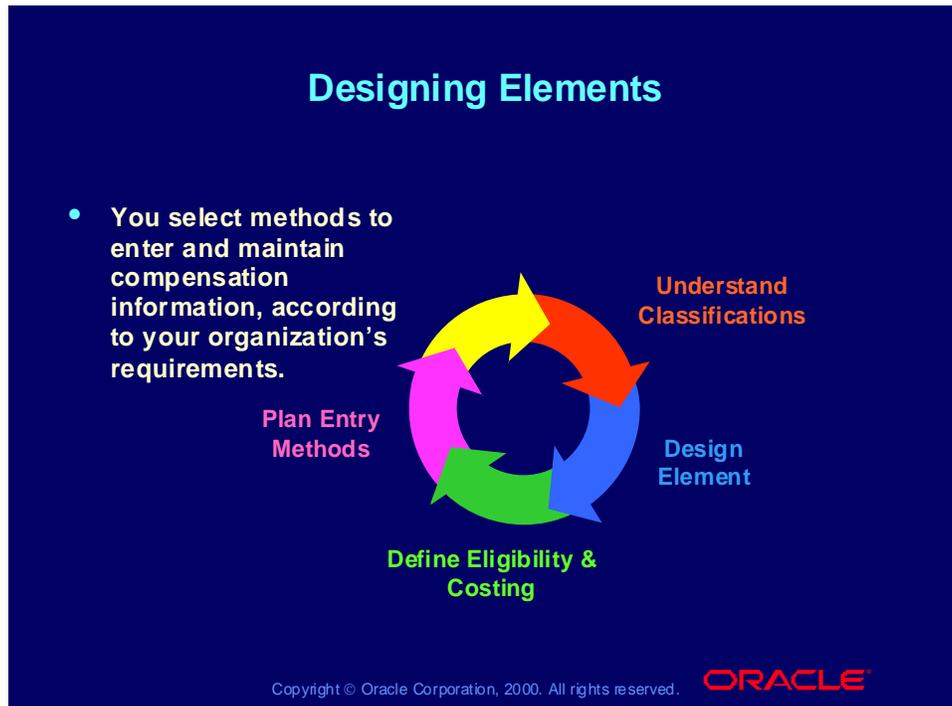


Define Eligibility &
Costing

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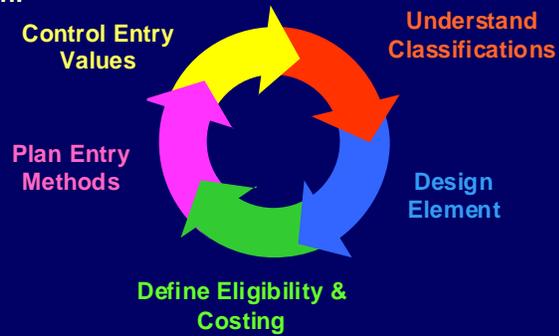
Designing Elements



Designing Elements

Designing Elements

- You control the entry values for your elements to ensure the validity of your compensation information.



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Understanding Element Classifications

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Objectives

Objectives

After this unit you should be able to:

- Understand the role of element classifications



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Overview

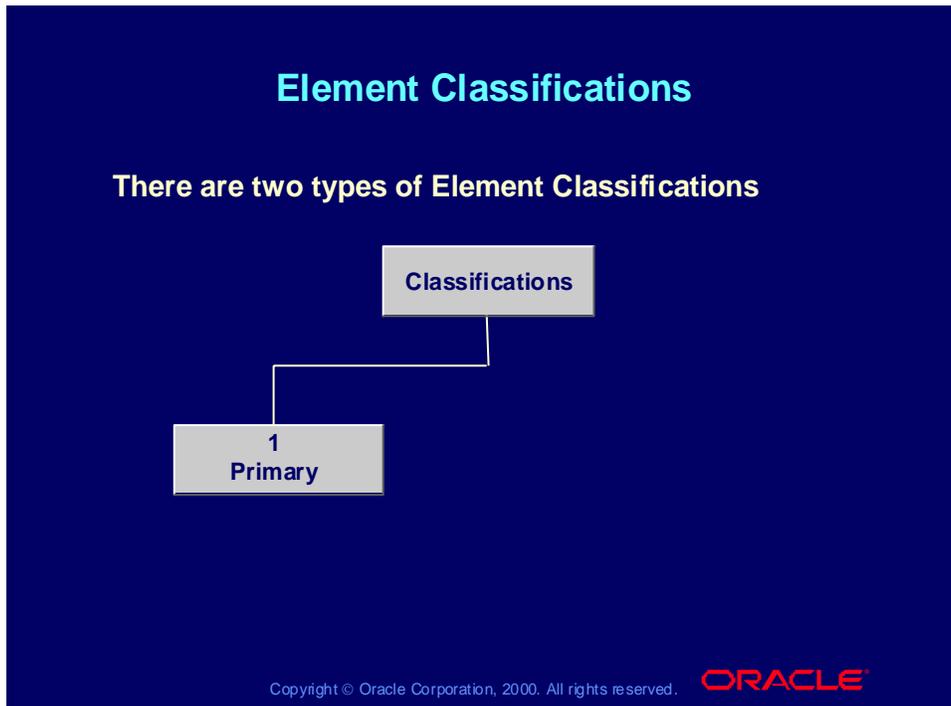
- ***Element classifications*** are how Oracle HRMS groups elements for information and analysis purposes
- **Element classifications:**
 - Control the order in which elements process (for taxation purposes)
 - Control the balances that are fed



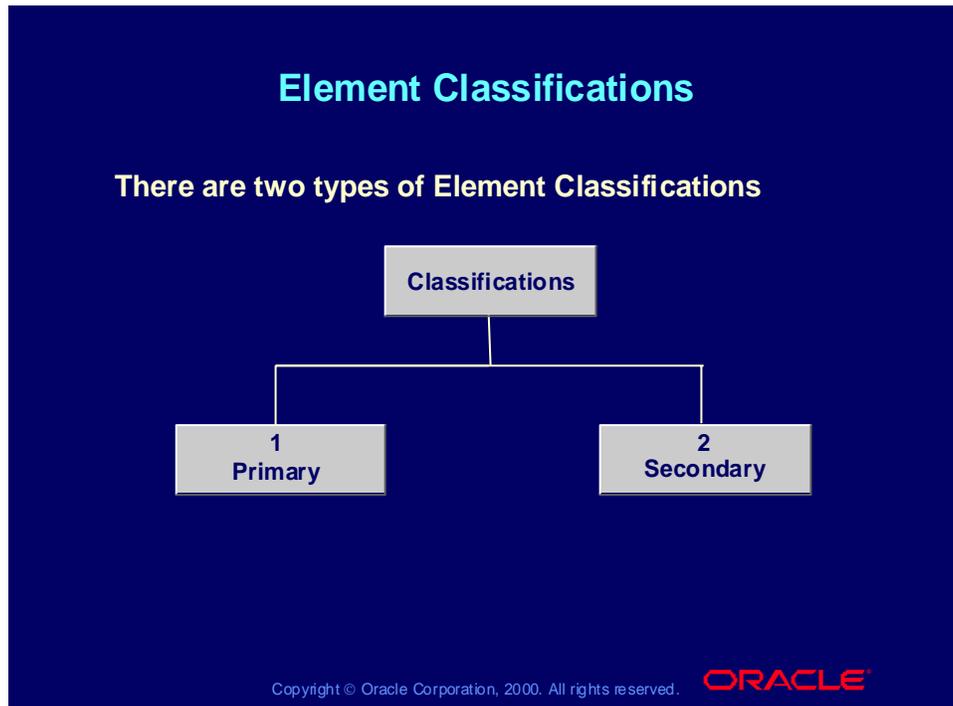
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Element Classifications



Element Classifications



Primary Classifications

Primary Classifications:

- Are predefined in Oracle HRMS and you cannot delete or update them
- Are designed to meet local legislative taxation and wage attachment requirements
- Provide default processing priorities in payroll runs. Smaller priority numbers process before larger numbers
- Determine the costing options that are available for elements in the classification (costable, distributable, debit or credit)

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U.S. Primary Classifications

U.S. Primary Classifications

- Balance Initialization
- Earnings
- Employer Liabilities
- Employer Tax Credits
- Employer Taxes
- Imputed Earnings
- Information
- Involuntary Deductions
- Non-payroll Payments
- Pre-Tax Deductions
- PTO Accruals
- Supplemental Earnings
- Tax Credits
- Tax Deductions
- Voluntary Deductions

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Secondary Element Classifications

Secondary Element Classifications

- You can define secondary element classifications to feed your own user defined balances
- You cannot remove or change any predefined secondary element classifications
- Secondary classifications are not used in the North American versions of Oracle Payroll at this time

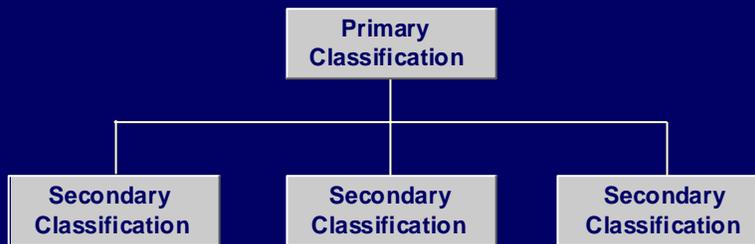
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Secondary Element Classifications

Secondary Element Classifications

Secondary element classifications are subsets of primary element classifications



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Secondary Element Classifications Predefined

Secondary Element Classifications Predefined

In some legislations, secondary classifications have been predefined.

U.K. examples include:

- National Insurance Earnings
- Statutory Sick Pay Earnings

As with primary classifications:

- You cannot remove or change any predefined secondary classifications
- You cannot disable any of the predefined balance feeds created for them

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Secondary Element Classifications User-Defined

Secondary Element Classifications User-Defined

- You can define secondary classifications for payroll purposes
- You select which earnings or deductions to include in the classification, then use the classification to feed your own user-defined balances
- For example, you could define a set of earnings on which a bonus is paid

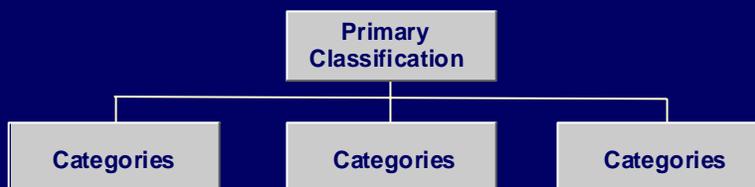
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Categories (U.S. and Canada)

Categories (U.S. and Canada)

- Most U.S. and Canadian classifications are subdivided into categories
- Categories further define an element's purpose and can help to determine applicable processing or tax rules
- You can define additional categories as needed



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Polling Question

Polling Question



True or False

An element's primary classification provides processing priority in payroll runs so that larger numbers process before smaller numbers.



True



False

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Answer

Answer



True or False

Smaller priority numbers process before larger numbers.



False

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Summary

Summary

In this lesson, you should have learned how to:

- Understand the role of element classifications



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Designing Elements

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Objective

Objective

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

- Define an element



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Overview

Elements are all types of earnings, deductions, employer charges and non-payroll payments that go through the payroll

Typical examples of elements are:

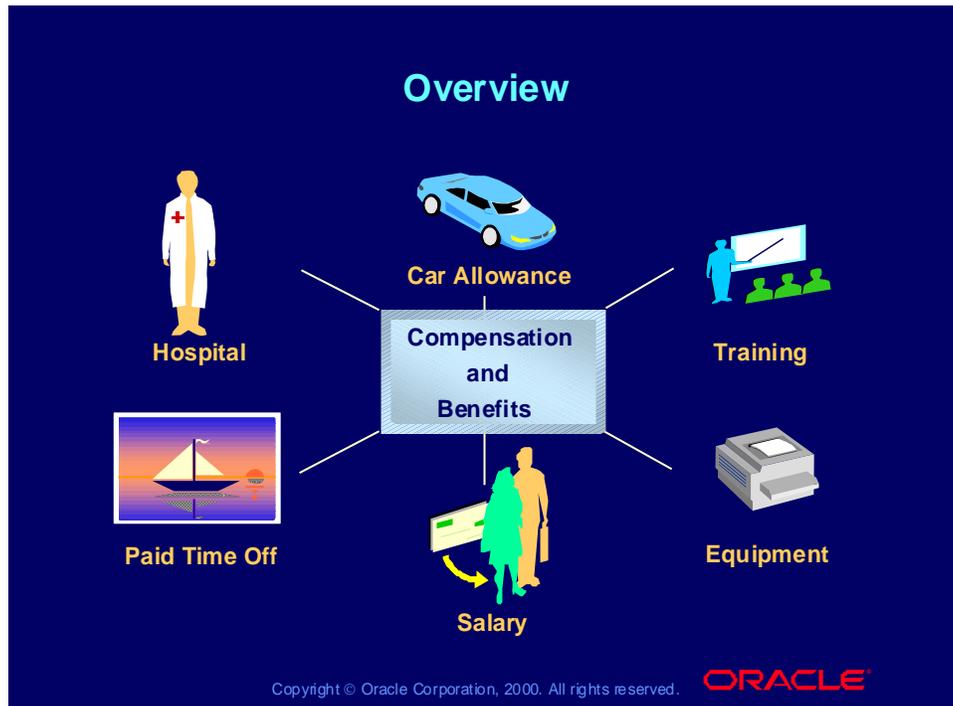
- Regular Salary
- Wages
- Bonus Payments
- Health Insurance
- Stock Purchase Plan
- Pension Contributions



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Overview



Overview

You can also use elements to hold information that is not about payments

Typical examples include:

- Mobile Phones
- Company Cars
- Uniforms
- Tools and Equipment



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Elements

Elements

There is no limit to the number of elements you can define and all of your elements are DateTracked



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Three Methods Used To Create Elements

Three Methods Used To Create Elements

- **Predefined**
 - Supplied with Oracle HRMS
 - Specific to your localization
 - Must not be modified
- **User Defined**
 - You create elements according to your needs
- **Generated**
 - Paid Time Off Accrual Plans

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Predefined Elements Delivered with HR

Predefined Elements Delivered with HR

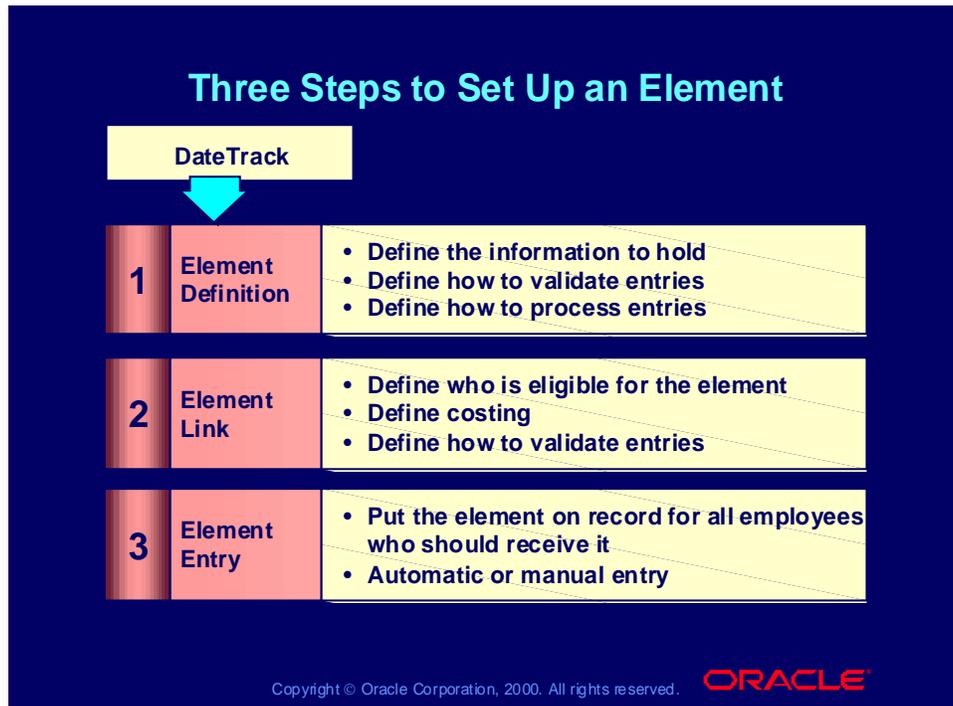
- **U.S. and Canada**
 - Regular Hours
 - Regular Salary
- **U.K.**
 - No predefined elements for HR



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Three Steps to Set Up an Element



Processing Types

Processing types control the duration of element entries

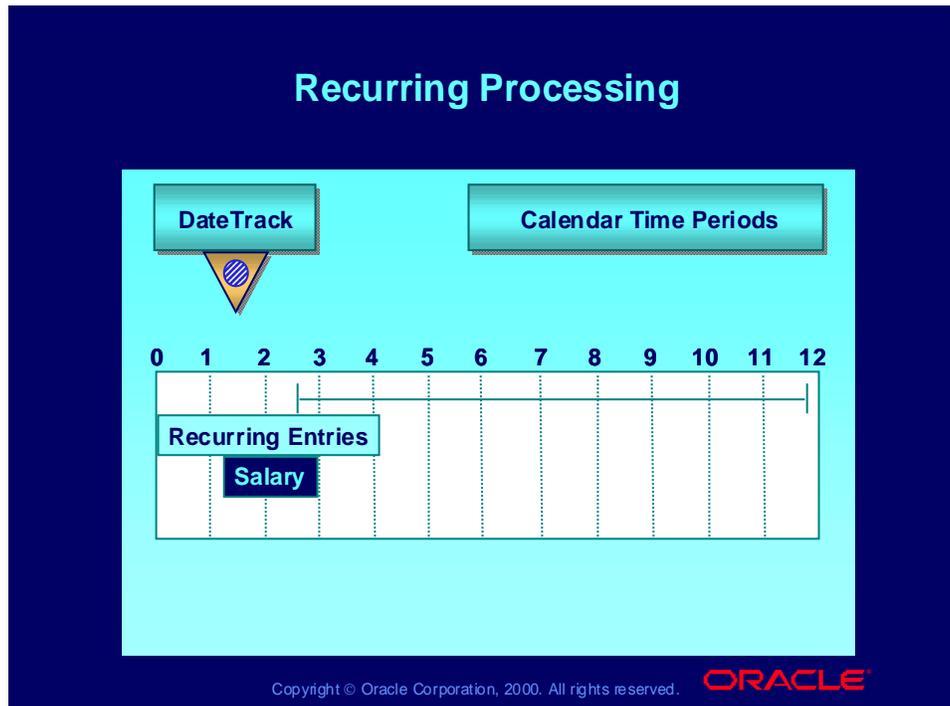
Processing type is either:

- **Recurring - entry persists through every pay period (current and future) until you end it**
- **Nonrecurring - one pay period only**
 - **You need to make a new entry each period in which the element should be processed**

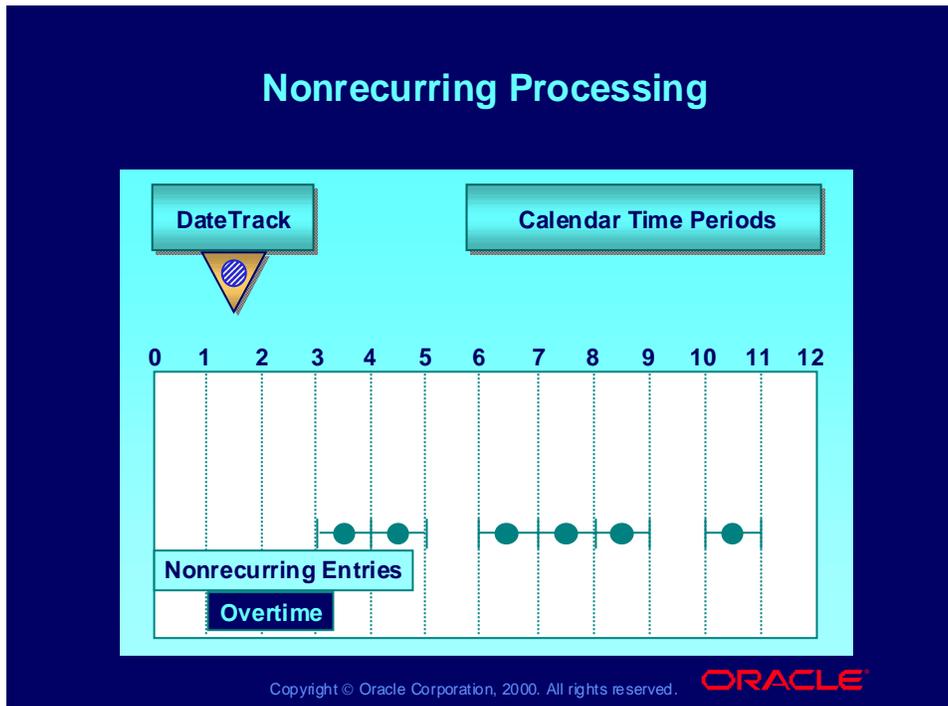
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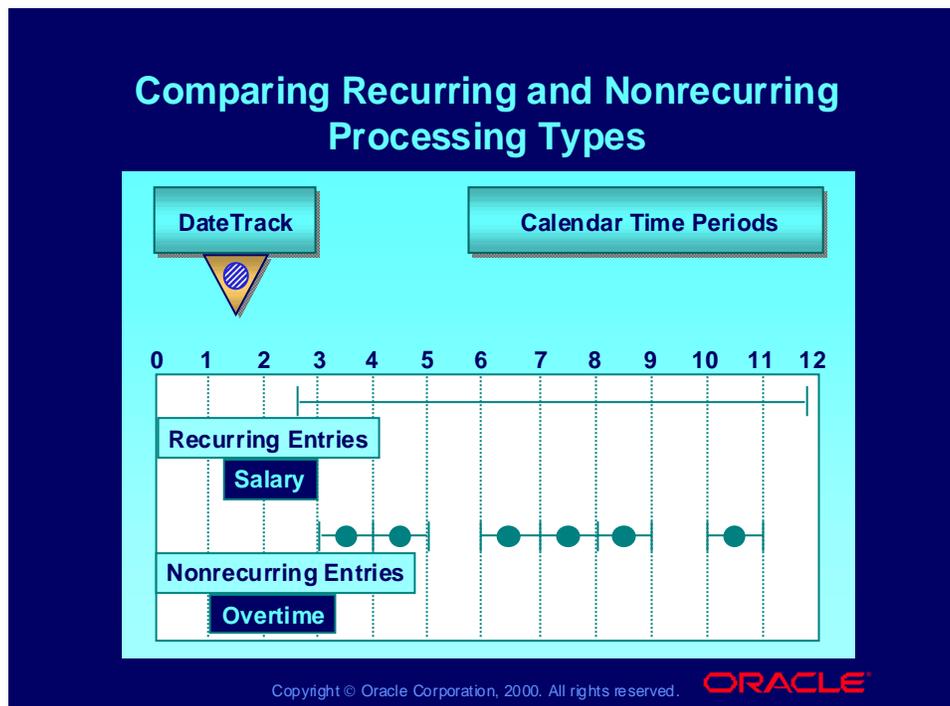
Recurring Processing



Nonrecurring Processing



Comparing Recurring and Nonrecurring Processing Types



Processing Options

Processing Options

- **Multiple Entries Allowed**
- **Additional Entries Allowed**
 - **Not used in North America**
- **Closed for Entry**



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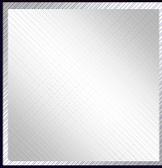
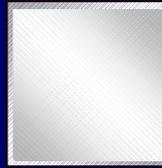
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Polling Question

Polling Question 

True or False

There is no limit to the number of elements you can define and all of your elements are datetracked.

True **False**

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Answer



True or False

There is no limit to the number of elements you can define and all of your elements are datetracked.



True

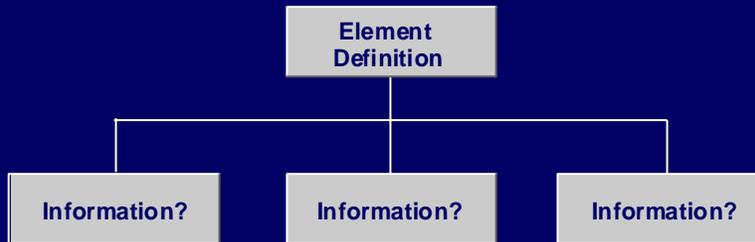
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Element Input Values

Element Input Values

When you define an element, you must consider what information you want to record each time you make an entry of the element for an employee



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Input Values

- ***Input values*** are values that you define to hold information about elements
- You can define up to 15 input values for an element
- Input values feed values into formulas used in Oracle Payroll
- Validation rules can be applied:
 - Range (Minimum/Maximum)
 - Lookup
 - Formulas

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Input Value Example

Input Value Example

Company Car element

Input Value	Unit of Measure
Make	Character
Model	Character
Year	Integer
Registration	Character
Date of Issue	Date
Mileage at Issue	Number

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Pay Value

- One input value is called the **Pay Value**
- Oracle Payroll makes special use of the pay value to store the result of processing an element for employee pay
- So an element must have a pay value if Oracle Payroll is to process it for pay
- You can have only one pay value for each element and it must have the name 'Pay Value'



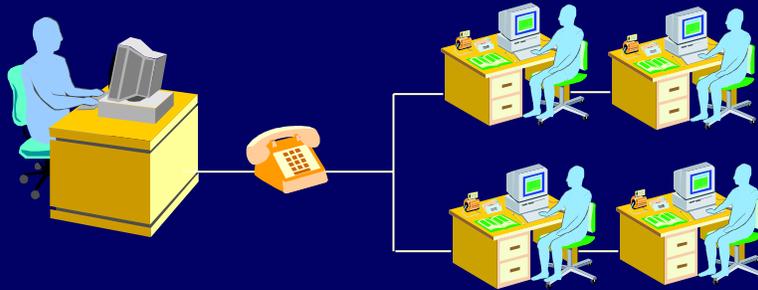
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Instructor Demonstration 2-a

Instructor Demonstration 2-a

The purpose of this demonstration is to show how to create an element. Observe as your instructor demonstrates how to define an element in the Information classification.



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Practice 2-a

Practice 2-a

Following the Instructor demonstration, define a company car element using the information supplied.



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Practice 2-a Navigation Path

**Practice 2-a
Navigation Path**



**Navigate to the Element window in US Super HRMS
Manager or UK HRMS Manager Responsibility:**

(N) Total Compensation > Basic > Element Description

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Online Help

For details on how to complete the Element window please refer to the Online Help path:

Oracle HRMS > Oracle HRMS Global > Compensation and Benefits Setup > How To > Define Elements > Define an Element

Summary

Summary

In this lesson, you should have learned how to:

- Define an element



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Controlling Eligibility and Costing for Elements

Controlling Eligibility and Costing for Elements

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Objectives

Objectives

After this lesson you should be able to:

- Describe the differences between eligibility profiles and element links
- Define the link rules for costing and eligibility of elements
- Understand how to use links and profiles together



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Overview

- **You can restrict compensation eligibility to certain individuals or groups within your organization**
 - **For example, you may want to pay bonuses only to certain individuals within certain divisions**



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Overview

You determine which employees are eligible for a compensation element, by building links to assignment components that employees must have to receive entries of particular elements



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Overview

- **With Oracle Standard and Advanced Benefits, you determine which employees are eligible for benefits in a different way**
 - **You use eligibility profiles**



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Overview

- **Links prevent employees from receiving element entries by mistake**
- **You can use qualifying conditions to restrict eligibility based upon age or length of service**



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Overview

- You define how an element is costed when you define its links
- Even if you have no eligibility or costing requirements for an element, you **must** define a link
 - You cannot allocate elements to your employees until you define a link



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Links

- Links effectively qualify employees to receive only those compensation elements that they are entitled to receive
- You establish which employees are eligible for a compensation element by linking the element to one or more assignment components



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Links

You can link to any of the following assignment components:

- Organization
- Job
- Grade
- Employment Category
- Salary Basis
- Group
- Position
- Location
- Payroll



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Links

- You can create multiple links as long as they are mutually exclusive
 - For example: If you create one link to Grade A, you can create another link to Grade B. However you cannot create another link to Sales Director. This would mean a Sales Director on Grade A is eligible twice.



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Benefit Links

Oracle Standard and Advanced Benefits users:

- When you define a link for a benefit, **do not** select any assignment components to restrict eligibility for the benefit element
- Instead, use a participation eligibility profile to restrict eligibility for the benefit element
- But, if you do create multiple links for costing purposes you are responsible for ensuring that your element links and eligibility rules don't conflict



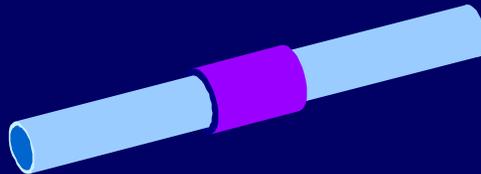
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Elements as Conduits in Oracle Standard and Advanced Benefits

Elements as Conduits in Oracle Standard and Advanced Benefits

- Elements are used to capture benefit rate information
- You create an element for each rate and link the element before you create the rate
- The enrollment window pulls together benefit plan, eligibility, enrollment, and rate information when an individual is enrolled



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Open Element Link in Oracle Standard and Advanced Benefits

Open Element Link in Oracle Standard and Advanced Benefits

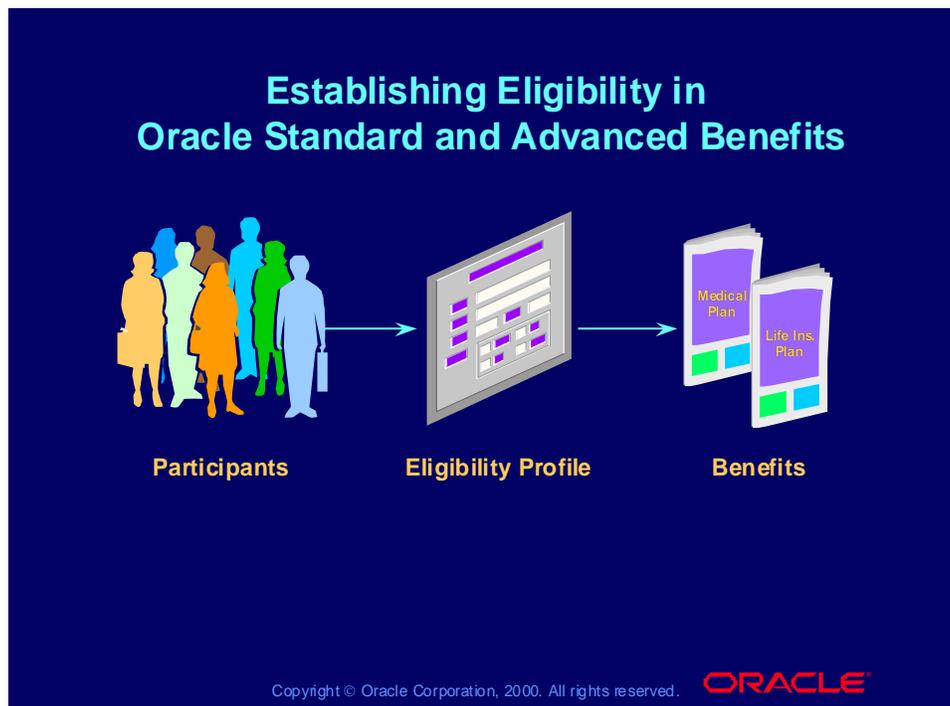
You need to define an element for each rate and then establish an open element link before you create a rate, since eligibility is controlled by profiles



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Establishing Eligibility in Oracle Standard and Advanced Benefits



Polling Question

Polling Question 

True or False

Eligibility profiles associate individuals or groups of individuals with specific benefits.

True **False**

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Answer



True or False

Eligibility profiles associate individuals or groups of individuals with specific benefits.



True

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Multiple Eligibility Rules

Multiple Eligibility Rules

- You can define more than one link for each compensation element, but there must be no overlap between the eligibility criteria for the links
- If you have more than one link for a compensation element, you can enter different default values, qualifying conditions, and costing information for each eligibility group



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Qualifying Conditions

Qualifying Conditions

- **Minimum or Maximum Age**
- **Length of Service (user extensible units)**
- **Qualifying Conditions are verified automatically when you try to enter an element for an employee**

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Costing

- You can set up cost allocations to distribute costs across different organizations
- When an employee changes cost centers, their existing element entry ends, but the system automatically creates a new entry that duplicates the old one if they are still eligible



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Costable Types

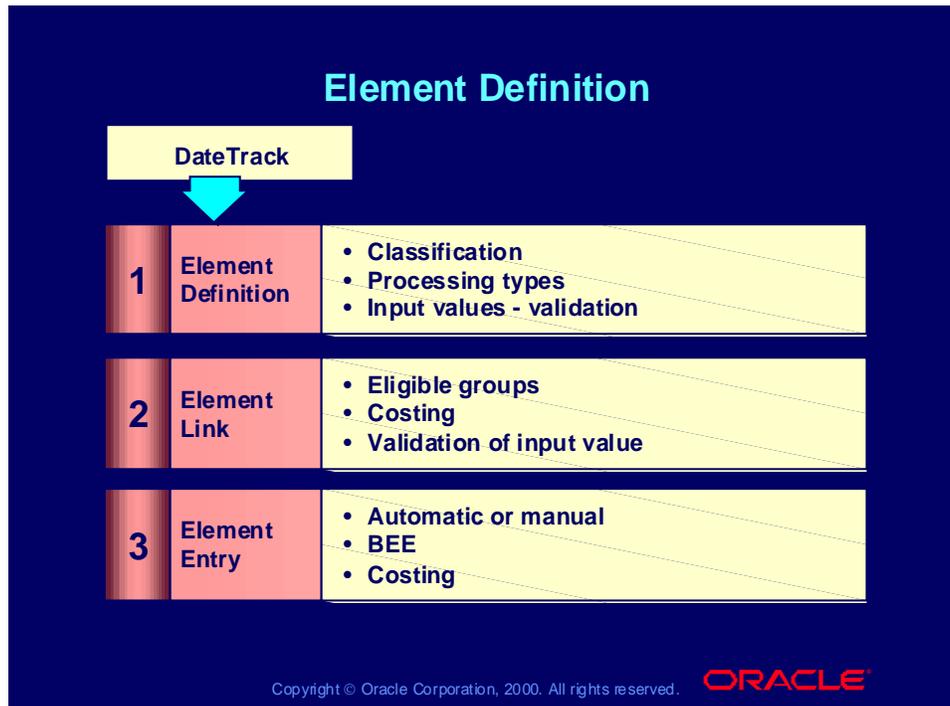
Costable Types

Costable Type	Definition
Not Costed	You do not want to allocate costs for the element.
Fixed Costs	You want all entries of the element to be allocated to the same account.
Costed	You want to override the account codes at the lower levels.
Distributed	You want to apportion the overhead costs to other elements. (You must also select a Distribution Set).

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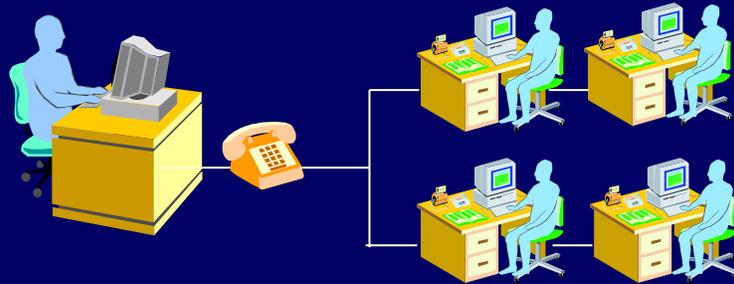
Element Definition



Instructor Demonstration 3-a

Instructor Demonstration 3-a

The purpose of this demonstration is to show how to link an element to an assignment component. Observe as your instructor demonstrates.



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Practice 3-a

Following the Instructor Demonstration, link an element to an assignment component using the information supplied.



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Practice 3-a Navigation Path

**Practice 3-a
Navigation Path**



Navigate to the Element Link window in US Super HRMS Manager or UK HRMS Manager Responsibility:

(N) Total Compensation > Basic > Link

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Online Help

For details on how to complete the Element Link window please refer to the Online Help path:

Oracle HRMS > Oracle HRMS Global > Compensation and Benefits Setup > How To > Define Elements > Define Element Links

Summary

Summary

In this lesson, you should have learned how to:

- Describe the differences between eligibility profiles and element links
- Define the link rules for costing and eligibility of elements
- Understand how to use links and profiles together



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Planning Methods of Entry

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Objective

Objective

After this lesson you should be able to:

- Understand the methods used to enter elements and the decisions to be applied



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Element Entry Method Types

Element Entry Method Types

- Automatic
- Batch
- Manual
- Indirect



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Element Entry Method Types

- **Automatic**
 - Entries are made automatically when an employee satisfies the eligibility criteria of the standard element link that was created for the element

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Element Entry Method Types

- **Automatic**
- **Batch**
 - You can use the Batch Header and Batch Lines windows of BEE for rapid entry of batches of information held as element entries
 - You can enter information in a batch for as many elements and assignments as you require
 - You can enter defaults for any value, to speed up data entry, and you can change the defaults as you work through the batch

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Element Entry Method Types

- Automatic
- Batch
- Manual
 - You select an element from a list
 - The list only contains elements that the employee is eligible for, that is, they satisfy the eligibility criteria of the element link
 - You make entries into each input value

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Element Entry Method Types

- Automatic
- Batch
- Manual
- **Indirect Entry by Payroll Run**
 - A formula for one element can supply the run result of another element as an indirect result

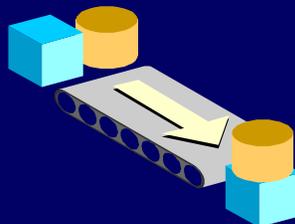
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Automatic Entry

Automatic Entry

- Applies to recurring entries only
- Ensures that all eligible employees receive a recurring element automatically by defining a standard link to the element
- Ensures that the element and all its default input value entries go on record for all eligible employees, now and in the future

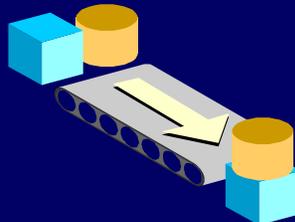


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Automatic Entry

- Automatic entry is **not** appropriate for use with elements that have requisite performance criteria (such as exceeding a sales quota)
- You can specify qualifying conditions that delay the automatic recording of an element



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Batch Element Entry (BEE)

Batch Element Entry (BEE)

- **BEE** is an open interface for entering all types of element information.
- You can save time by entering compensation information in batches for many employees at once.



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Batch Element Entry (BEE)

Batch Element Entry (BEE)

- You can control, submit, correct, and resubmit your batch element entries prior to processing
- You can record TimeCard data needed for regular pay processing:
 - For example: You might want to record the overtime hours worked by several employees during the current pay period.



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BEE Examples

- Enroll employees in Paid Time Off accrual plans
- Enter special one-time changes to nonrecurring earnings or deductions to be processed in the period
- Make changes to salary, bonuses and commissions, and other types of earnings

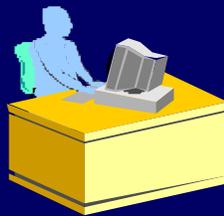


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Manual Element Entry Methods

- **Element Entry Window**
- **Salary Administration Window**
- **Absence Detail Window**
- **Enrollment forms for benefit plans, and self service enrollment**



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Salary Administration Window

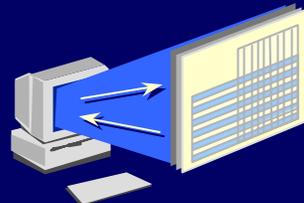
Salary Administration Window

Enter salaries:

- Proposed values
- Confirmed values

Using ADE you can download a batch of salaries to a spreadsheet, update them in the spreadsheet, then upload them

- Example: You might want to propose a salary increase for several employees



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Absence Detail Window

Absence Detail Window

- Record sick leave
- Record accrued absences



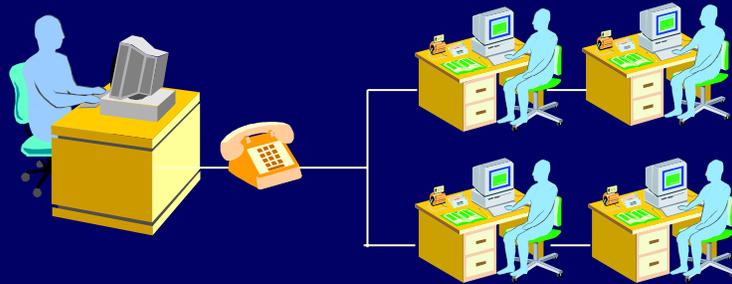
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Instructor Demonstration 4-a

Instructor Demonstration 4-a

The purpose of this demonstration is to show how to make an element entry using the Element Entries window. Observe as your instructor demonstrates.



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Practice 4-a

Following the Instructor demonstration, make a manual element entry using the information supplied.



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Practice 4-a Navigation Path

**Practice 4-a
Navigation Path**



Navigate to the Element Entries window in US Super HRMS Manager or UK HRMS Manager Responsibility:

(N) People > Enter and Mantain > (B) Assignment > (B) Entries

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Online Help

For details on how to complete the Element Entries window please refer to the Online Help path:

Oracle HRMS Global > Compensation Entry and Analysis > How To > Enter Compensation > Make Manual Element Entries

Customize Element Entries Windows

- You can customize element entry windows to restrict the elements that users can enter, thus ensuring that the wrong elements are not entered

You can restrict element entry using the following criteria:

- Element Sets (Element groups you define)
- Element Processing Types (Recurring or NonRecurring)
- Element Classification (such as Paid Time Off or Voluntary Deduction)

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Summary

Summary

In this lesson, you should have learned how to:

- Understand the methods used to enter elements and the decisions to be applied



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Controlling Entry Values

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Objective

Objective

After this lesson you should be able to:

- Control element entry values at the point of entry



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Overview

- When you define inputs for an element, you also define the validation for each input value. The validation controls the values a user can enter.
- Using a formula you can model complex business rules for validating entries
- You can also supply a default value for any input value, and have different defaults on each link



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Defaults

Defaults

- You can enter a default for any input value
- You can have a different default on each link
- The default applies to all entries if you make the input value not user enterable



A screenshot of a software interface showing a 'Default' label next to a text input field containing the value '\$200.00'. Below the input field are two empty rectangular boxes, likely representing other input fields or buttons.

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Default Entries on Links

Default Entries on Links

- **Link to Monthly payroll**

Input Value	Unit of Measure	Validation	Default Entry
Make	Character	Look up	Ford
Model	Character	Look up	Escort

- **Link to Executive payroll**

Input Value	Unit of Measure	Validation	Default Entry
Make	Character	Look up	Ford
Model	Character	Look up	Mustang

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Hot Default

Hot Default

If the input value is required, you can create a hot default:

- Changing a hot default updates future and existing entries *unless* default was overridden when entry was made
- Hot defaults appear in **red** on the Entry Values window

Hot Default



The screenshot shows a window titled "Hot Default". Inside the window, there is a label "Default" followed by a text input field containing the value "\$200.00". The value "\$200.00" is displayed in red text, indicating it is a hot default. Below the input field, there are two empty rectangular boxes, likely for additional configuration or validation.

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Validation Types

- Value Range (Minimum - Maximum)
- Lookup List of Valid Values
- Formulas



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Validation Example

Validation Example

- **Company Car element**

Input Value	Unit of Measure	Validation Type
Make	Character	Look up
Model	Character	Look up
Year	Integer	Look up
Registration	Character	
Date of Issue	Date	
Mileage at Issue	Number	Minimum/Maximum

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Polling Question

Polling Question



Which of the following are *not* validation options for Input Values?

Value List

Default Value

Input Value

Minimum Value Range

Maximum Value Range

Formula Range

Using Formula

Fixed Value Range

Fixed Value

Lookup List

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Answer

Answer



Which of the following are *not* validation options for Input Values?

Value List

Default Value

Input Value

Minimum Value Range

Maximum Value Range

Formula Range

Using Formula

Fixed Value Range

Fixed Value

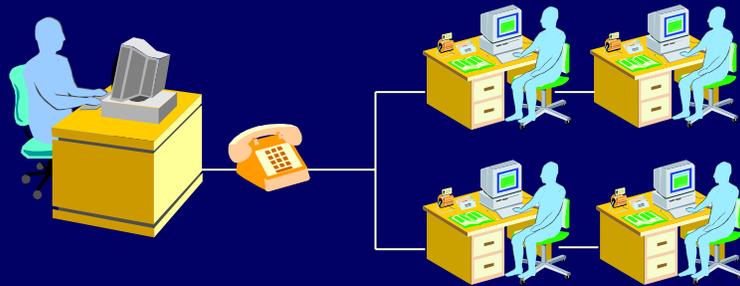
Lookup List

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Instructor Demonstration 5-a

The purpose of this demonstration is to show how to restrict an entry value using minimum and maximum range validation or a lookup. Observe as your instructor demonstrates.



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Practice 5-a

Following the Instructor demonstration, define a lookup type and use value ranges to validate entry values, using the information supplied.



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Practice 5-a Navigation Path

**Practice 5-a
Navigation Path**



**Navigate to the Element window in US Super HRMS
Manager or UK HRMS Manager Responsibility:**

**(N) Total Compensation > Basic > Element Description >
(B) Input Values**

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Online Help

For details on how to enter the value range in the Element Window please refer to the Online Help path:

Oracle HRMS > Oracle HRMS Global > Compensation and Benefits Setup >
How To > Define Elements > Define an Element's Input Values

Formula Validation

Using Oracle FastFormula, you can write conditional logic to validate input values using different criteria for different employees

- Example: You could have a different maximum value for employees at different locations

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Formula Validation

- You can define your formula so that it returns a success or failure message when the validation is executed
 - Example: A failure message can alert the user that a bonus amount has been exceeded

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Formula Validation

- **Validation Formulas are called by the Element Entry API**
- **So your formulas are used to validate entries made using:**
 - **BEE**
 - **The Element Entries window**
 - **Any other interface that calls the Element Entry API**

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Tables of Valid Values

- You can restrict element entries by creating a matrix of valid values combinations
- For example, if you wanted to restrict bonus amounts based upon length of service you could create a user table (see **Setting Up User Tables, Columns, and Rows, Customizing, Reporting, and System Administration in Oracle HRMS**)

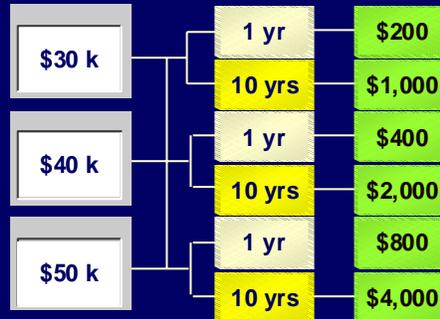
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Validating Input Values

Validating Input Values

Example - for a bonus payment you can set a bonus value that depends on length of service and current salary



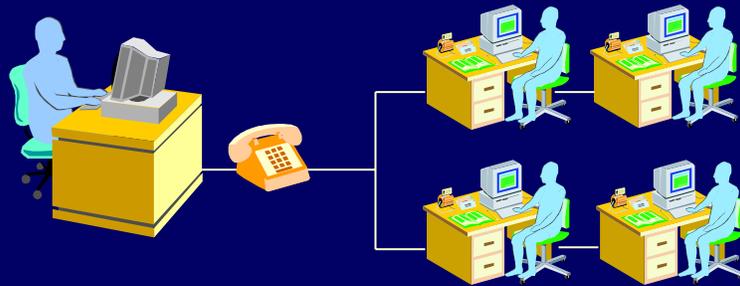
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Instructor Demonstration 5-b

Instructor Demonstration 5-b

The purpose of this demonstration is to show how to restrict an entry value using a formula. Observe as your instructor demonstrates.



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Practice 5-b

Practice 5-b

Following the Instructor demonstration, use a formula to validate entry values of an element.



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Practice 5-b Navigation Path

**Practice 5-b
Navigation Path**



**Navigate to the Formula window in US Super HRMS
Manager or UK HRMS Manager Responsibility:**

(N) Total Compensation > Basic > Write Formulas

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Online Help

For details on how to select a validation formula in the Element window please refer to the Online Help path:

Oracle HRMS > Oracle HRMS Global > Compensation and Benefits Setup > How To > Define Elements > Define an Element's Input Values

For details on how to write a validation formula in the Formulas window please refer to the Online Help path:

Oracle HRMS > Oracle HRMS Global > Oracle FastFormula > How To > Use Oracle FastFormula > Define Formulas for Validation

Summary

Summary

In this lesson, you should have learned how to:

- Control element entry values at the point of entry



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Summary

Summary

In this unit you should have learned how to:

- Understand Element Classifications
- Design Elements
- Control Eligibility and Cost Elements
- Plan Methods of Entry
- Control Entry Values



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Module Summary

In this module you should have learnt how to:

- Understand Element Classifications
- Design Elements
- Control Eligibility and Cost Elements
- Plan Methods of Entry
- Control Entry Values



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