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.

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Related Publications

Oracle Publications

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

Additional Publications

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

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Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The ***algorithm*** 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: `debug.set ('I", 300);` Directory: `bin` (DOS), `$FMHOME` (UNIX) Filename: Locate the `init.ora` file. Password: User `tiger` as your password. Pathname: Open `c:\my_docs\projects` URL: Go to `http://www.oracle.com` User input: Enter `300` Username: Log on as `scott`
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (*but* Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do *not* save changes to the database. For further information, see *Oracle7 Server SQL Language Reference Manual.* Enter `user_id@us.oracle.com`, where *user_id* 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 SELECT command to view information stored in the LAST_NAME column of the EMP table.

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

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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 role`
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

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(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.

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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.

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Modeling the Employment Relationship

Chapter 2

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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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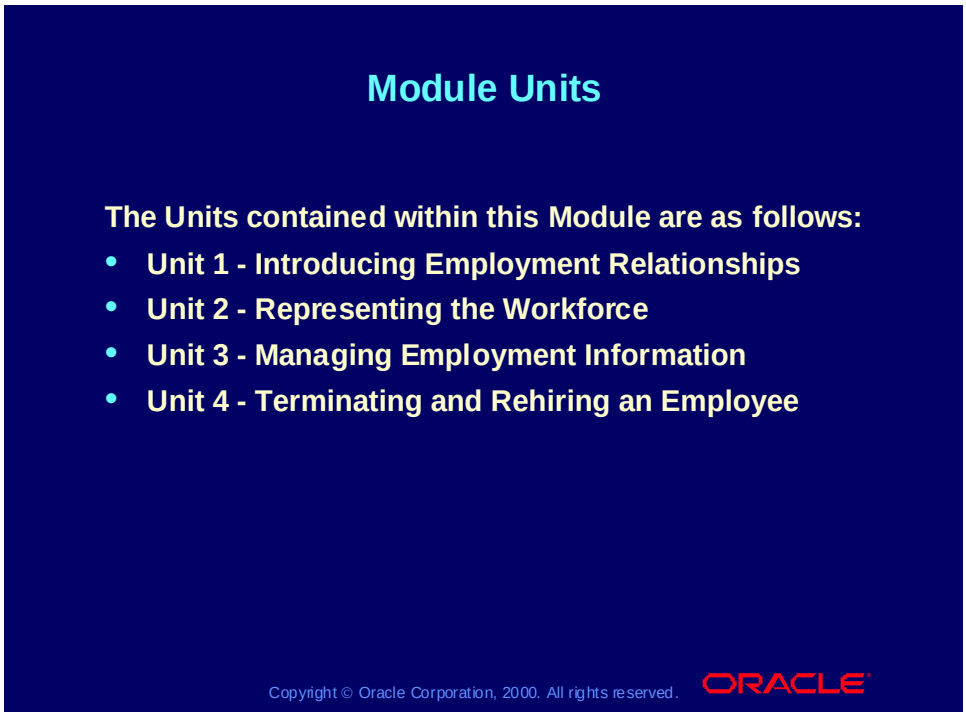

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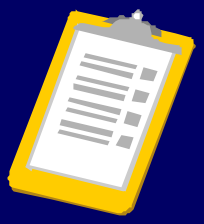
Objectives

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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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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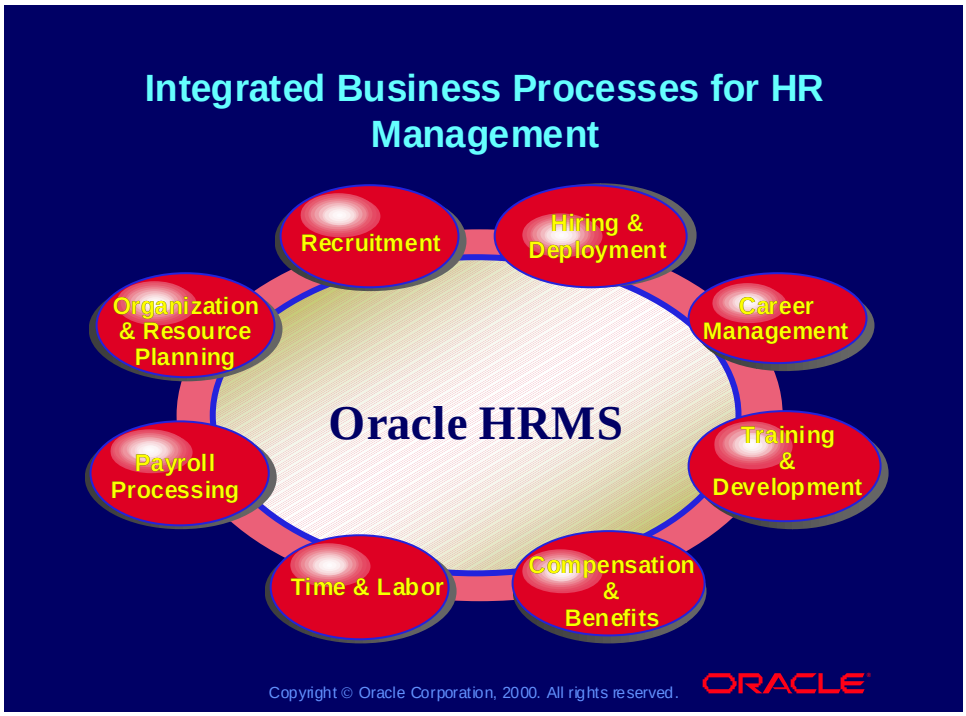

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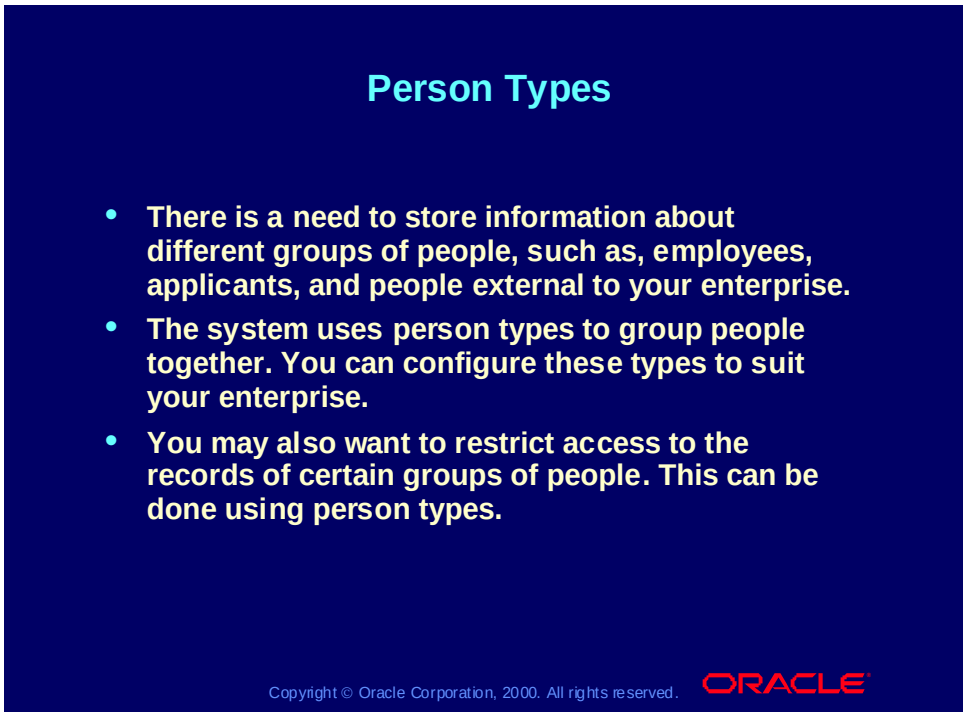

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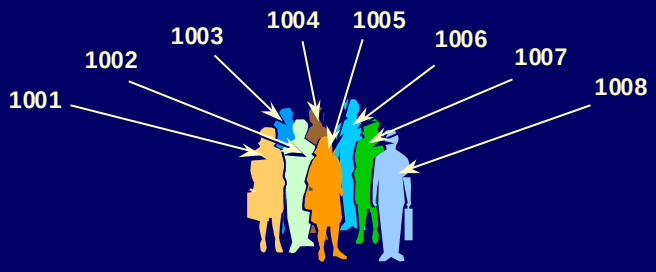
Identifying Employees

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



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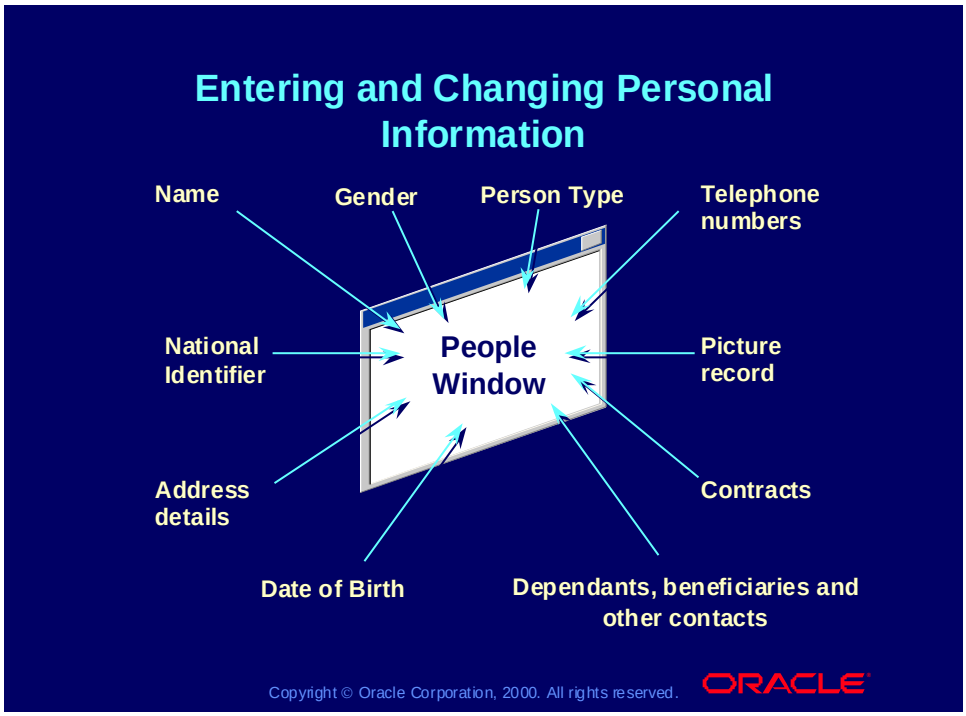

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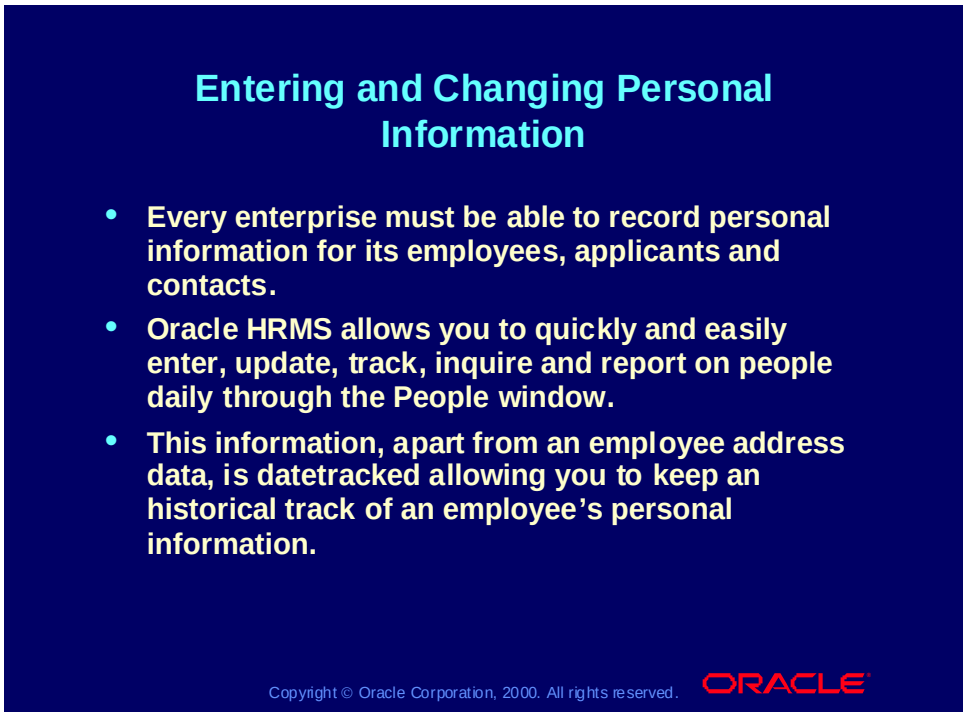

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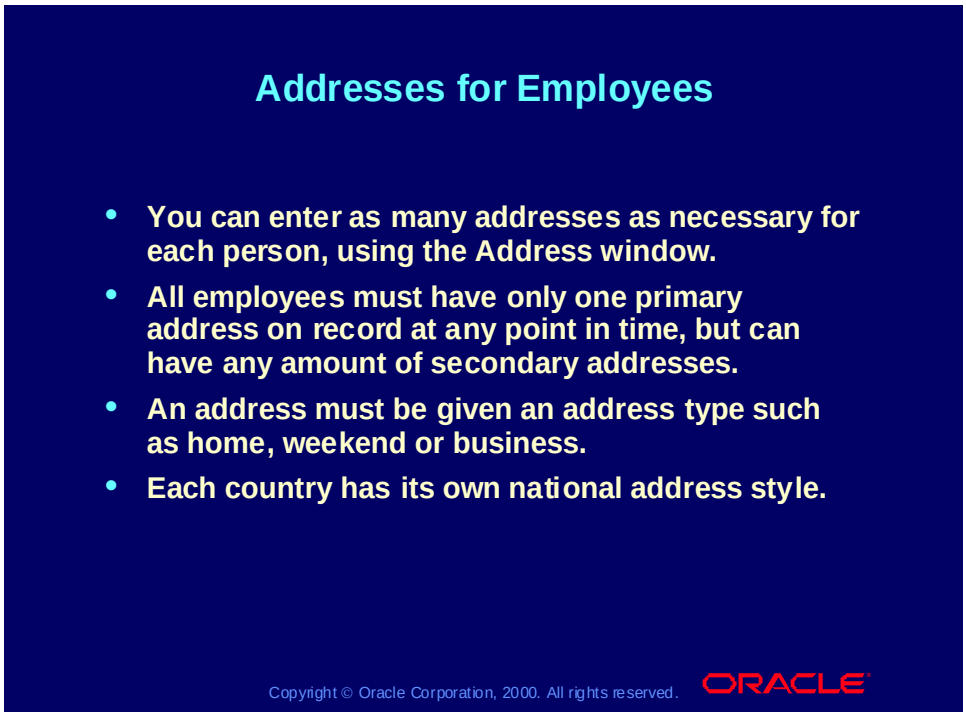

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Tracking Peoples Roles and Activities

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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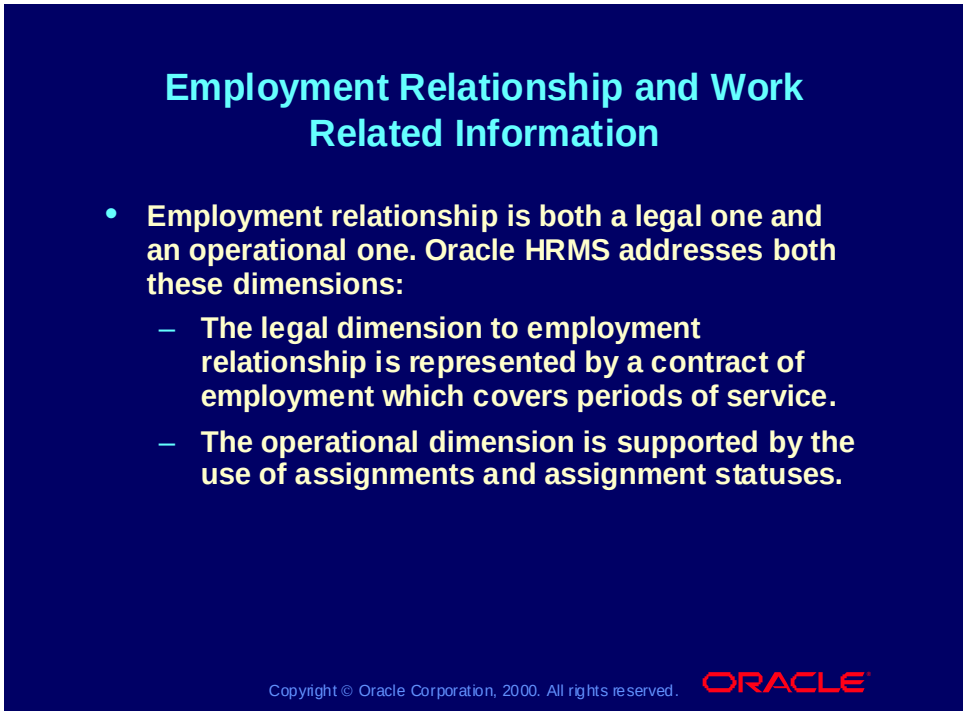

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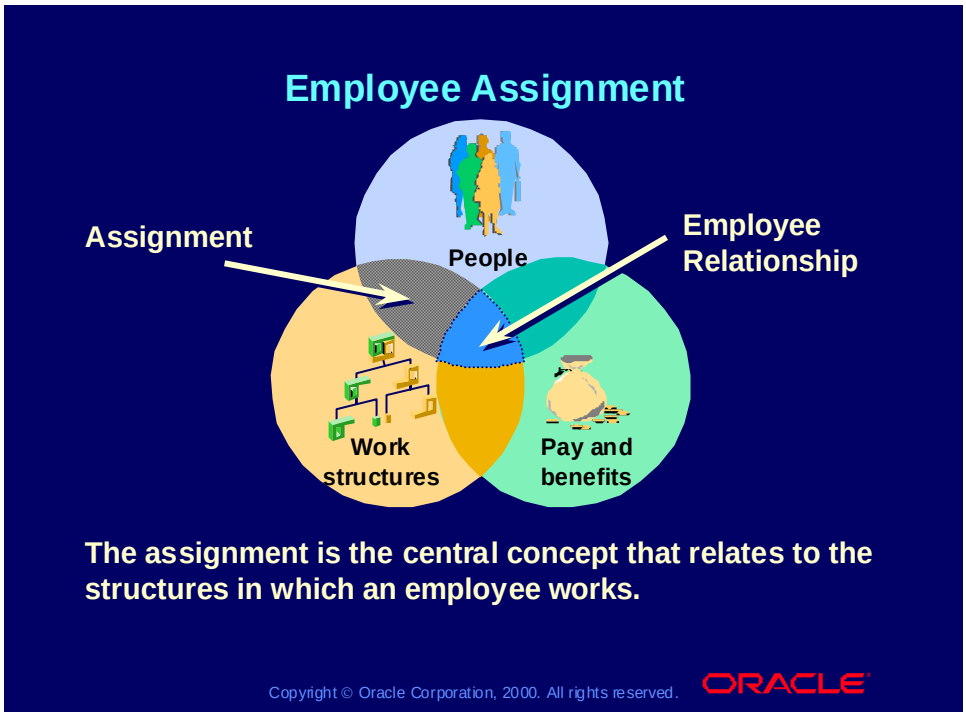
Employee Assignment



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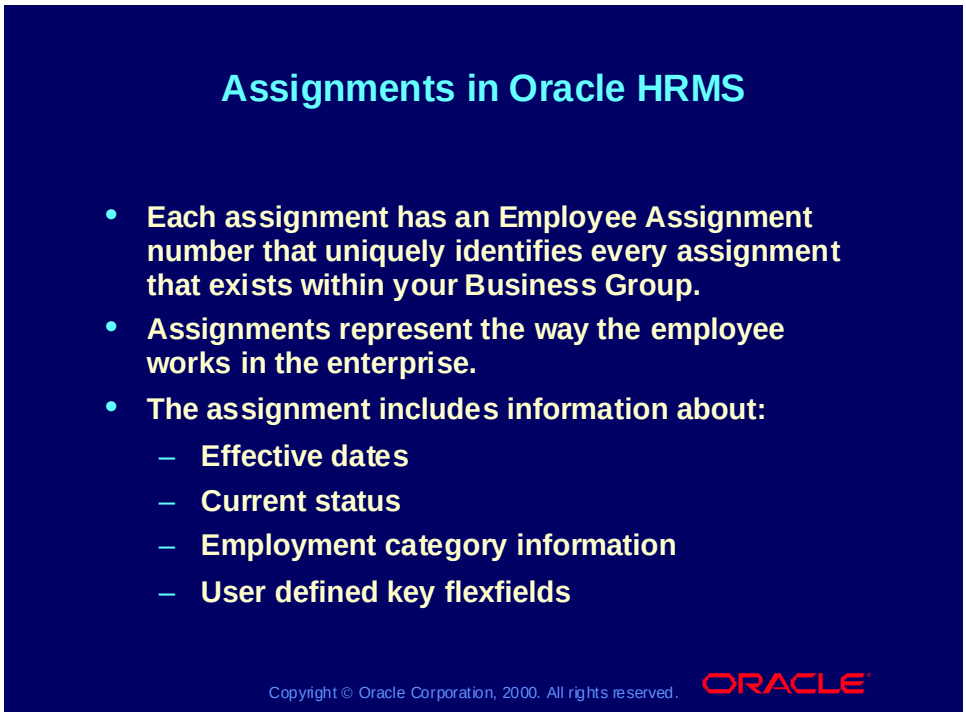

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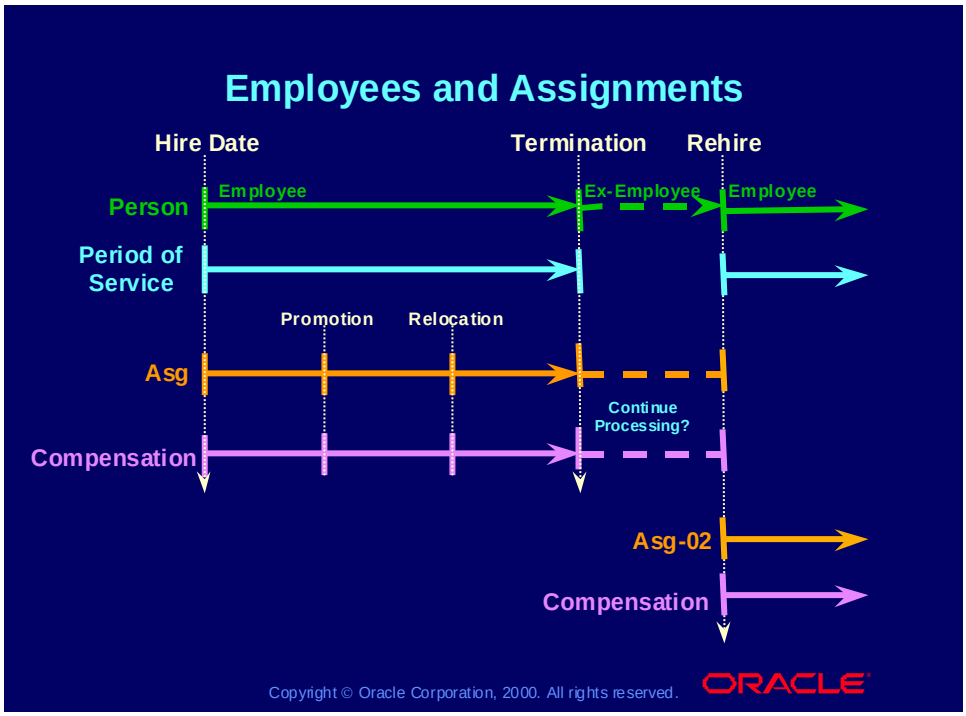
Employees and Assignments



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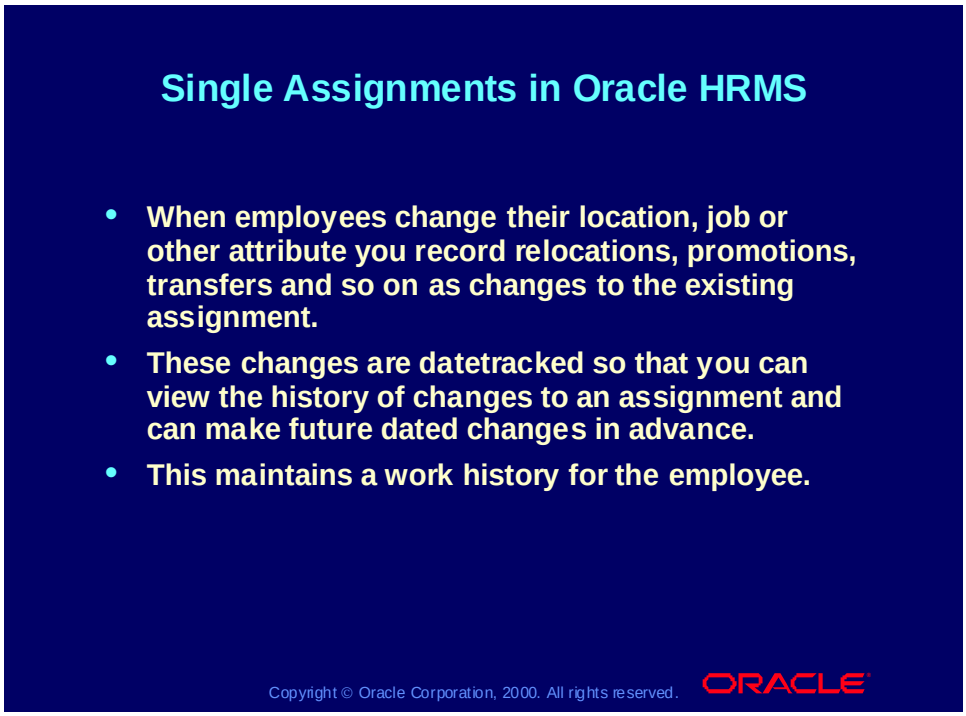

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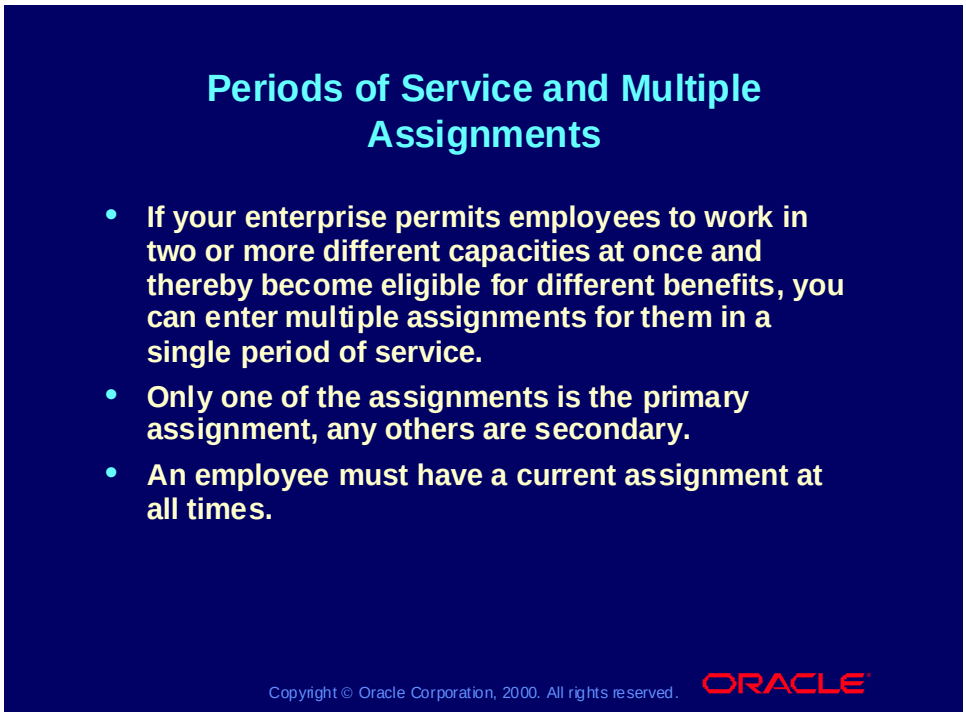

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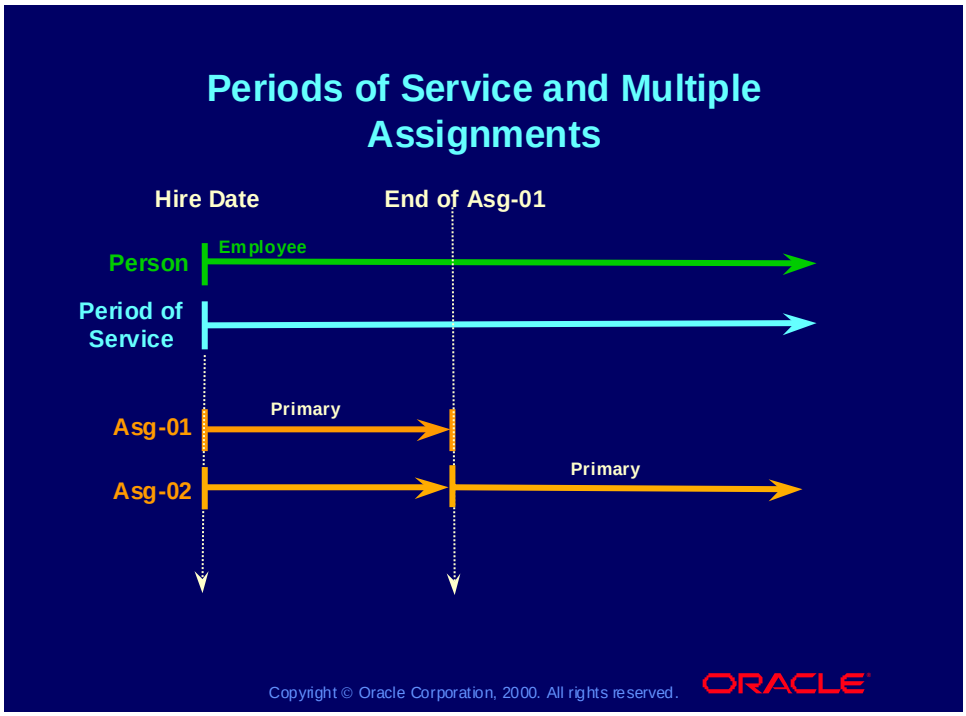
Periods of Service and Multiple Assignments



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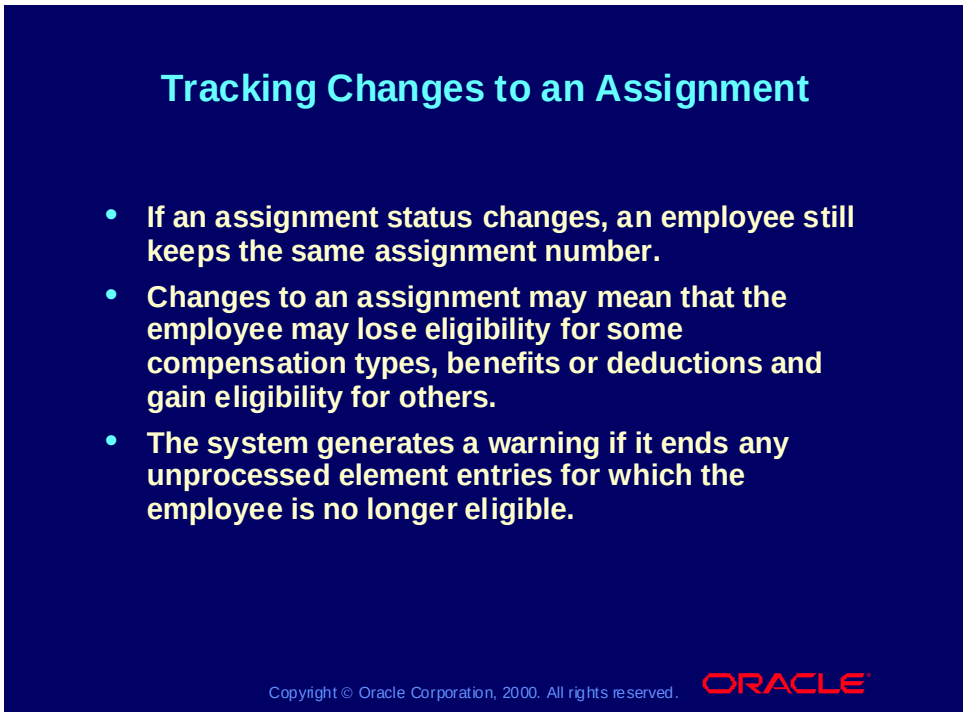

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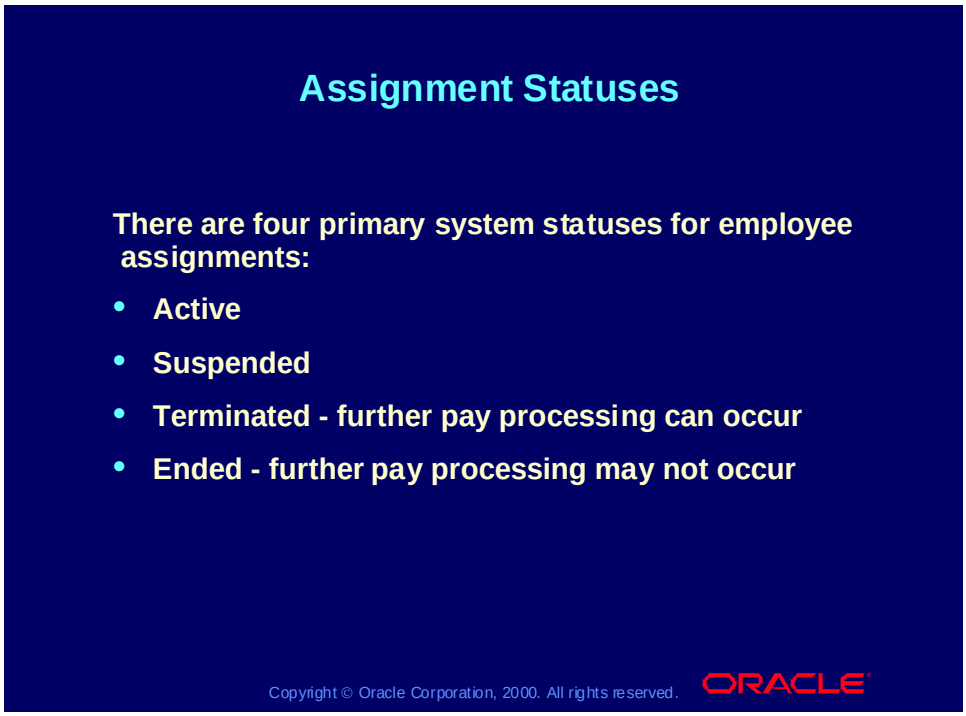

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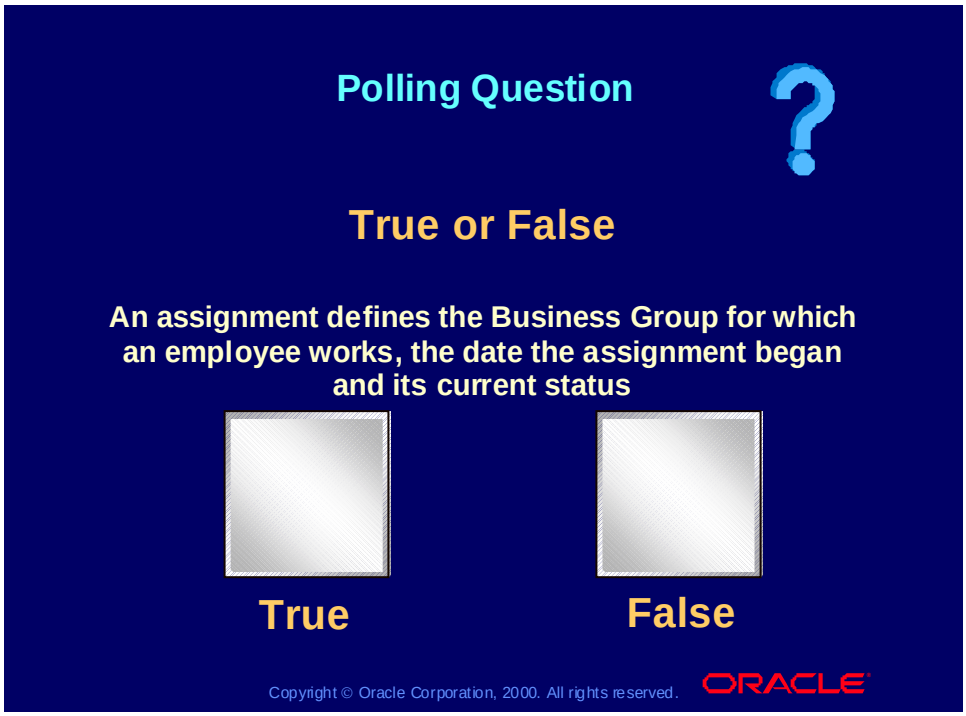
Polling Question



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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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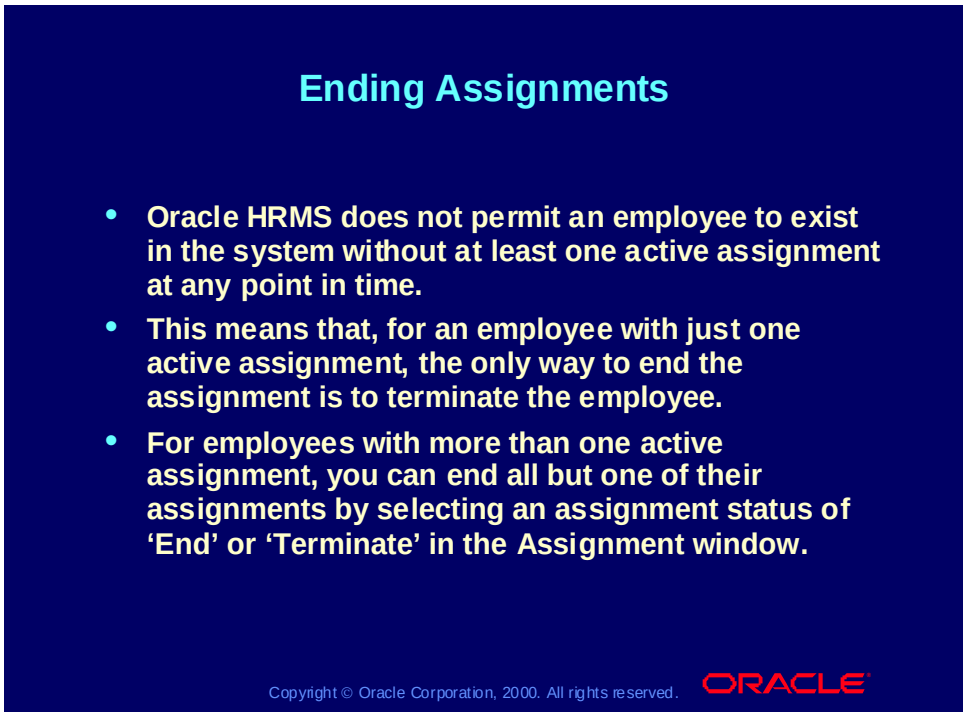

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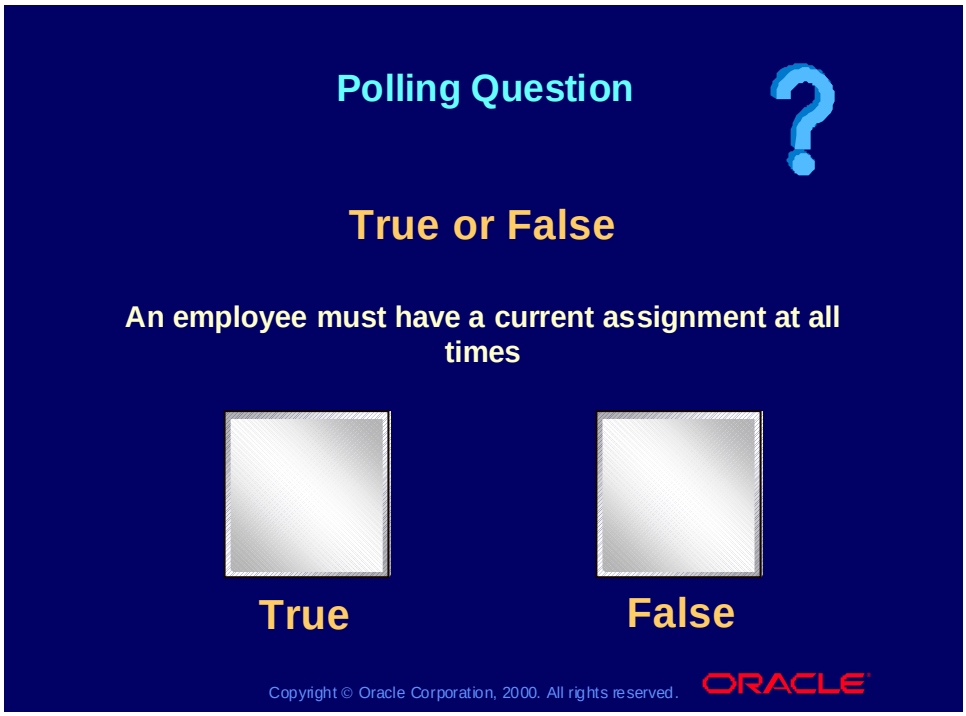

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Answer

True or False

An employee must have a current assignment at all times

True

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Terminating Employees

- 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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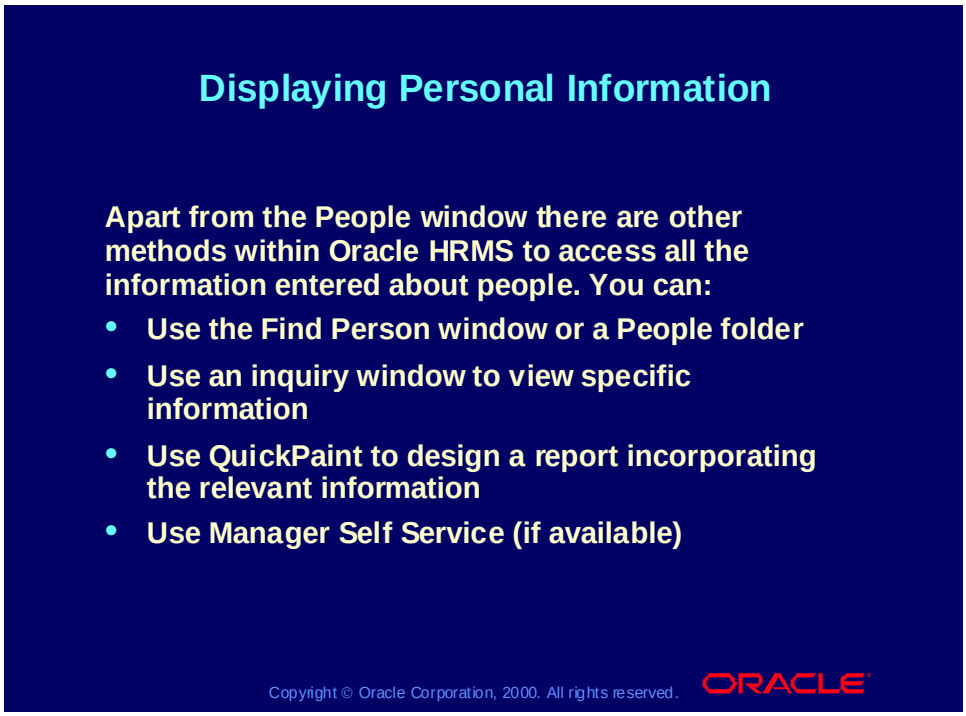

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Employee Development

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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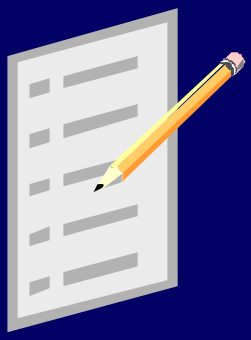
Polling Question

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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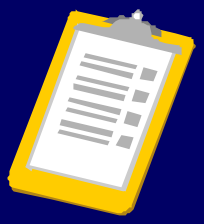
Objectives

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

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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Overview

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

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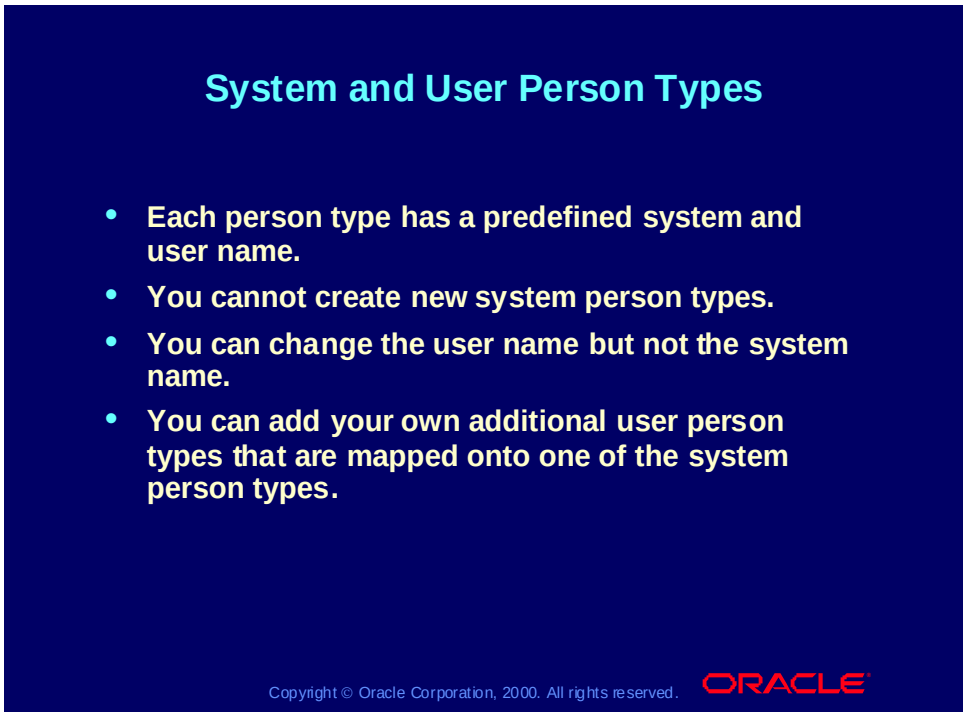

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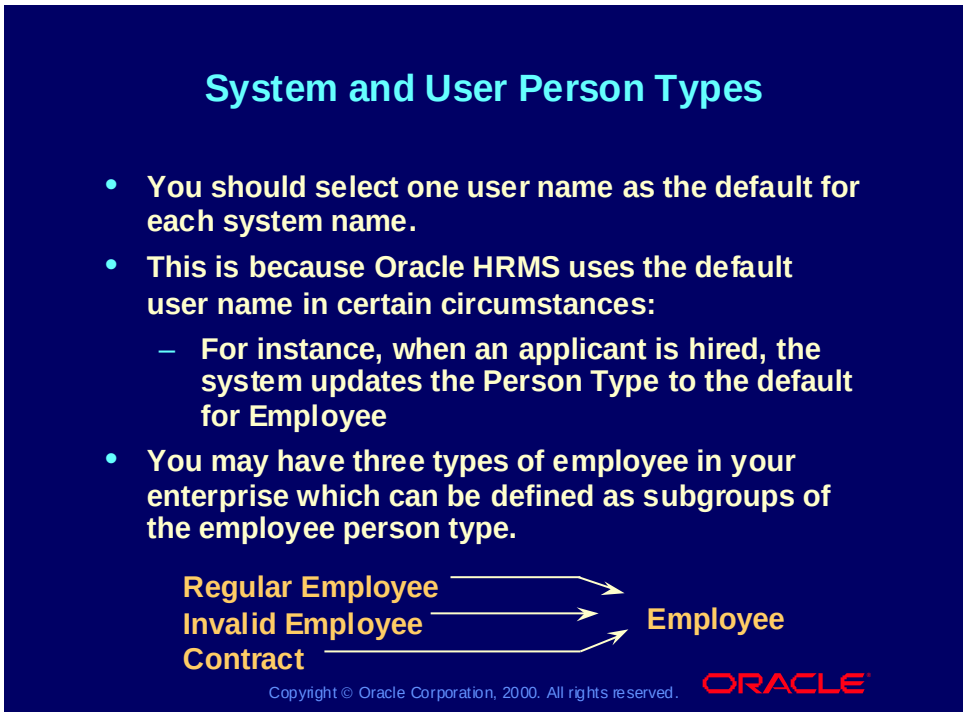

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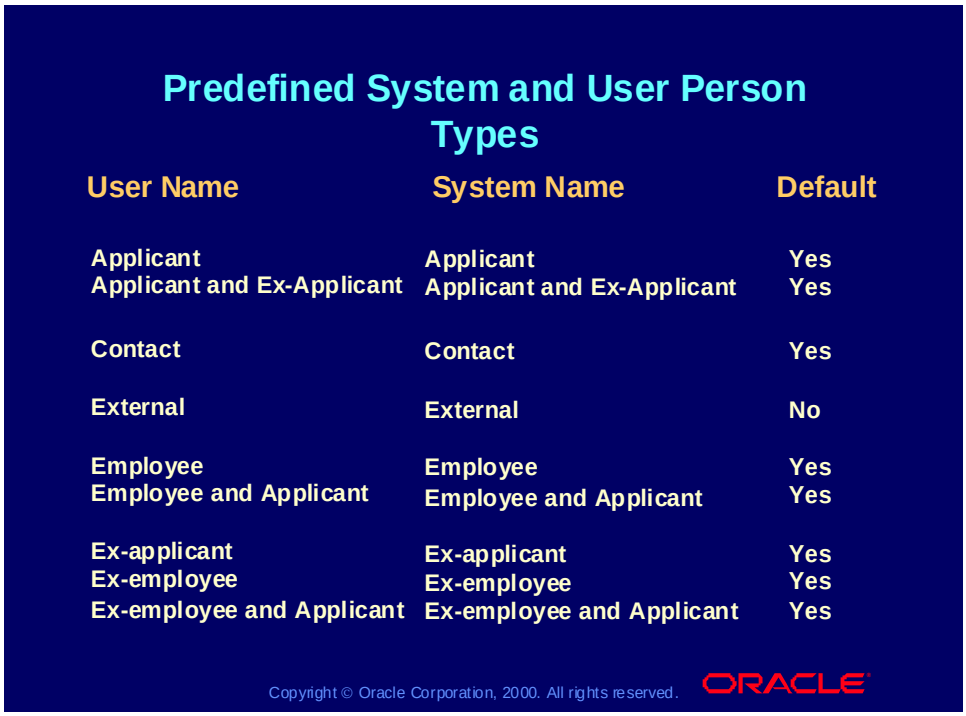
Predefined System and User Person Types



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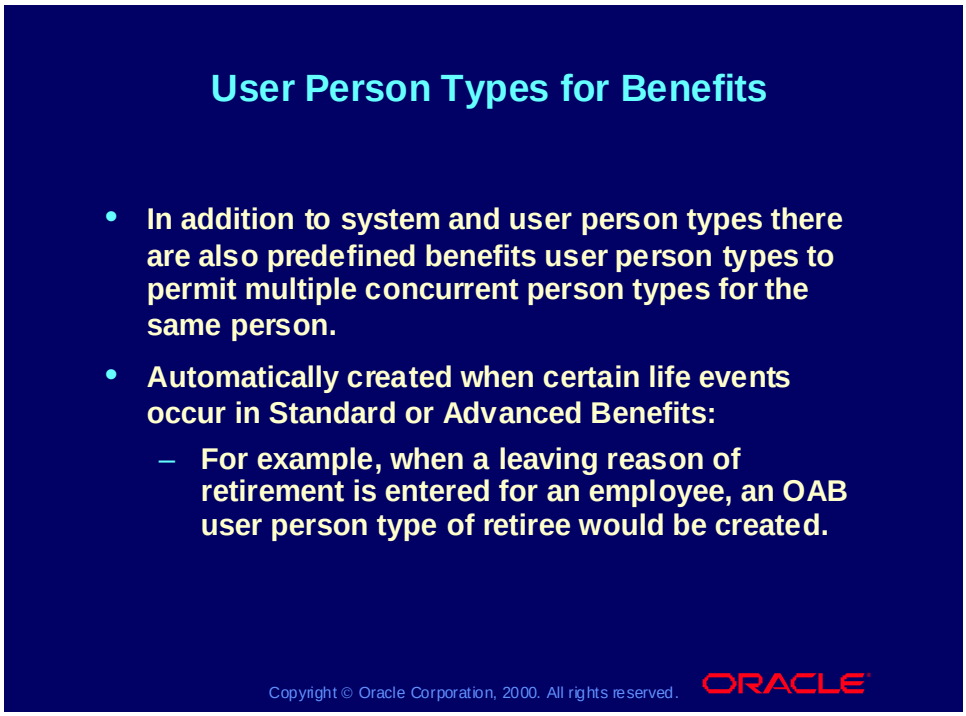

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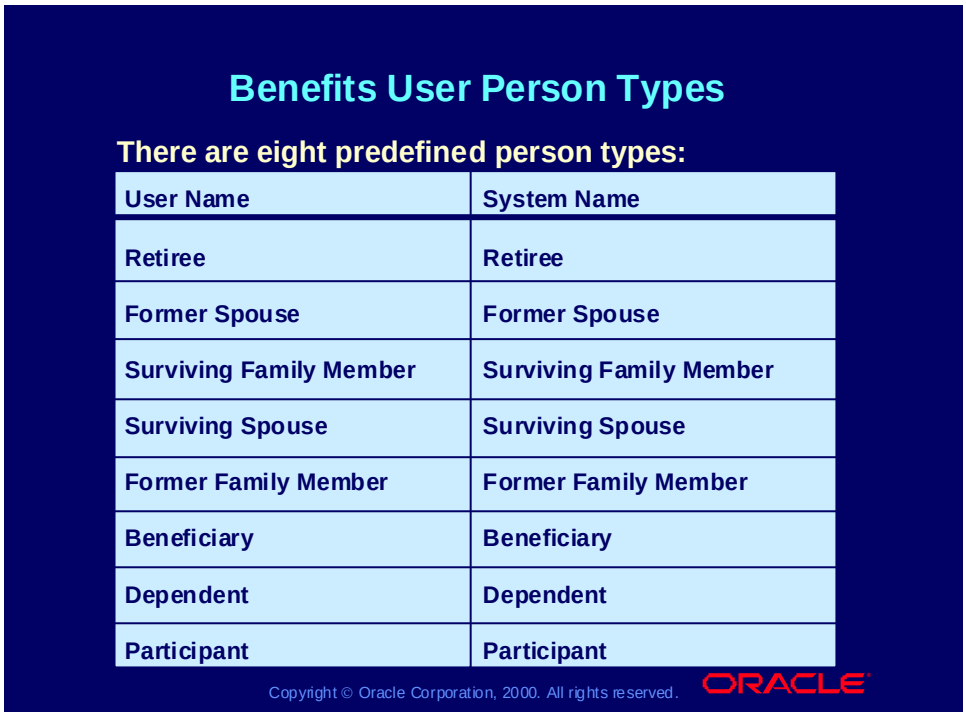

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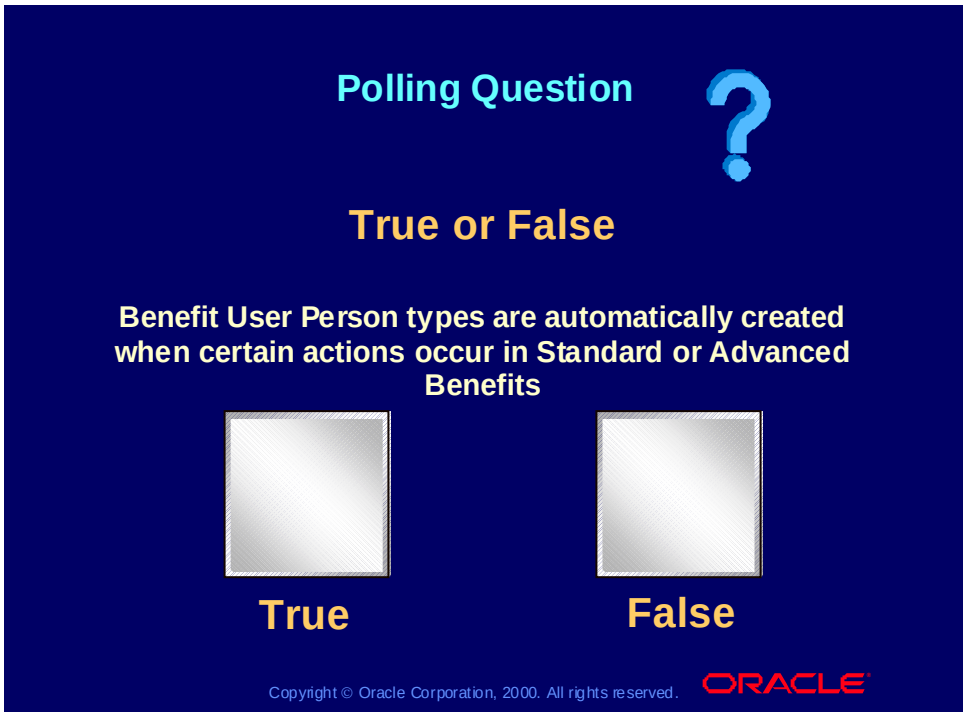
Polling Question



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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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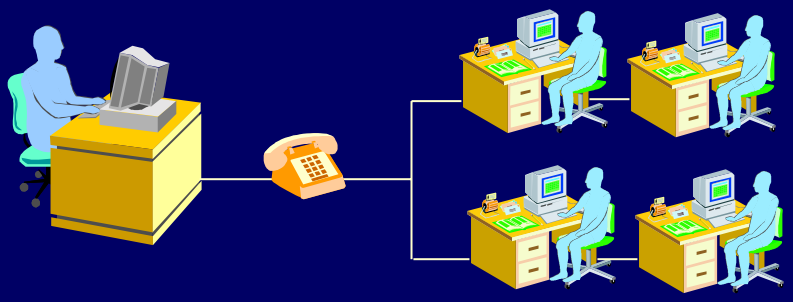
Instructor Demonstration 1-a

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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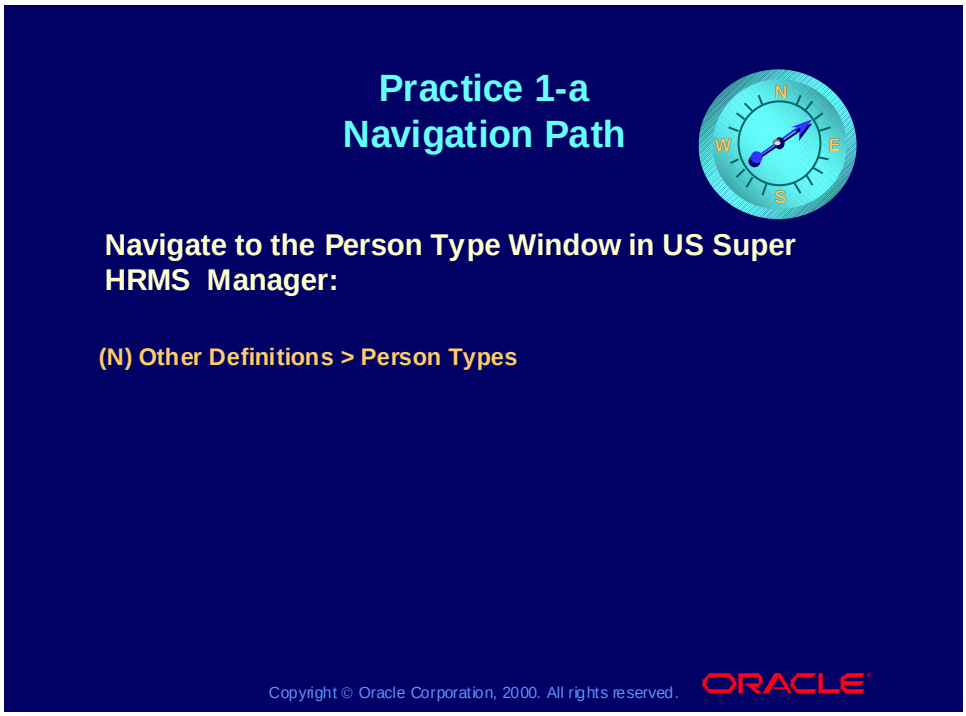

Online Help

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

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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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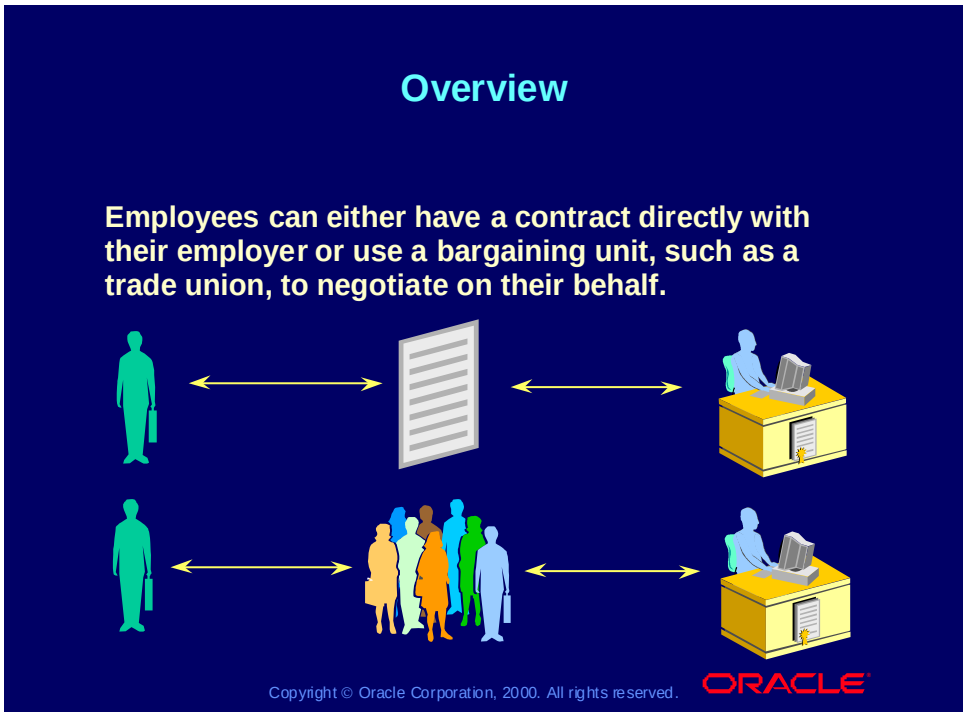

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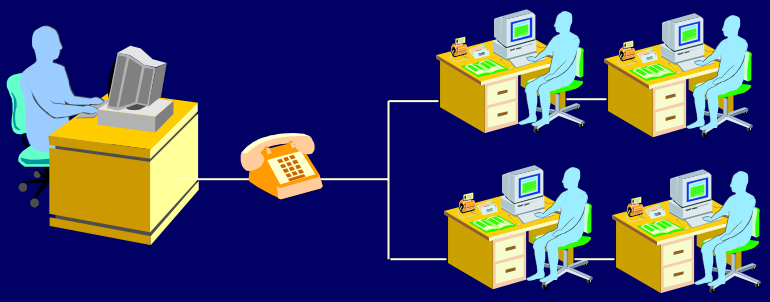
Instructor Demonstration 2-a

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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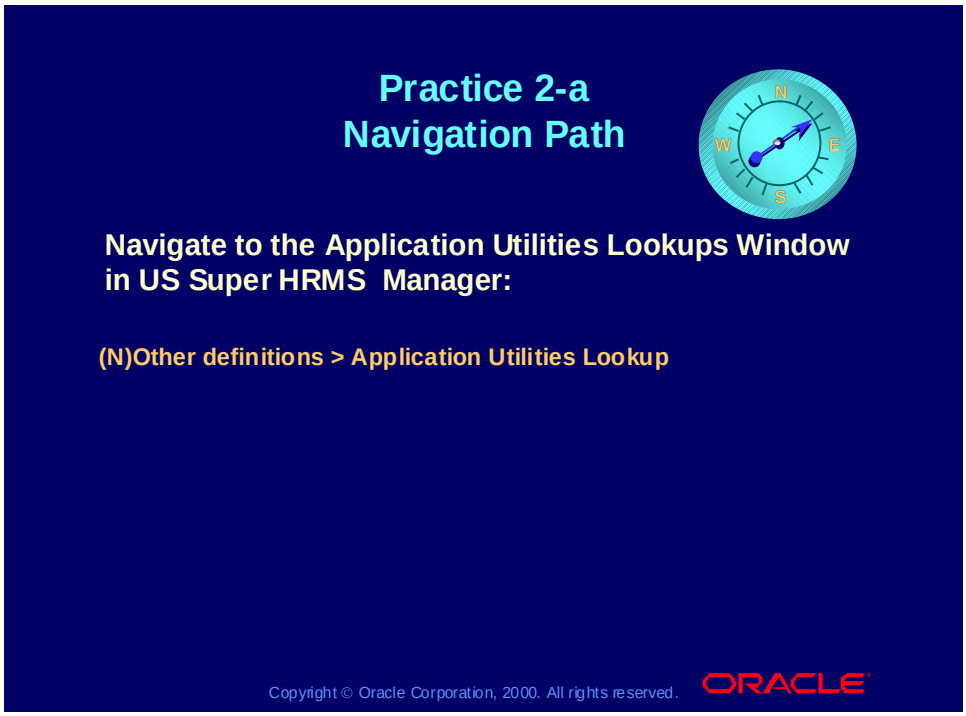

Online Help

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

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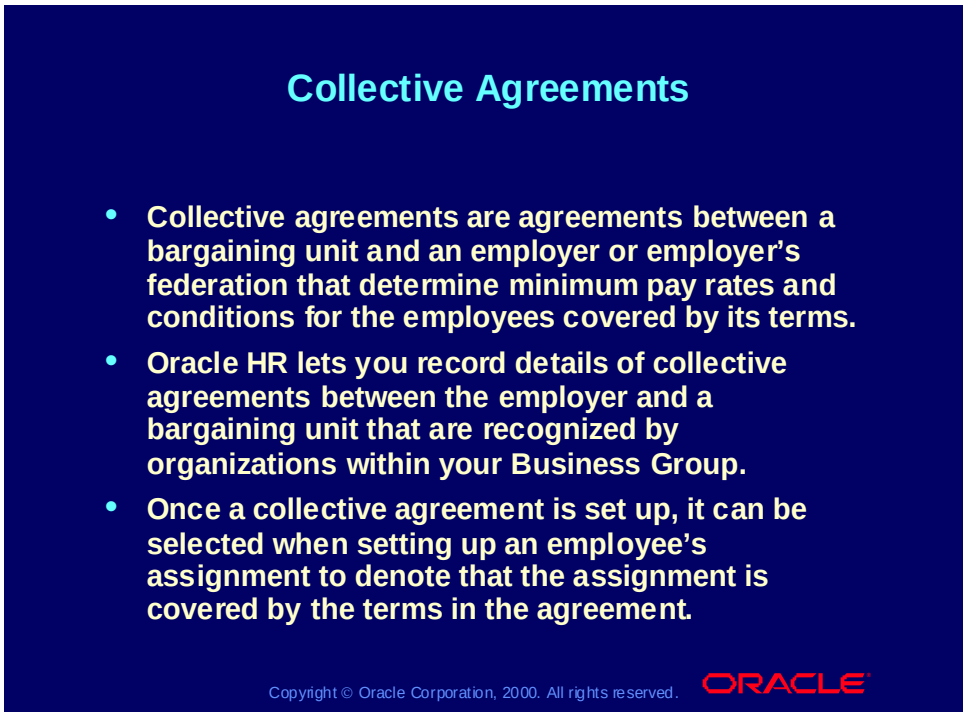

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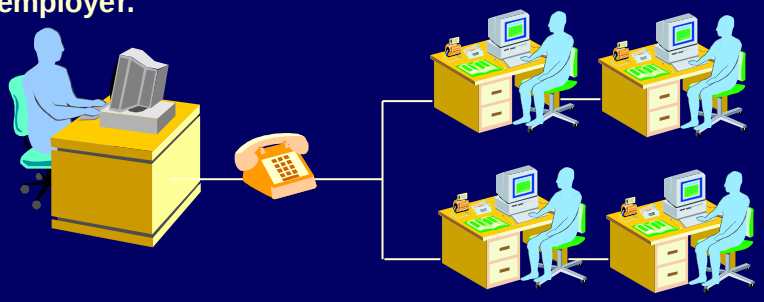
Instructor Demonstration 2-b

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

- 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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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

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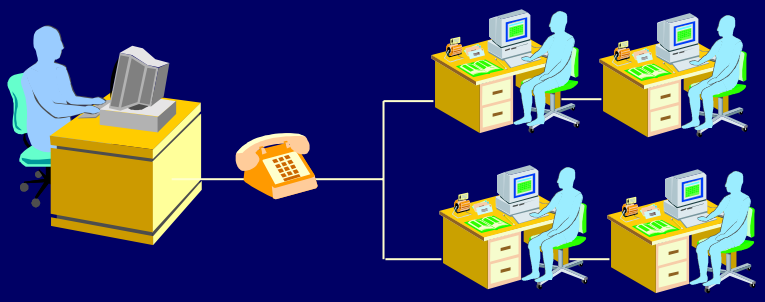
Instructor Demonstration 2-c

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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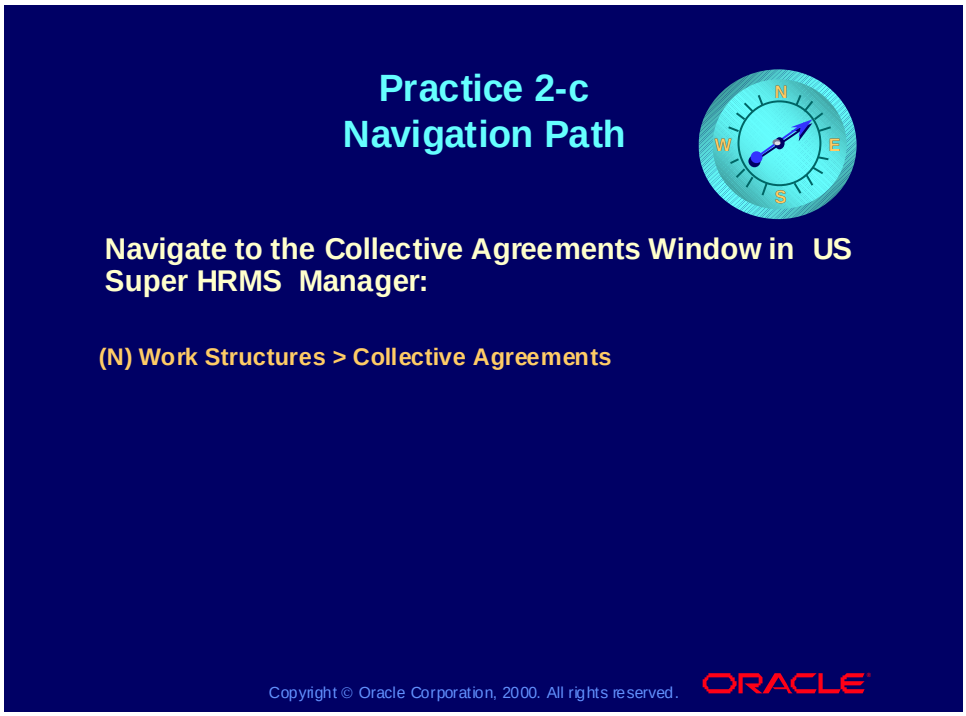

Online Help

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

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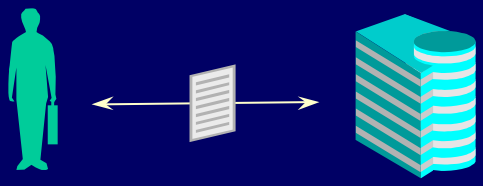
Contracts

- 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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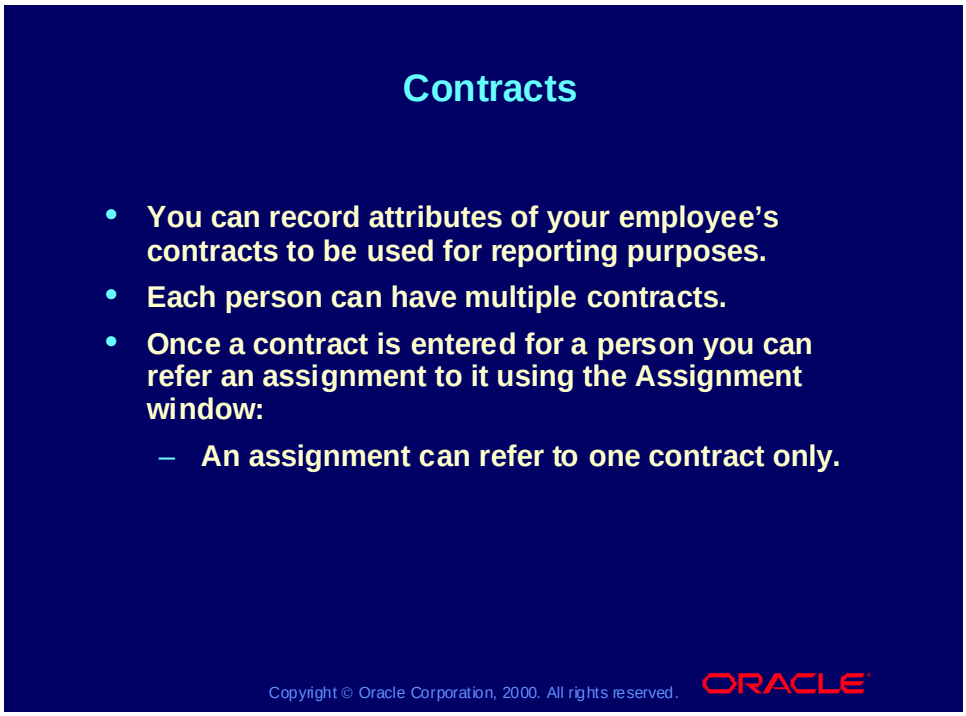

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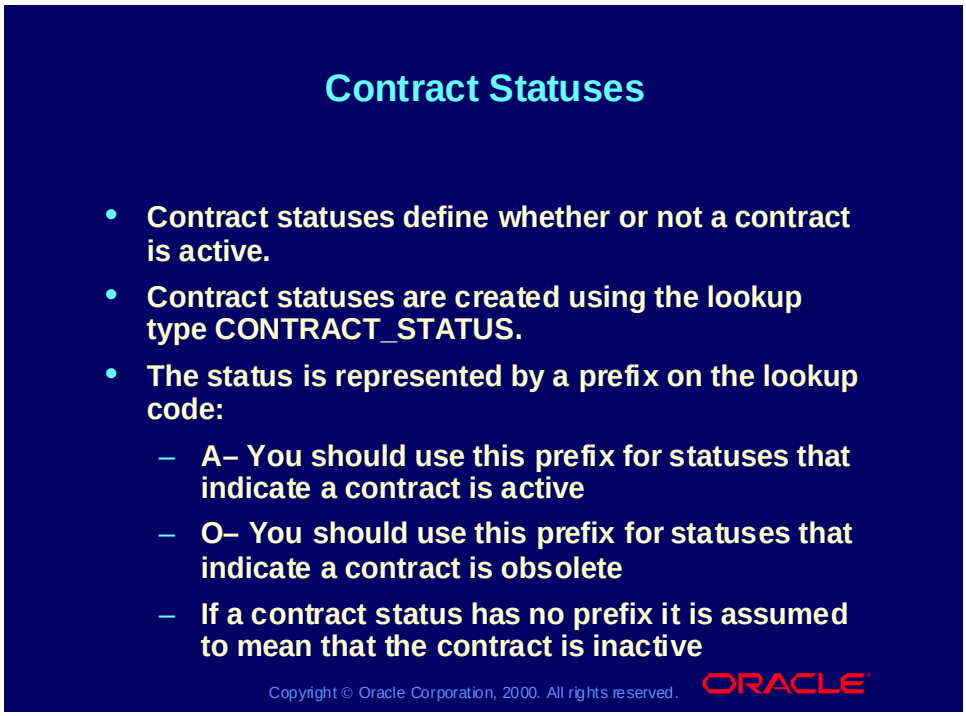

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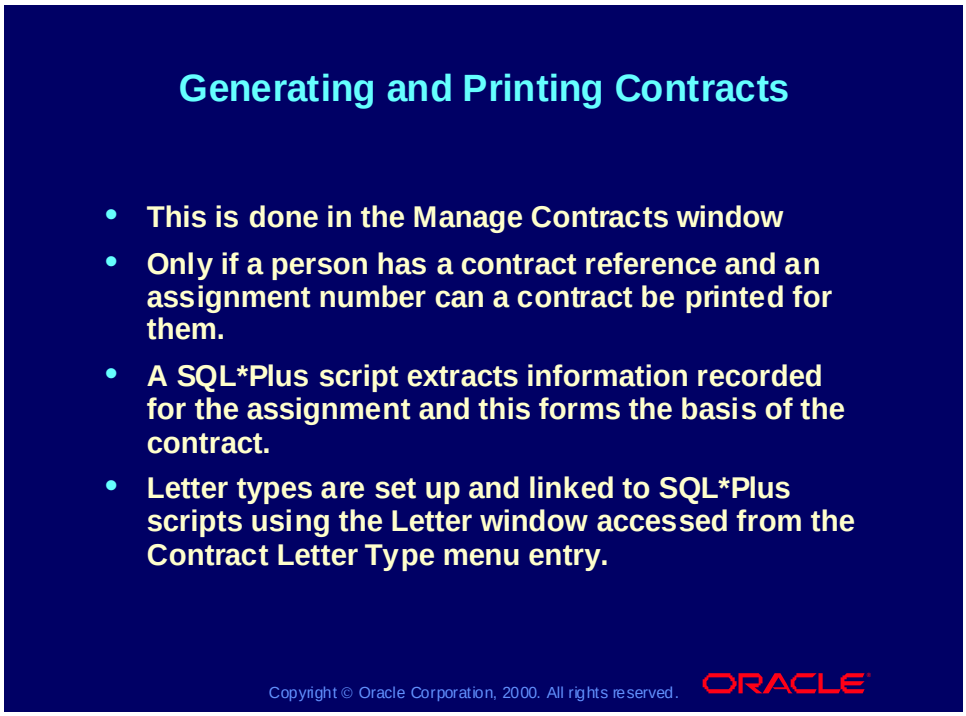

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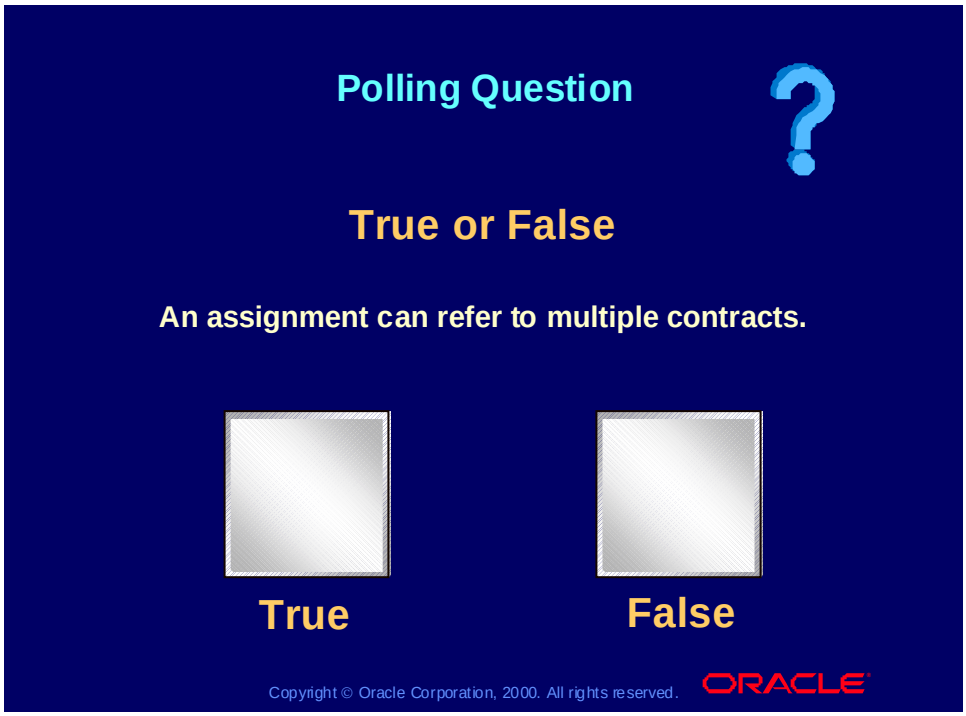

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Answer

True or False

An assignment can refer to multiple contracts.

False

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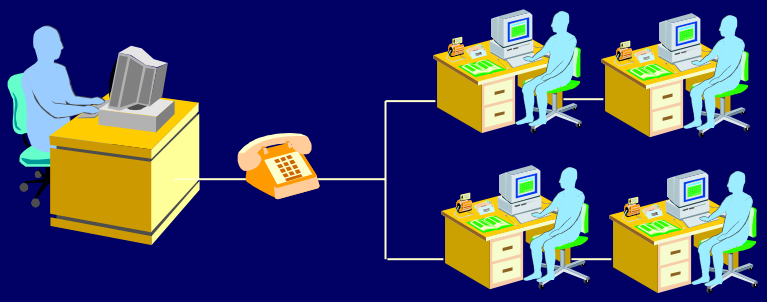
Instructor Demonstration 2-d

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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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

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Summary

In this lesson, you should have learned how to:

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

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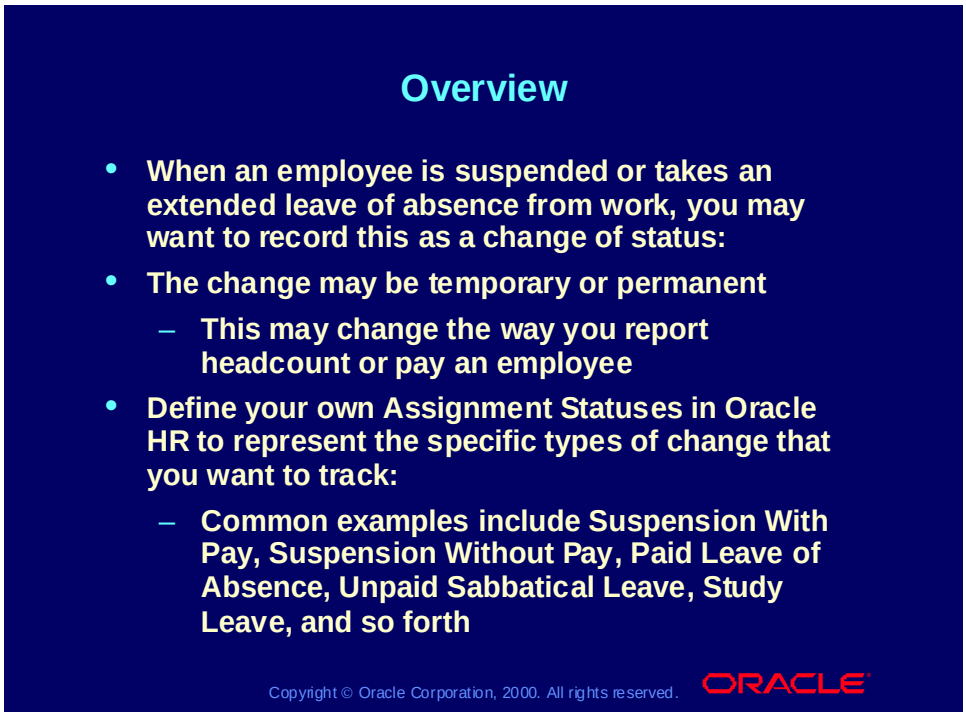

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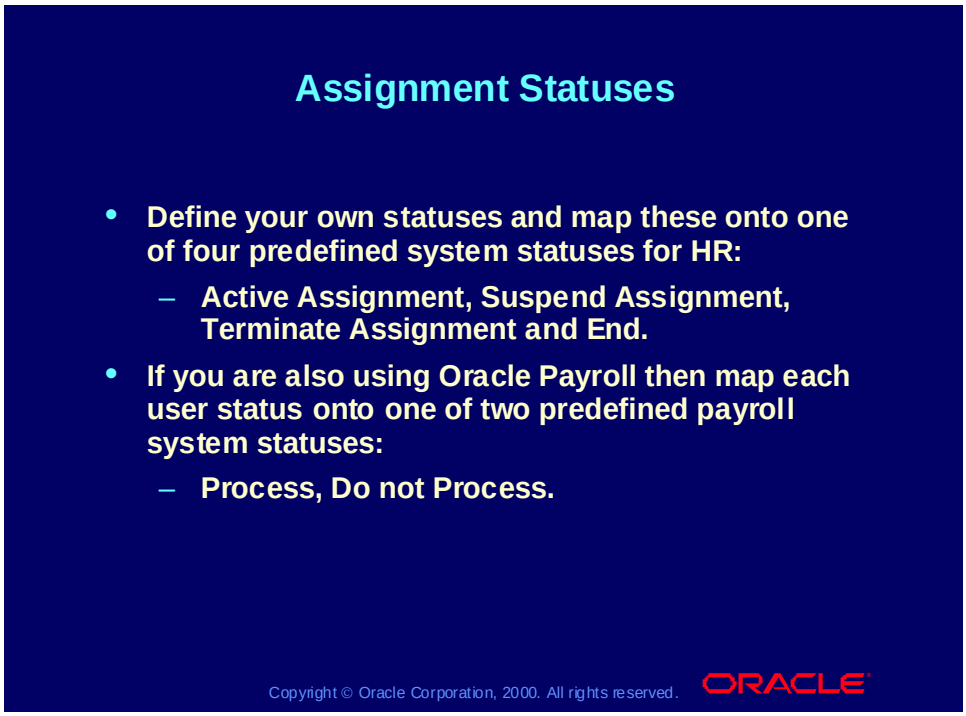

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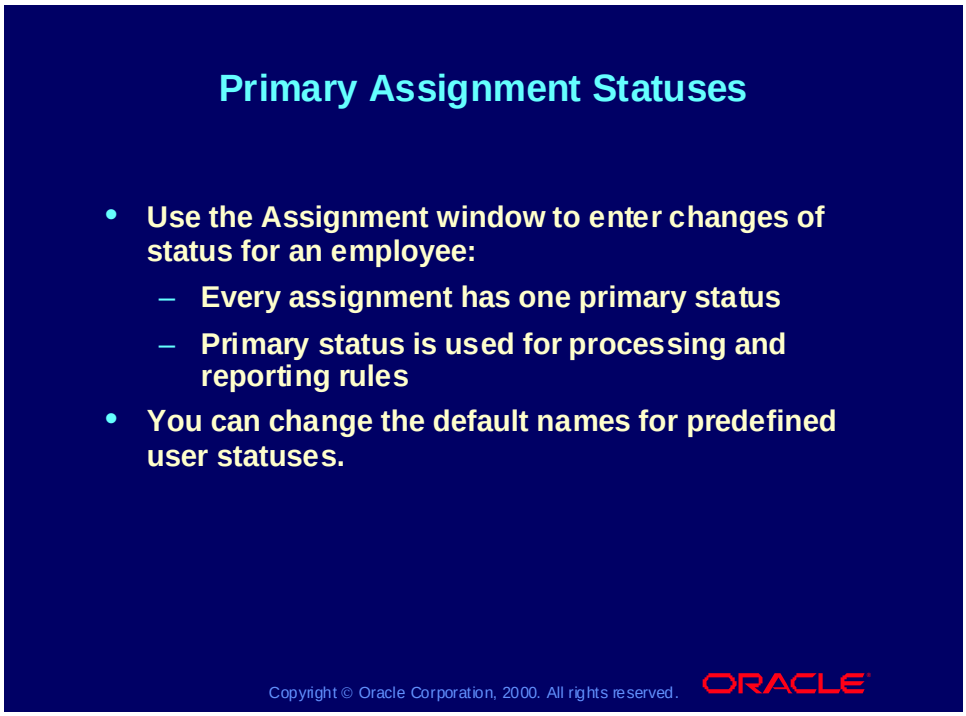

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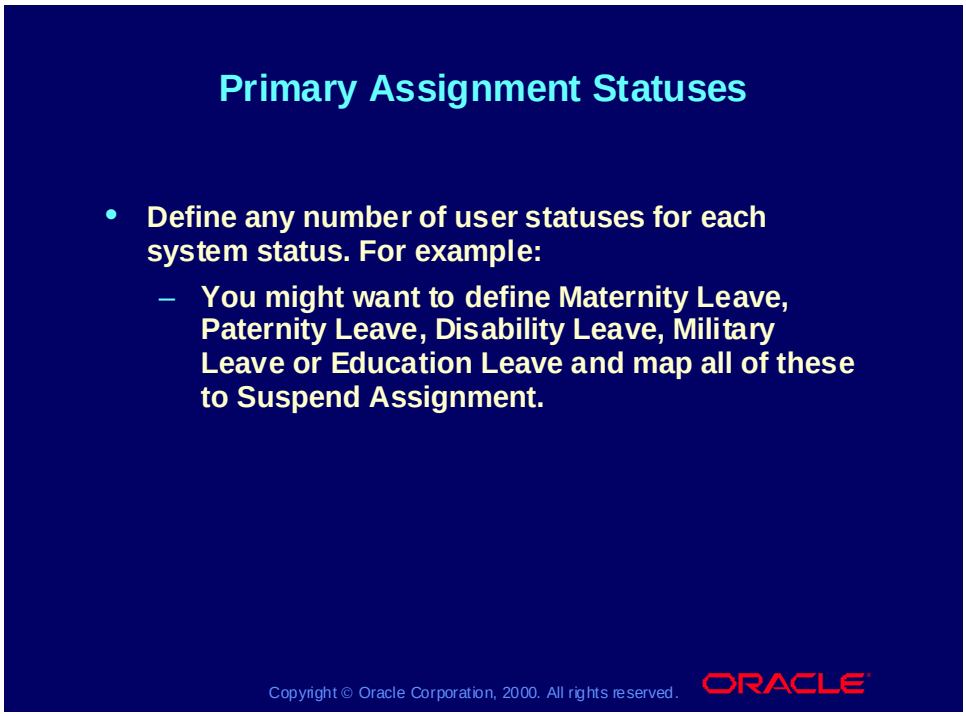

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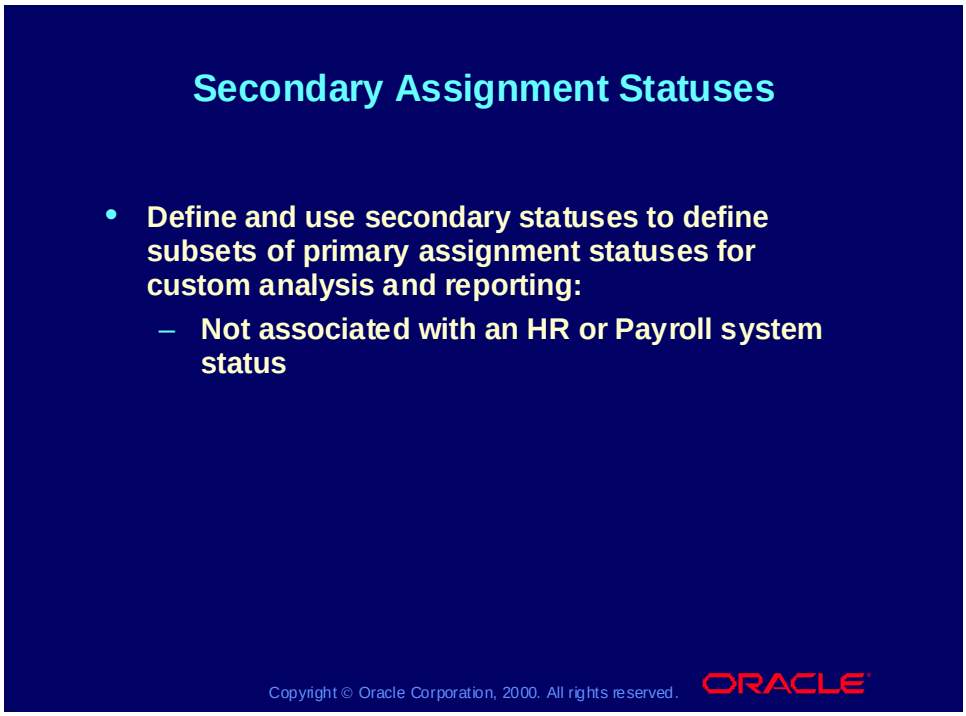

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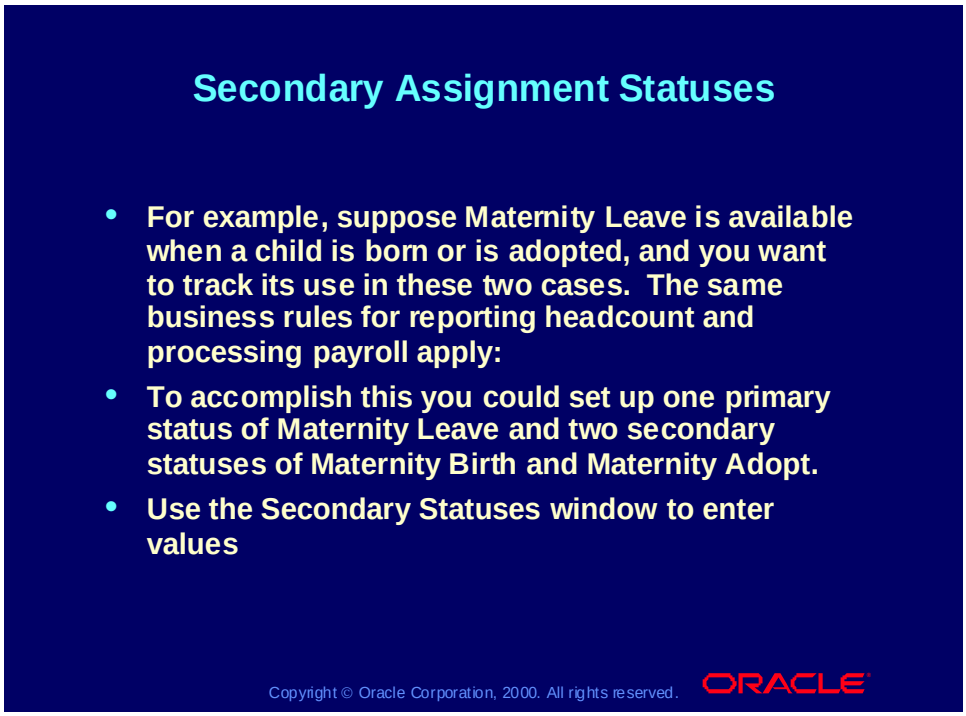

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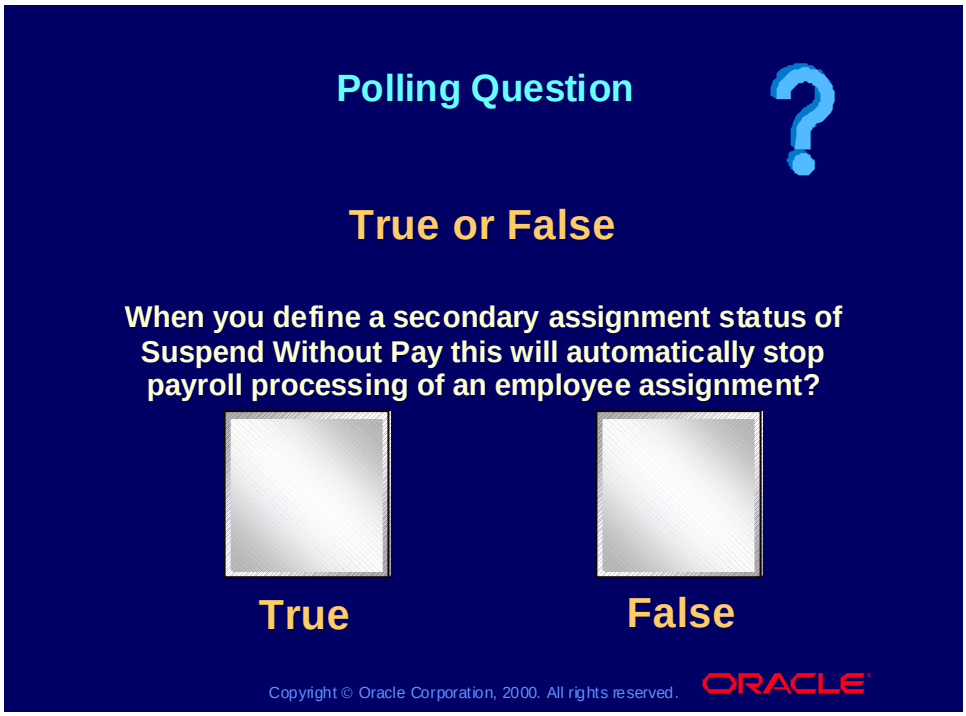
Polling Question



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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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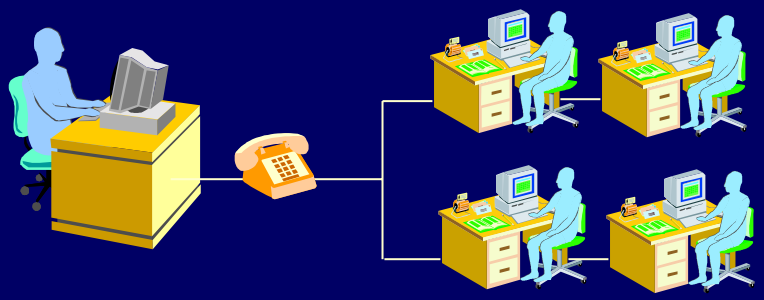
Instructor Demonstration 3-a

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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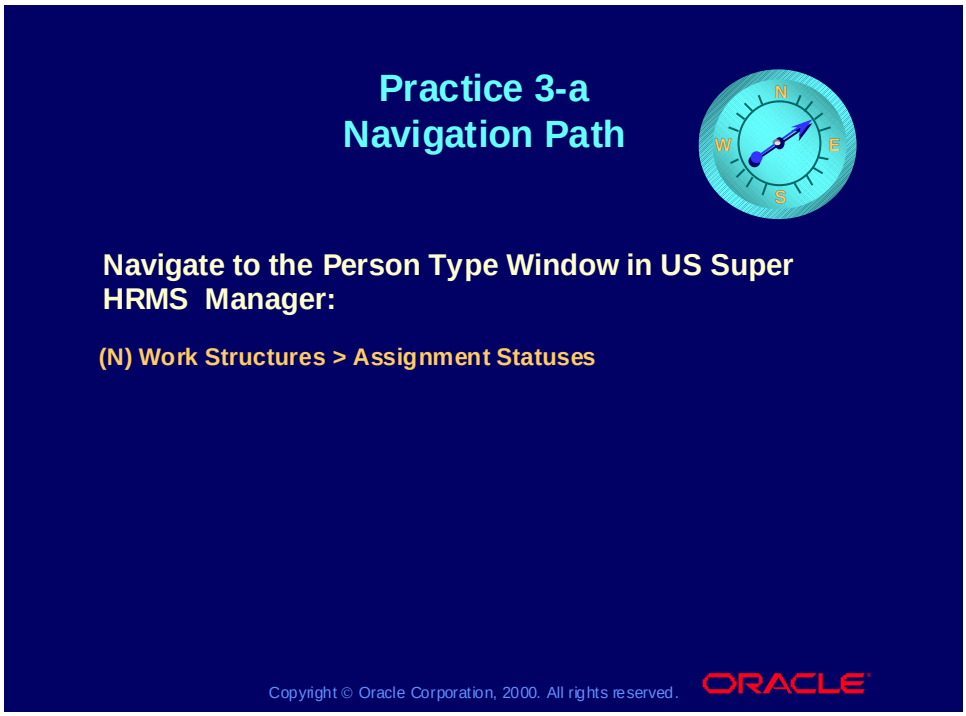

Online Help

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

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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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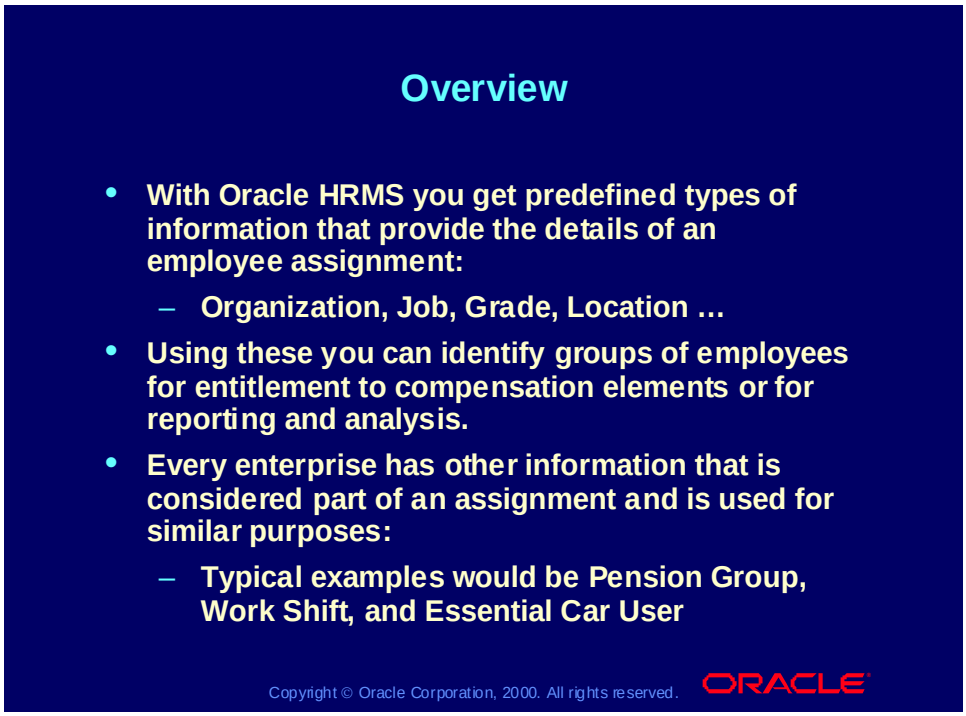

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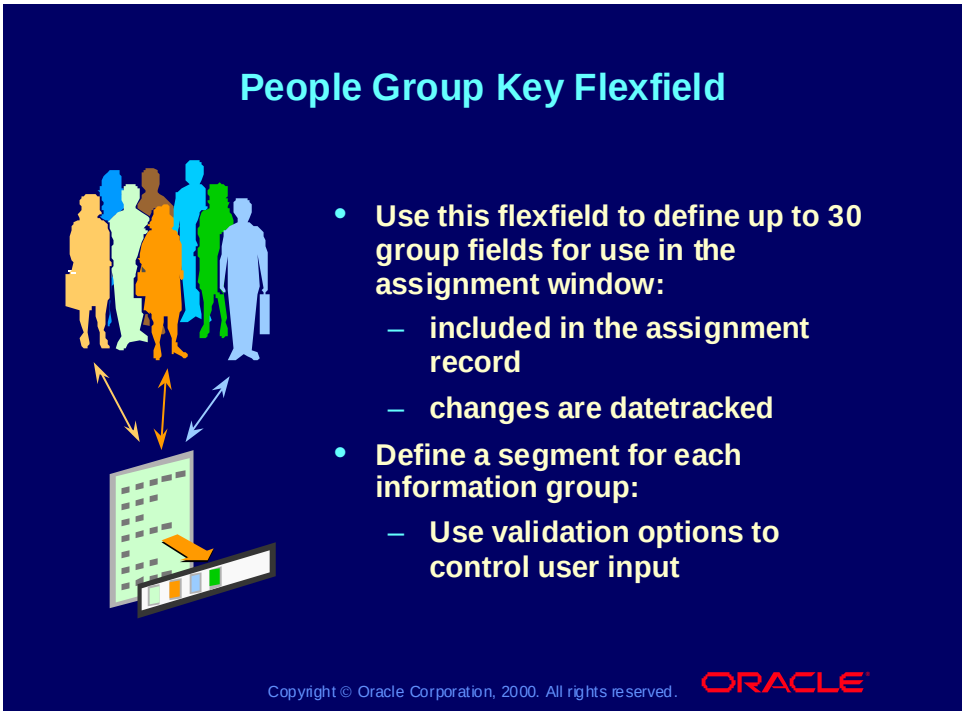
People Group Key Flexfield



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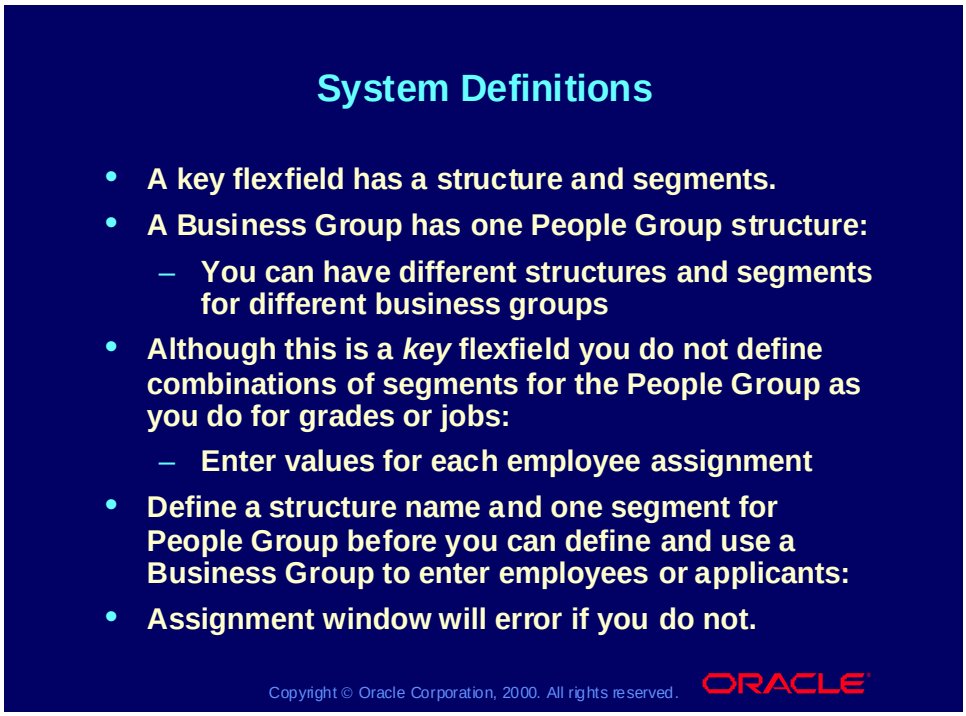

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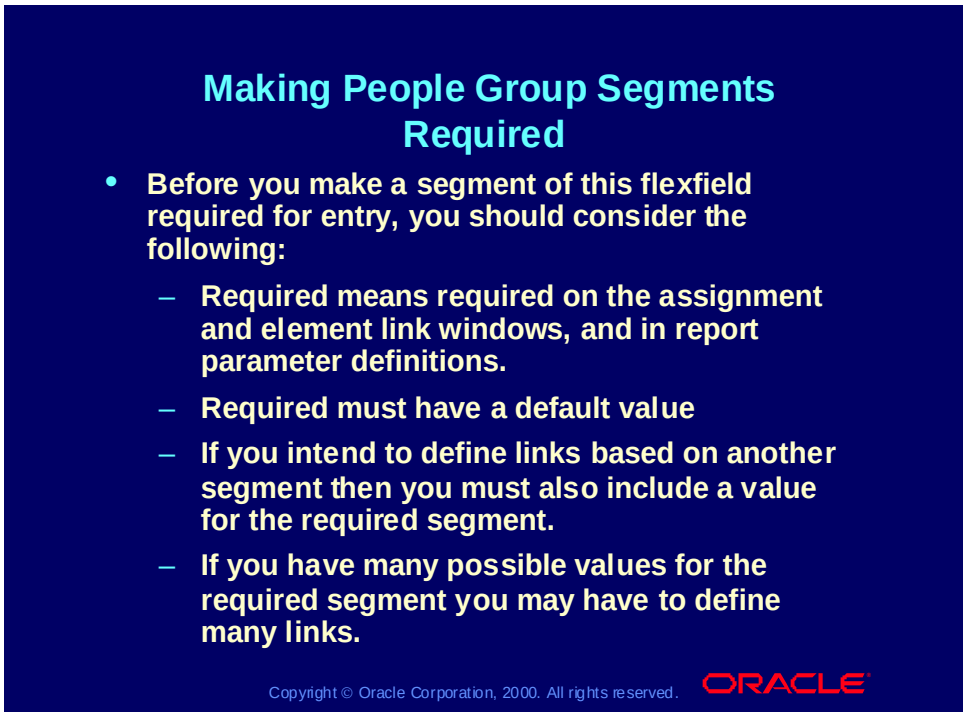

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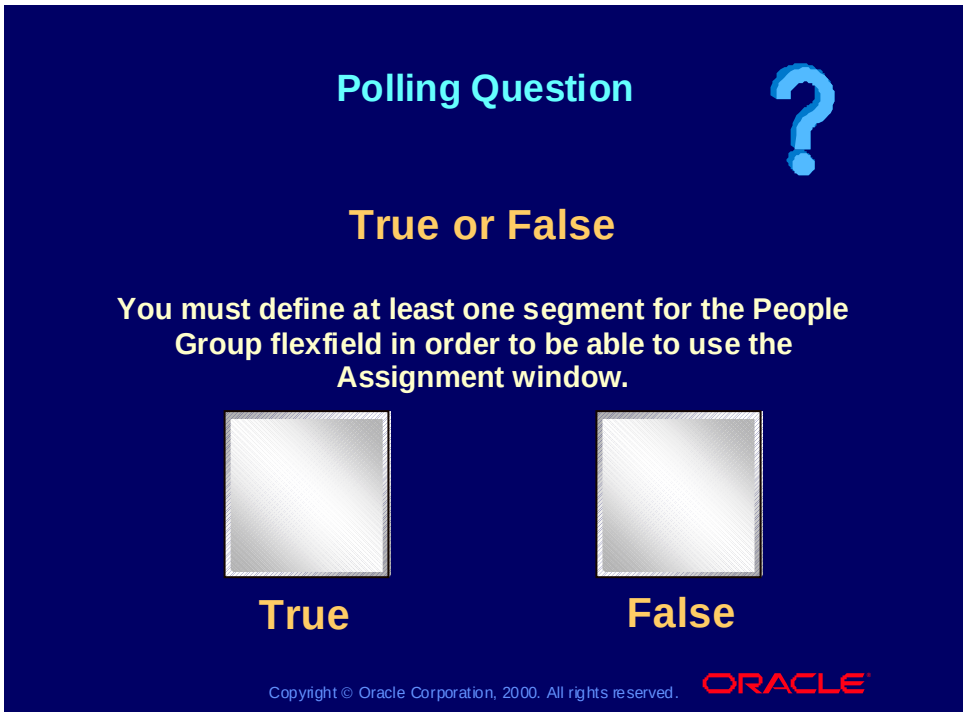
Polling Question



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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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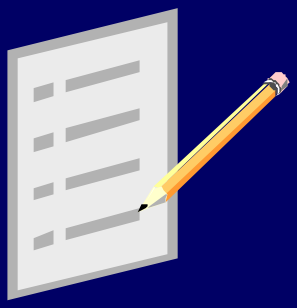
Polling Question

List four possible uses for the People Group key flexfield.



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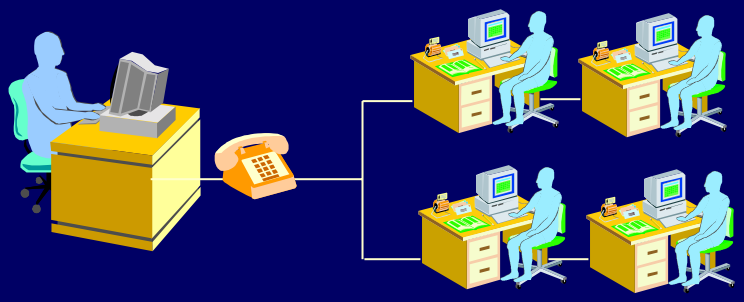
Instructor Demonstration 4-a

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

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

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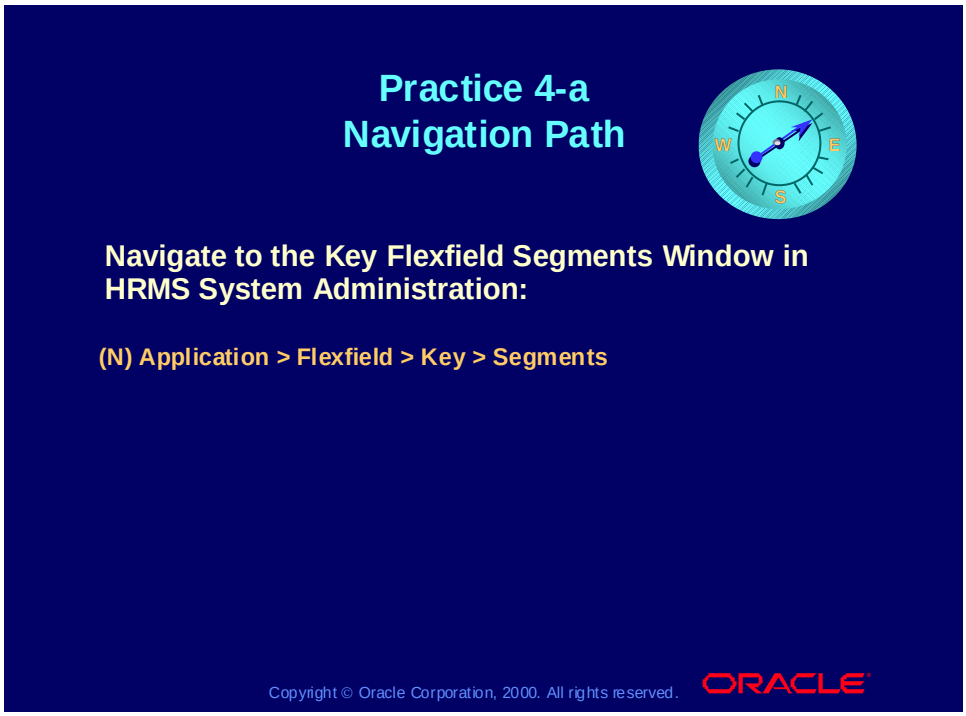

Online Help

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

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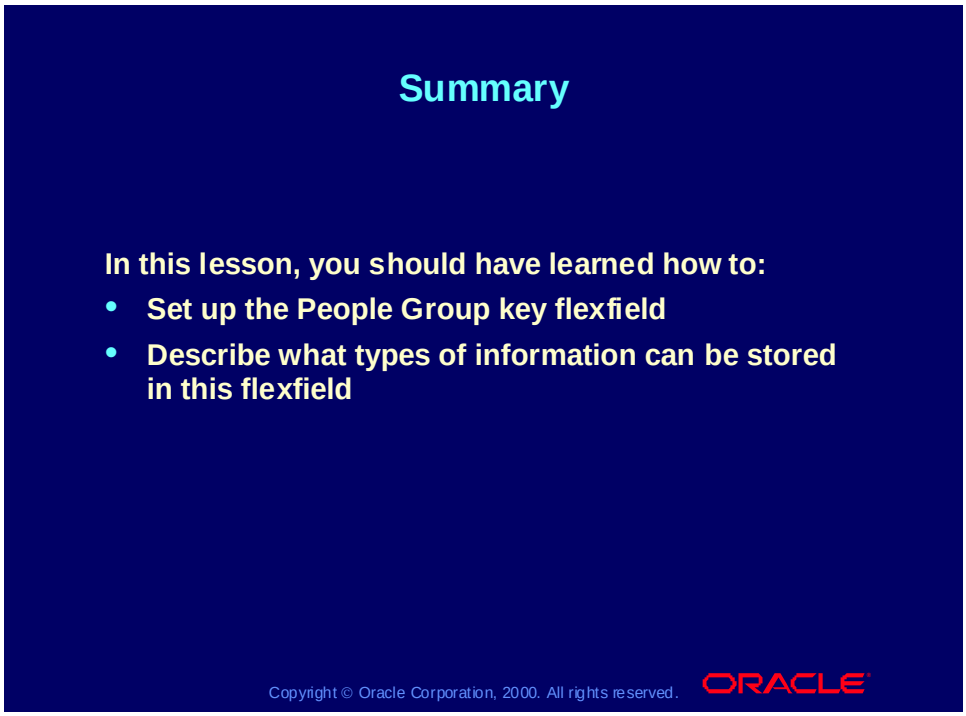

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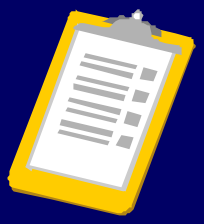
Objectives

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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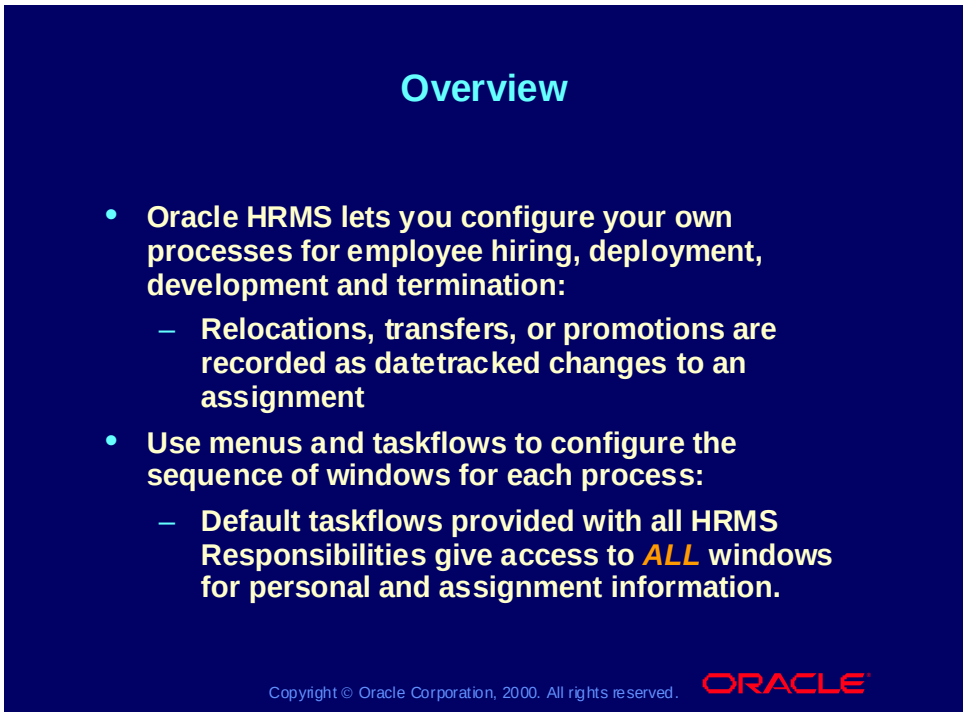

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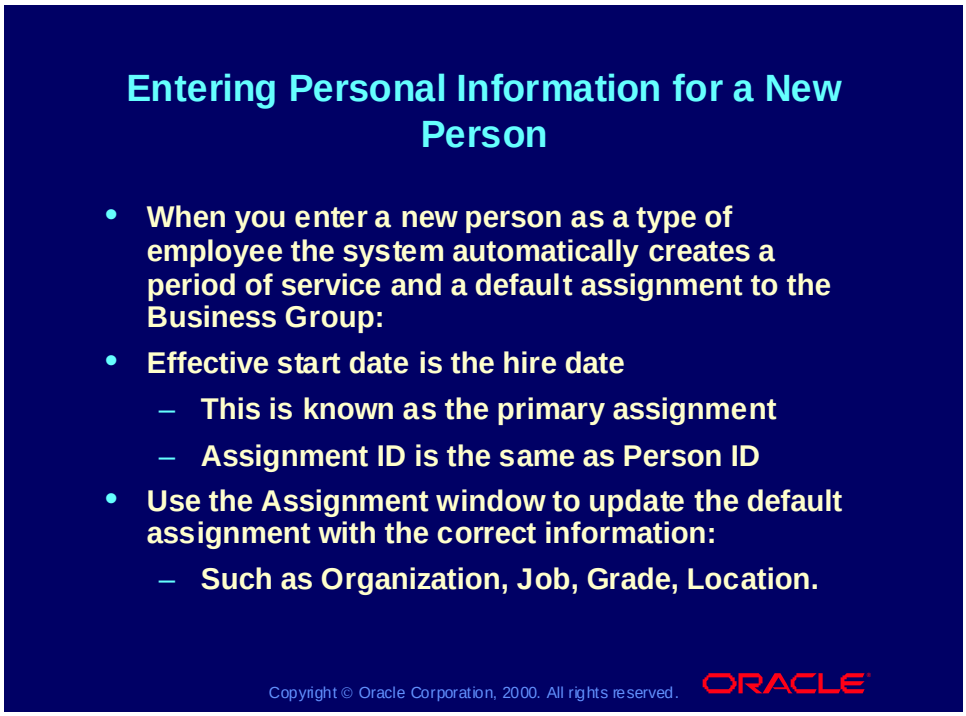

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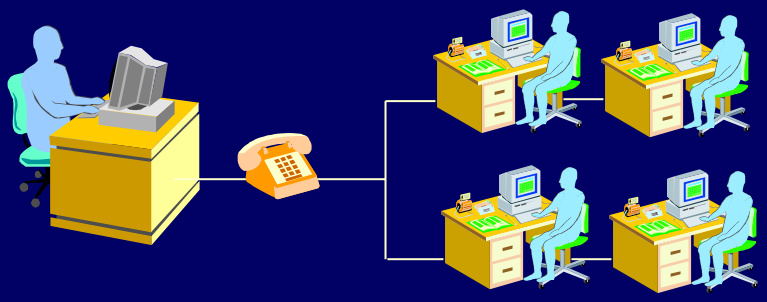
Instructor Demonstration 1-a

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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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

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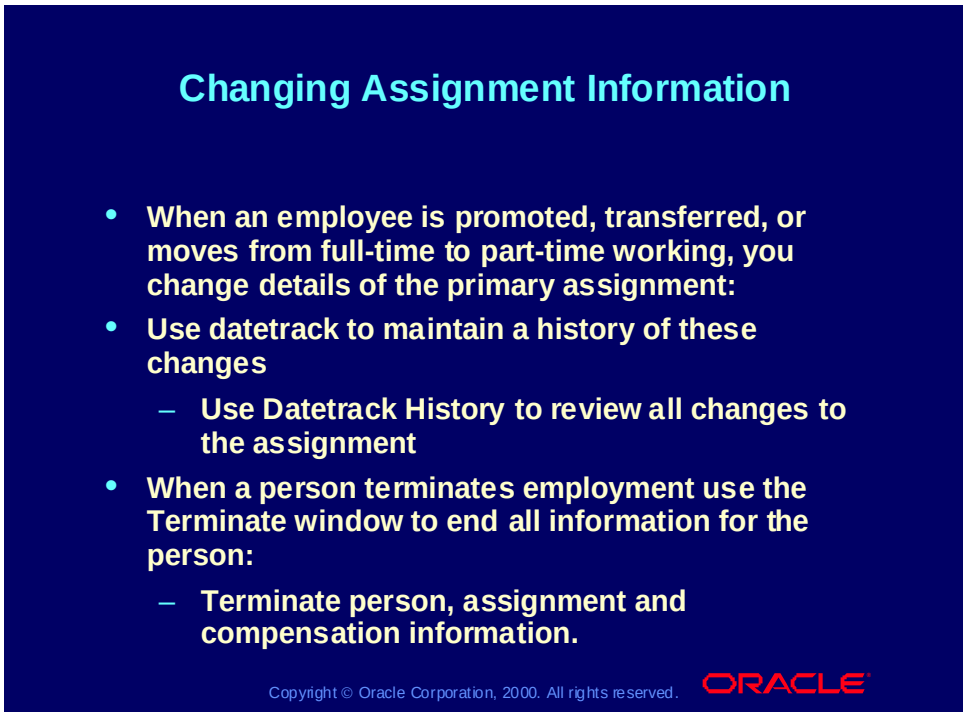

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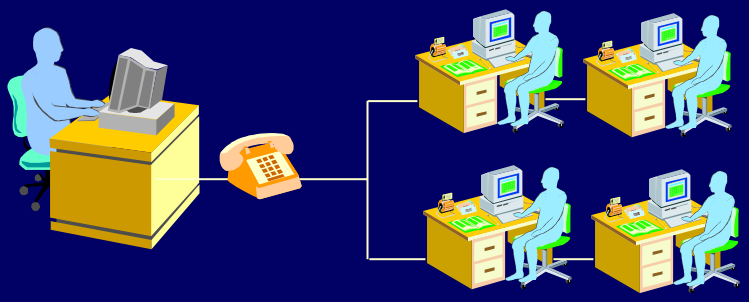
Instructor Demonstration 1-b

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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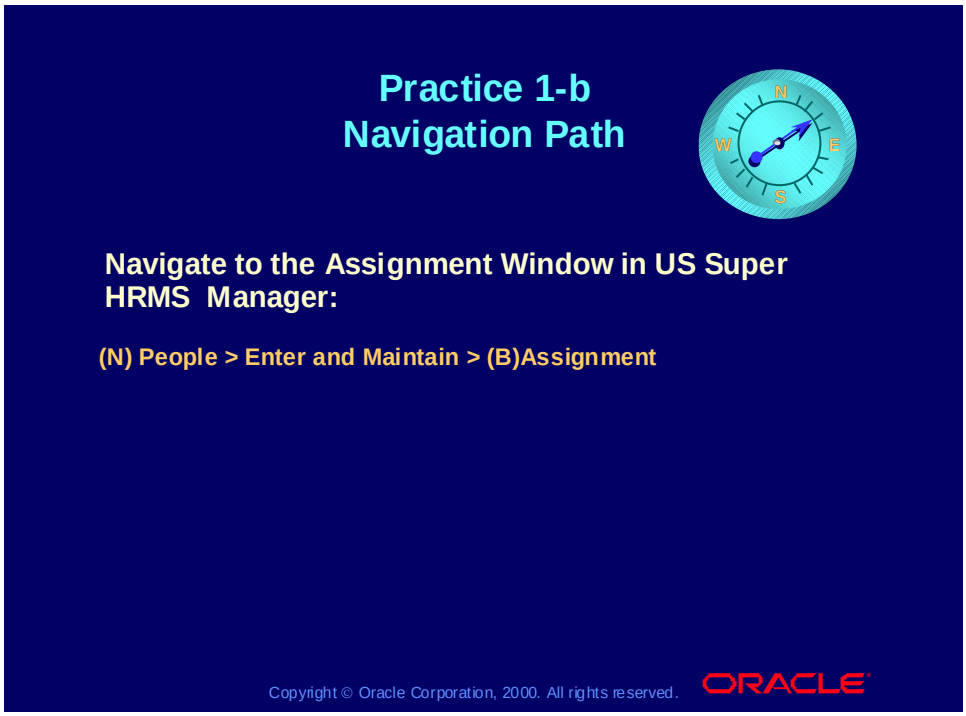

Online Help

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

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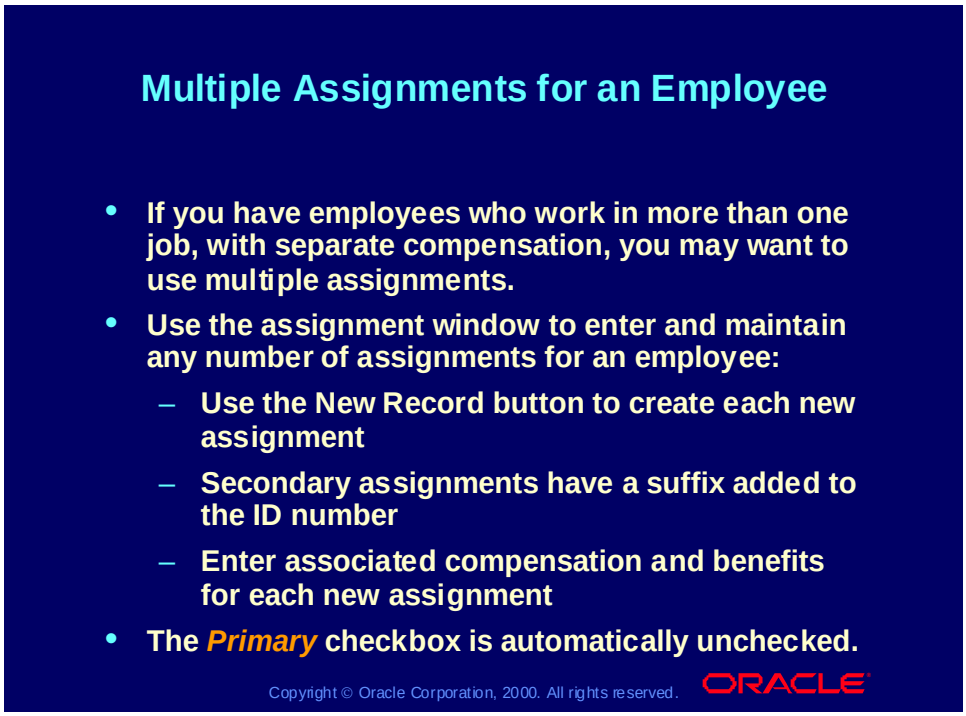

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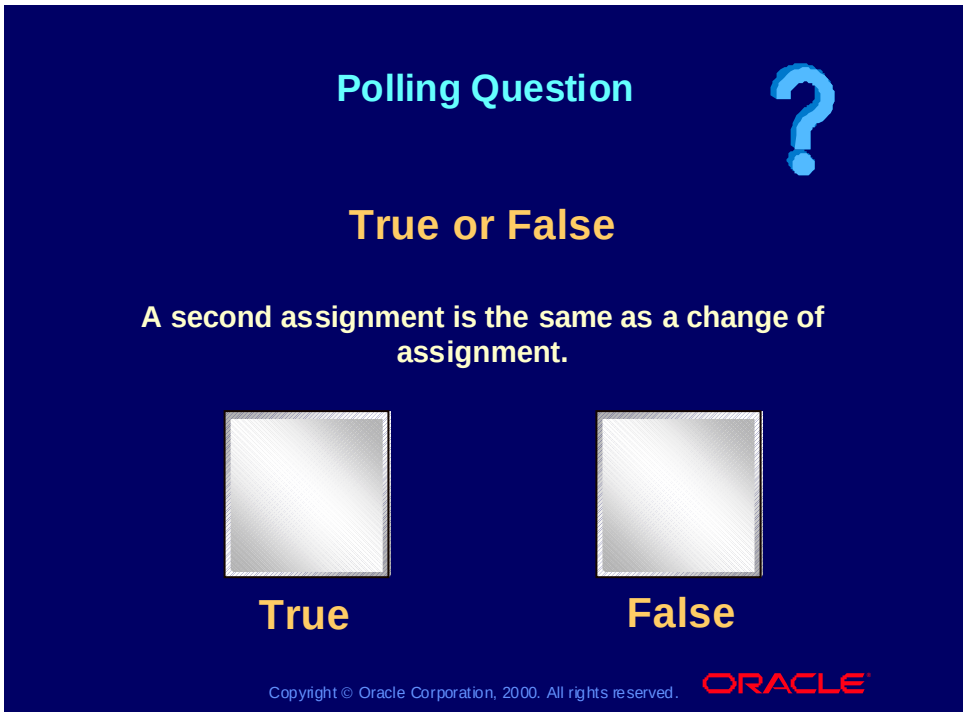
Polling Question



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Answer

True or False

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

False

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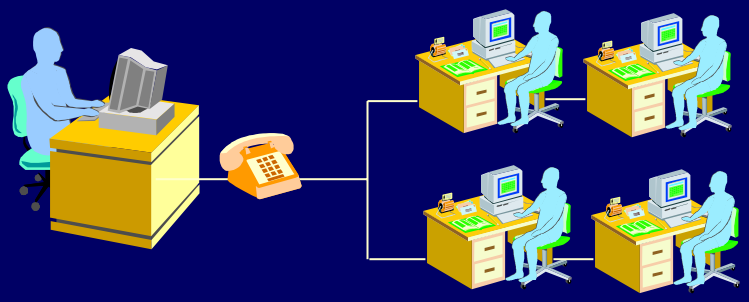
Instructor Demonstration 1-c

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



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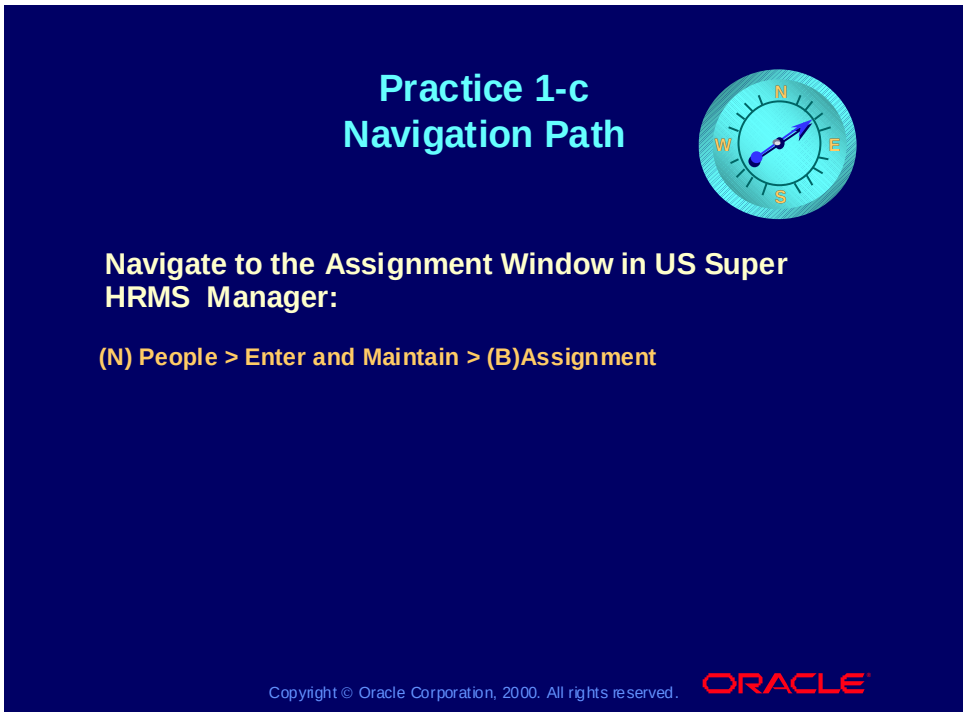

Online Help

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

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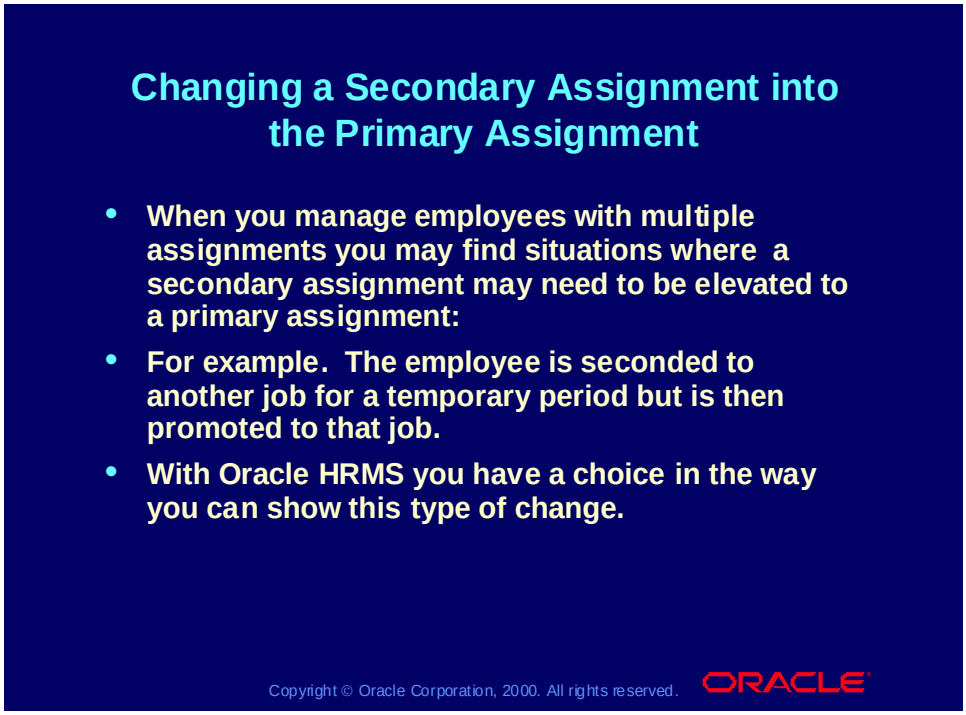
Changing a Secondary Assignment into the Primary Assignment



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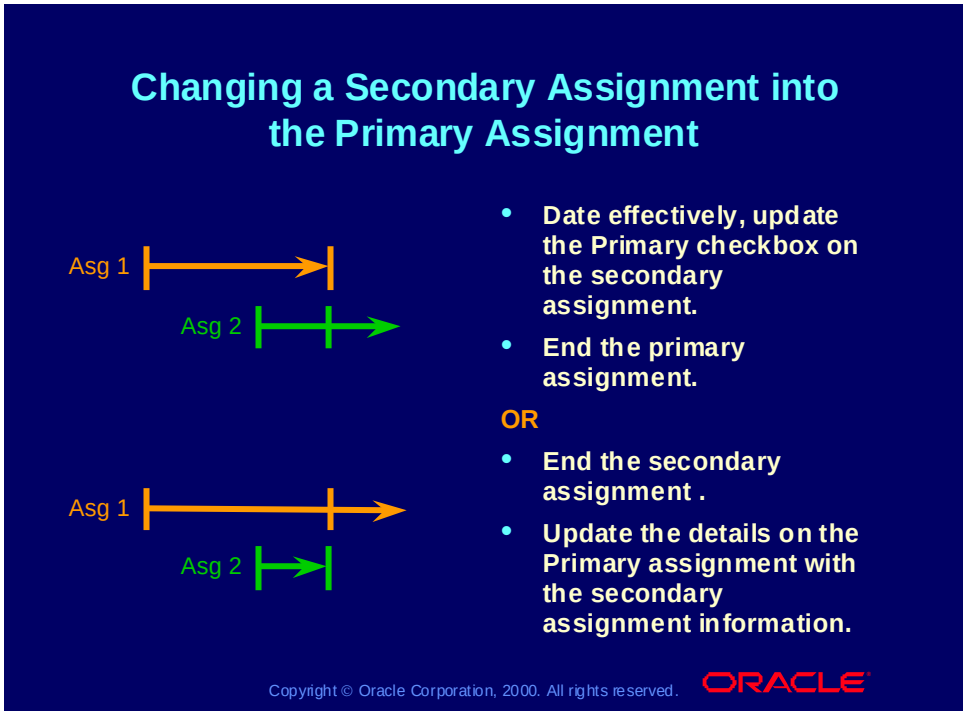
Changing a Secondary Assignment into the Primary Assignment



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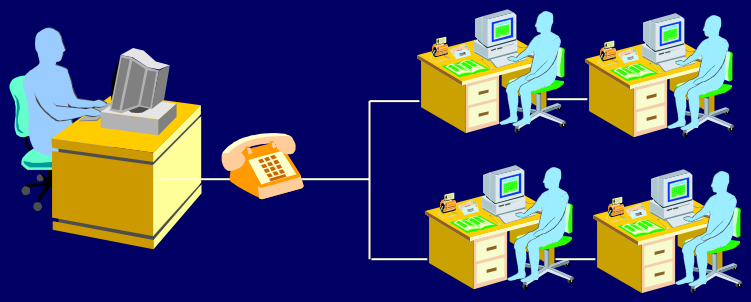
Instructor Demonstration 1-d

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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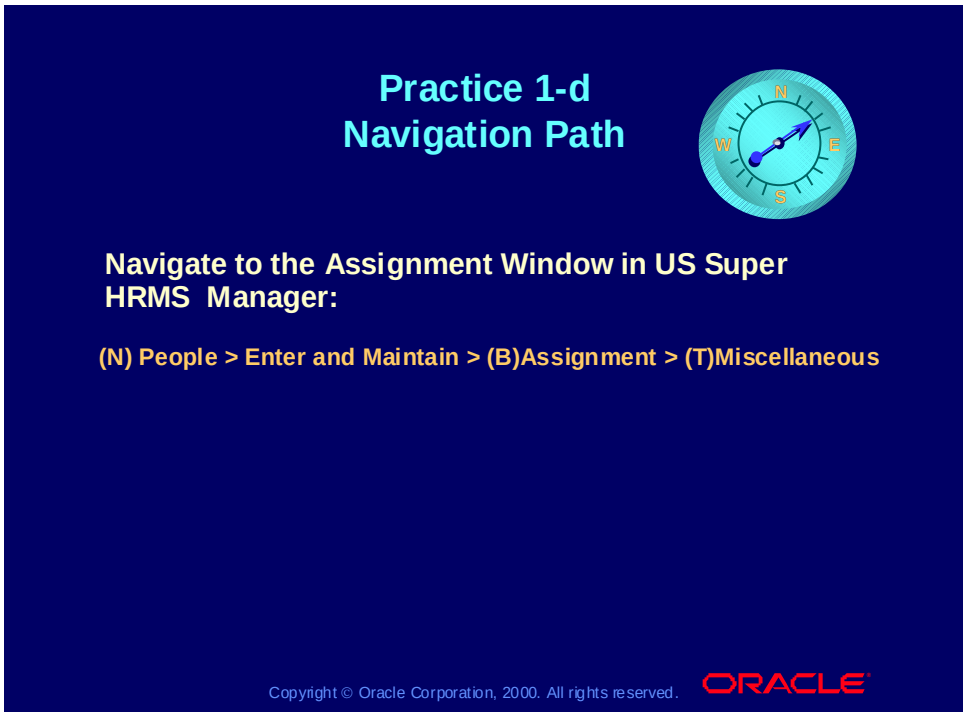

Online Help

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

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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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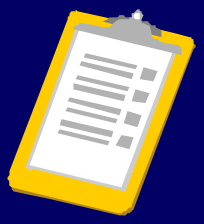
Objectives

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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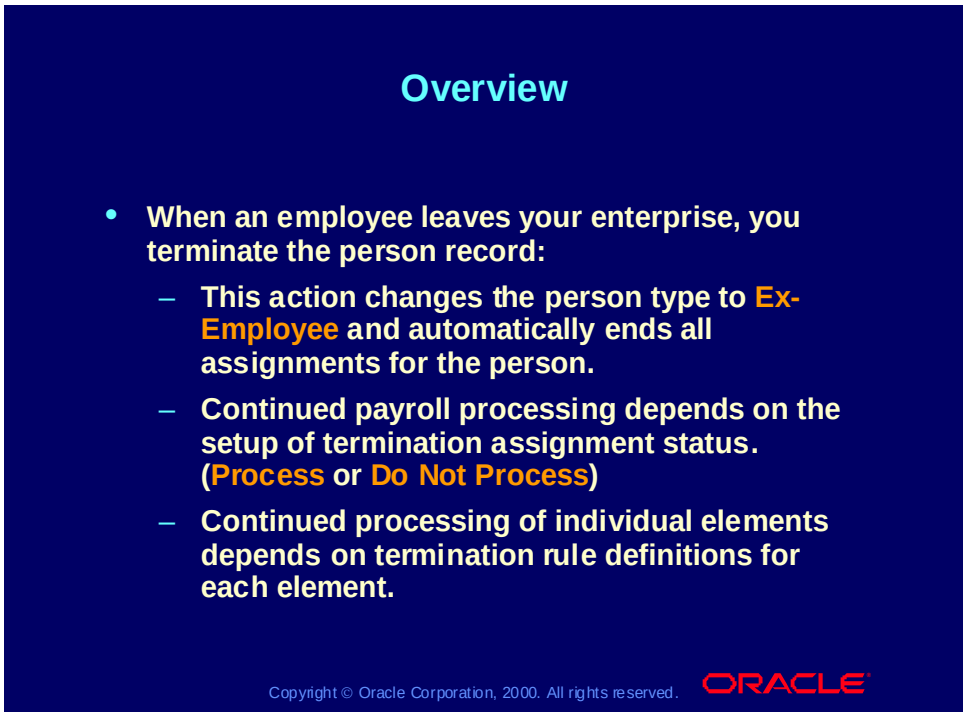

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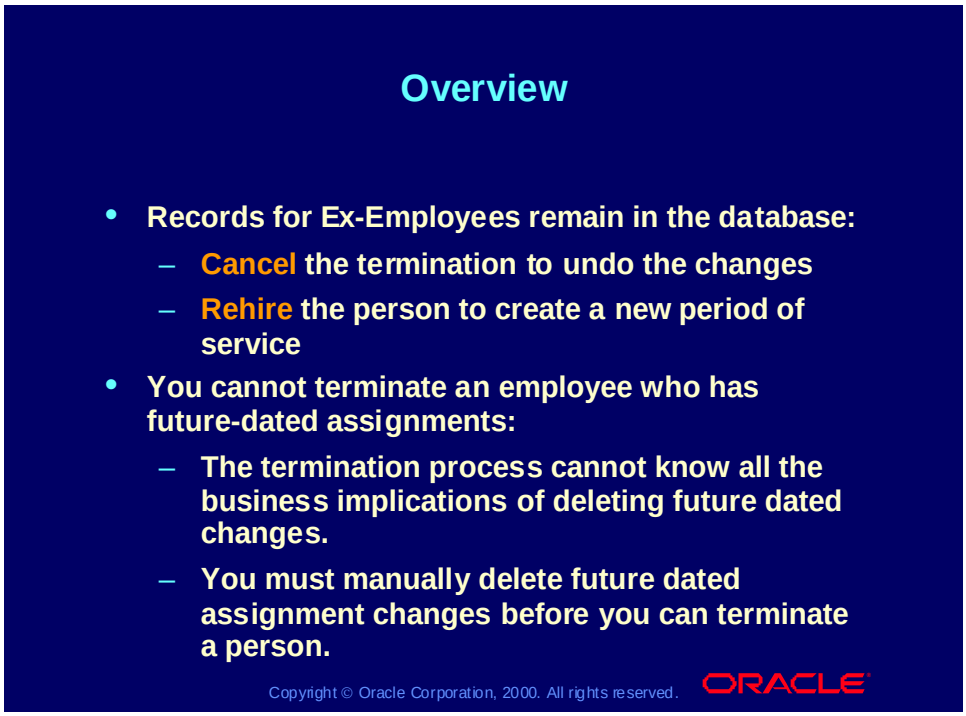

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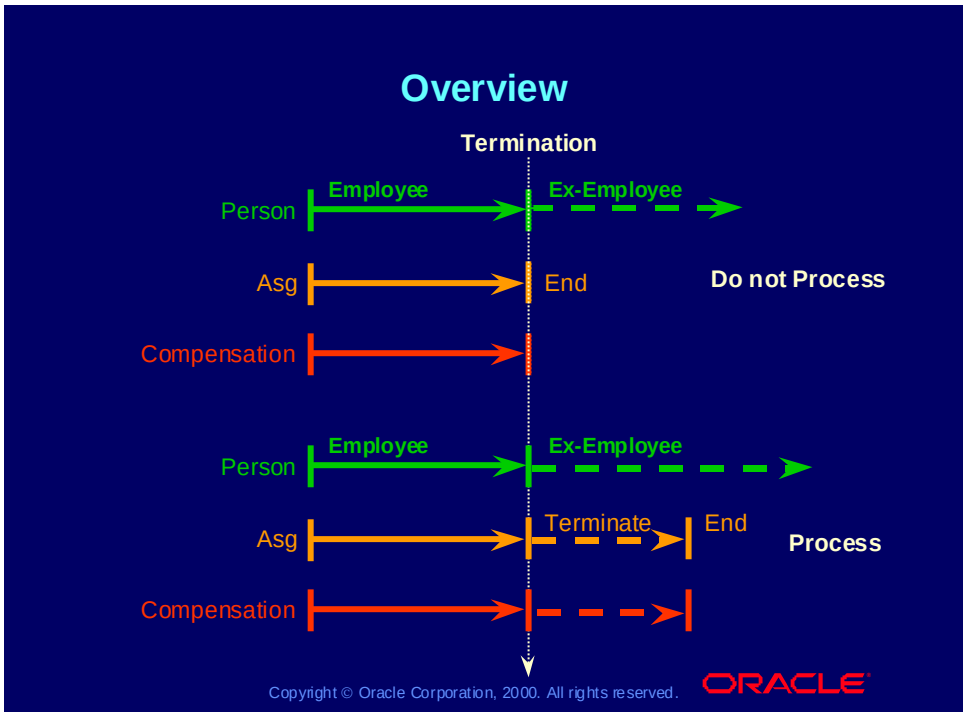
Overview



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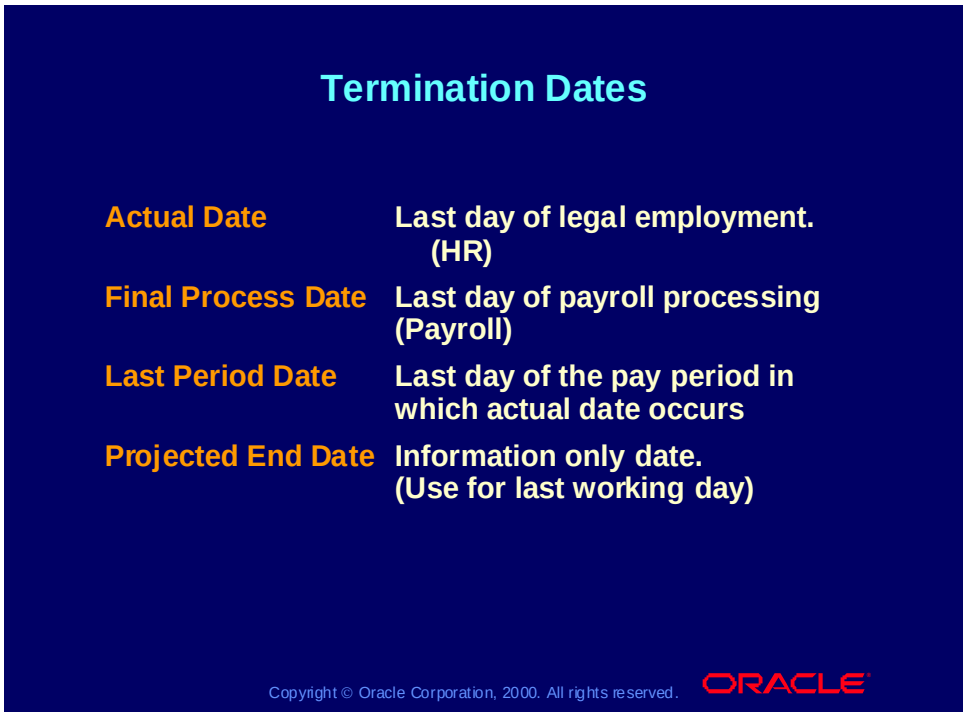

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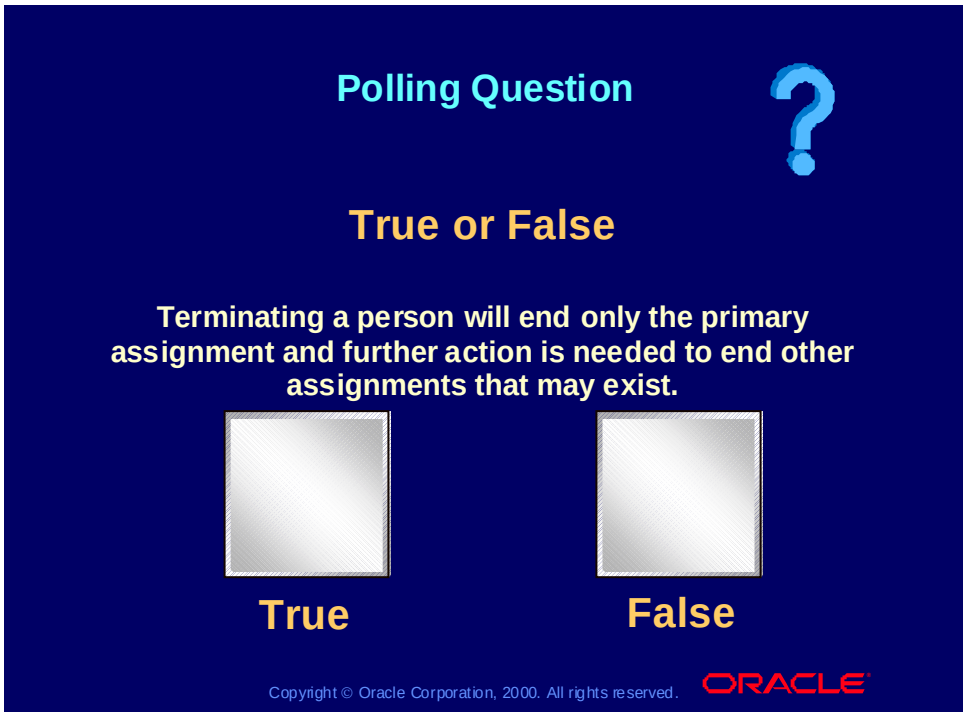
Polling Question



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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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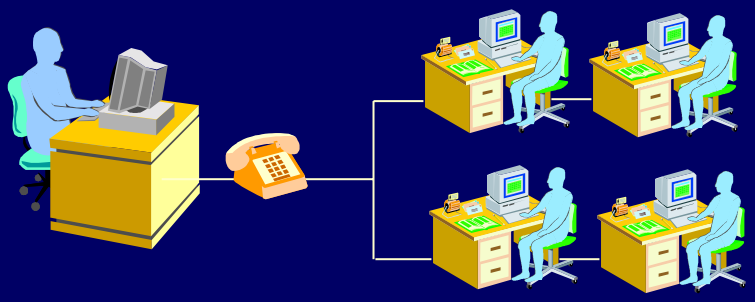
Instructor Demonstration 1-a

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

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

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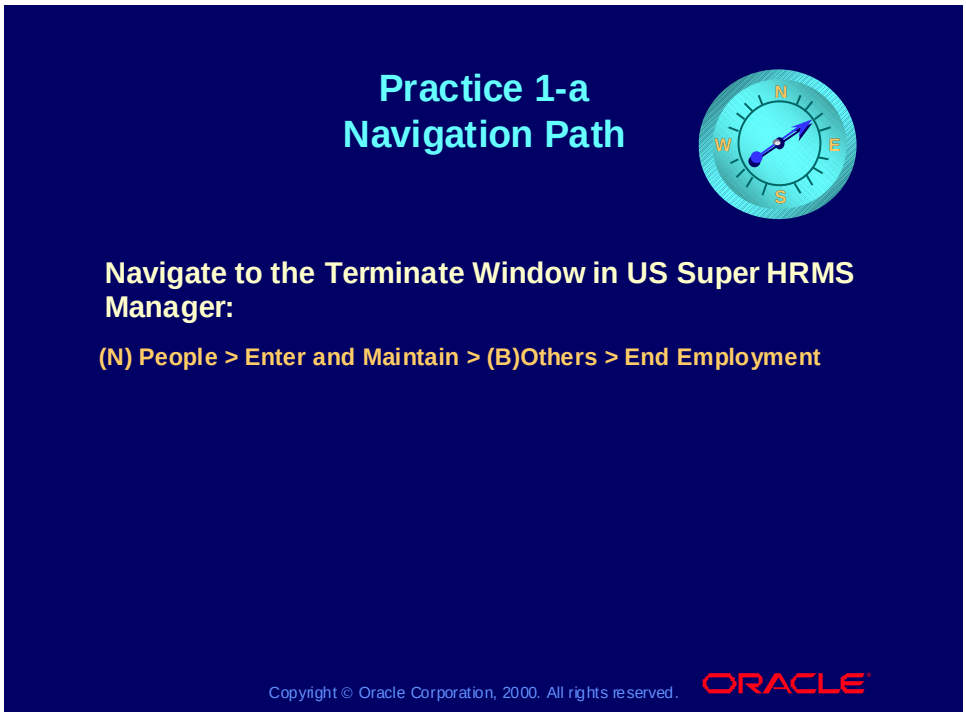

Online Help

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

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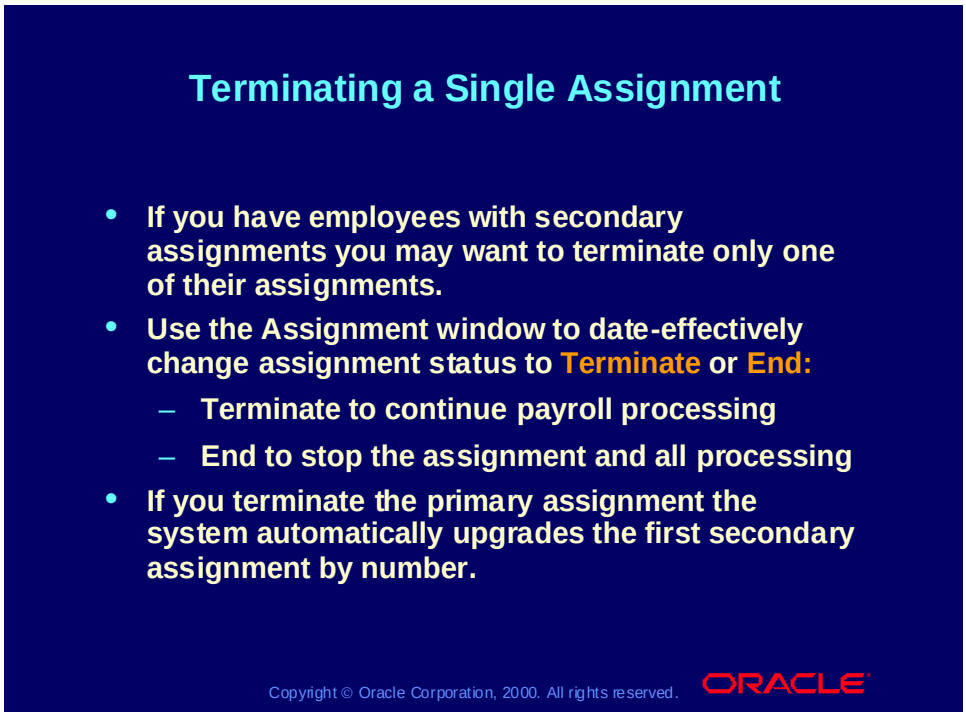

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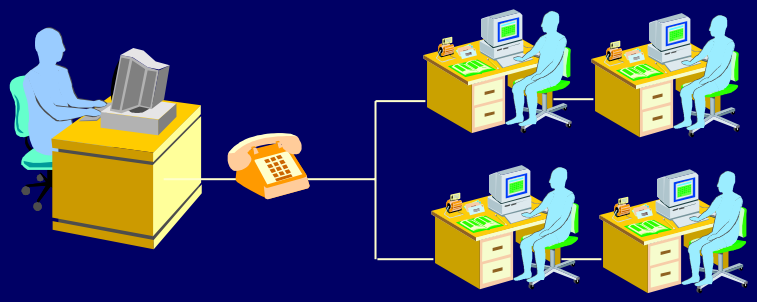
Instructor Demonstration 1-b

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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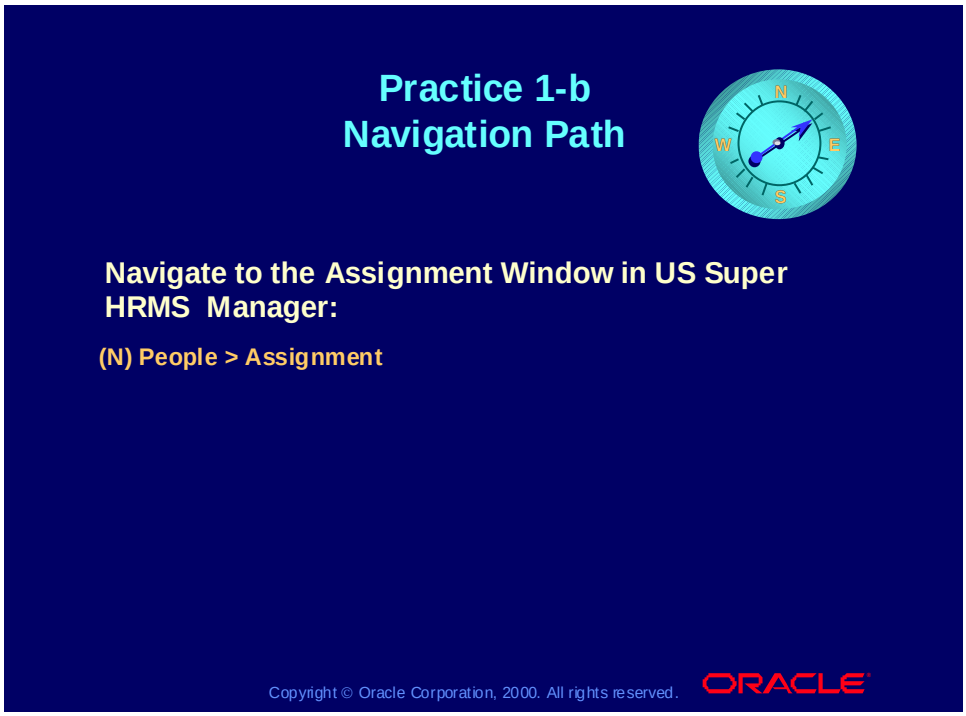

Online Help

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

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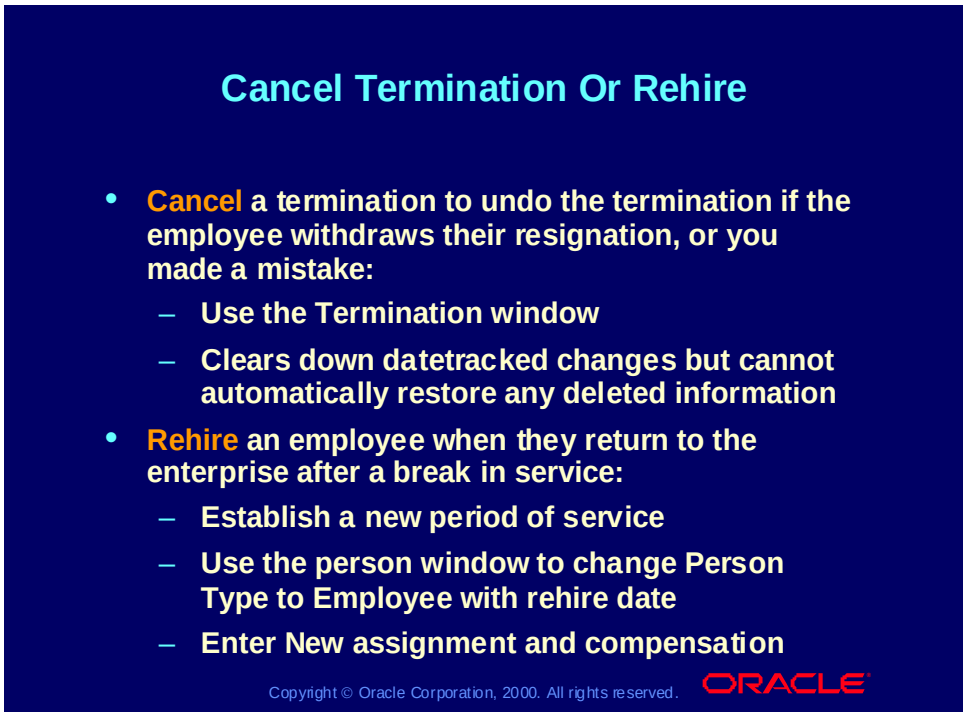

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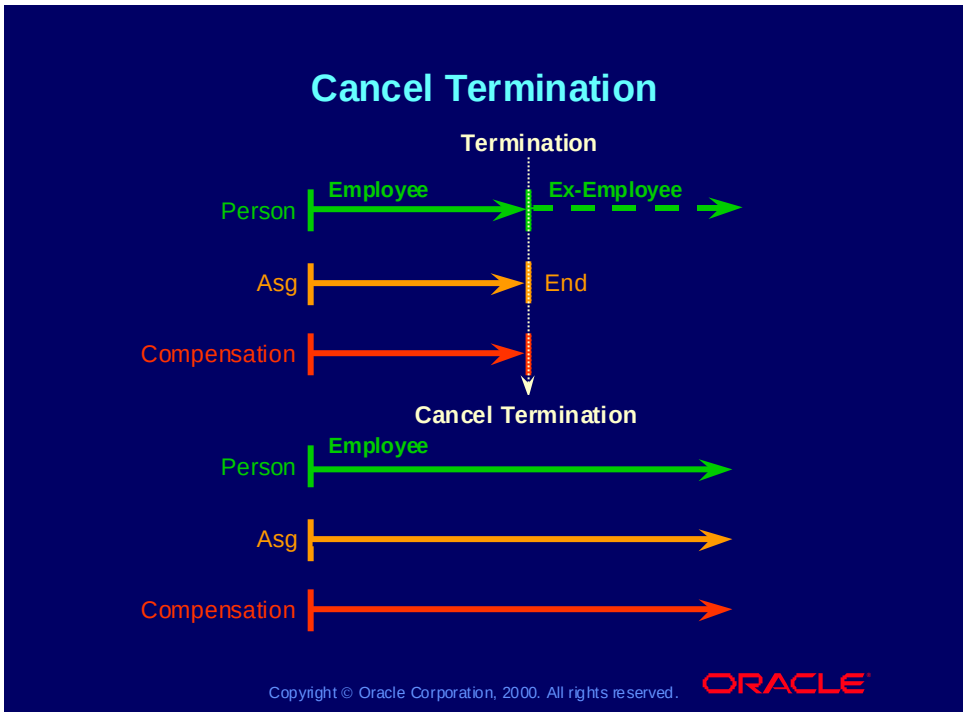
Cancel Termination



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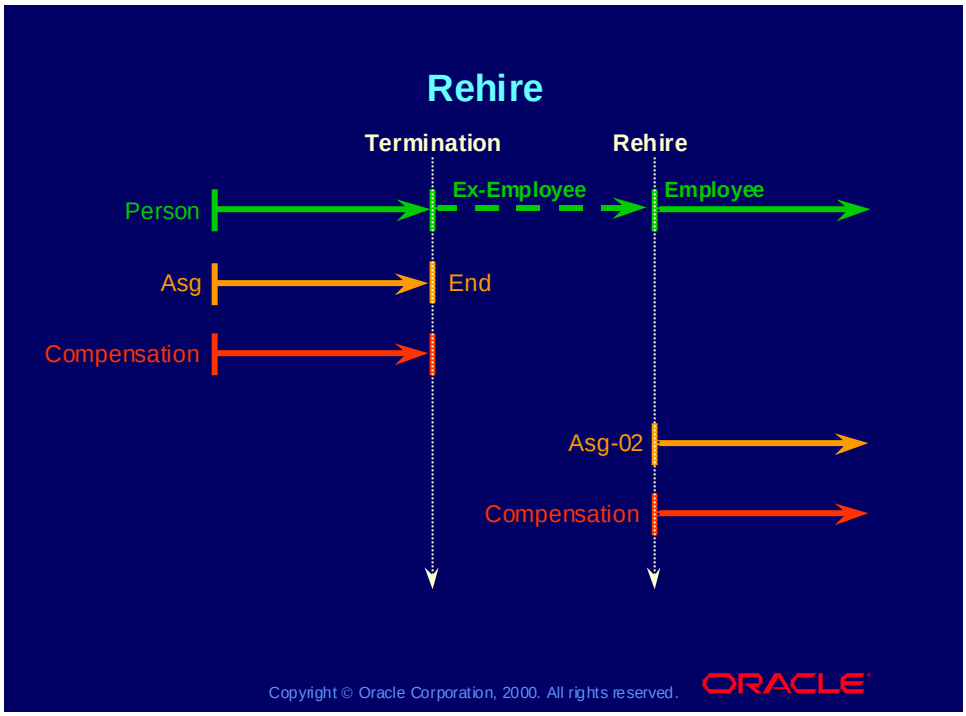
Rehire



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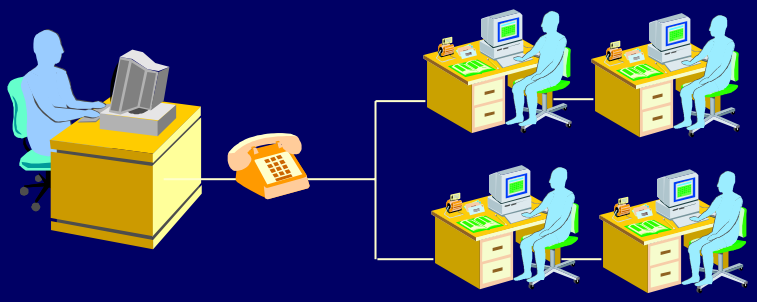
Instructor Demonstration 1-c

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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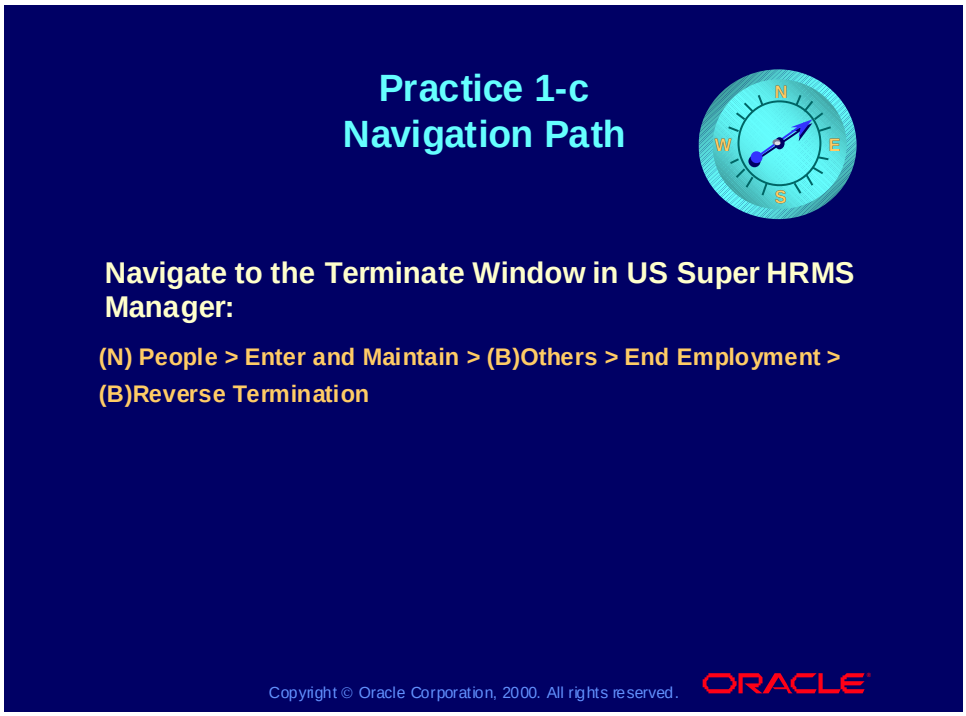

Online Help

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

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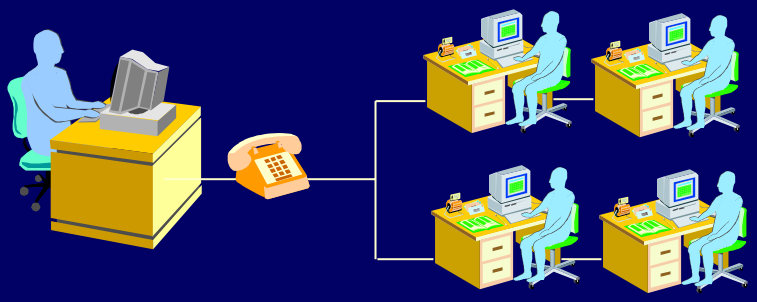
Instructor Demonstration 1-d

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

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

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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

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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

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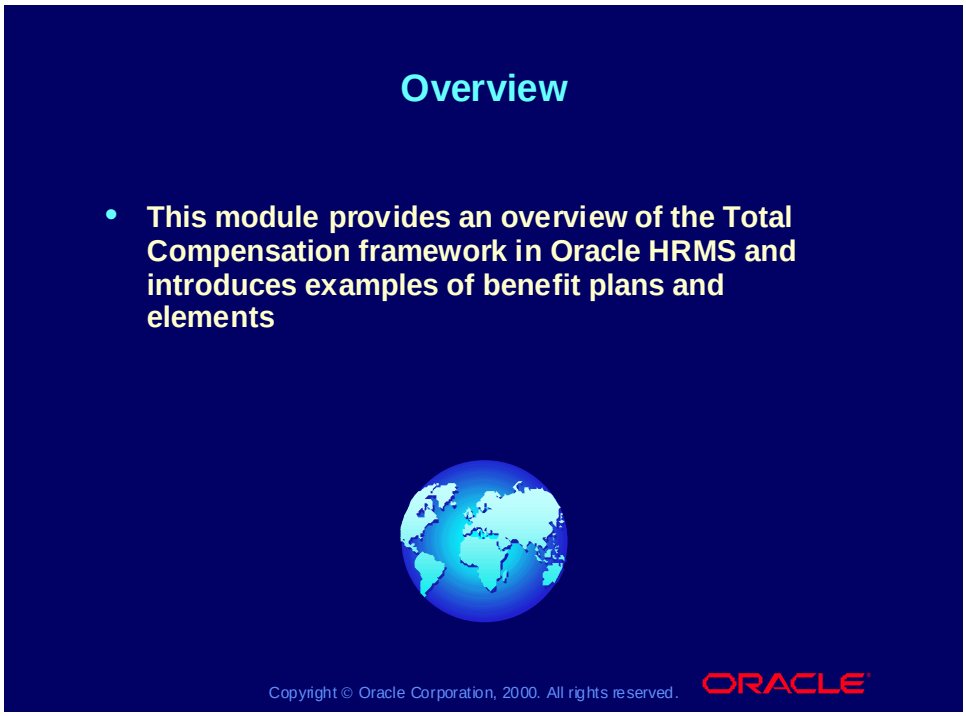

Overview

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'.

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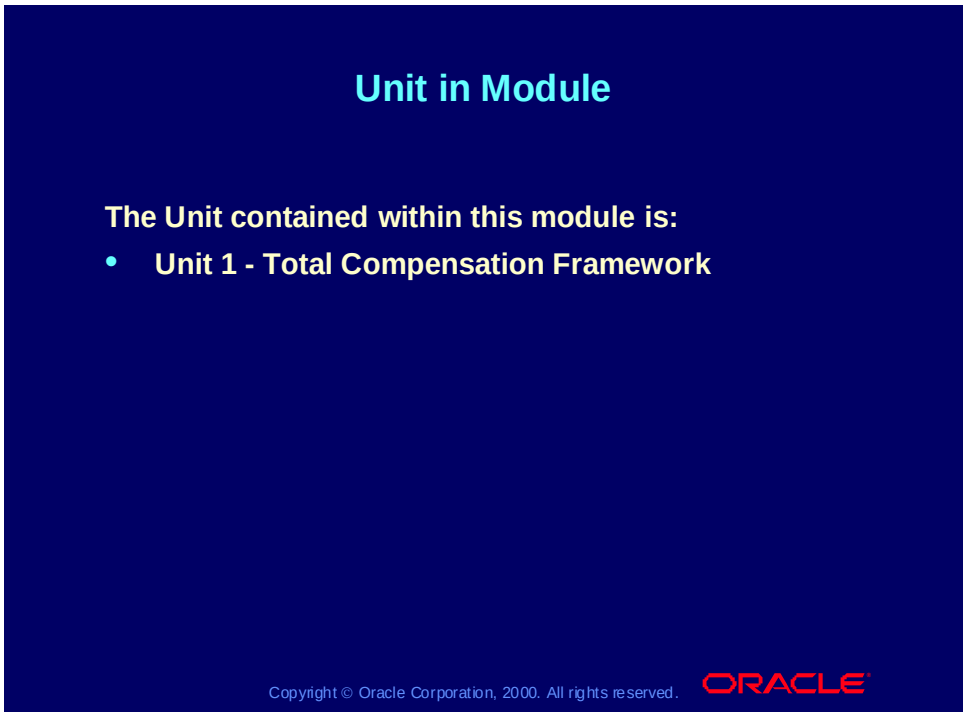

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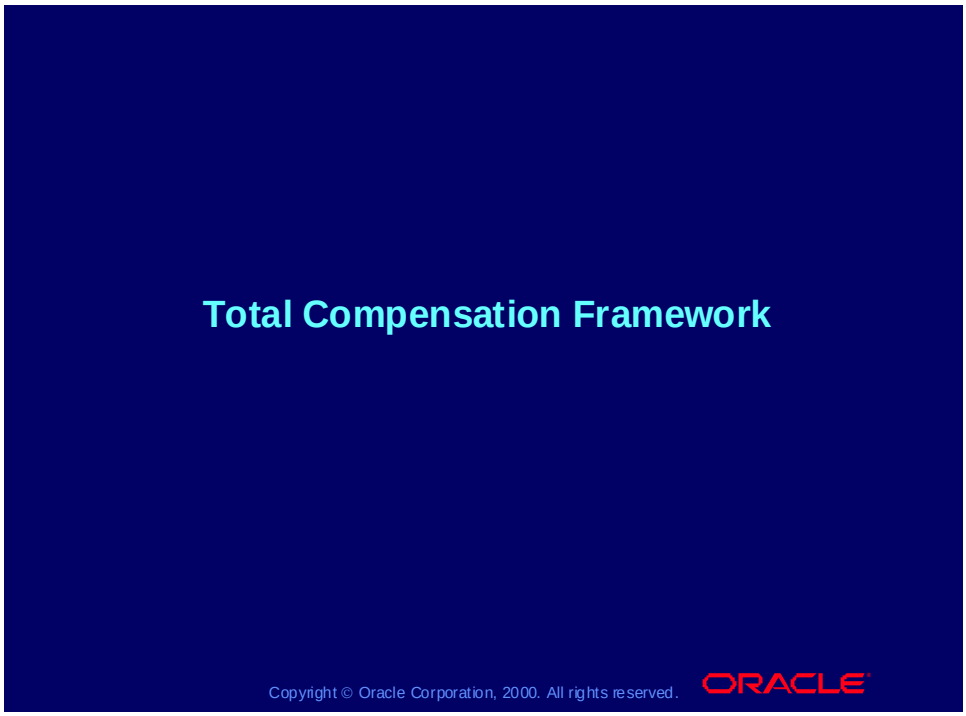

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Objectives

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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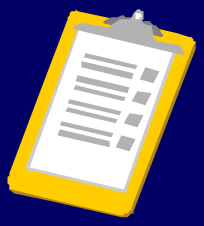
Objectives

- 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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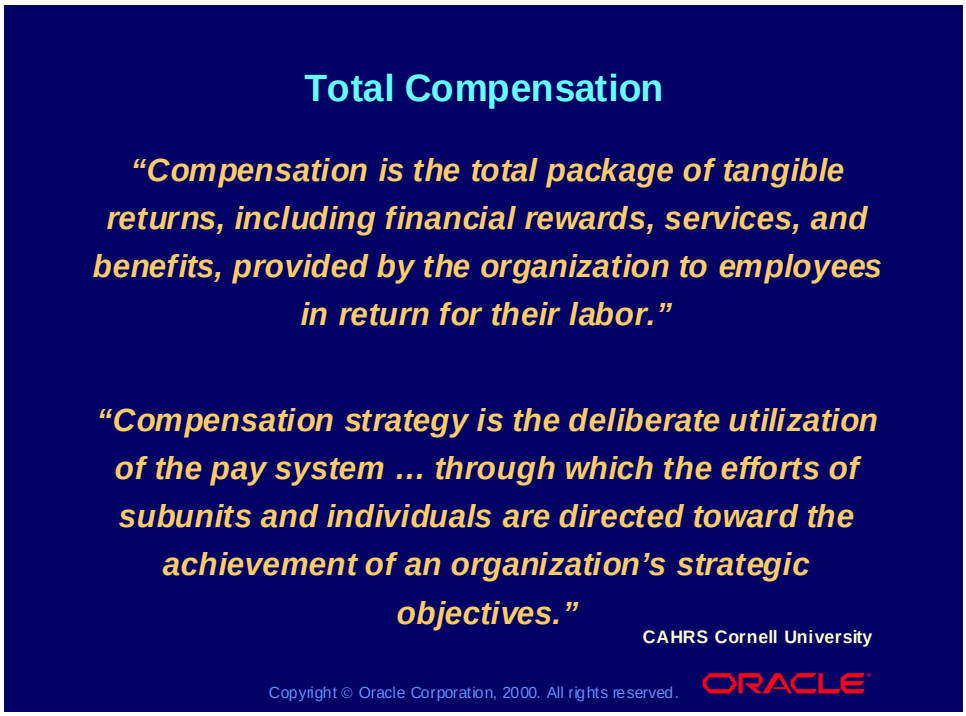

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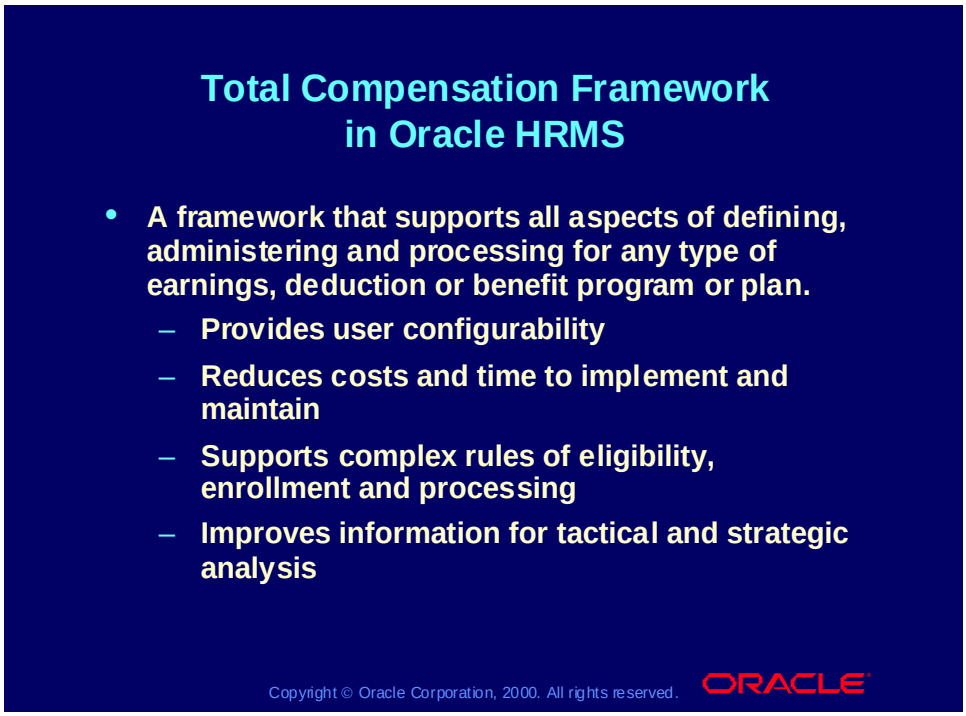

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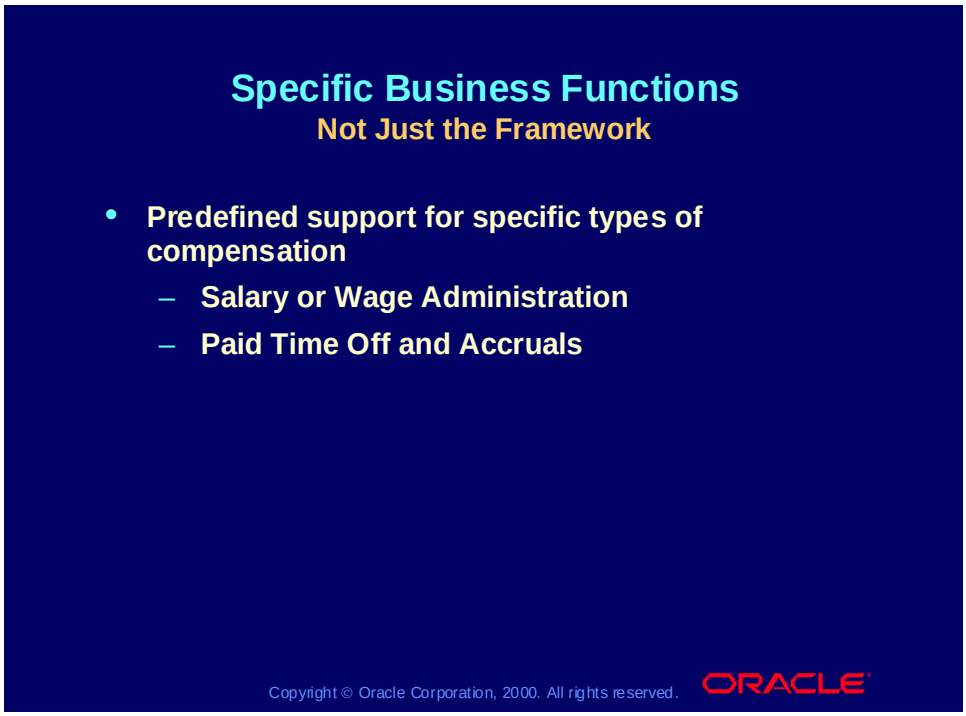

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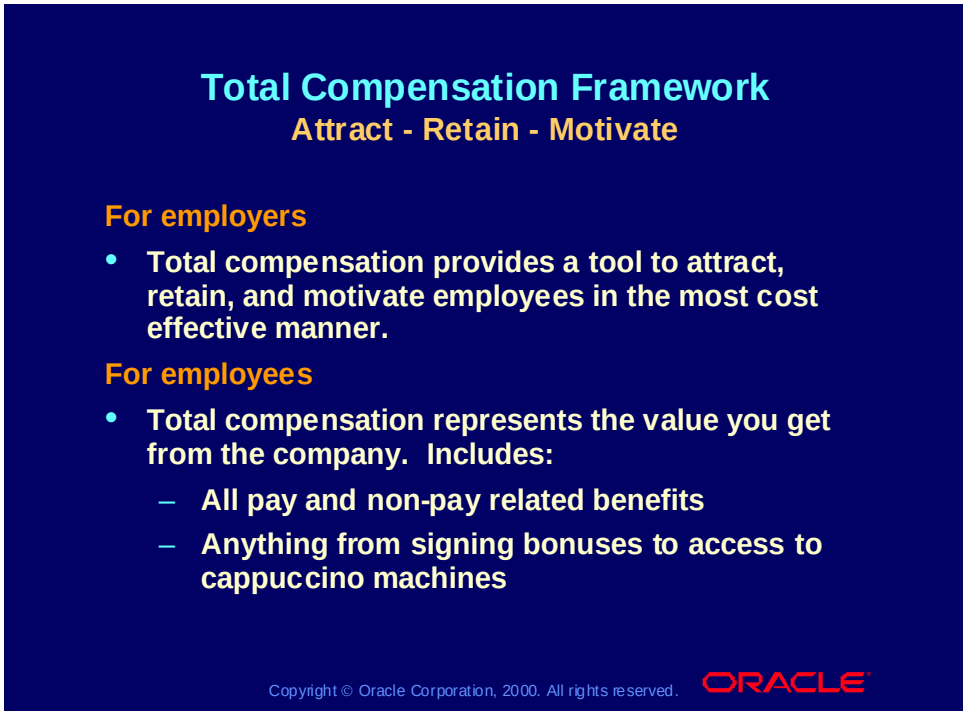
Total Compensation Framework Attract - Retain - Motivate



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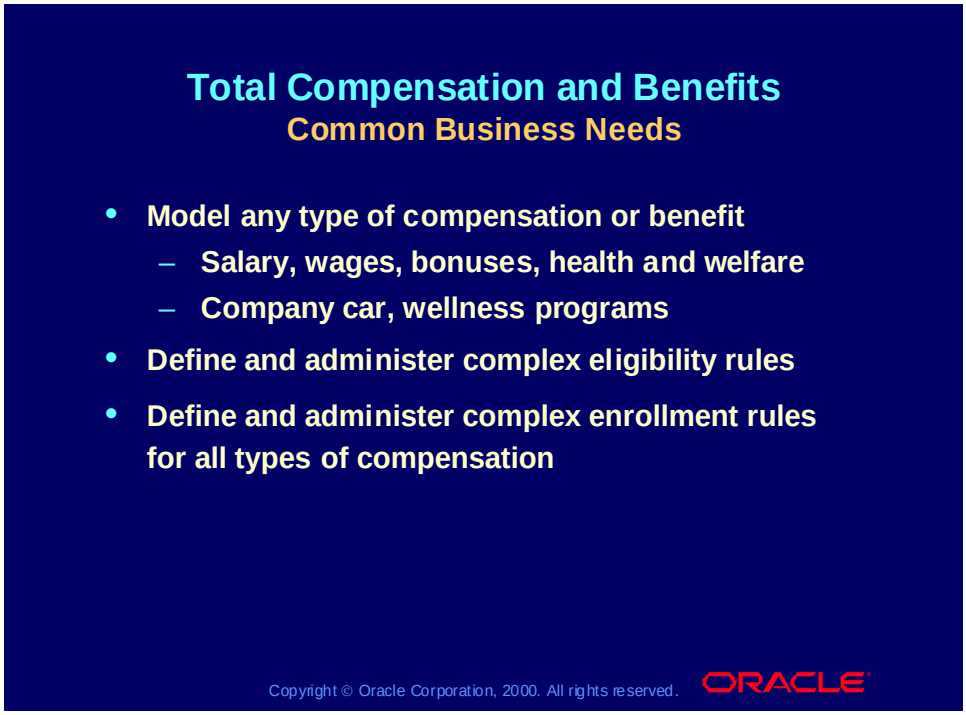
Total Compensation and Benefits Common Business Needs



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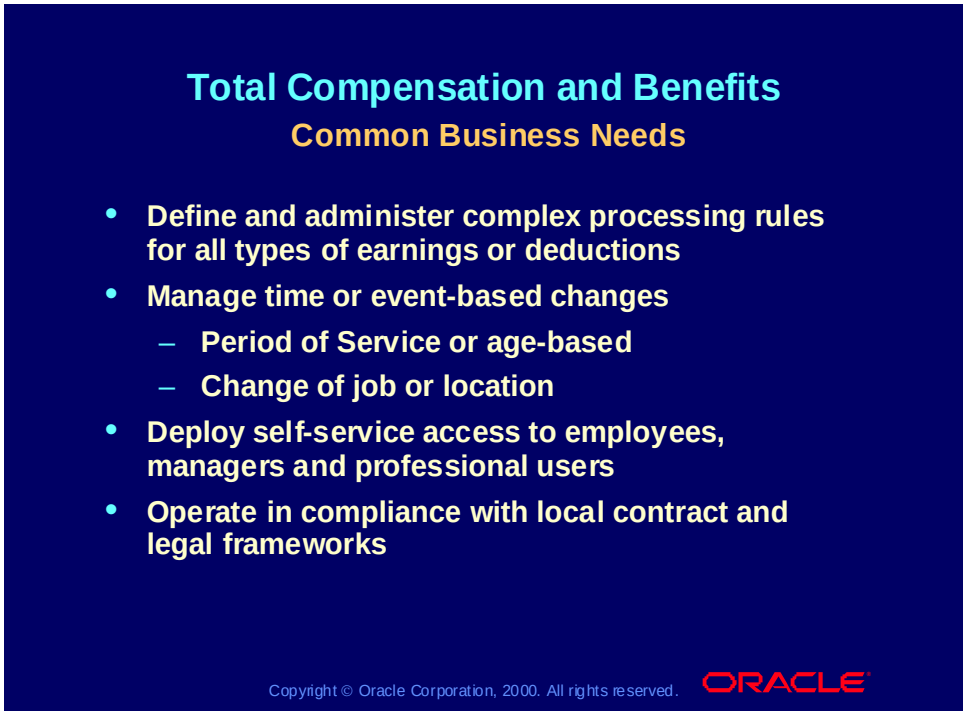
Total Compensation and Benefits Common Business Needs



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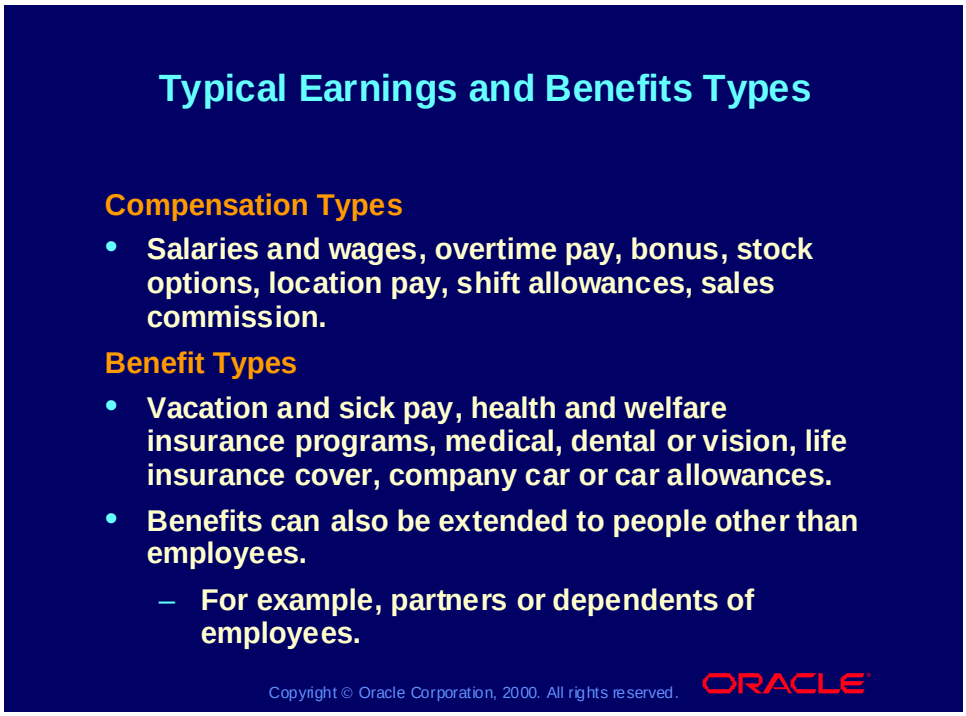

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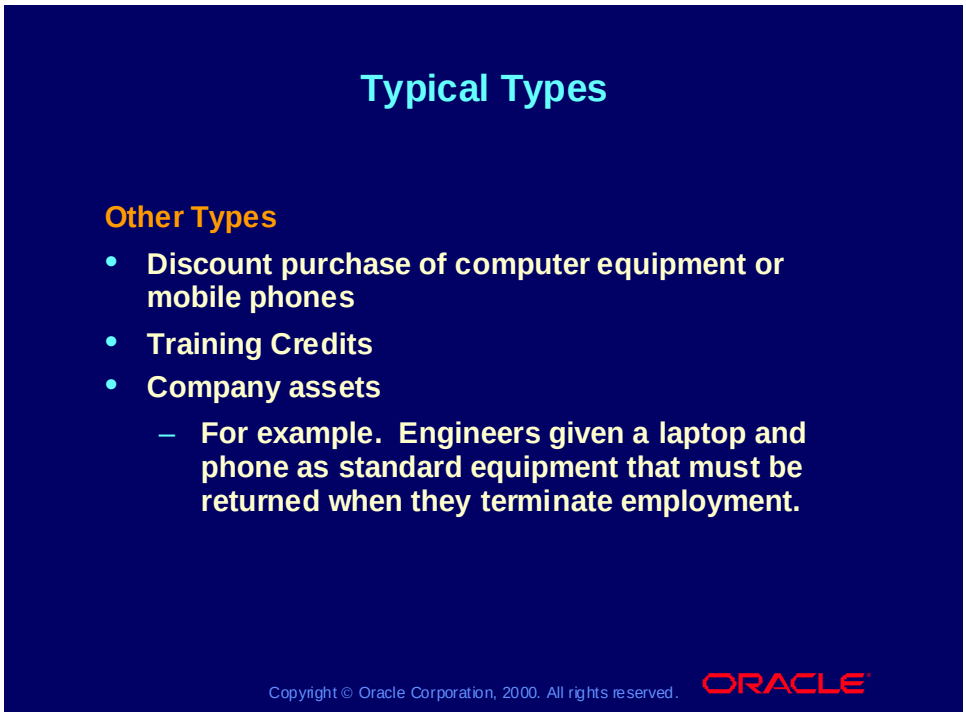

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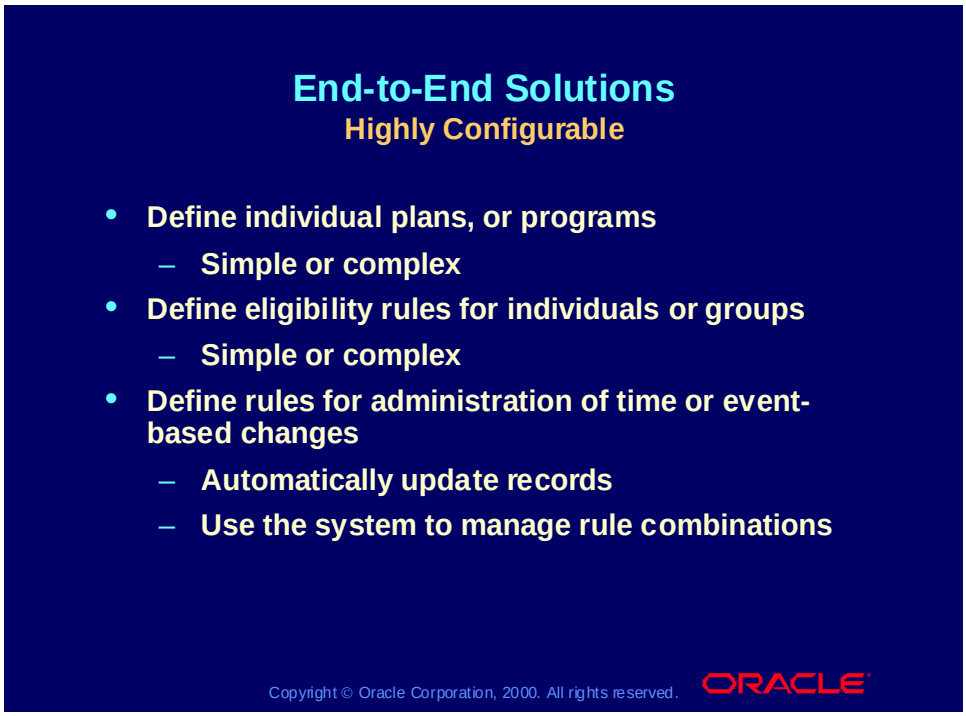
End-to-End Solutions Highly Configurable



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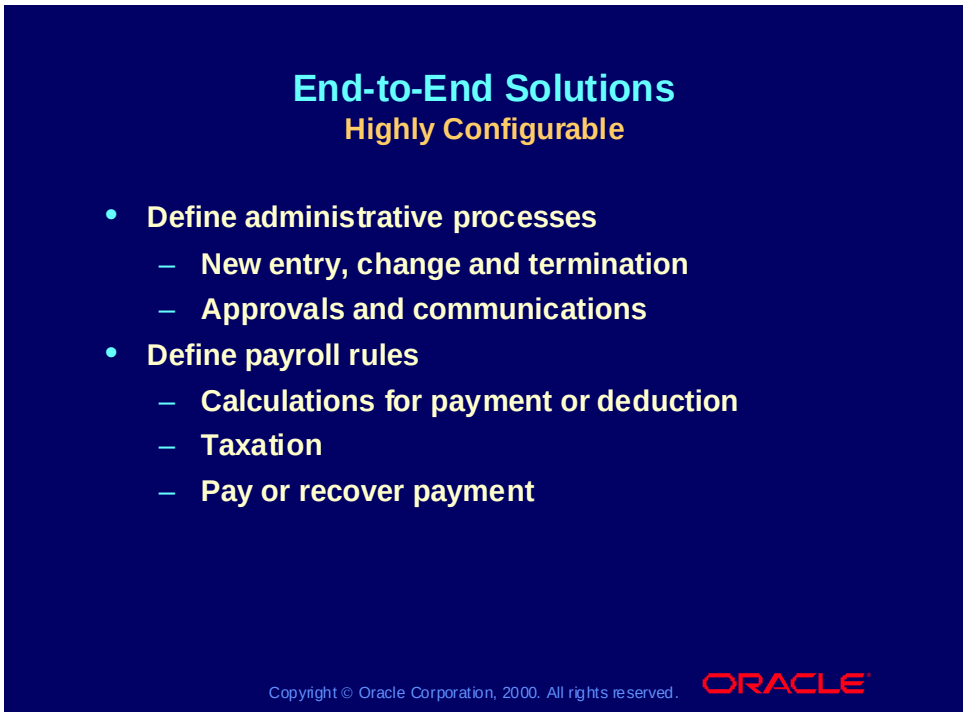
End-to-End Solutions Highly Configurable



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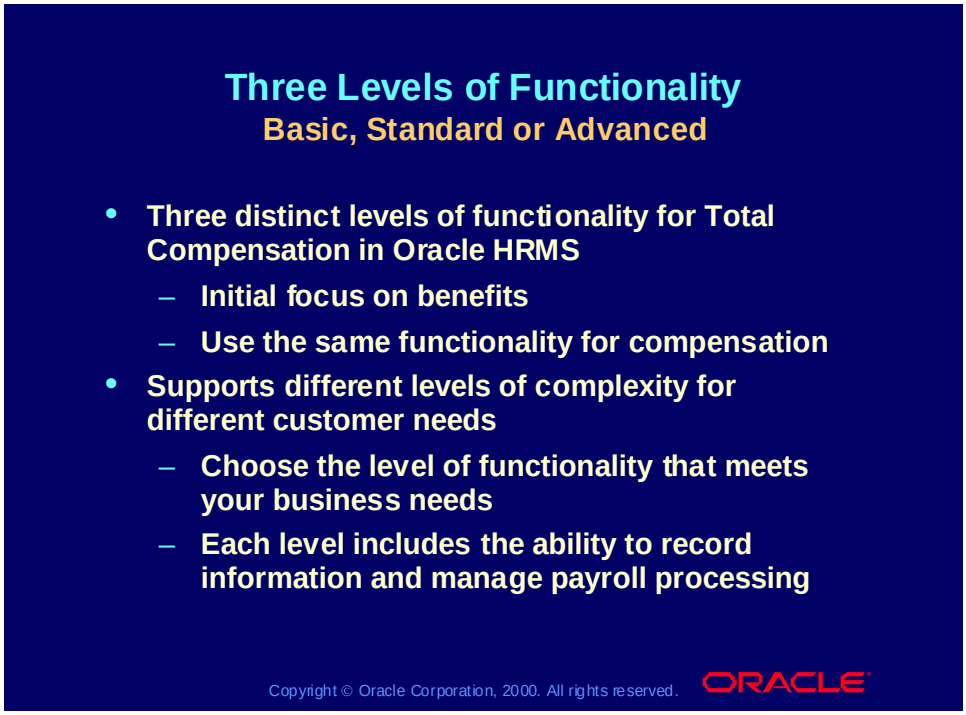
Three Levels of Functionality Basic, Standard or Advanced



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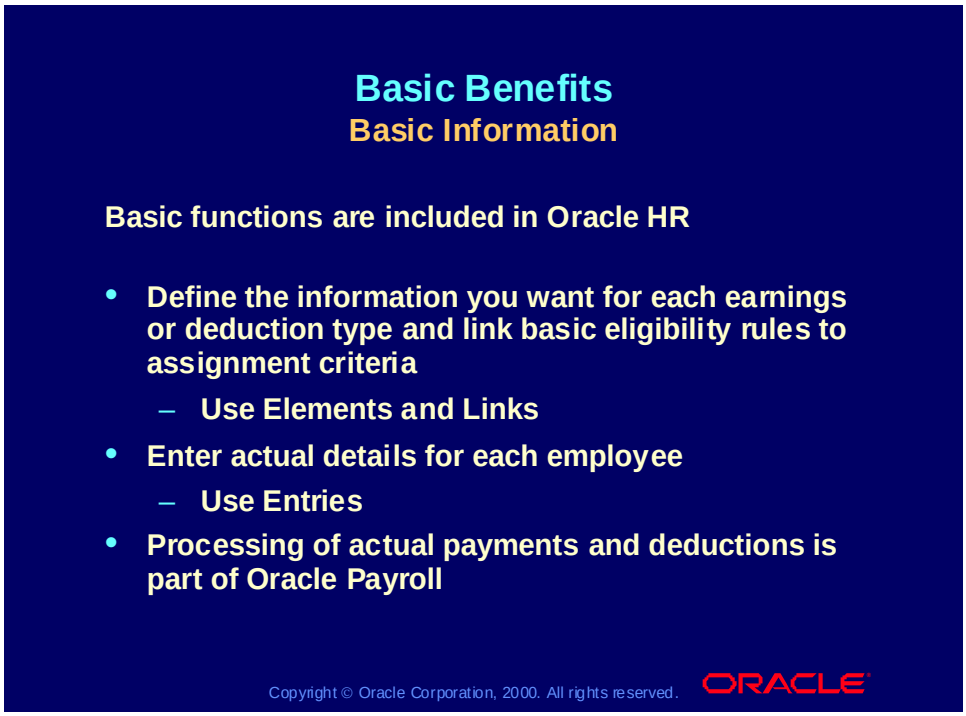

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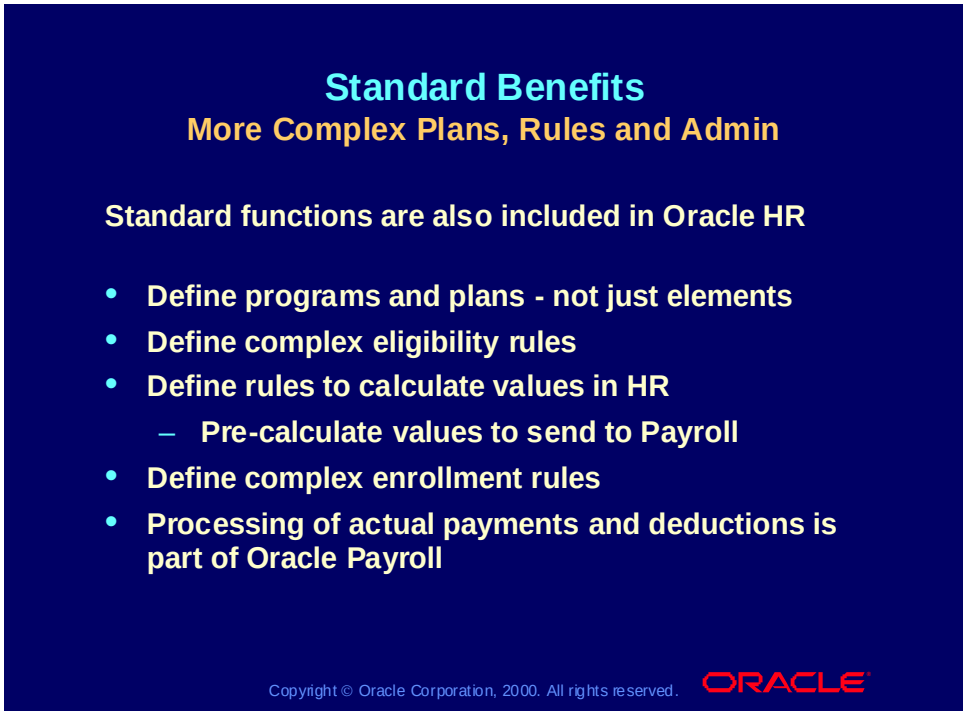

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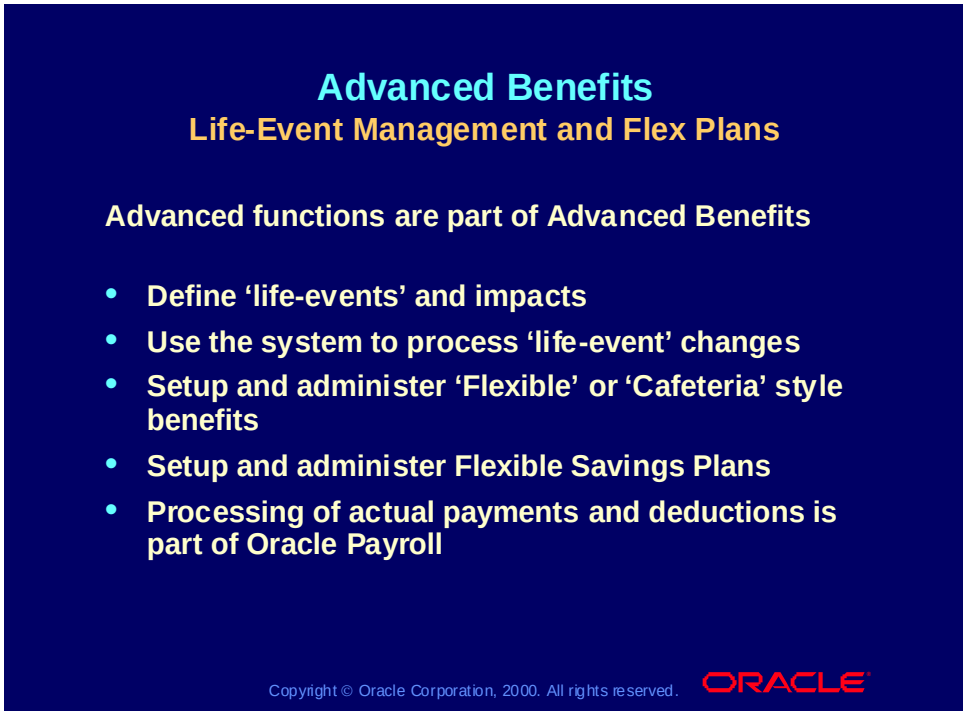

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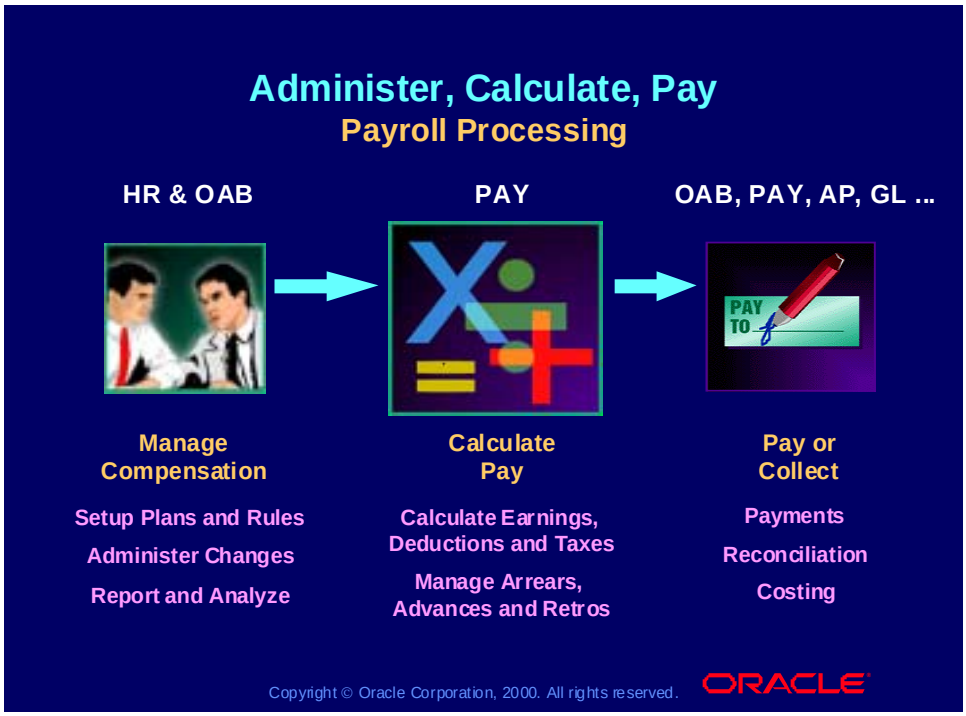
Administer, Calculate, Pay Payroll Processing



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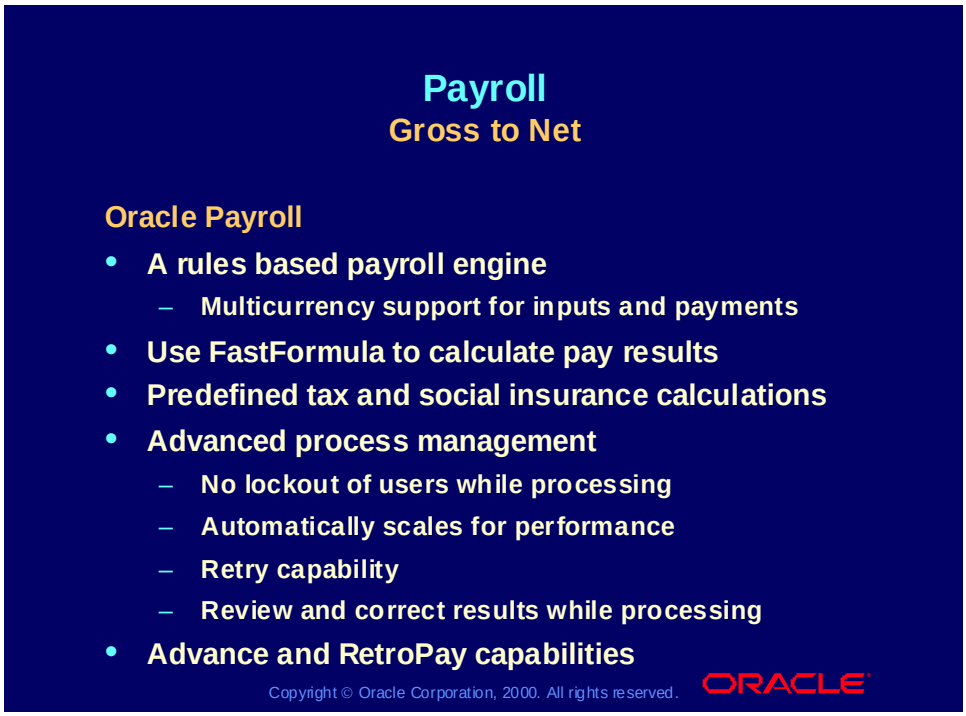

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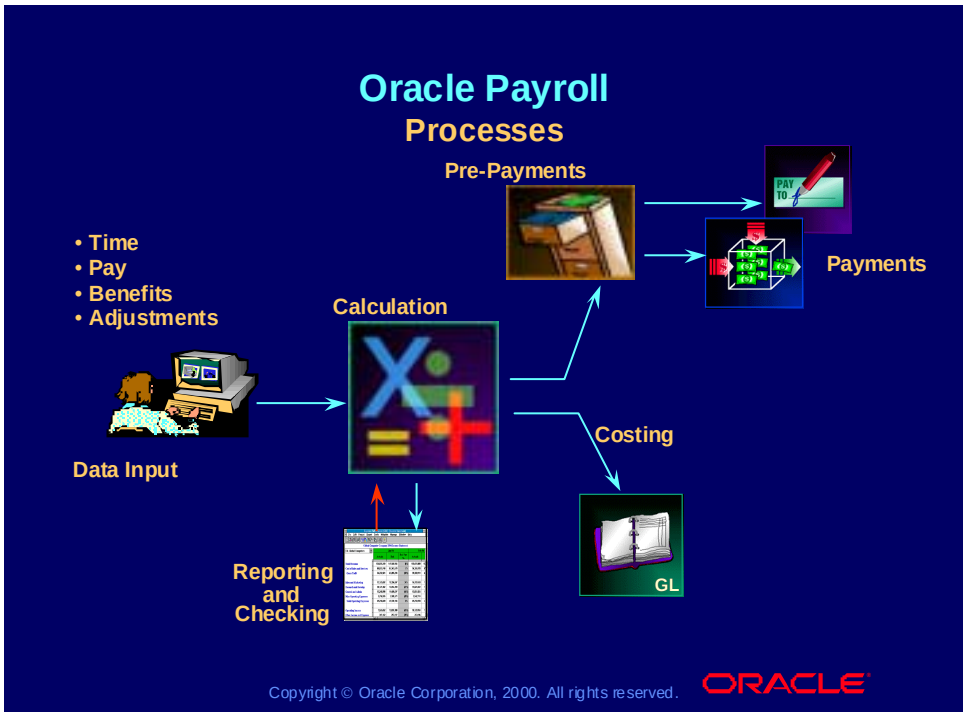
Oracle Payroll Processes



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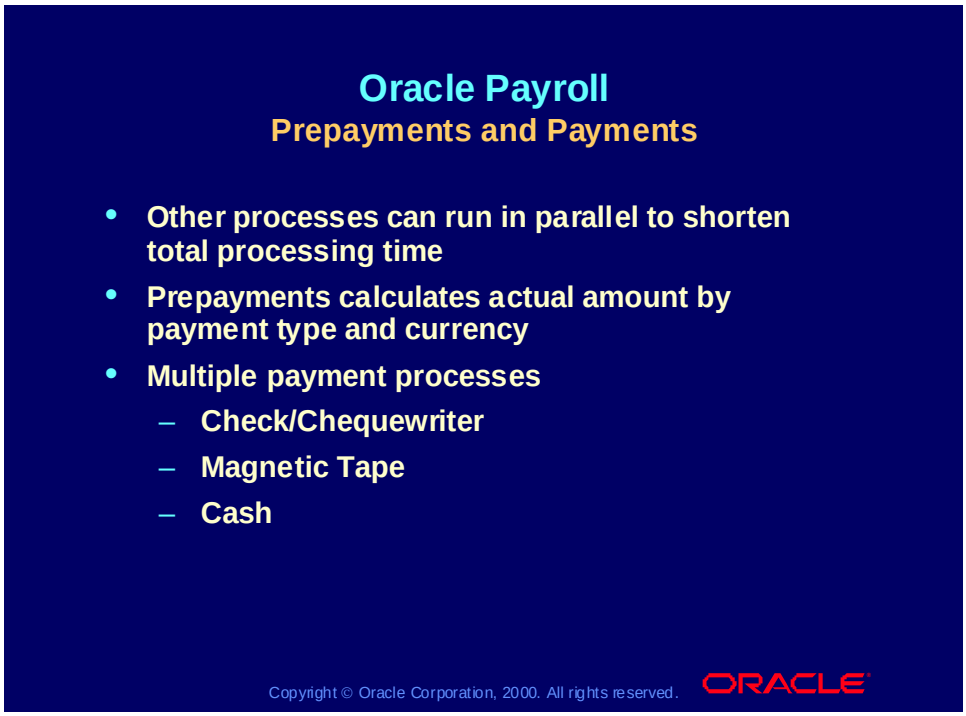
Oracle Payroll Prepayments and Payments



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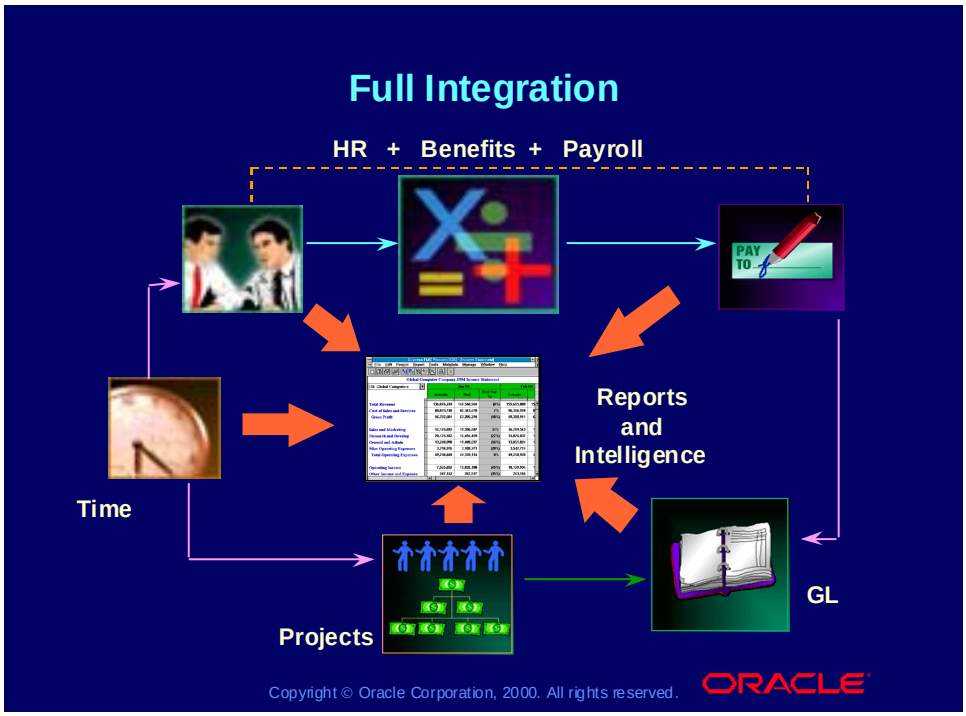
Full Integration



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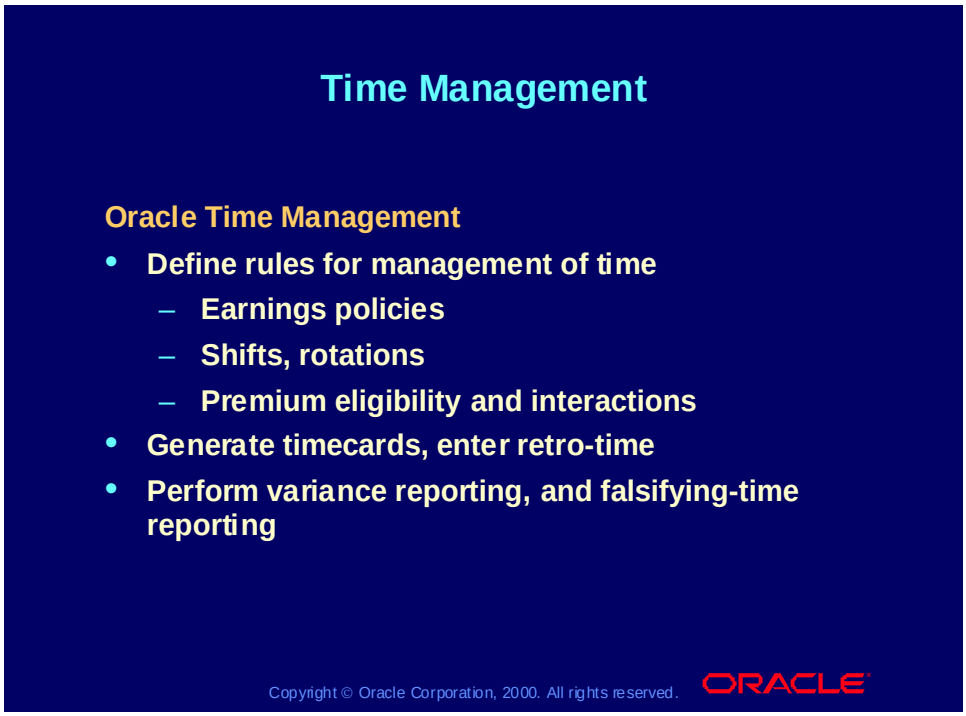

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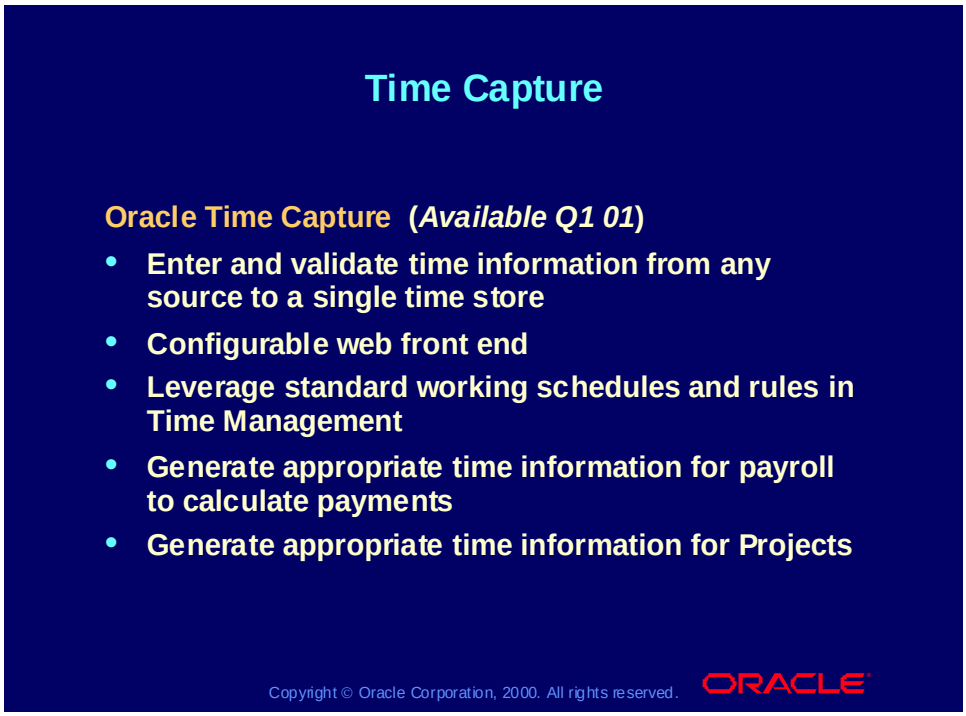

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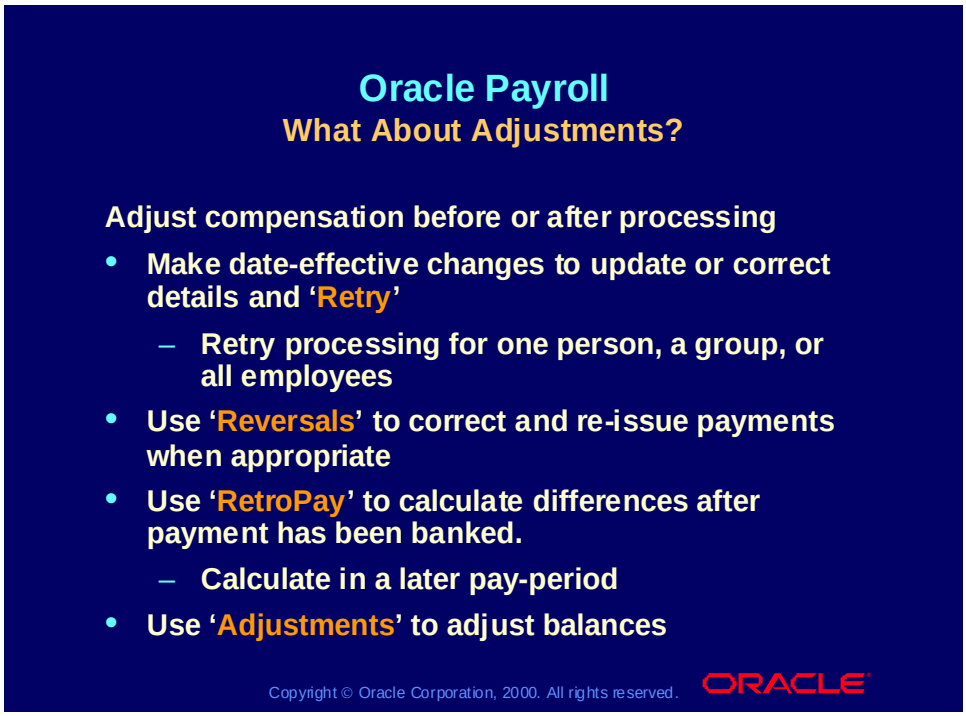

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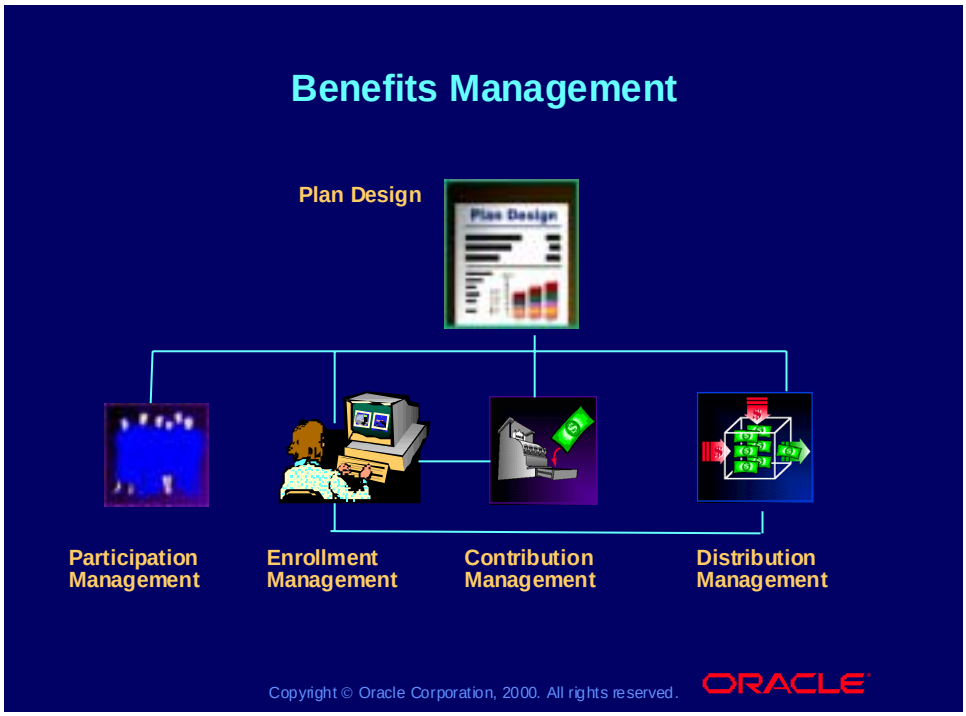
Benefits Management



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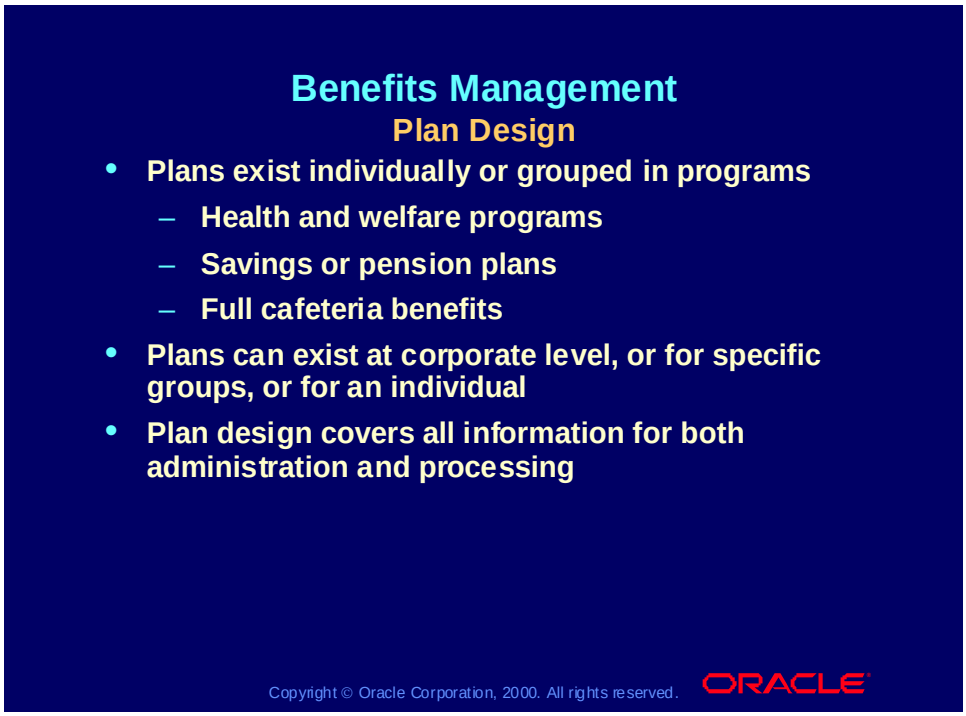

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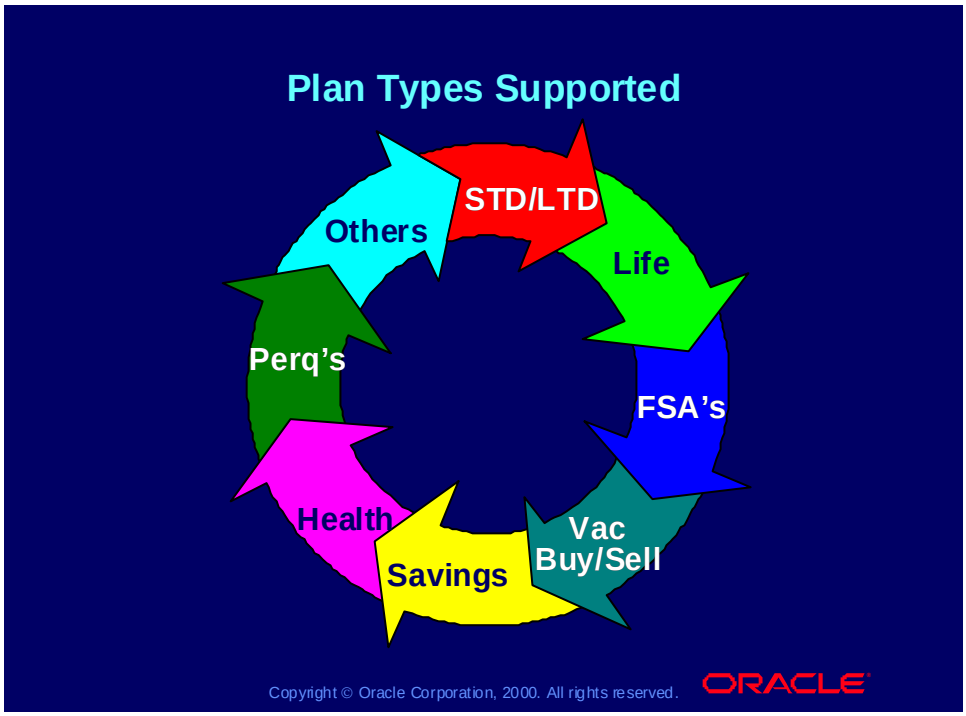

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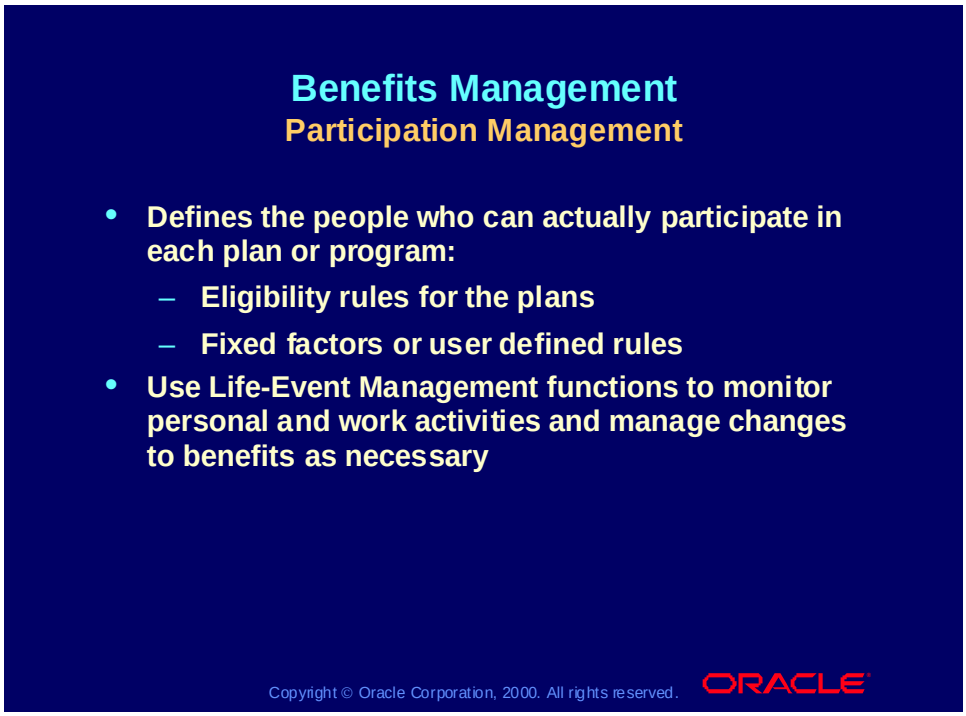

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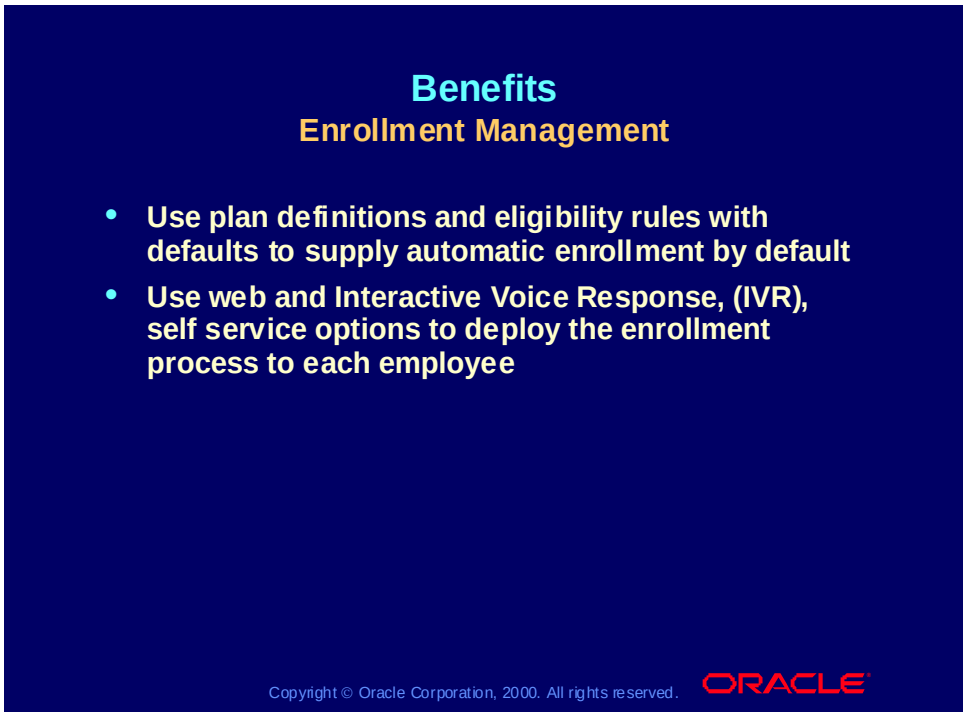

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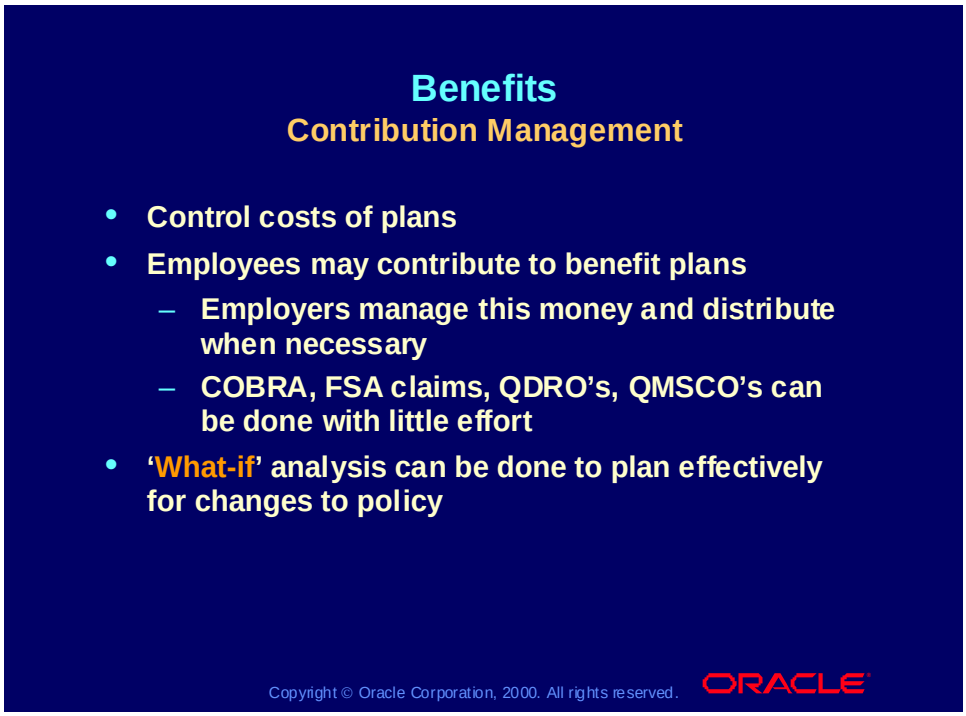

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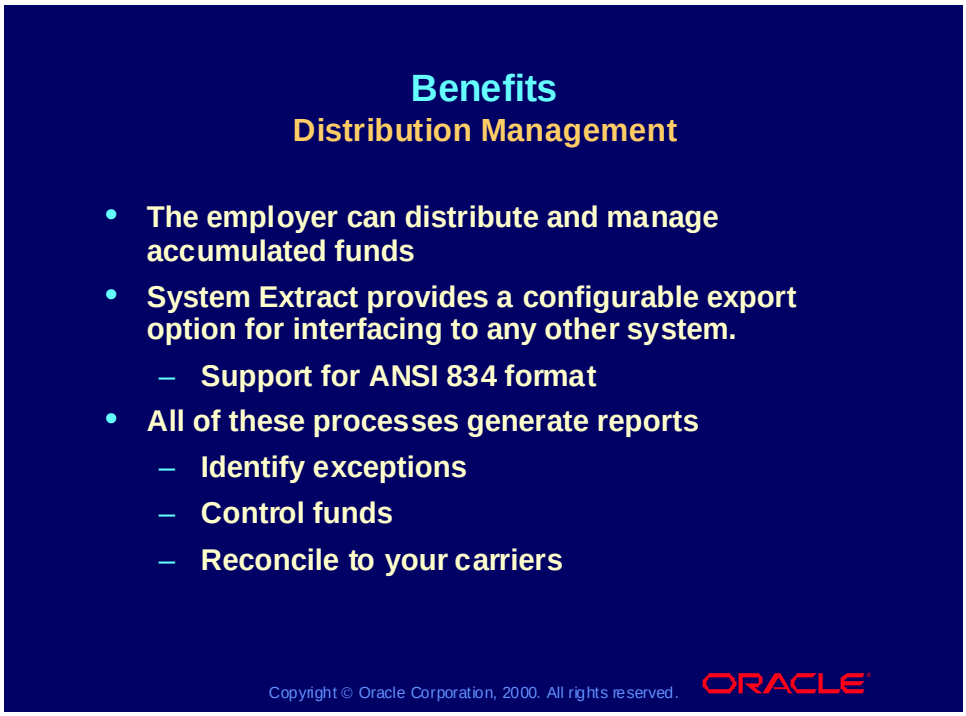

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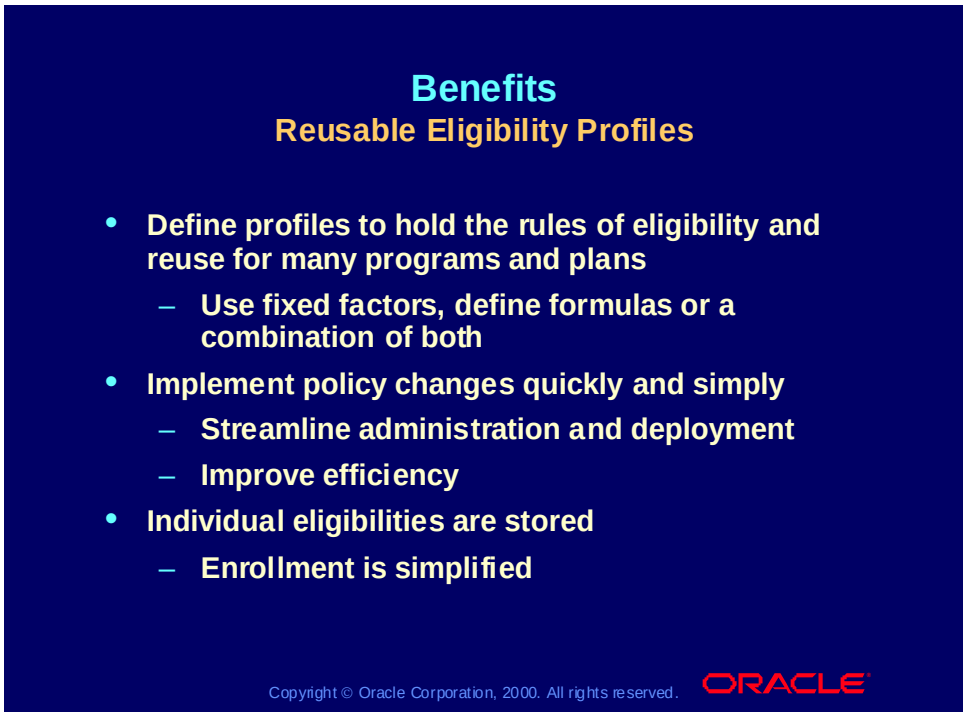
Benefits Reusable Eligibility Profiles



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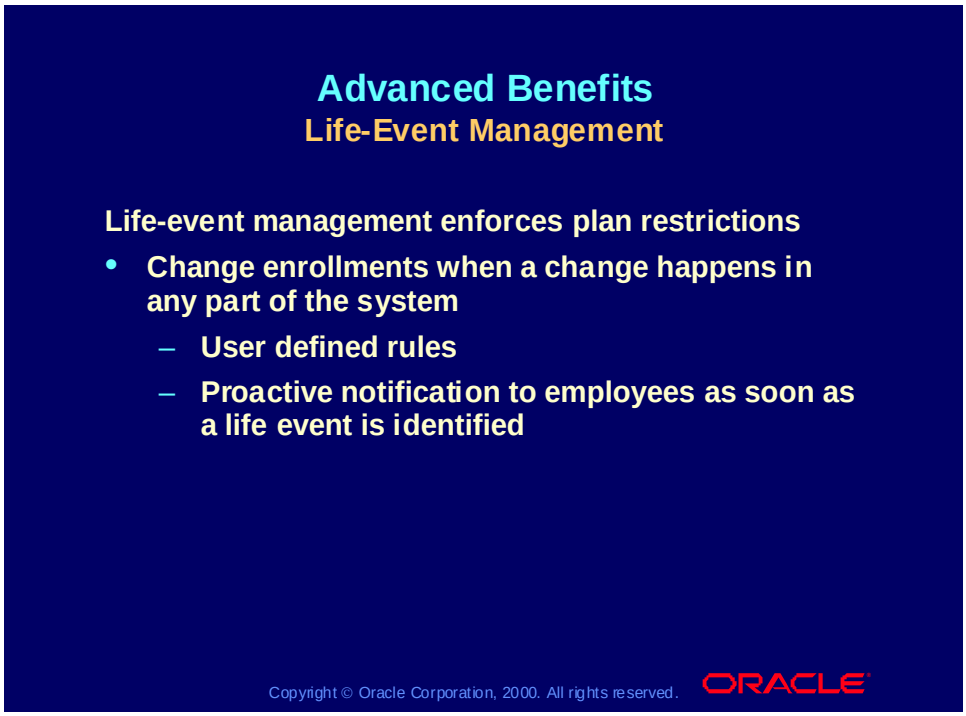

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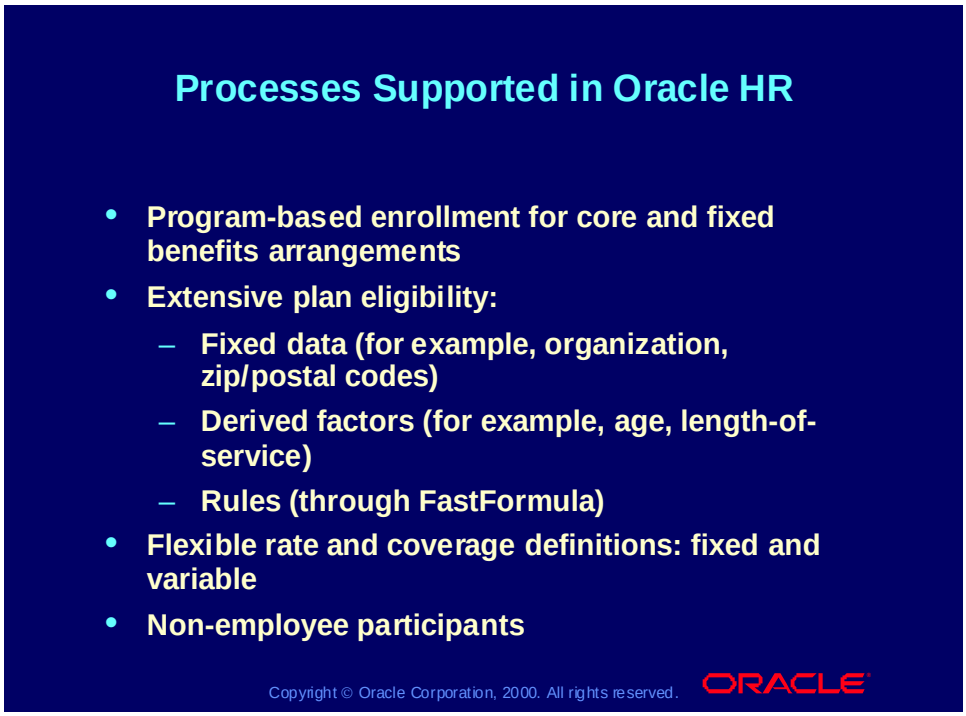

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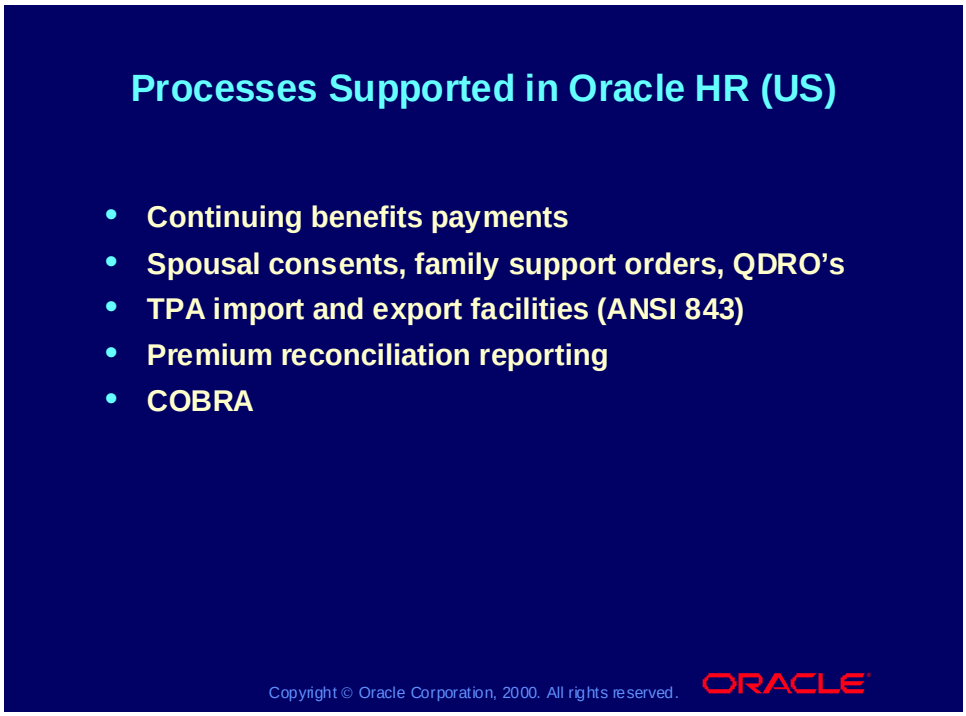

- Statutory (for example, HIPAA certificates, COBRA)
- Practitioner-directed
- Management-directed

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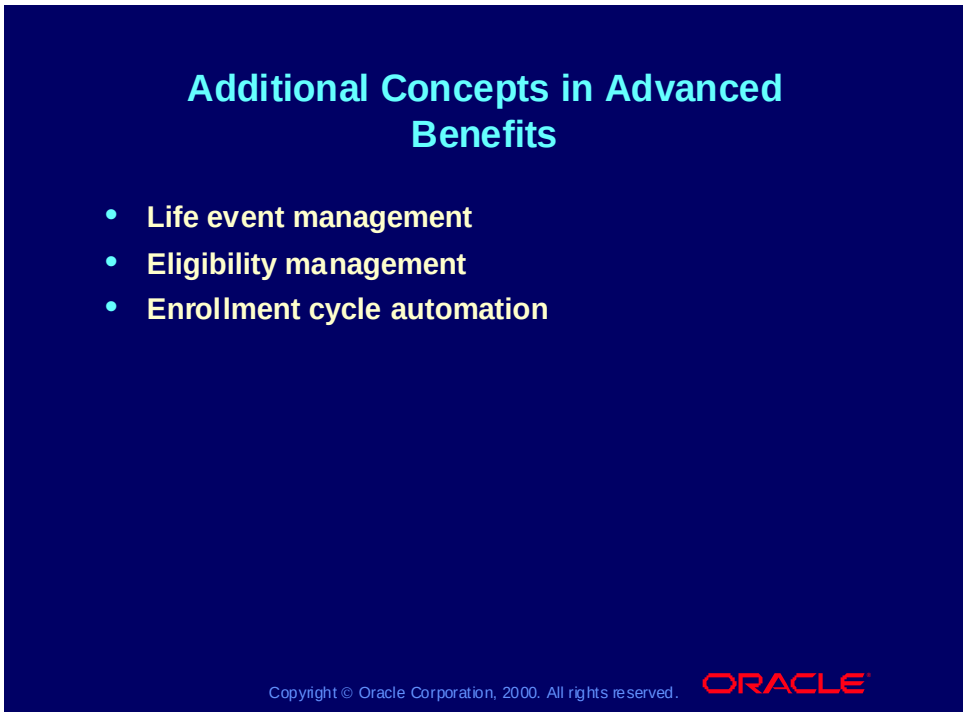

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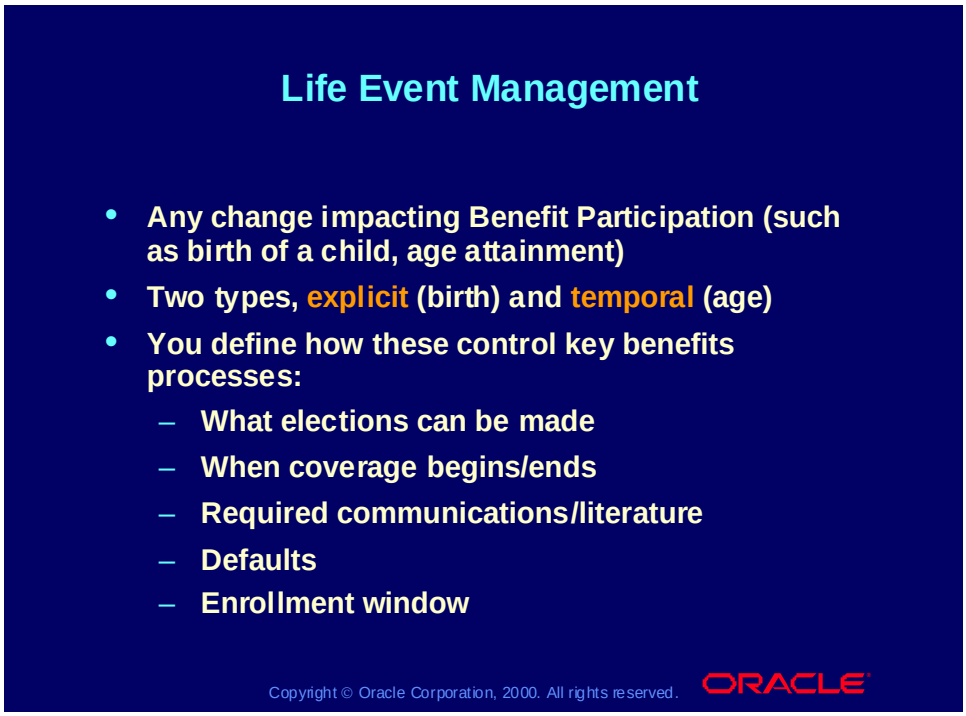

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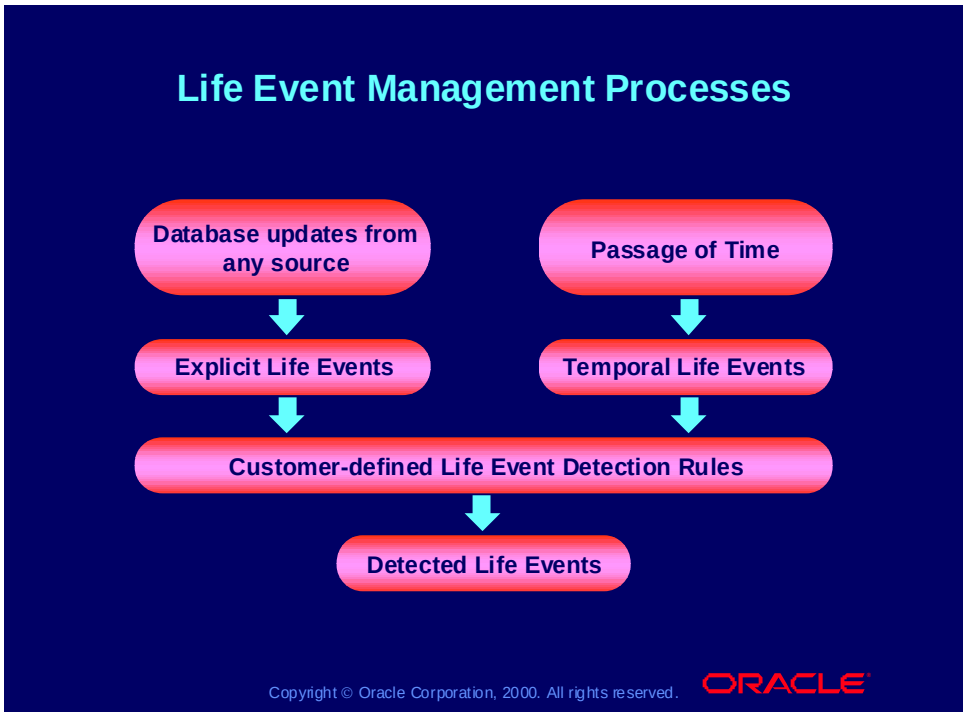
Life Event Management Processes



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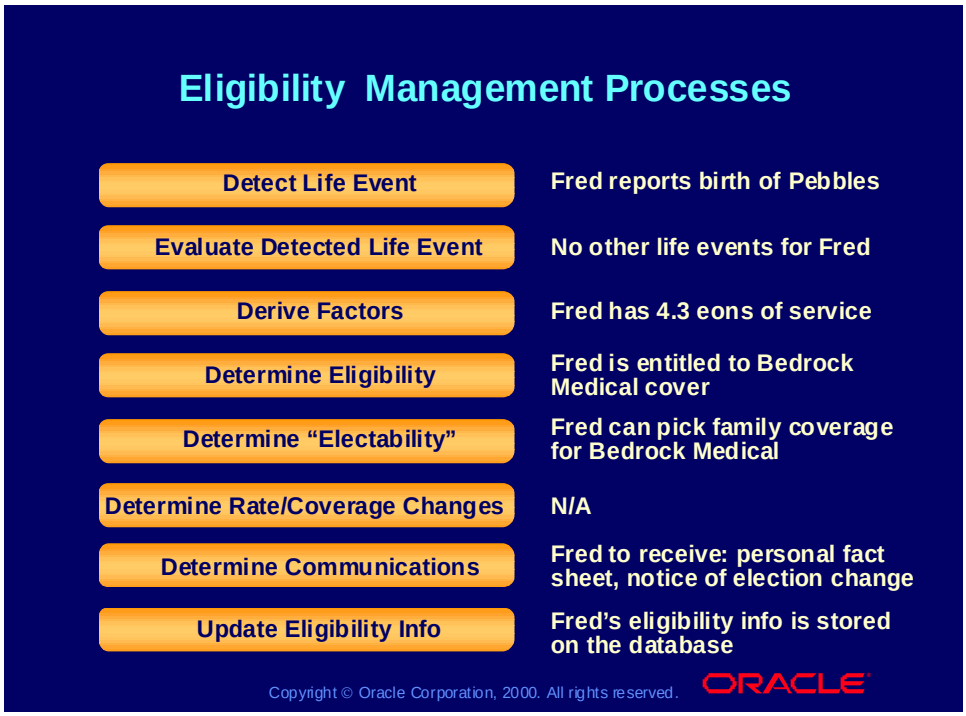

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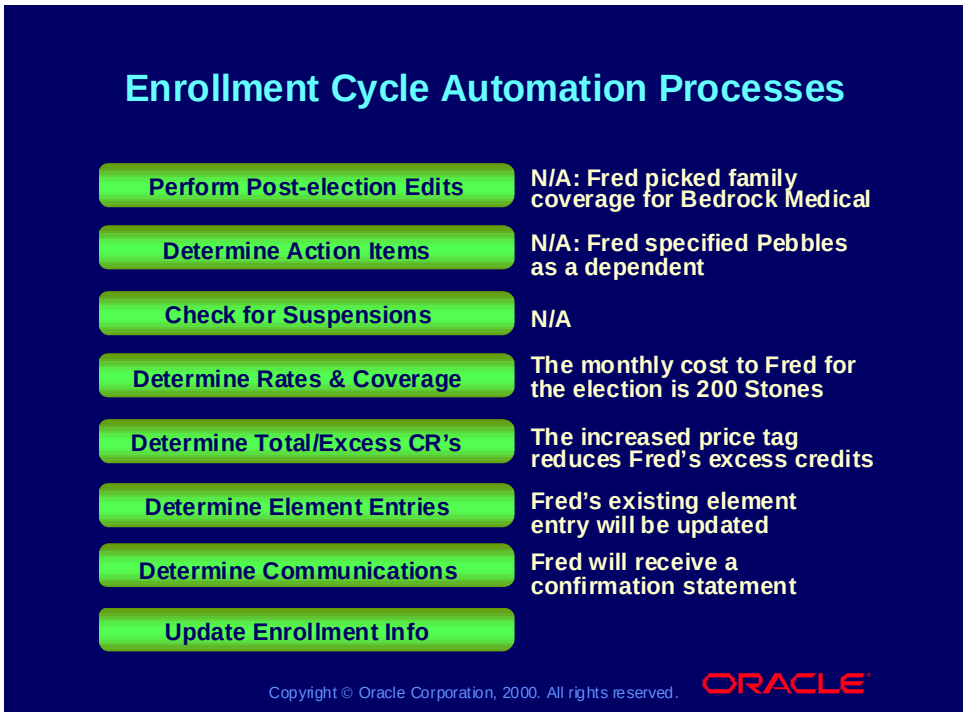

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Summary

- 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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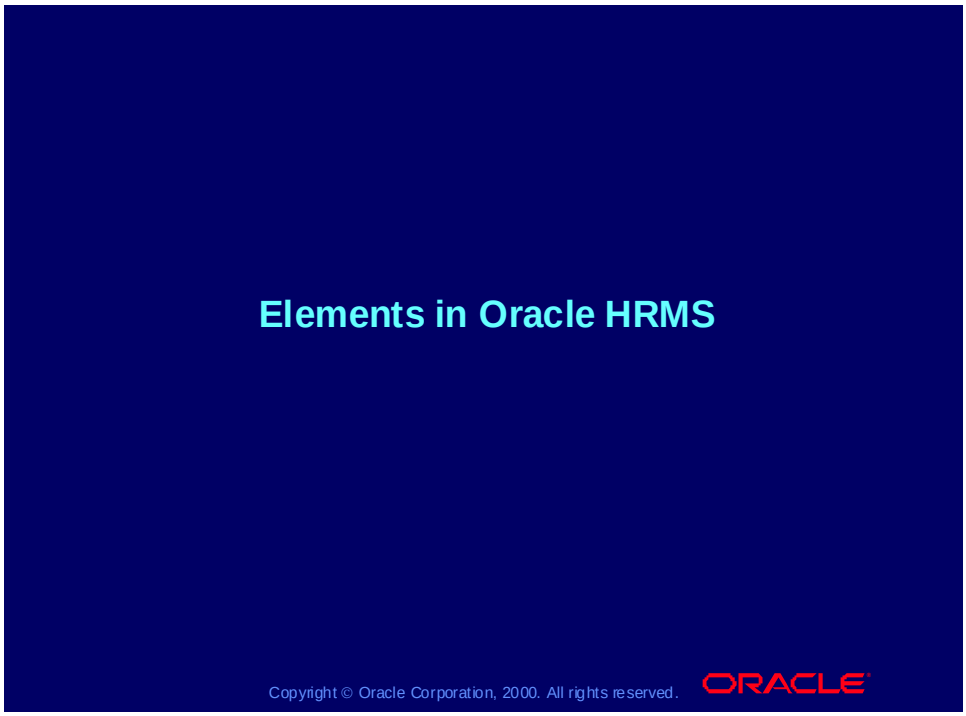

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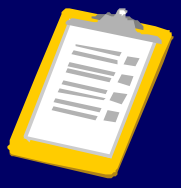
Objectives

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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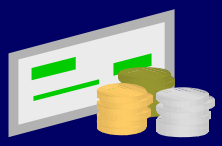
Earnings, Deductions & Benefits

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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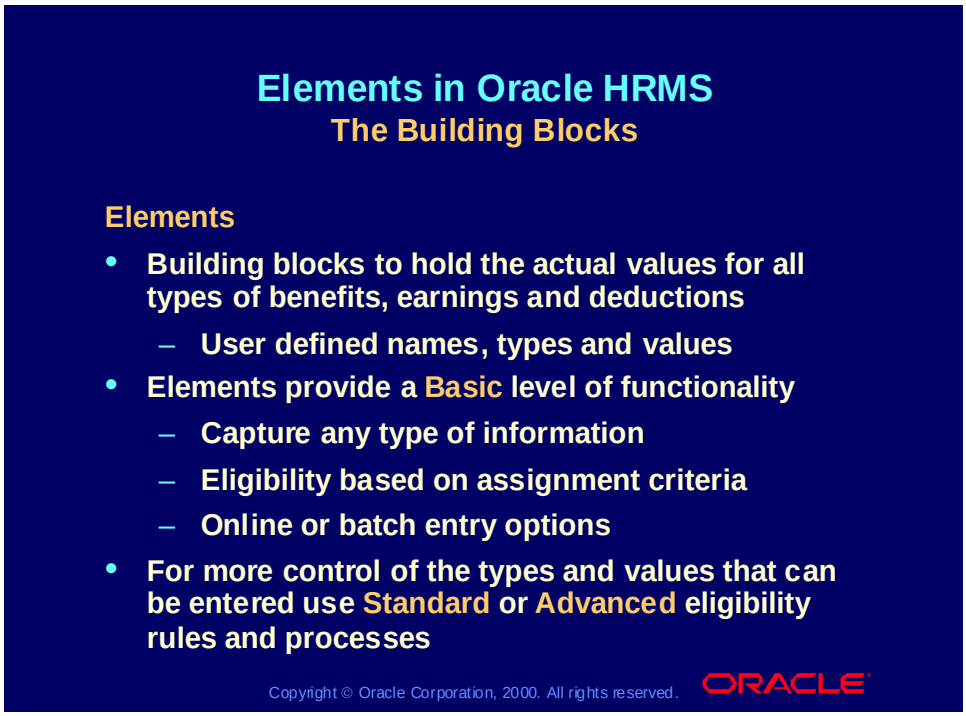

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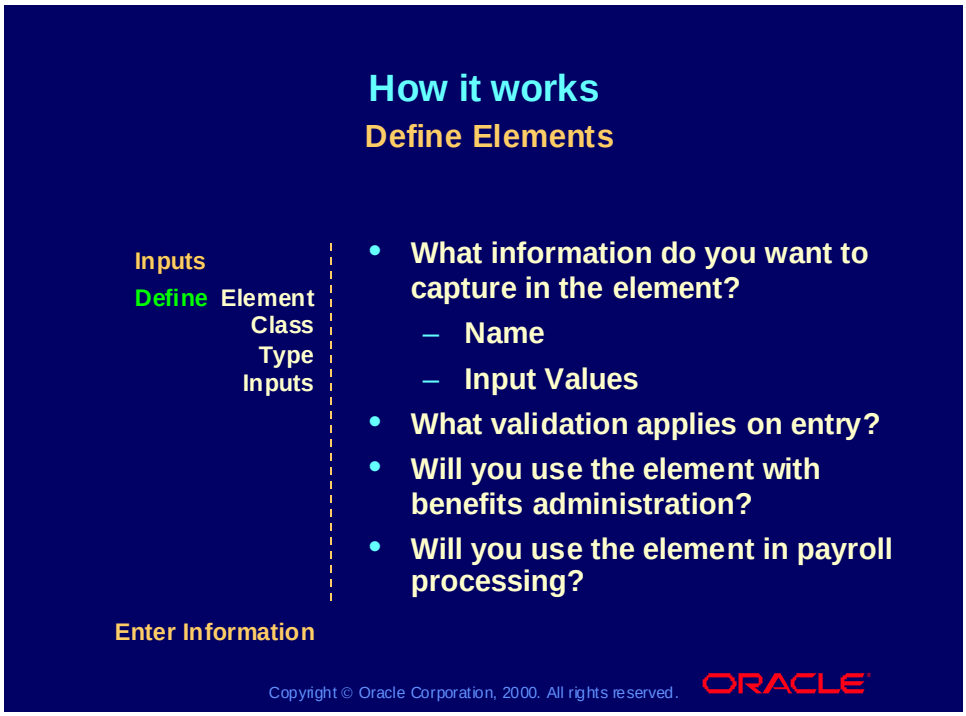

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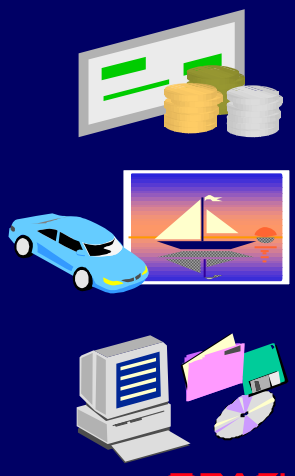
Defining Elements Key Attributes

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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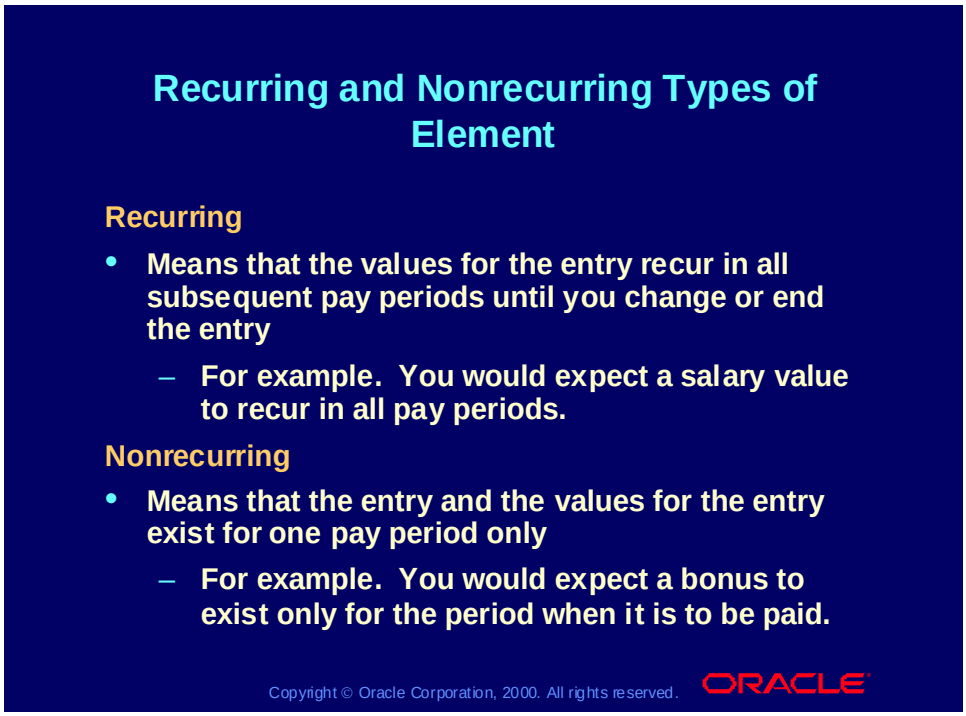

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Element Links

- 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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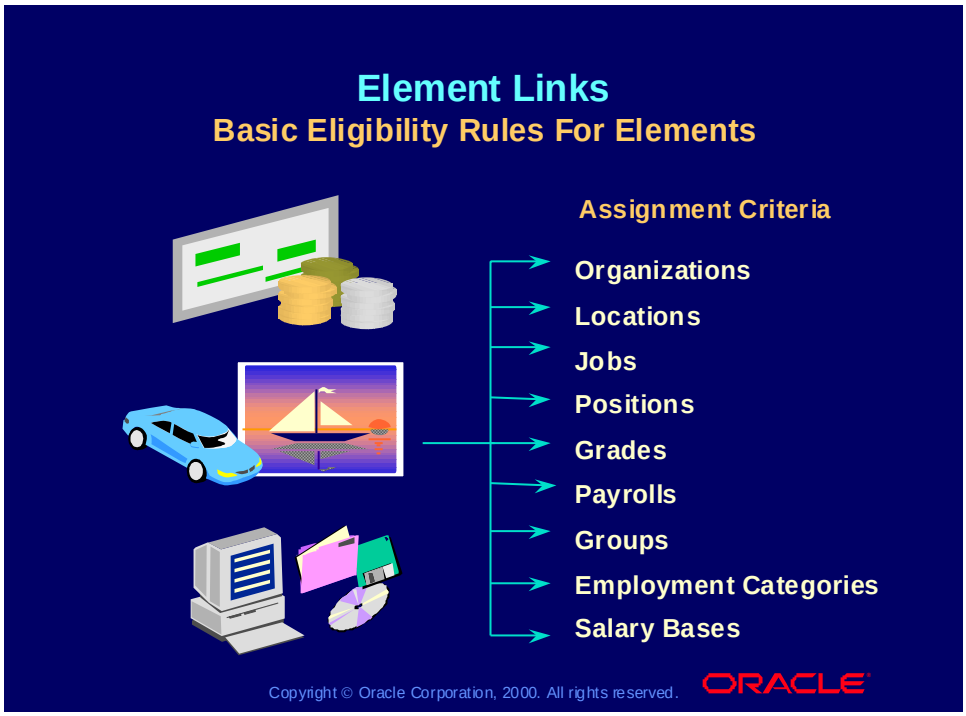
Element Links Basic Eligibility Rules For Elements



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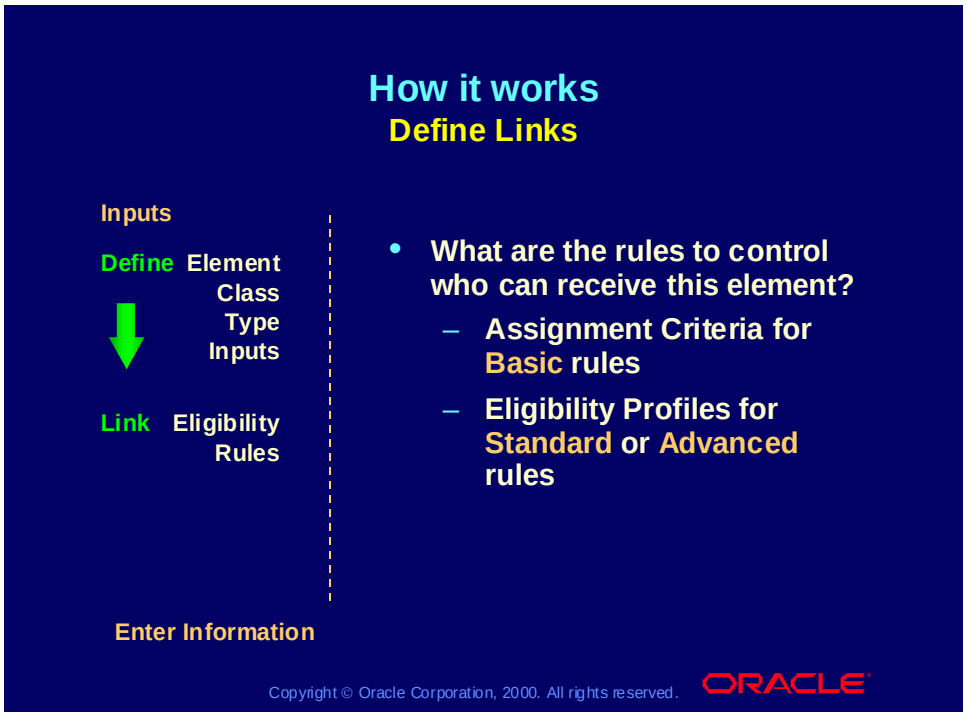
How it works Define Links



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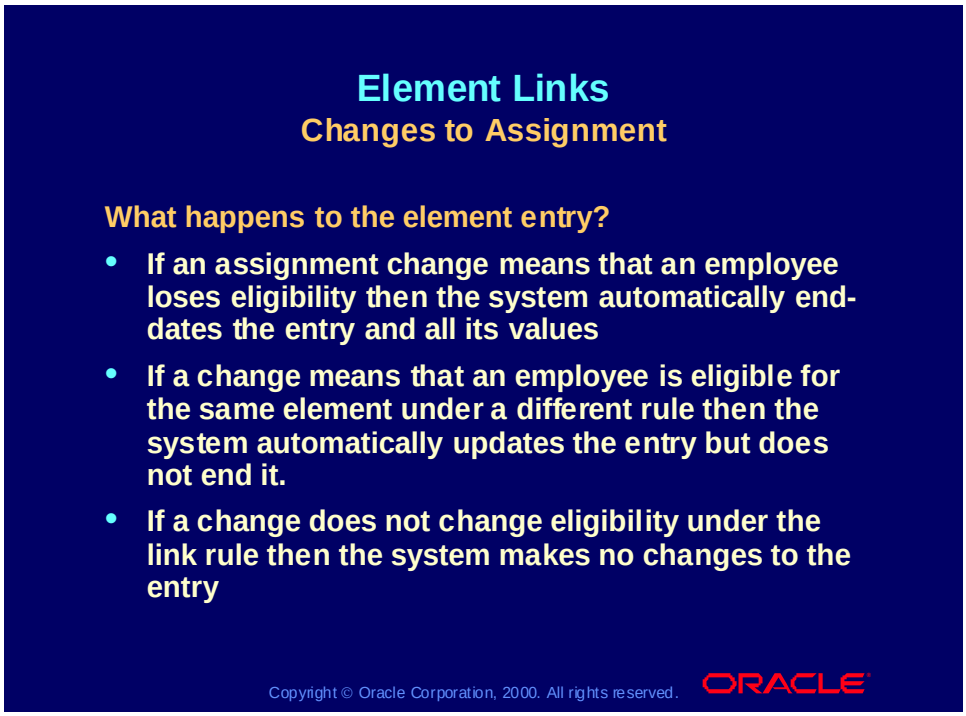
Element Links Changes to Assignment



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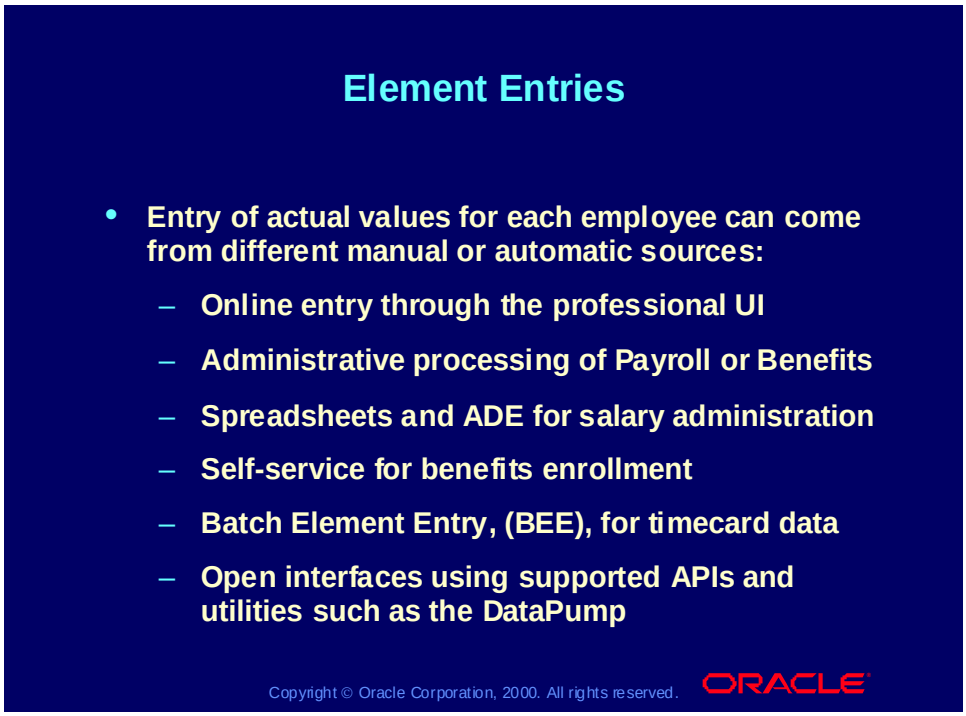

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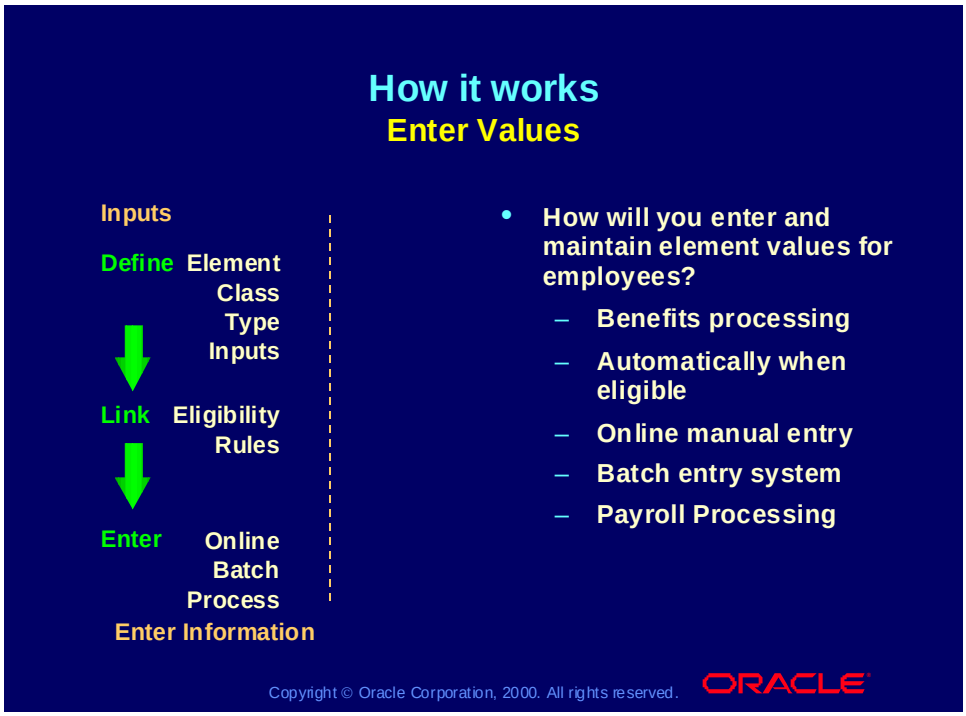
How it works Enter Values



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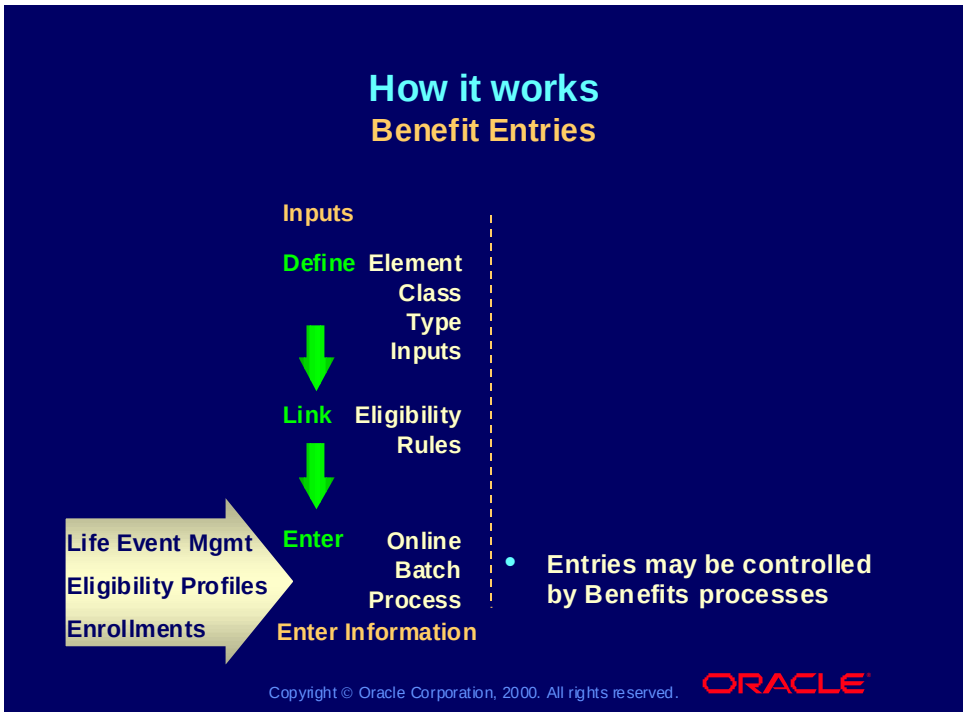
How it works Benefit Entries



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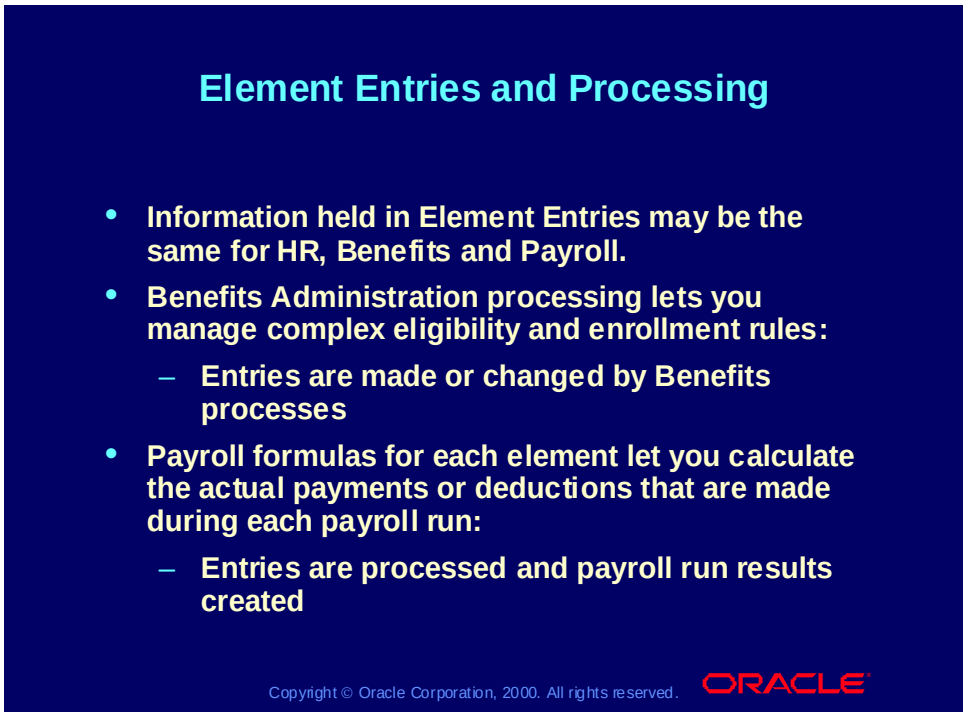

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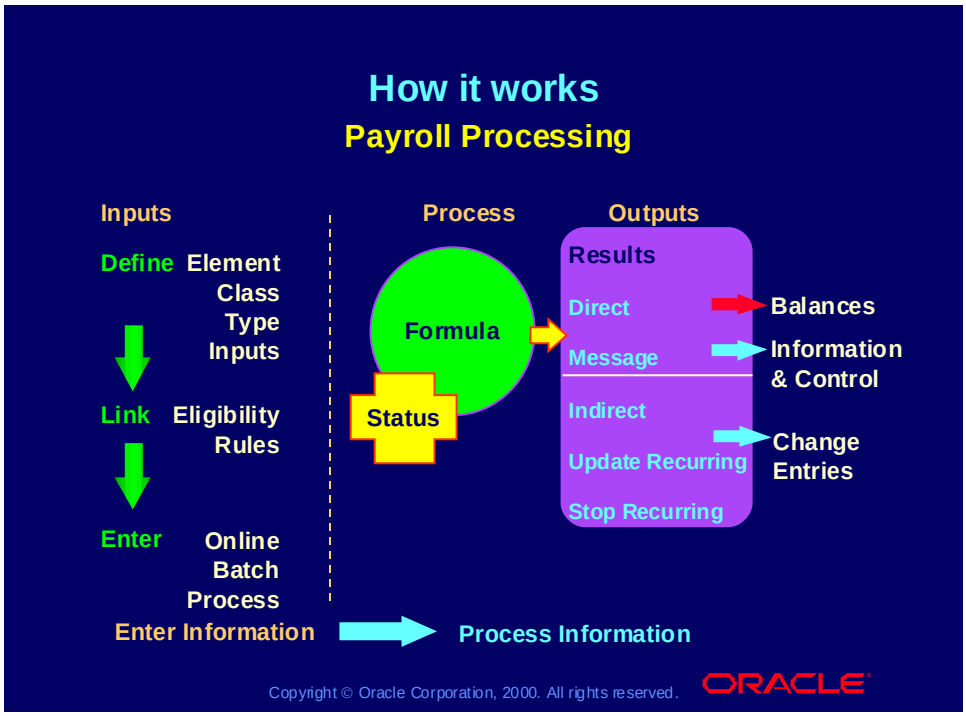

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Lesson Summary

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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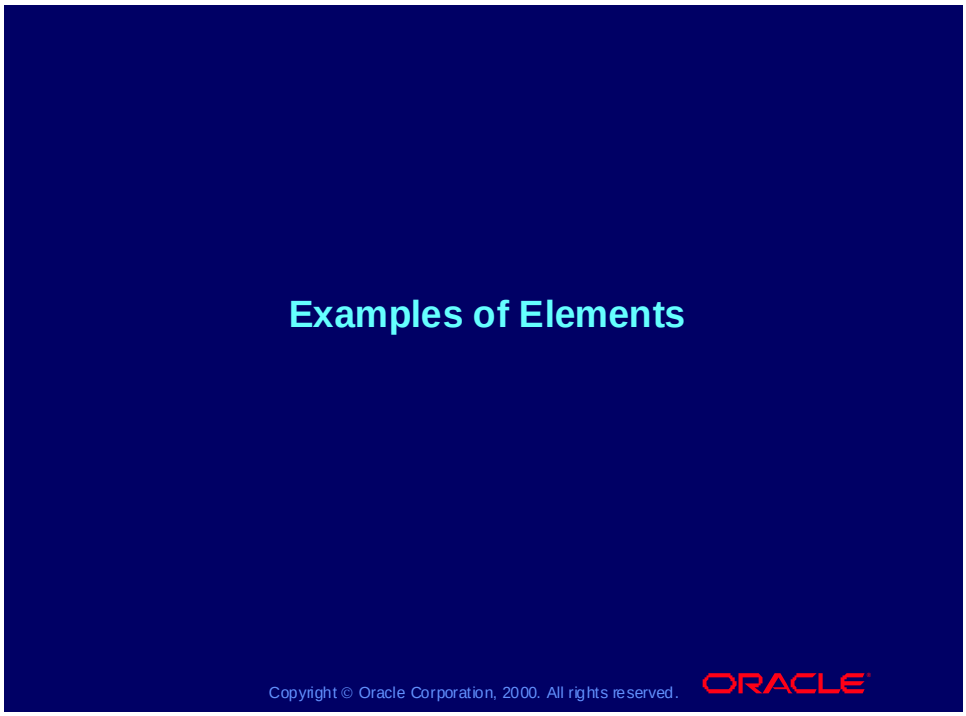

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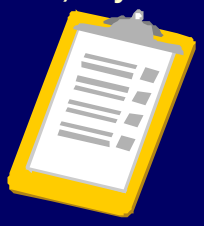
Objectives

- 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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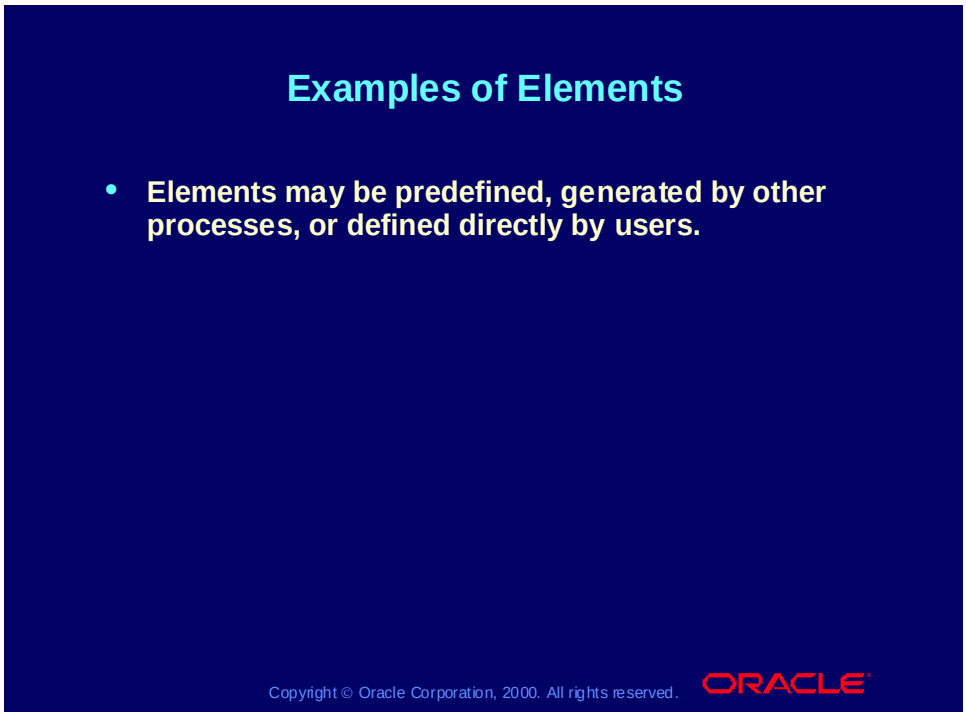

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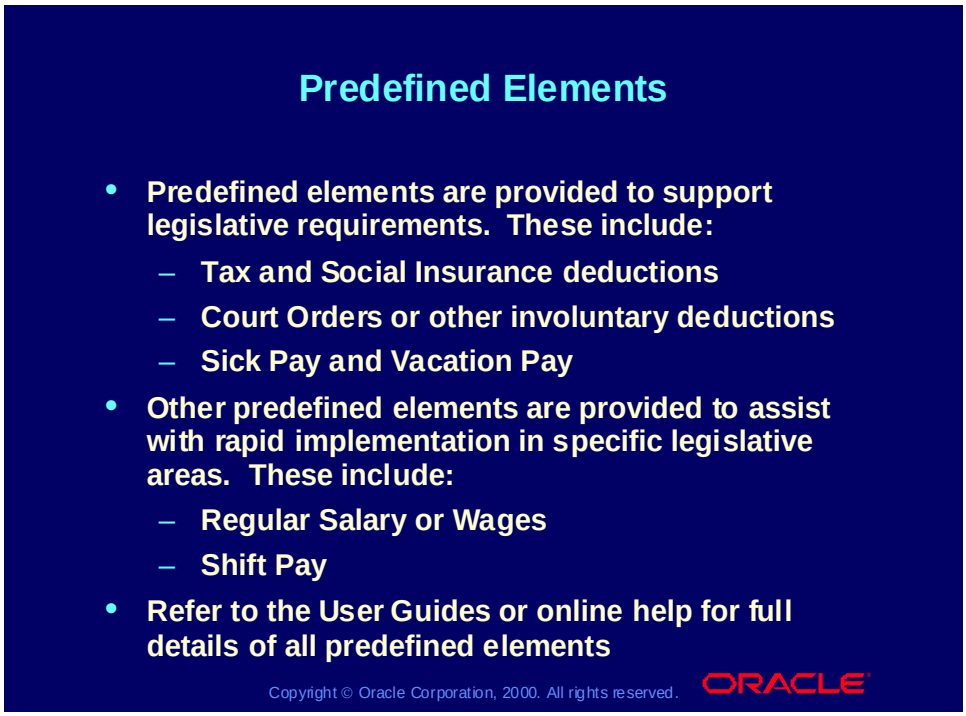

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Summary

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

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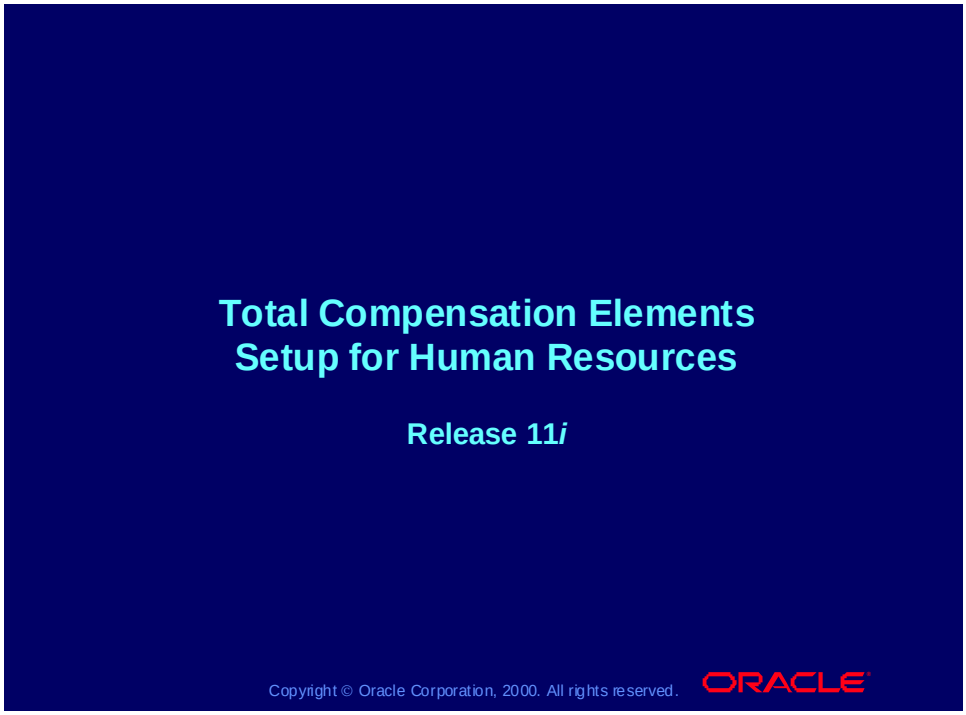

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Overview

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

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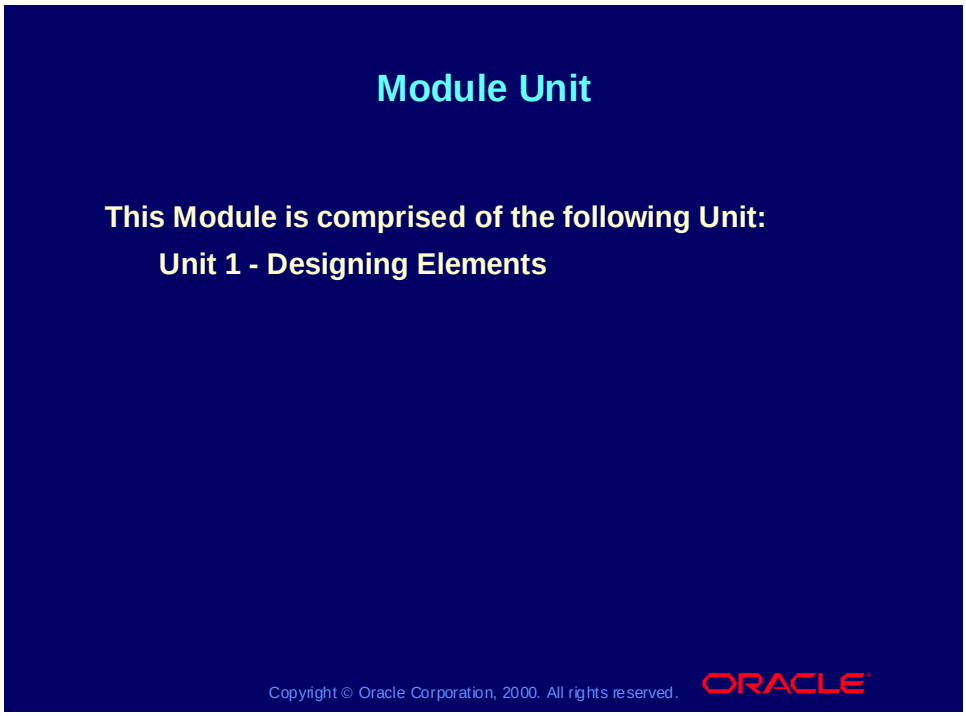

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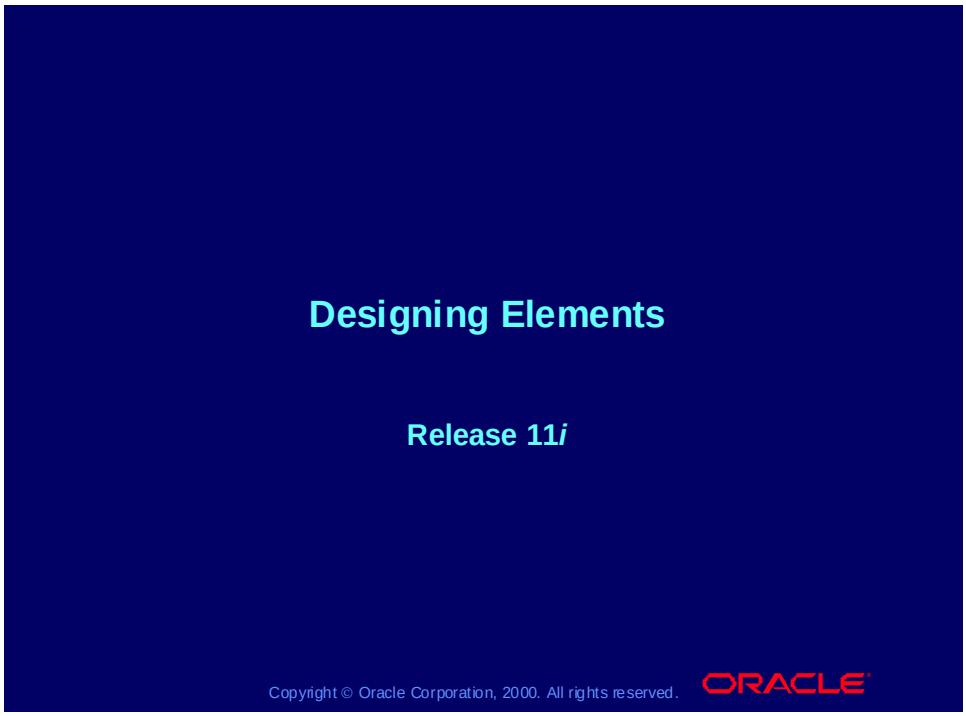

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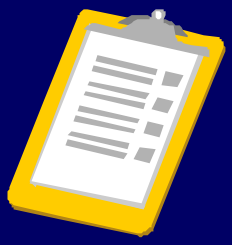
Objectives

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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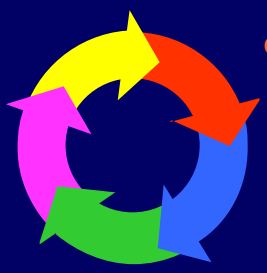
Designing Elements



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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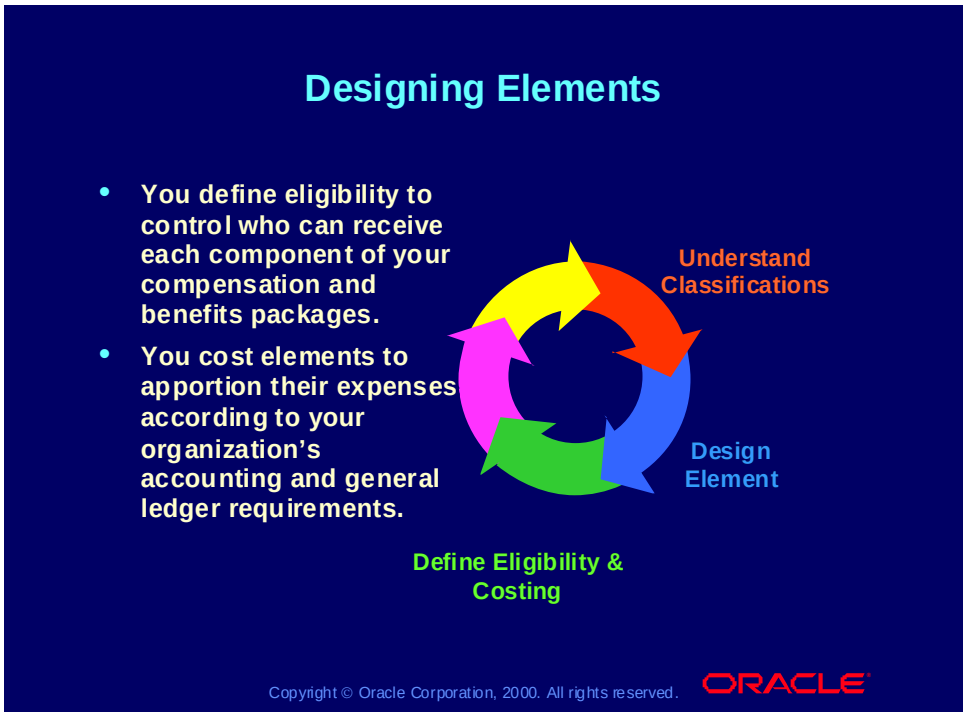

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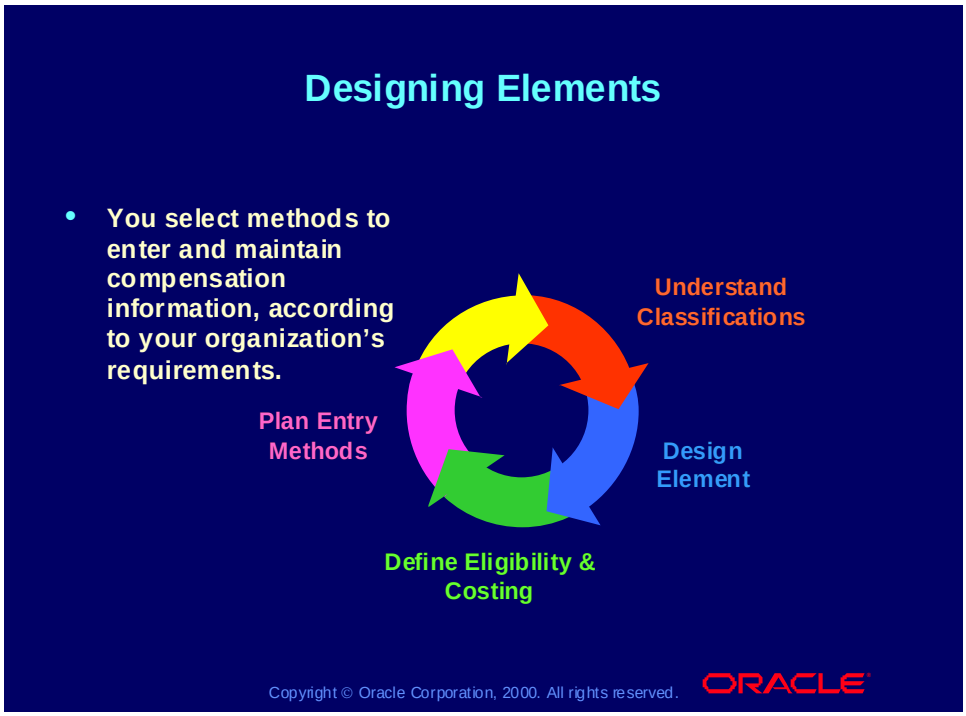

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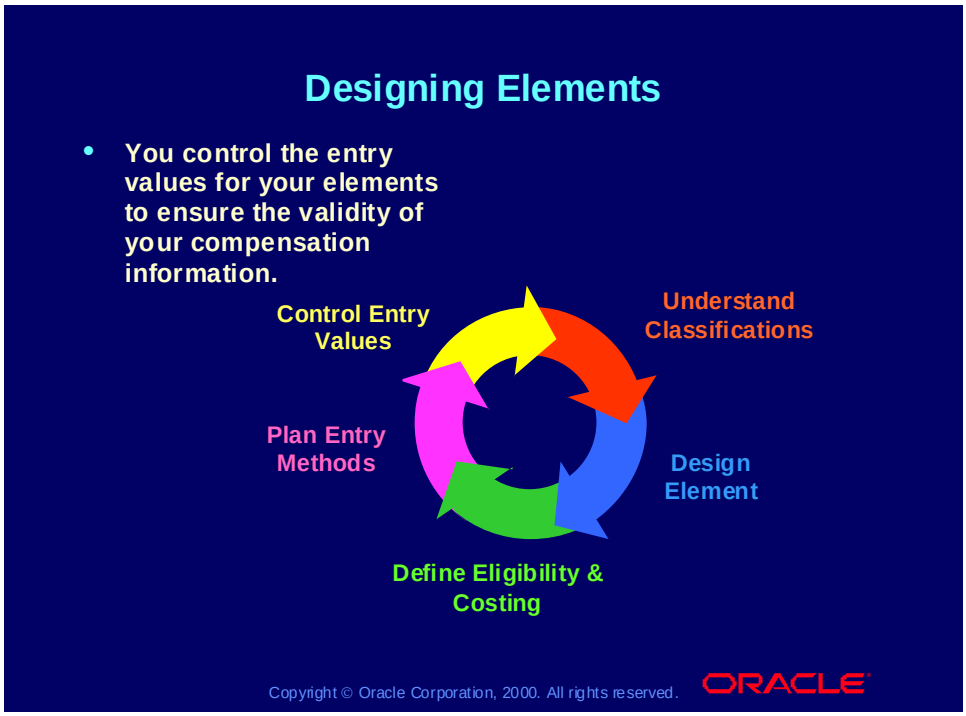

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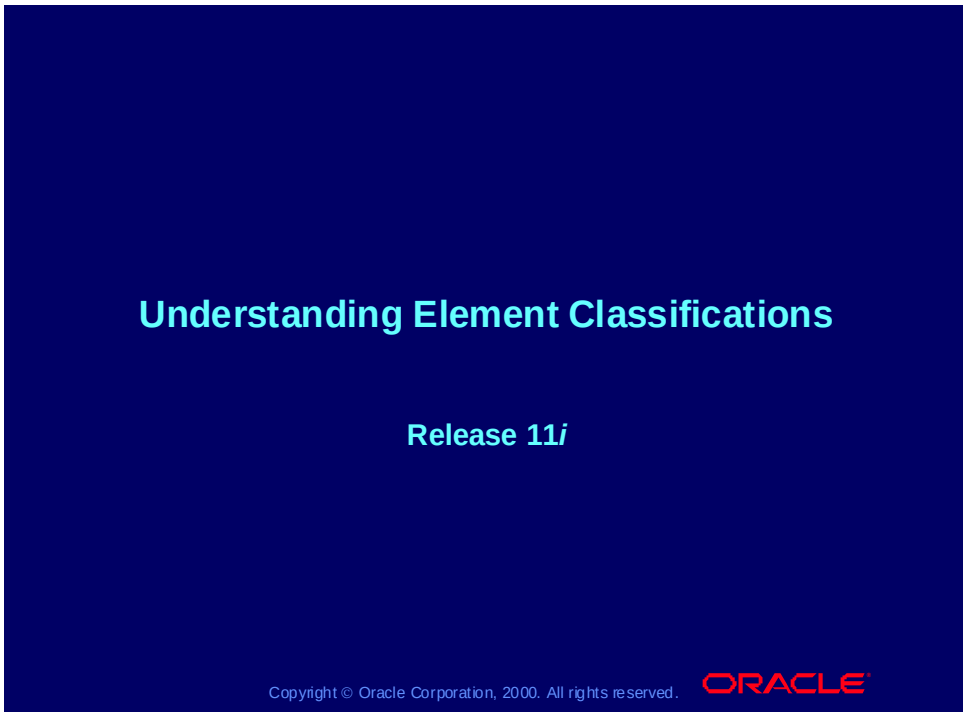

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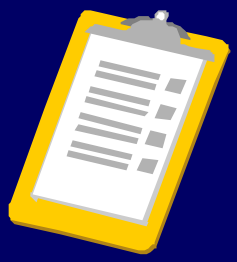
Objectives

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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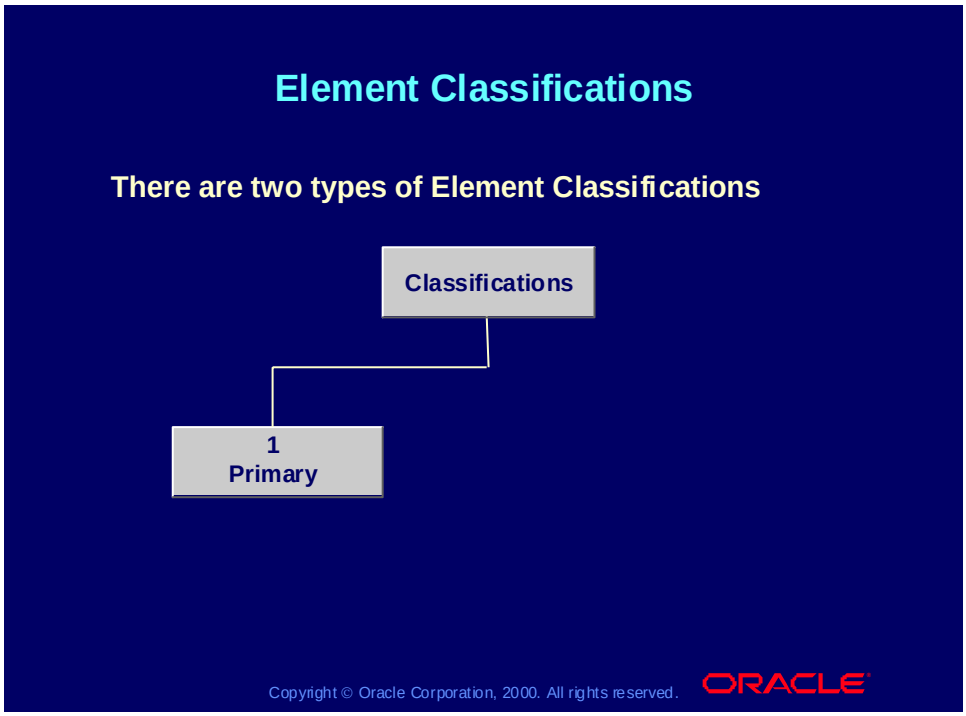
Element Classifications



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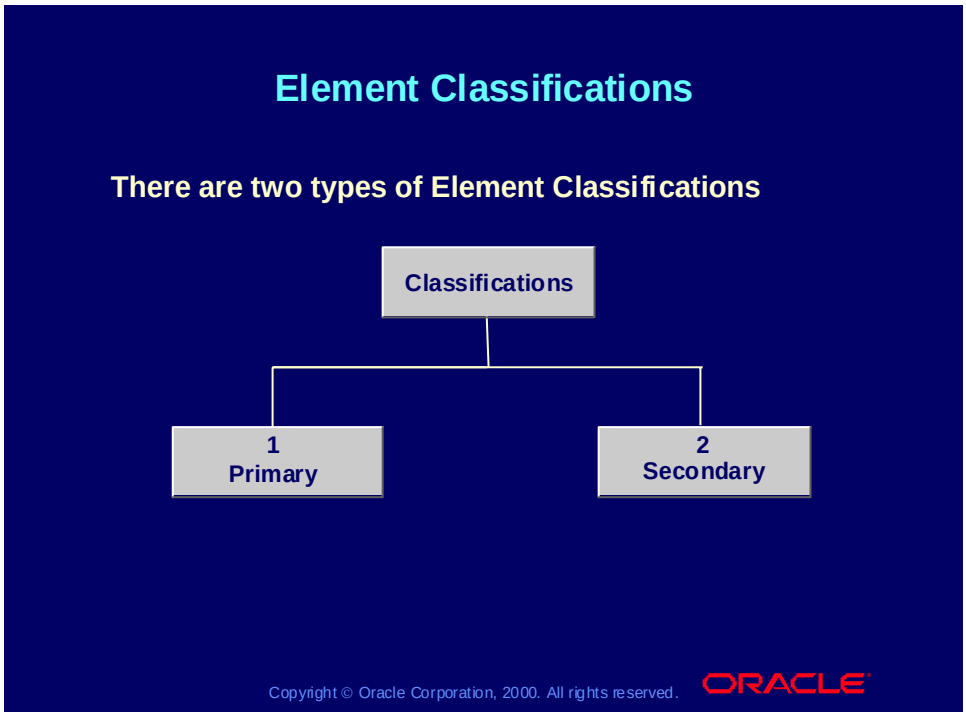
Element Classifications



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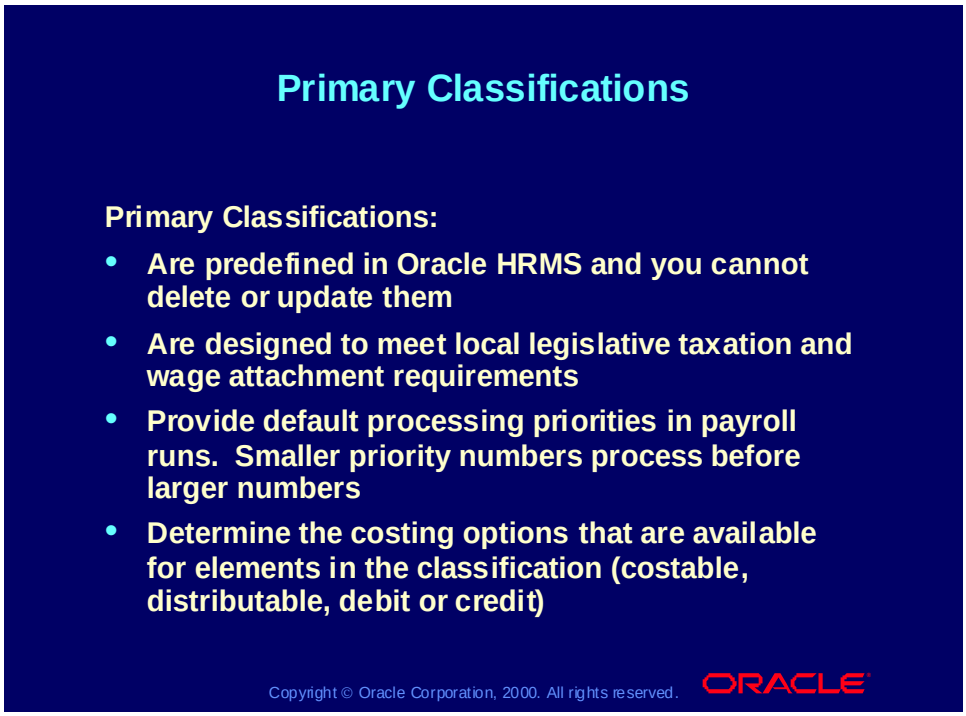

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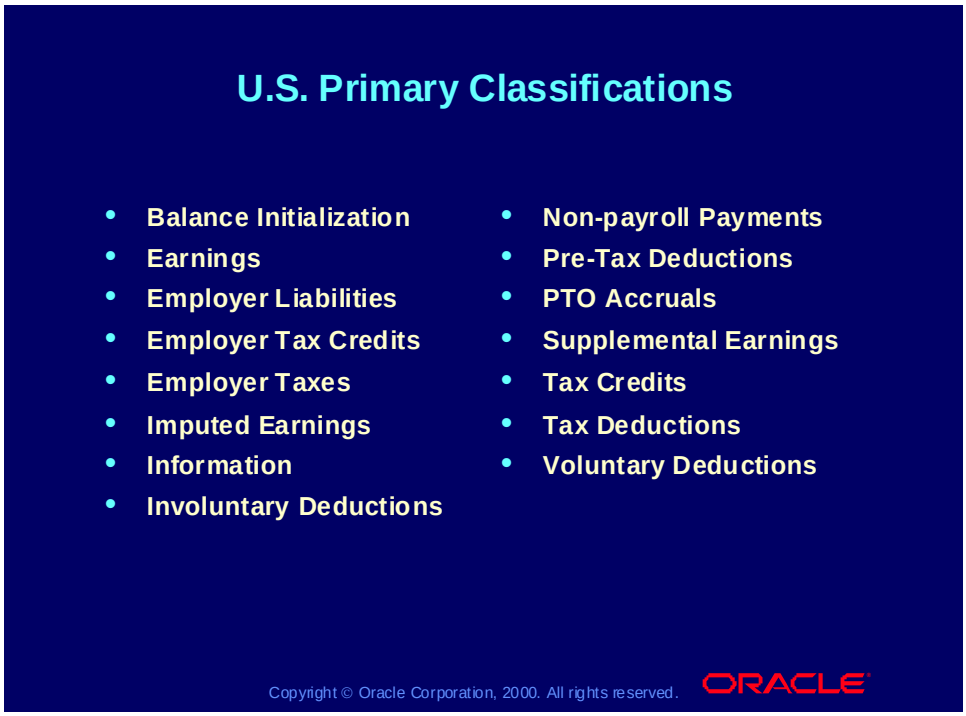
U.S. Primary Classifications



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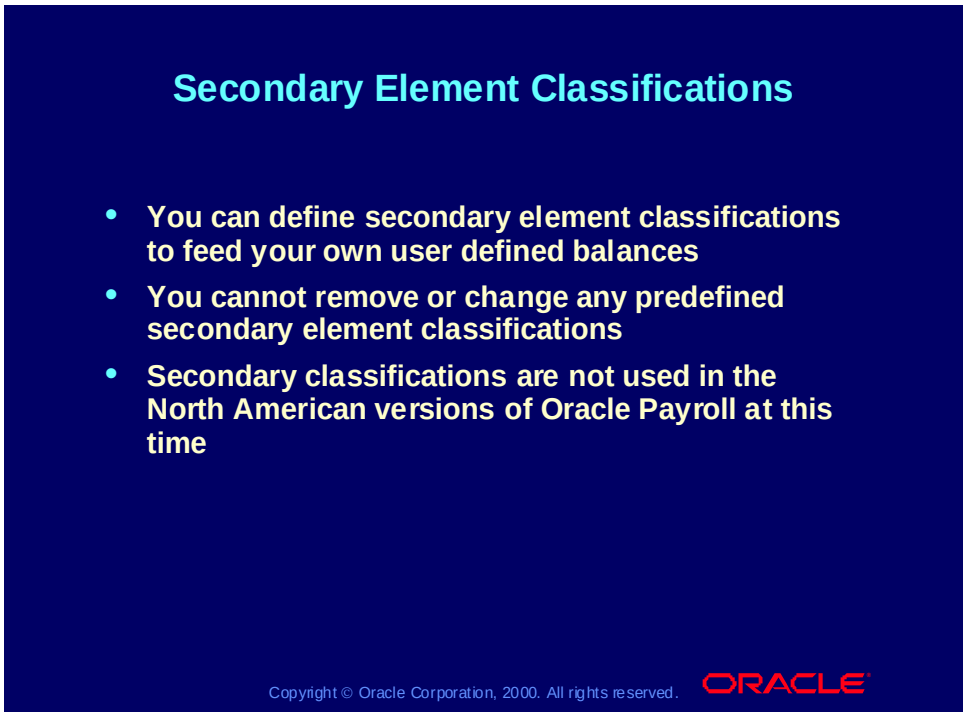

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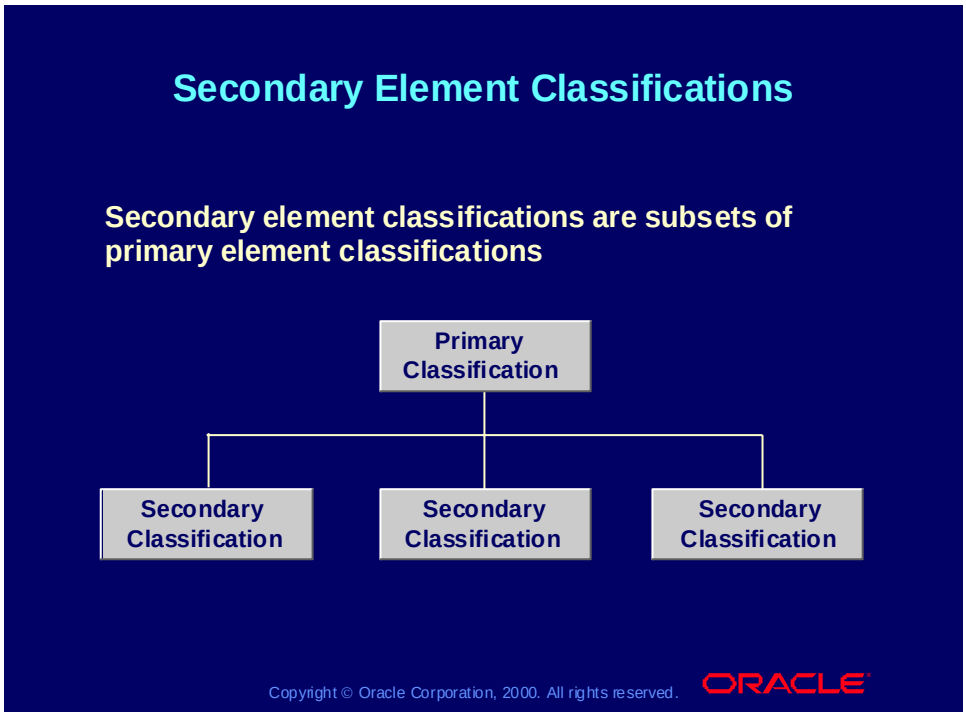

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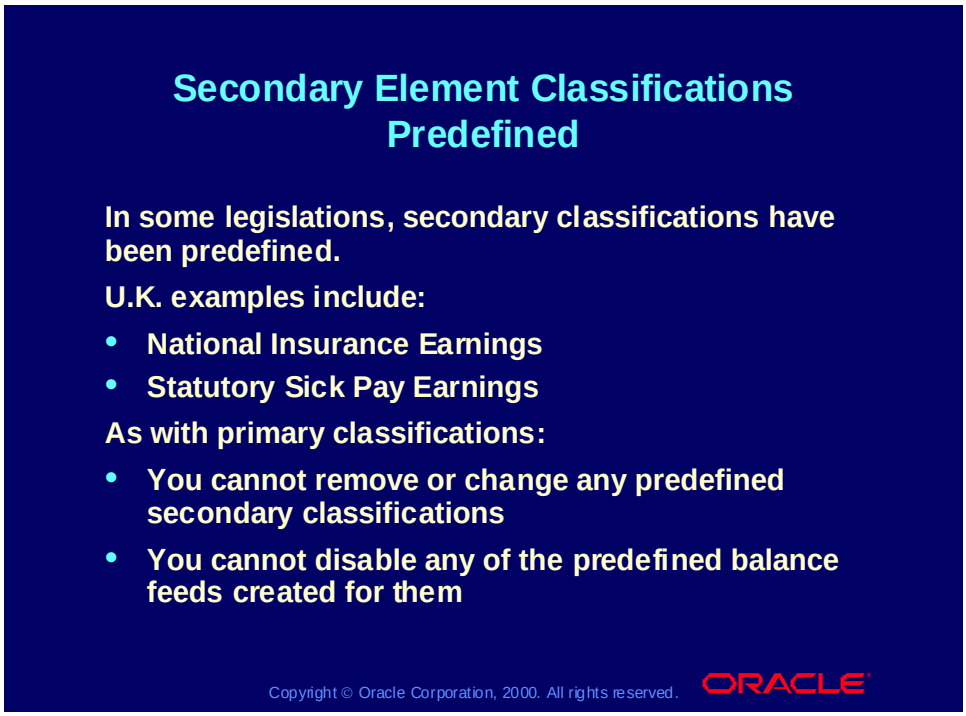

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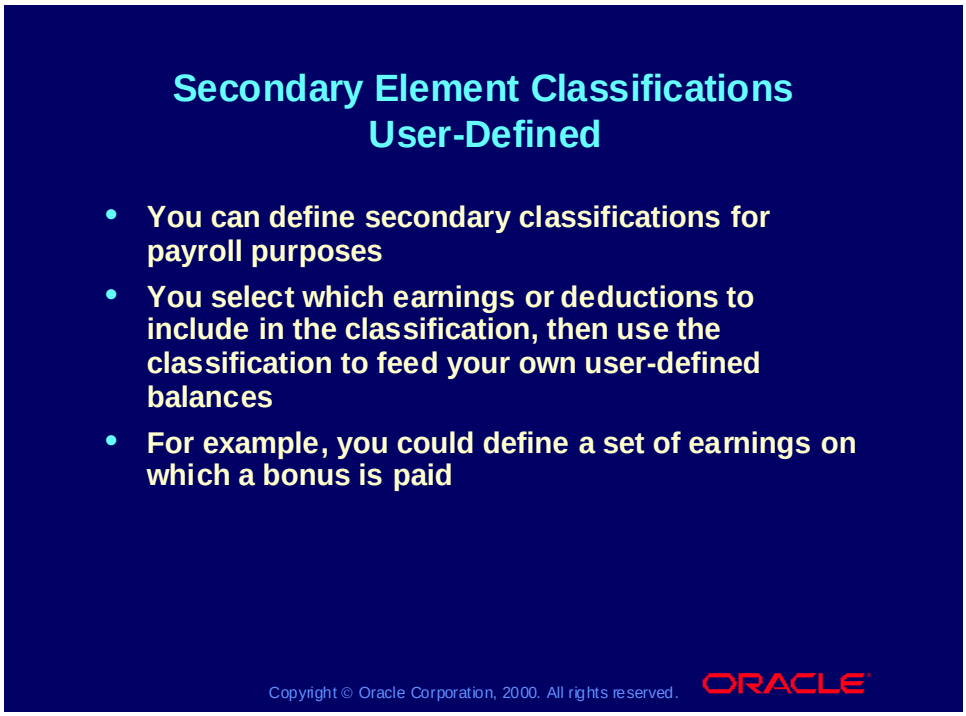

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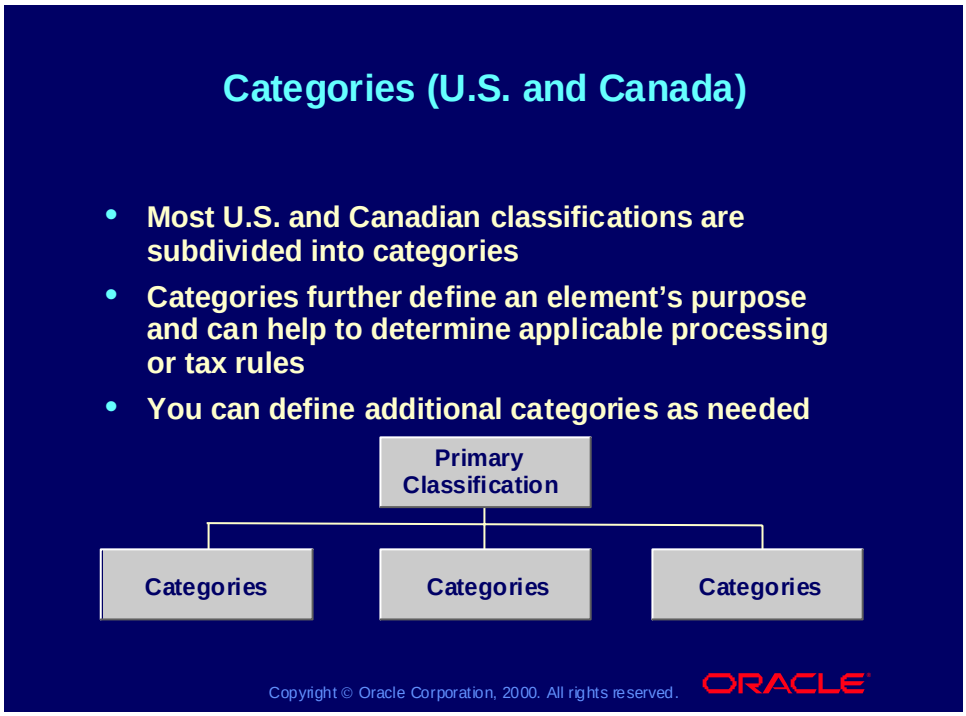

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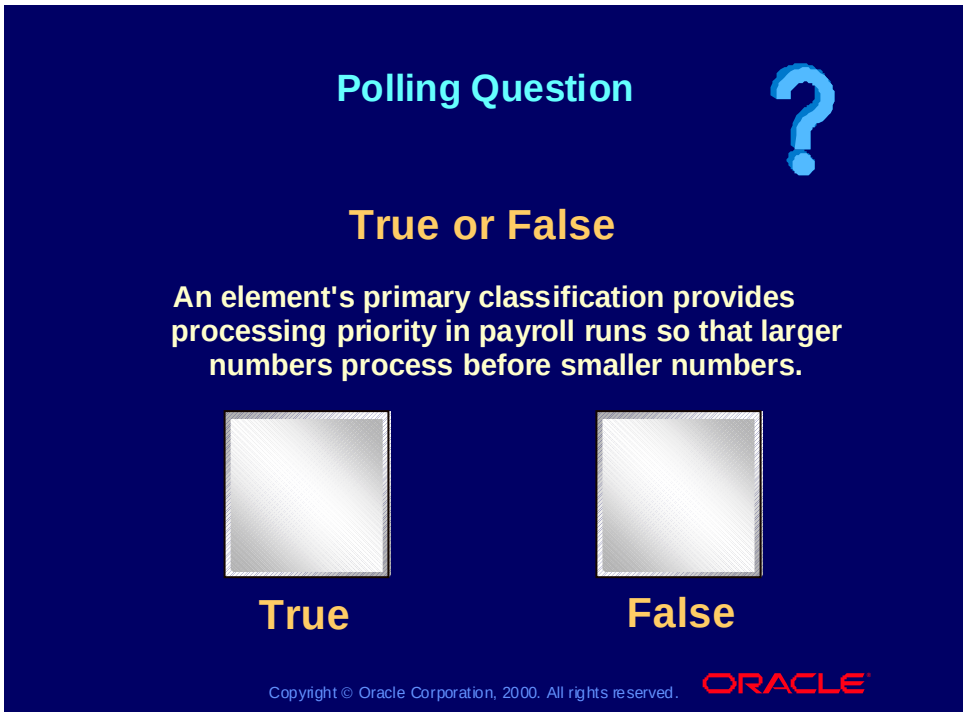
Polling Question



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Answer

True or False

Smaller priority numbers process before larger numbers.

False

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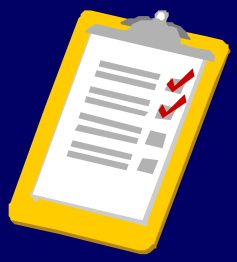
Summary

In this lesson, you should have learned how to:

- Understand the role of element classifications



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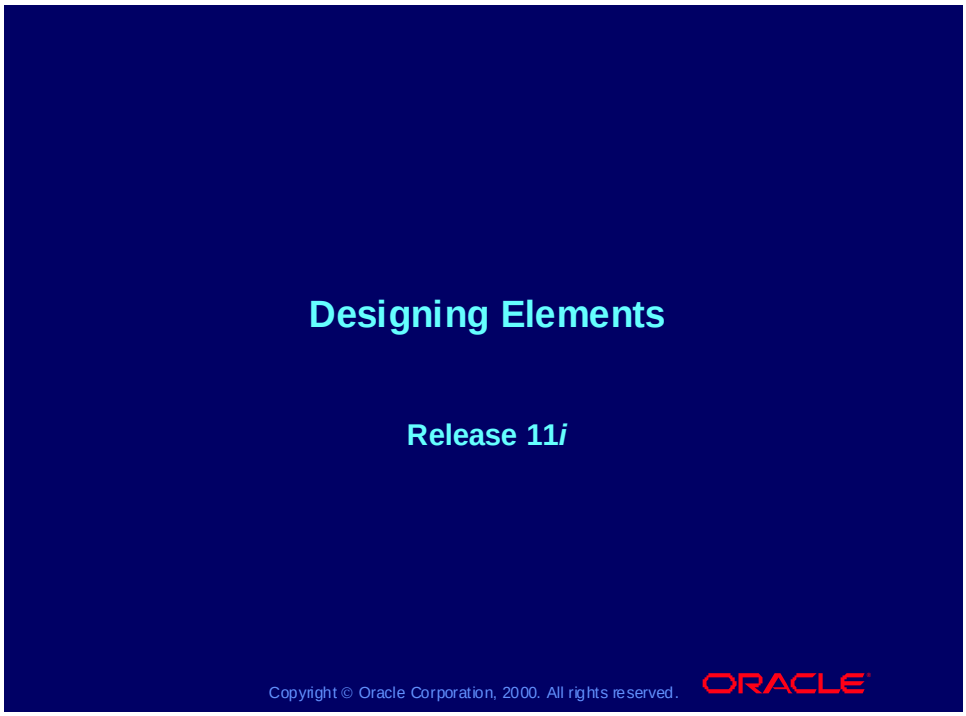

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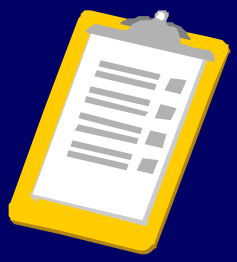
Objective

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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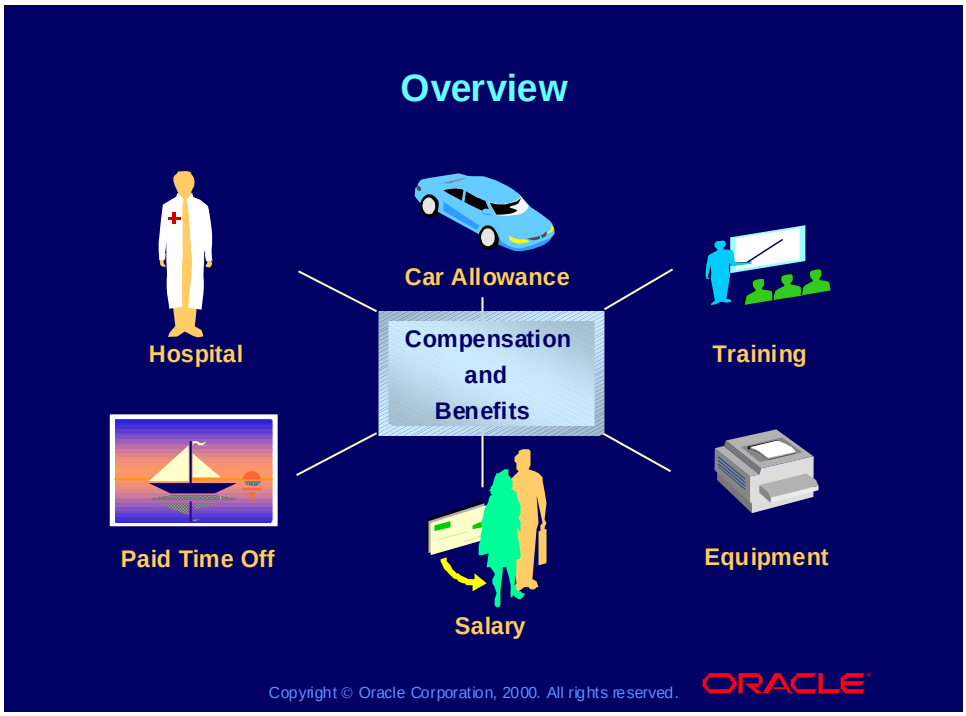
Overview



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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

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

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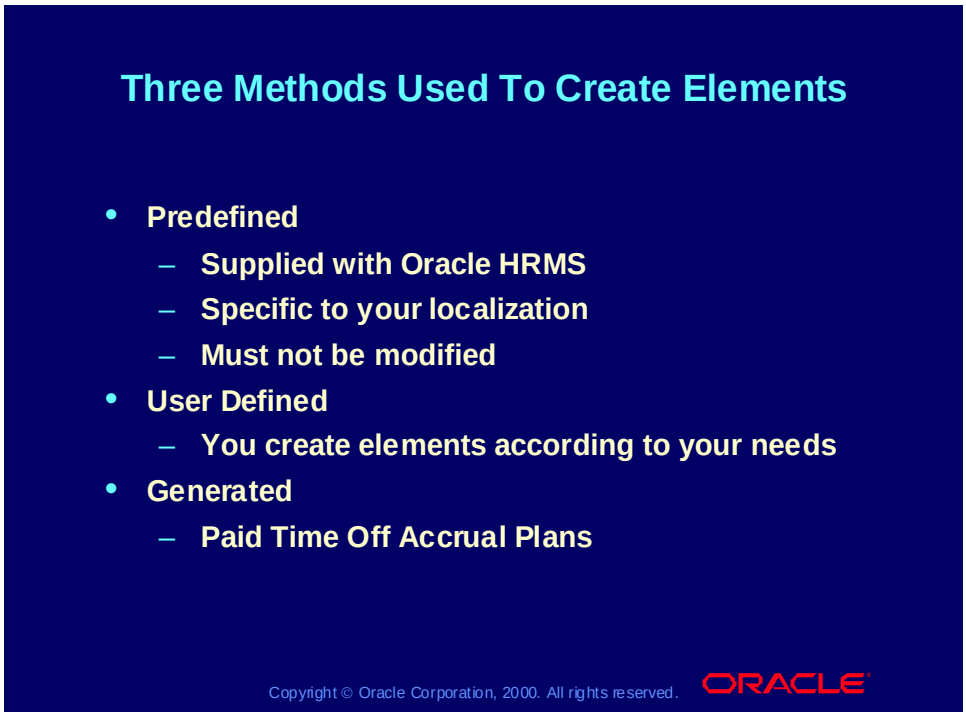

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Predefined Elements Delivered with HR

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

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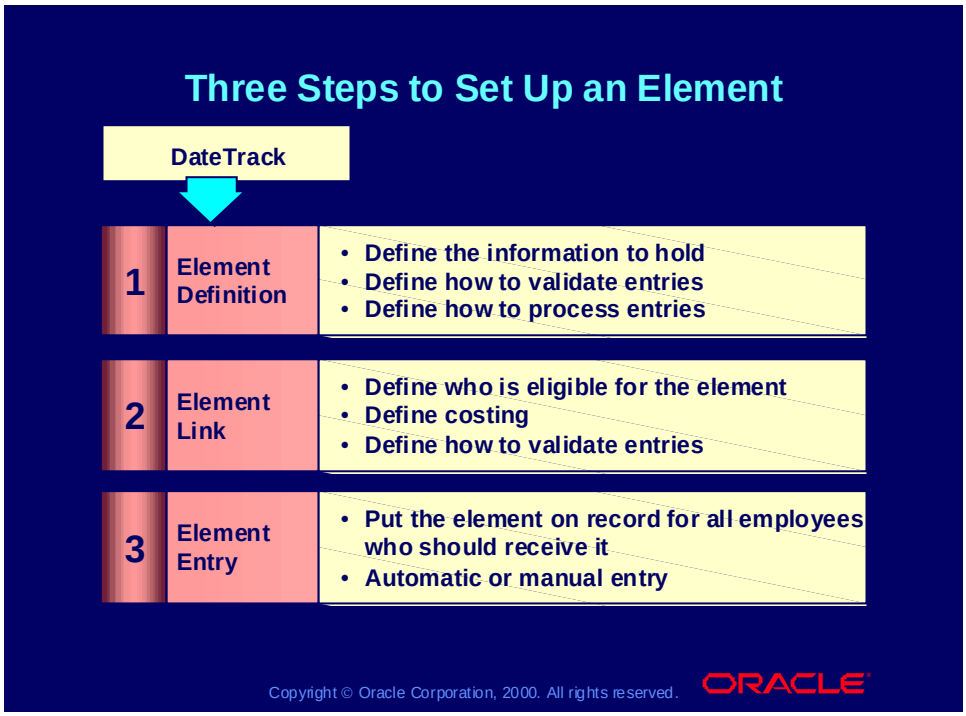
Three Steps to Set Up an Element



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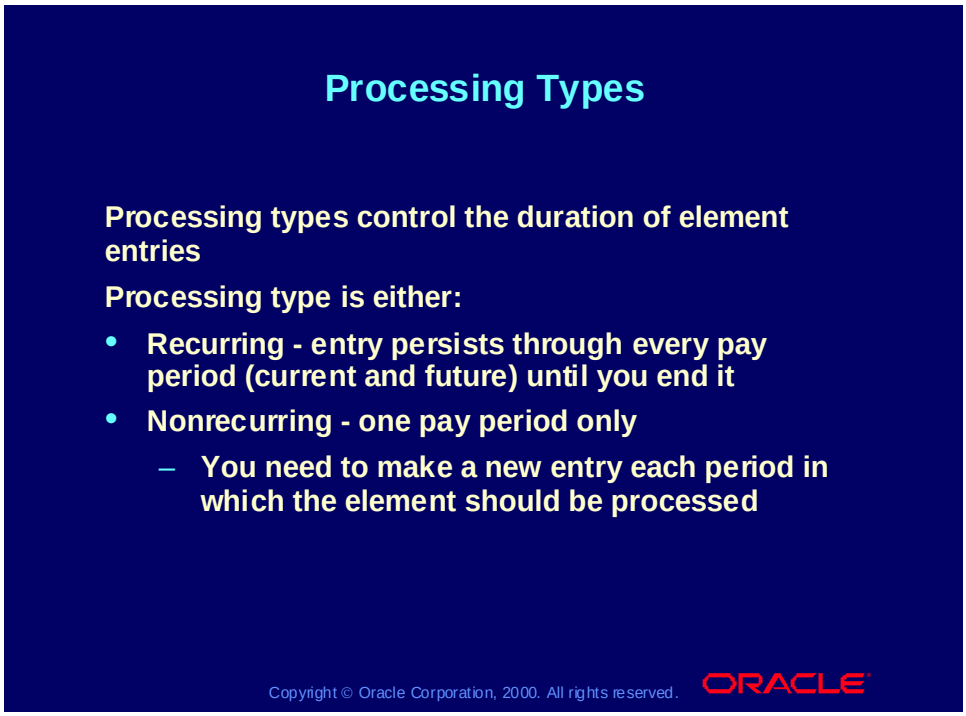

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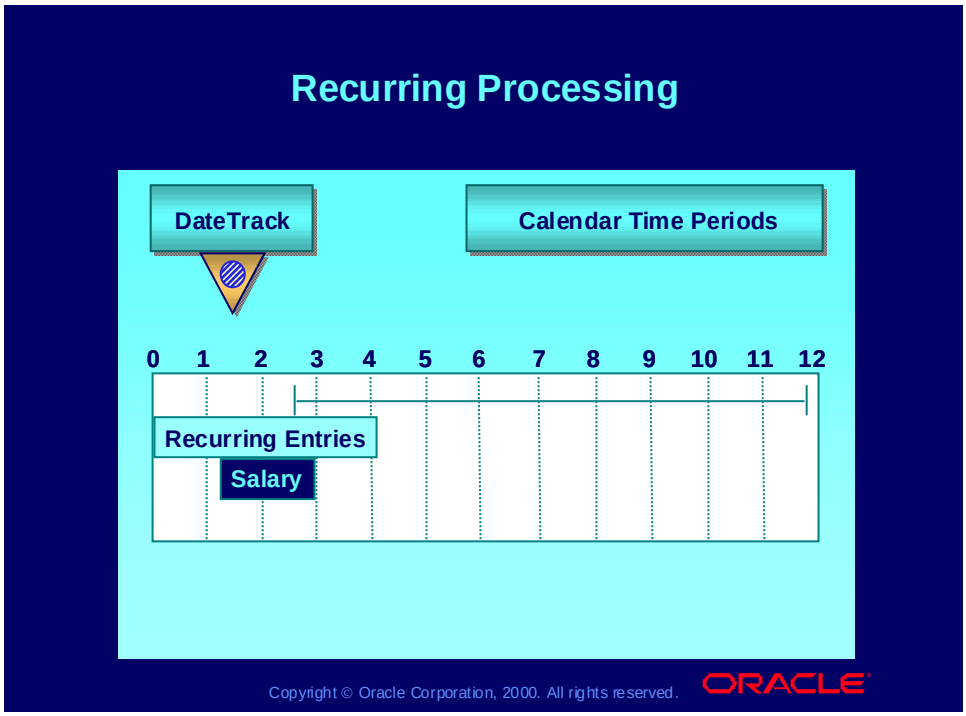

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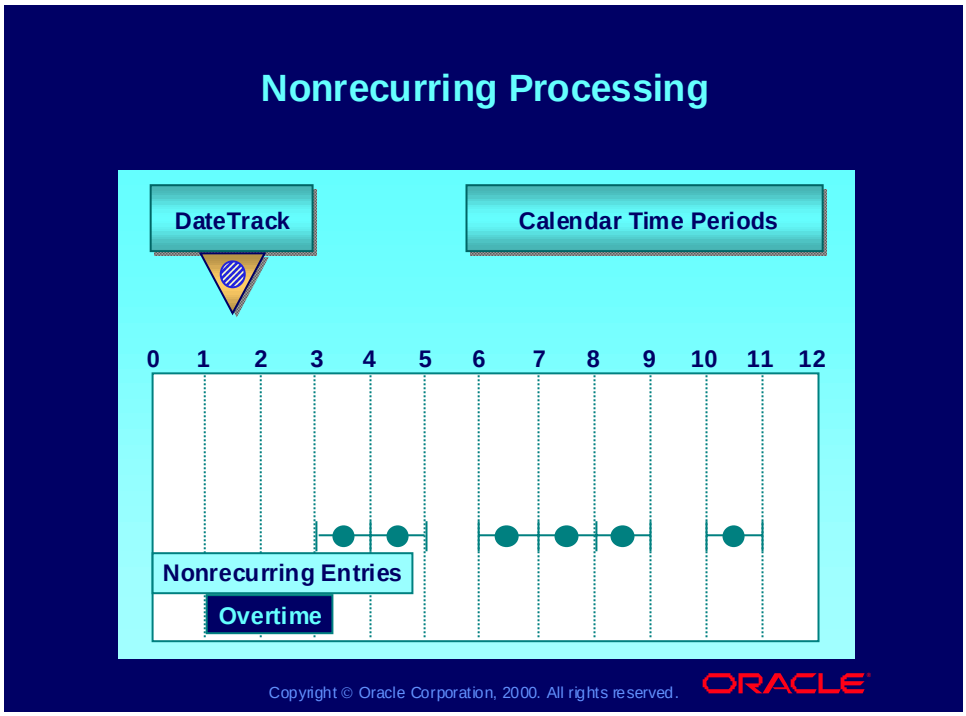
Nonrecurring Processing



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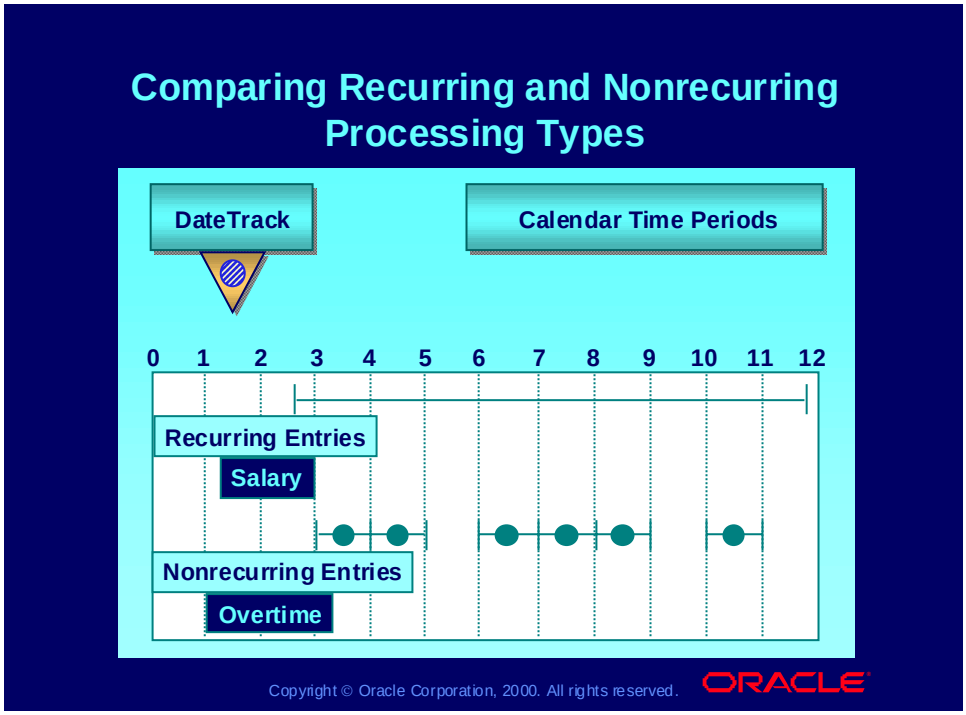
Comparing Recurring and Nonrecurring Processing Types



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Processing Options

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

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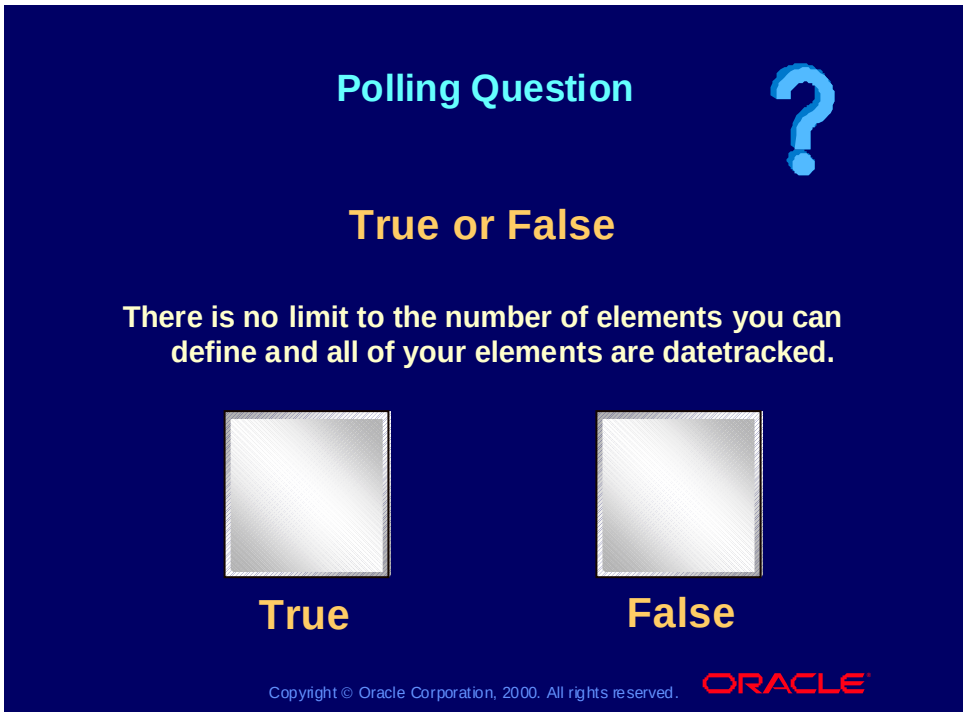
Polling Question



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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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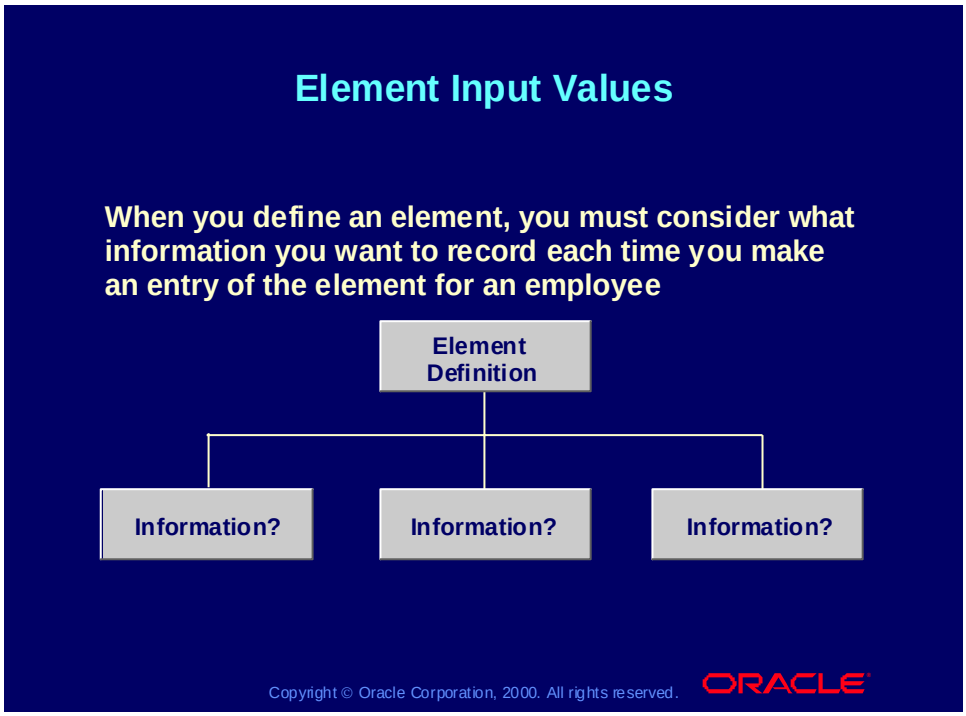

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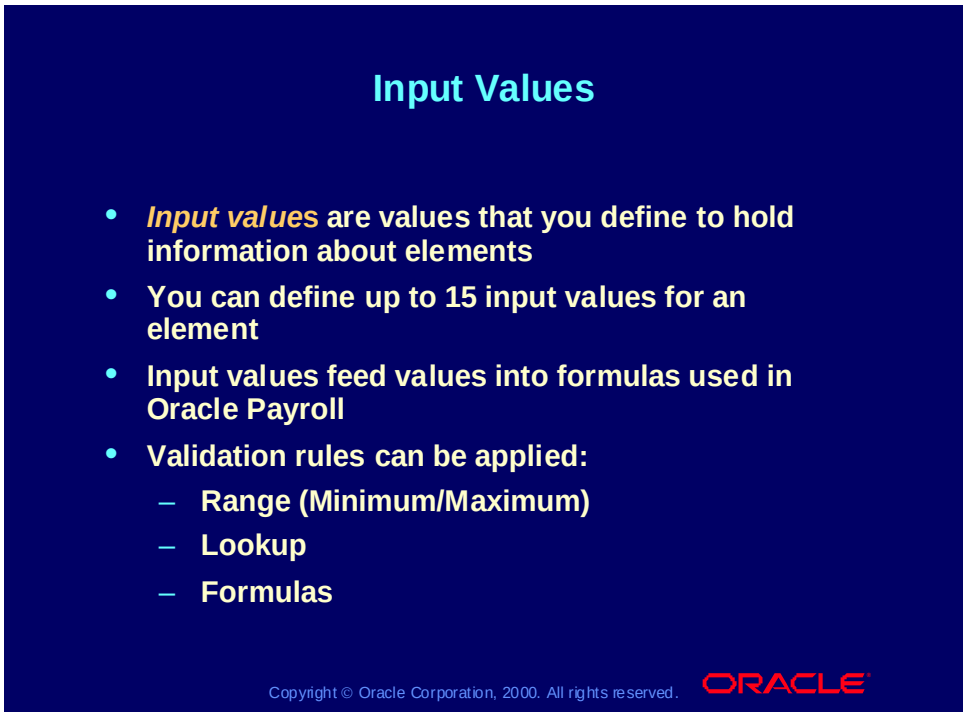

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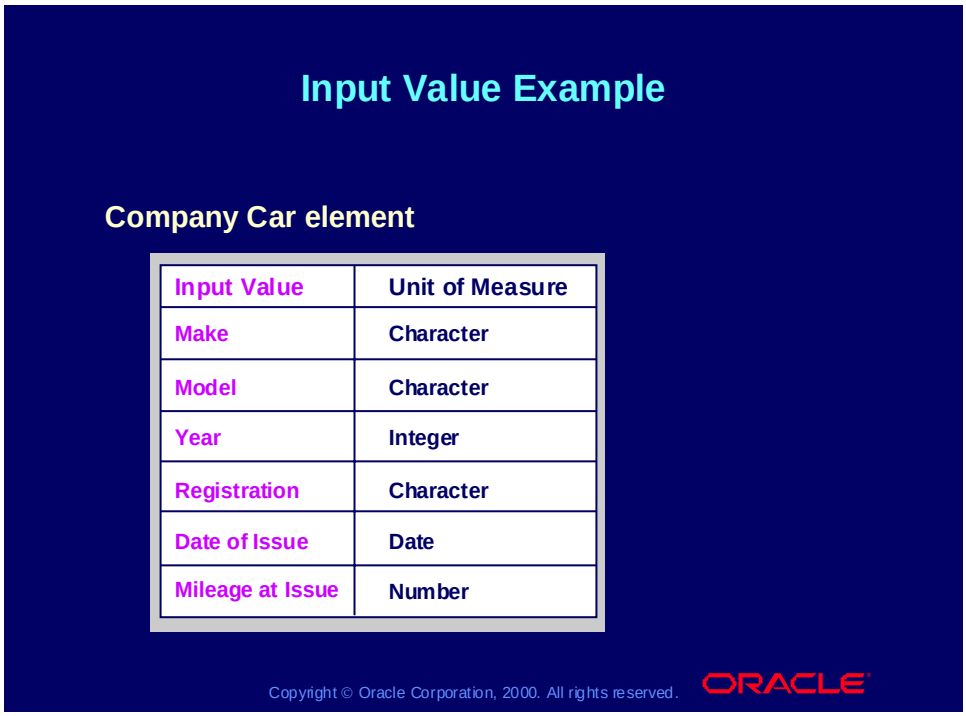
Input Value Example



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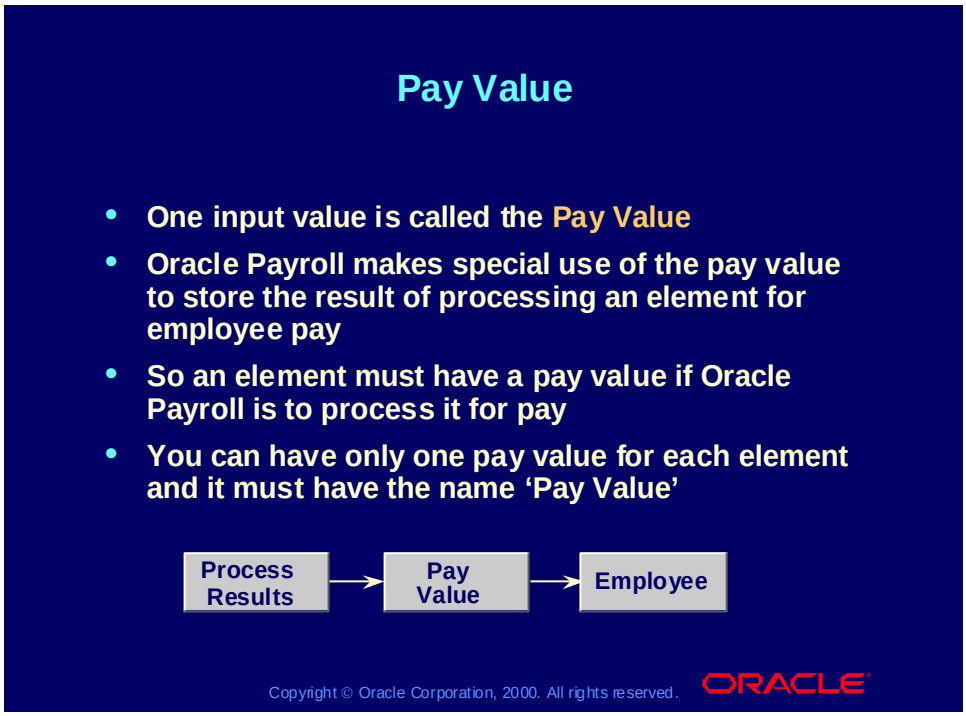
Pay Value



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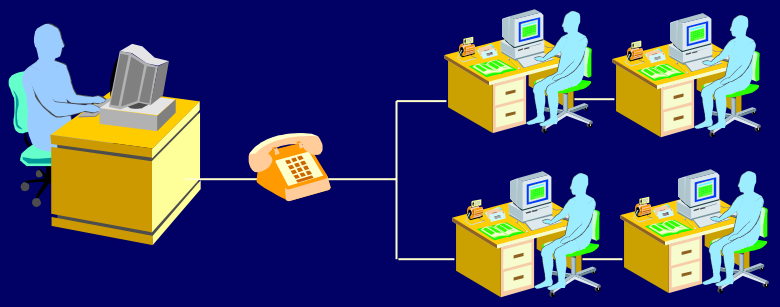
Instructor Demonstration 2-a

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

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

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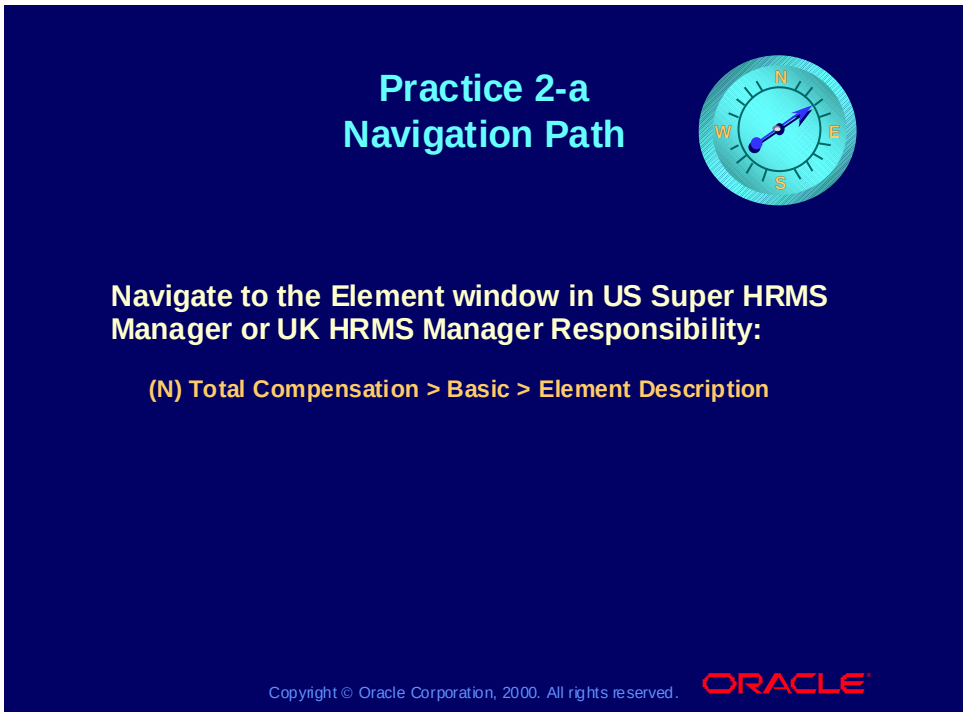
Practice 2-a Navigation Path



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

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Summary

In this lesson, you should have learned how to:

- Define an element

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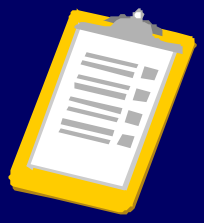
Objectives

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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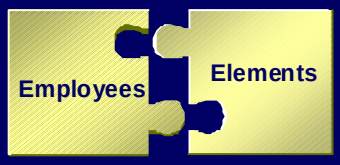
Links

- 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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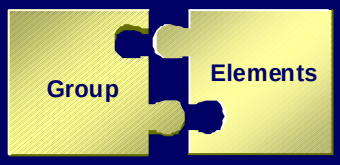
Links

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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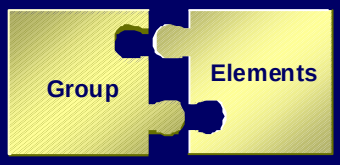
Links

- 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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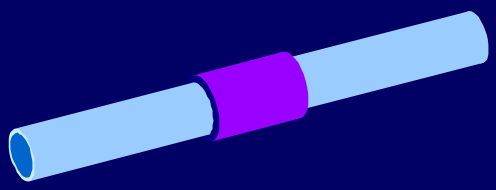
Elements as Conduits in Oracle Standard and Advanced Benefits

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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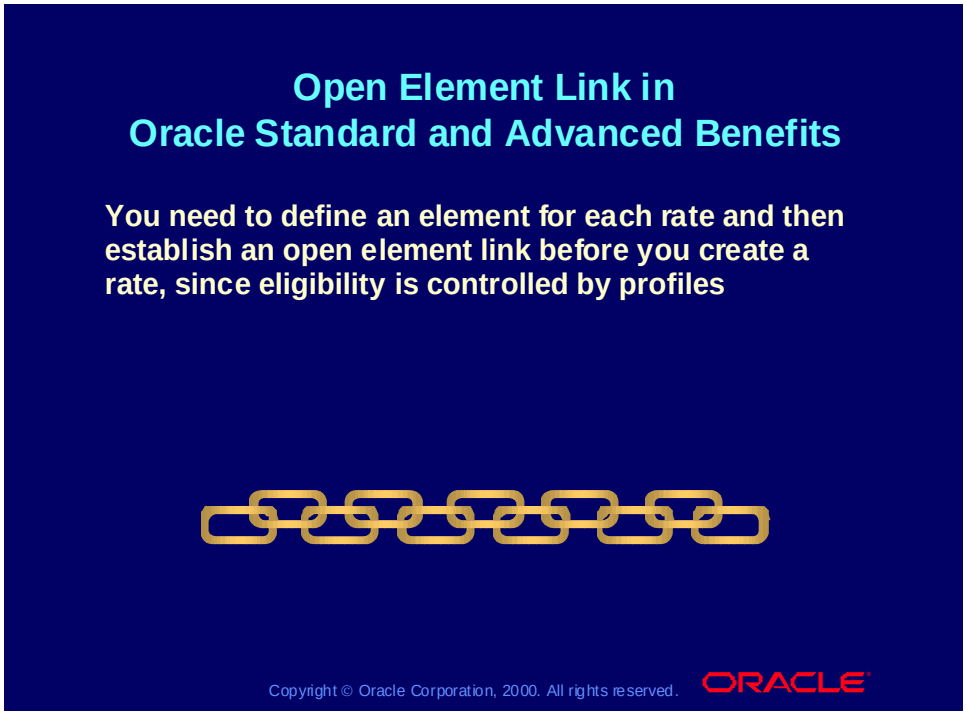
Open Element Link in Oracle Standard and Advanced Benefits



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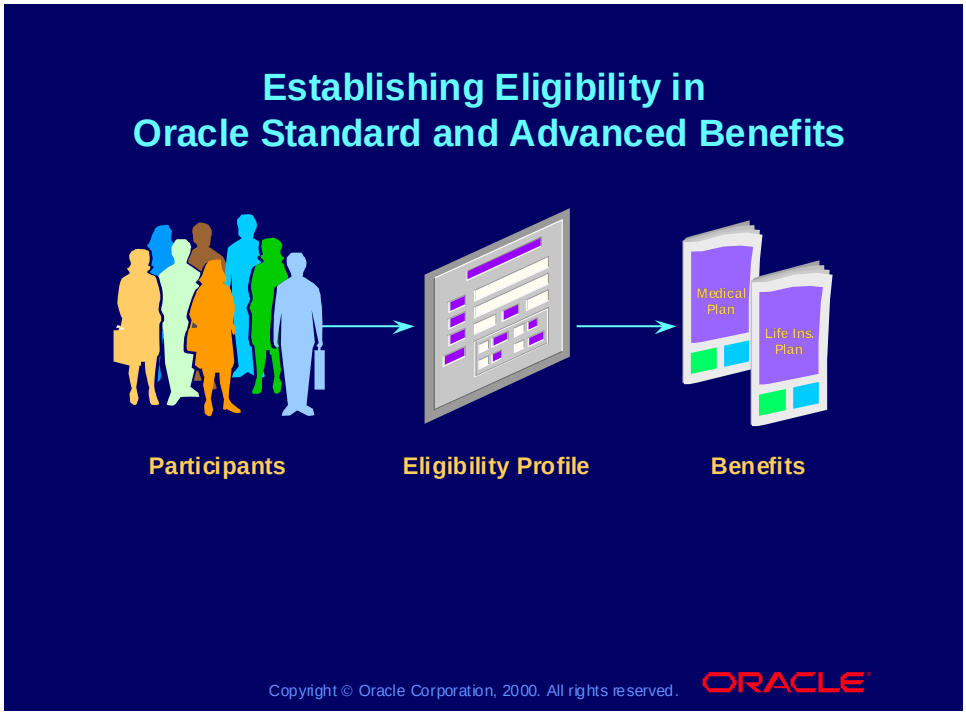
Establishing Eligibility in Oracle Standard and Advanced Benefits



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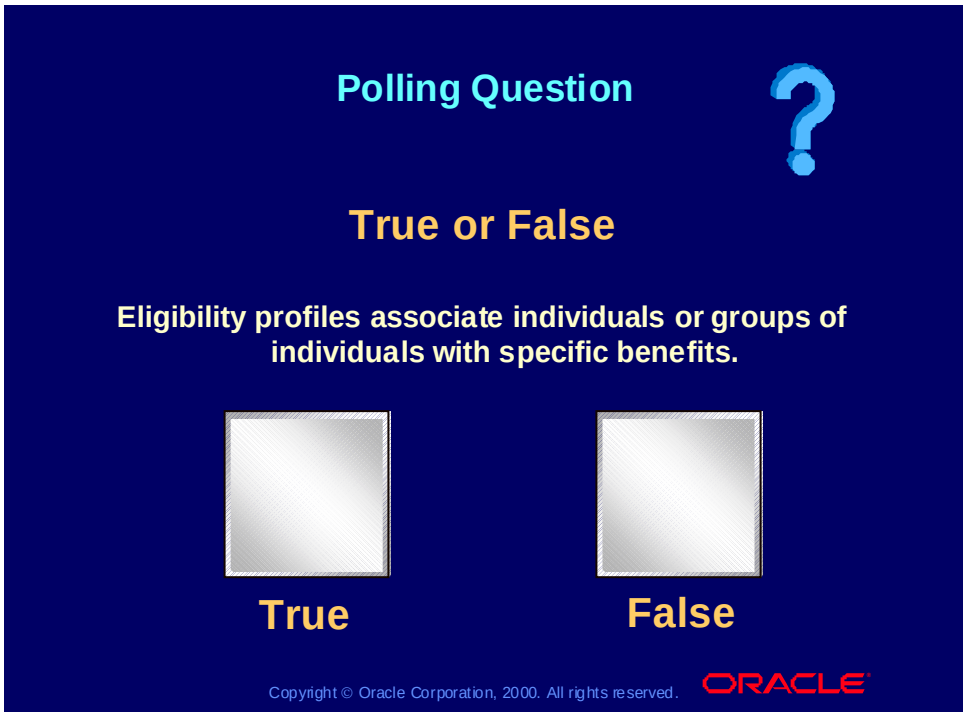
Polling Question



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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

- 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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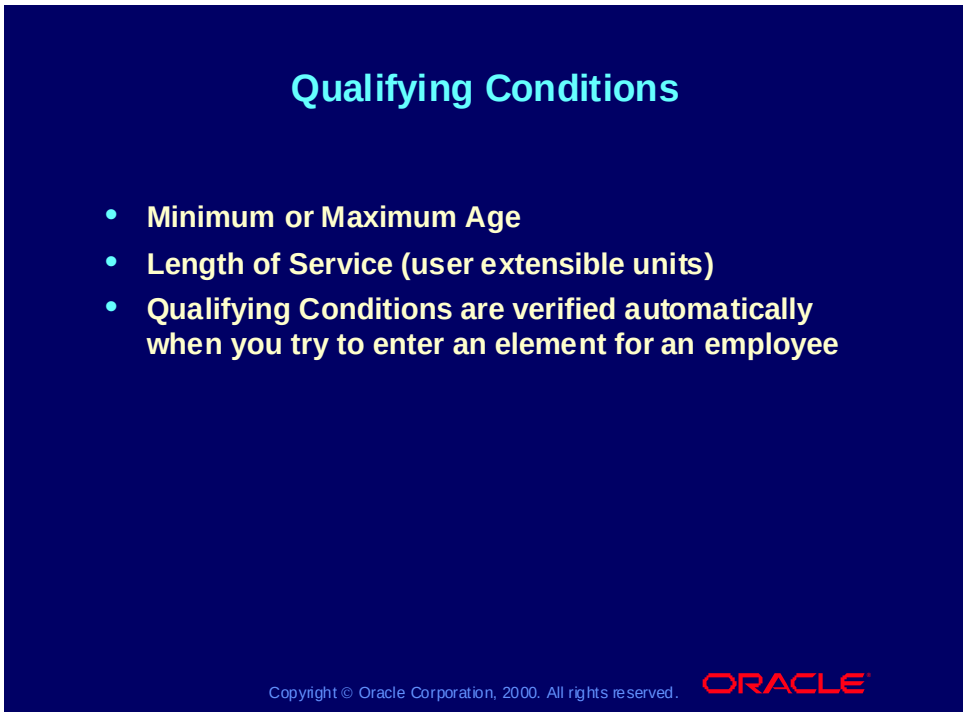

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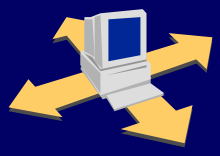
Costing

- 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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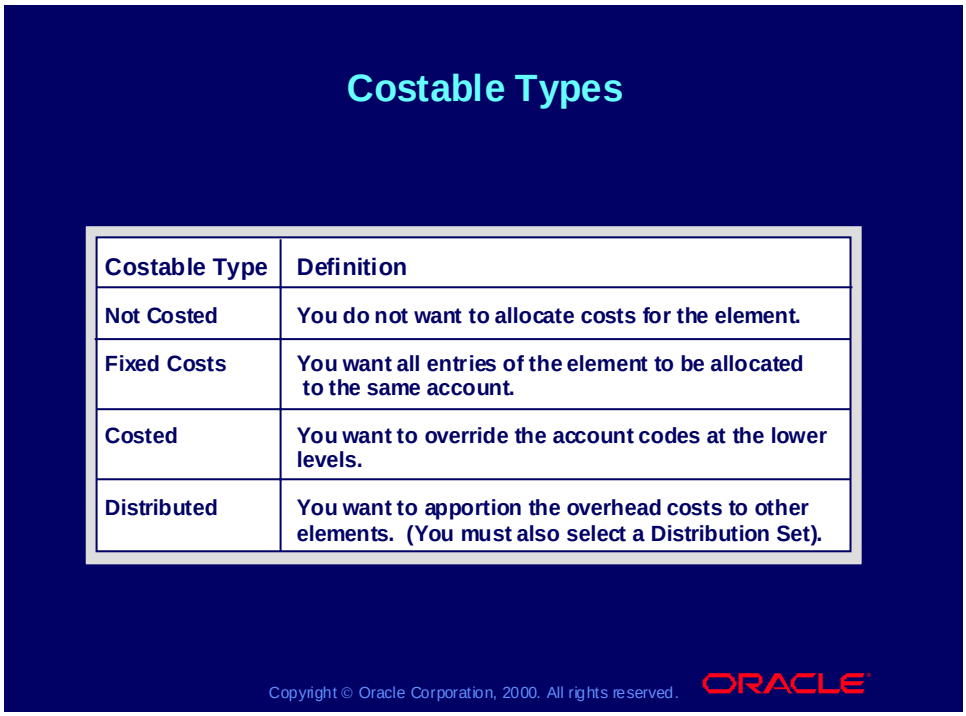
Costable Types



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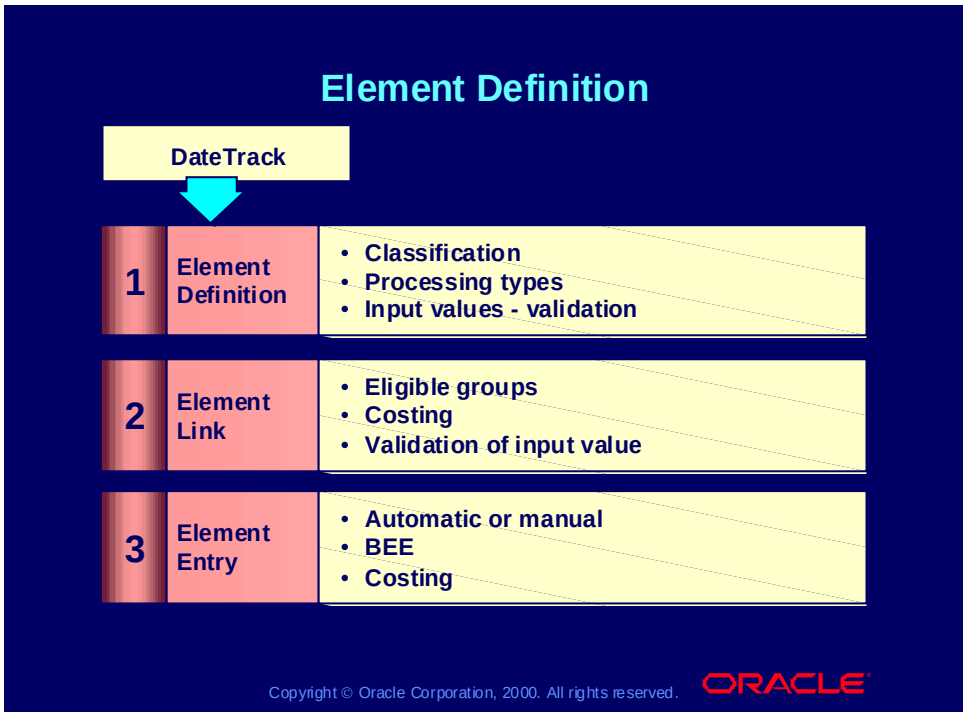
Element Definition



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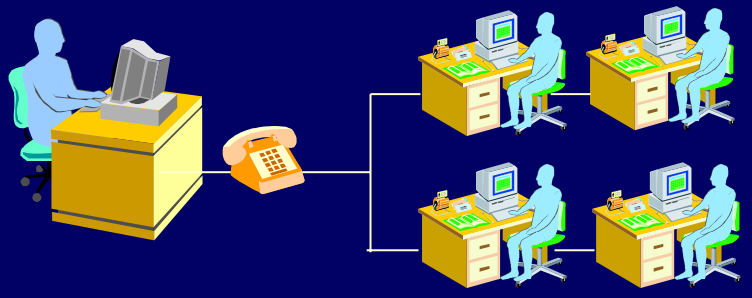
Instructor Demonstration 3-a

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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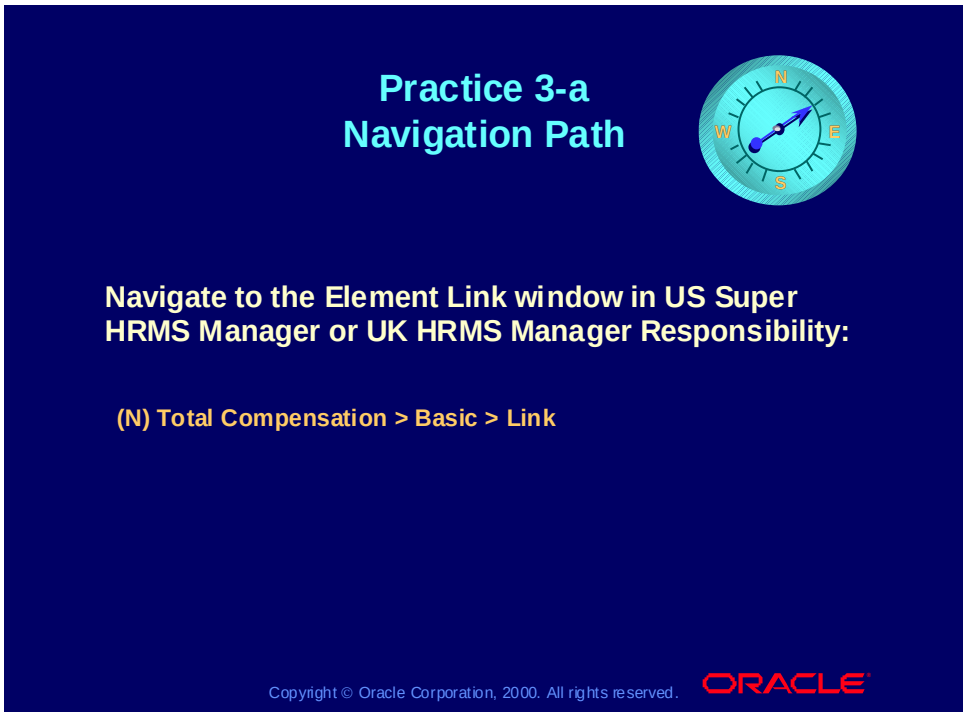
Practice 3-a Navigation Path



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

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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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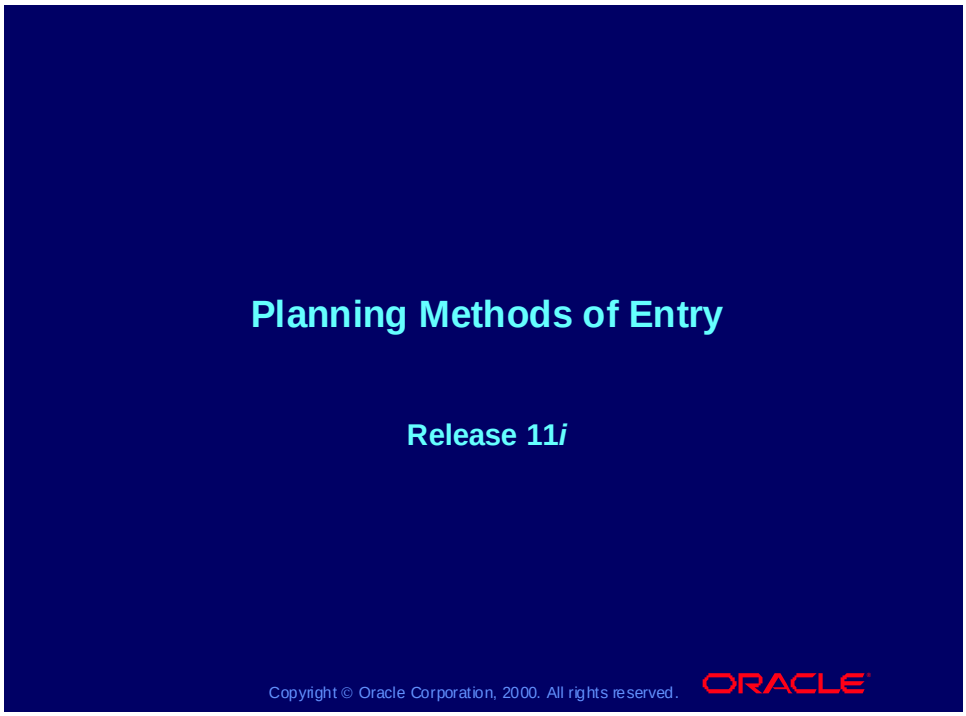

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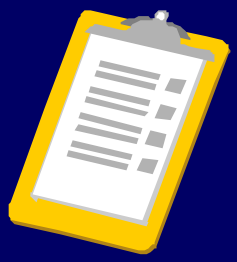
Objective

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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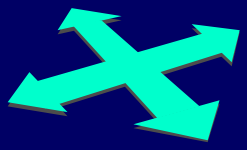
Element Entry Method Types

Element Entry Method Types

- Automatic
- Batch
- Manual
- Indirect



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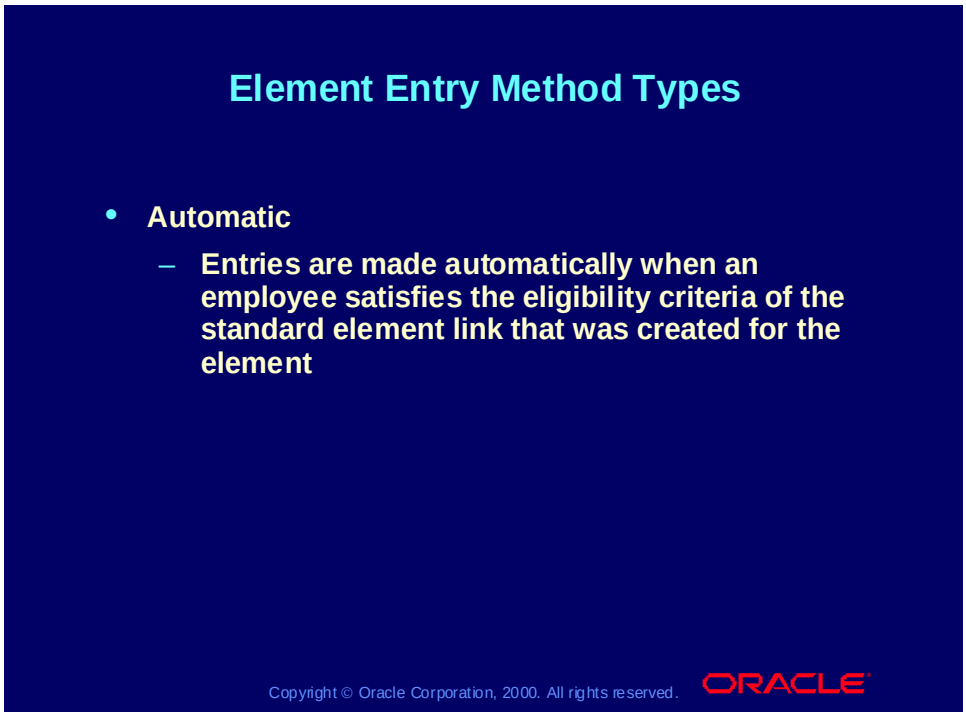

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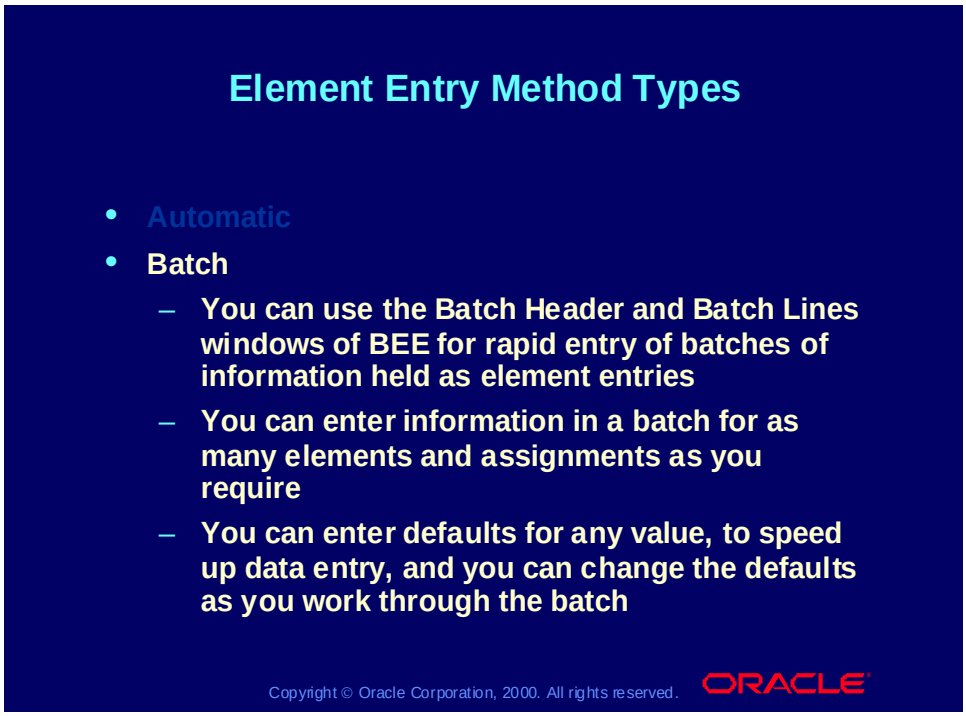

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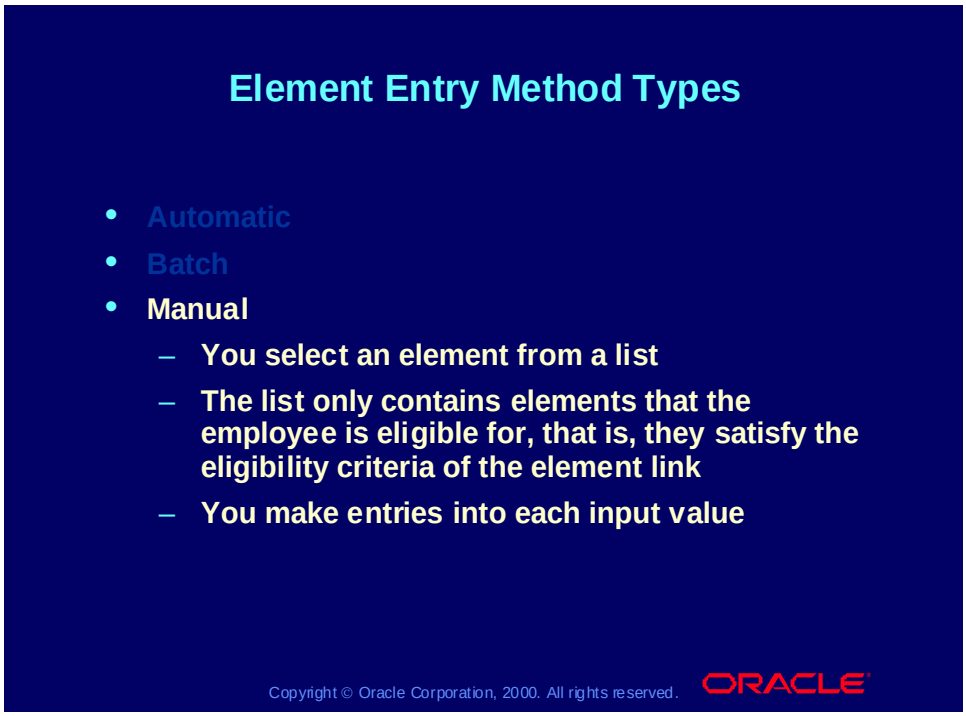

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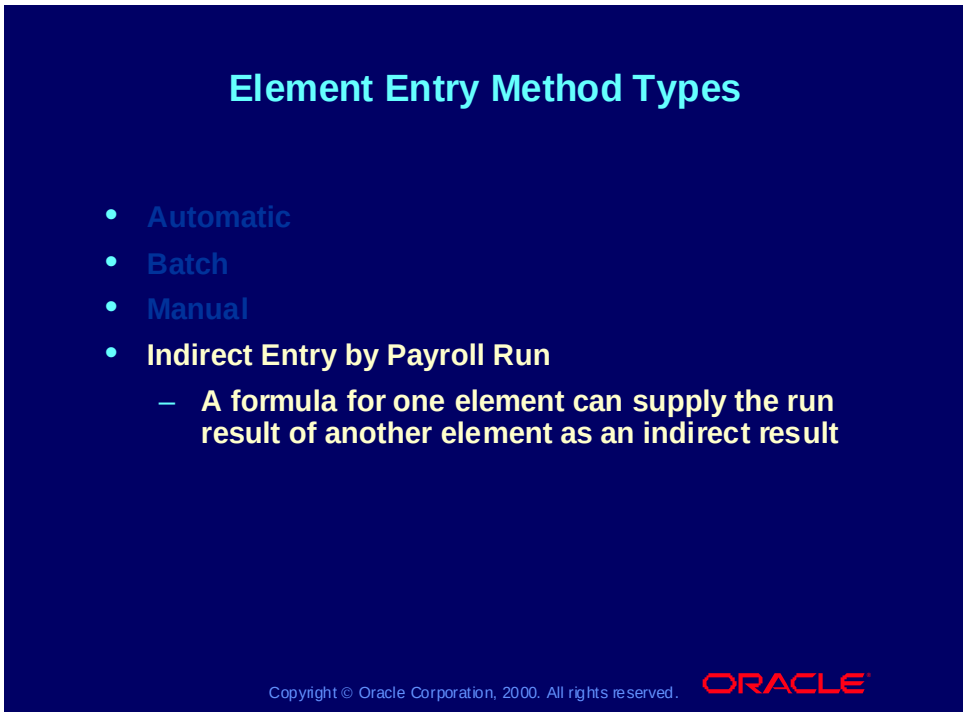

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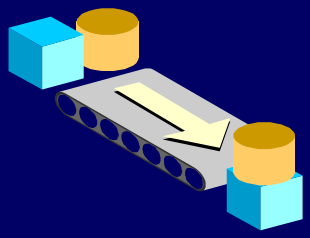
Automatic Entry

- 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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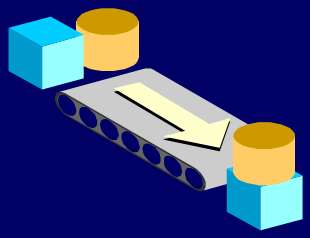
Automatic Entry

- 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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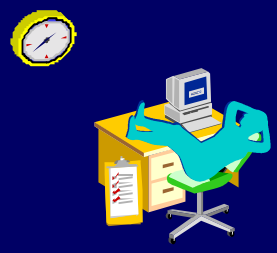
Batch Element Entry (BEE)

- ***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)

- 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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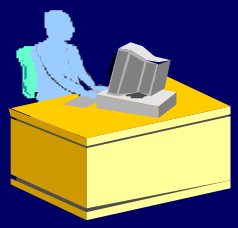
Manual Element Entry Methods

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



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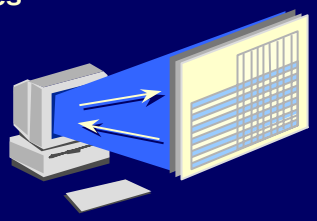
Salary Administration Window

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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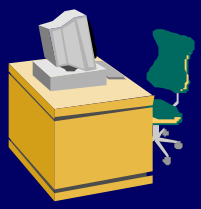
Absence Detail Window

- Record sick leave
- Record accrued absences



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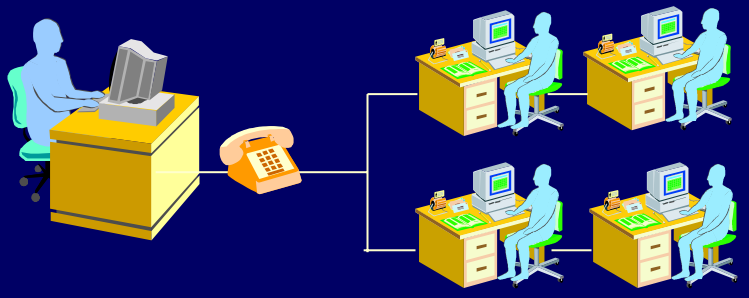
Instructor Demonstration 4-a

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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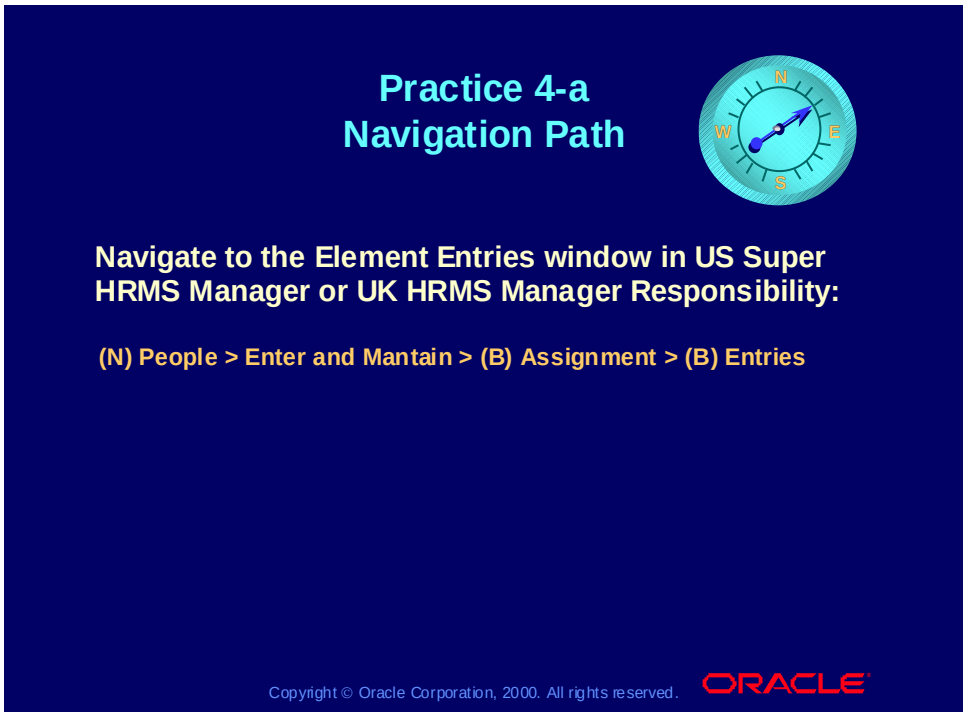

Online Help

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

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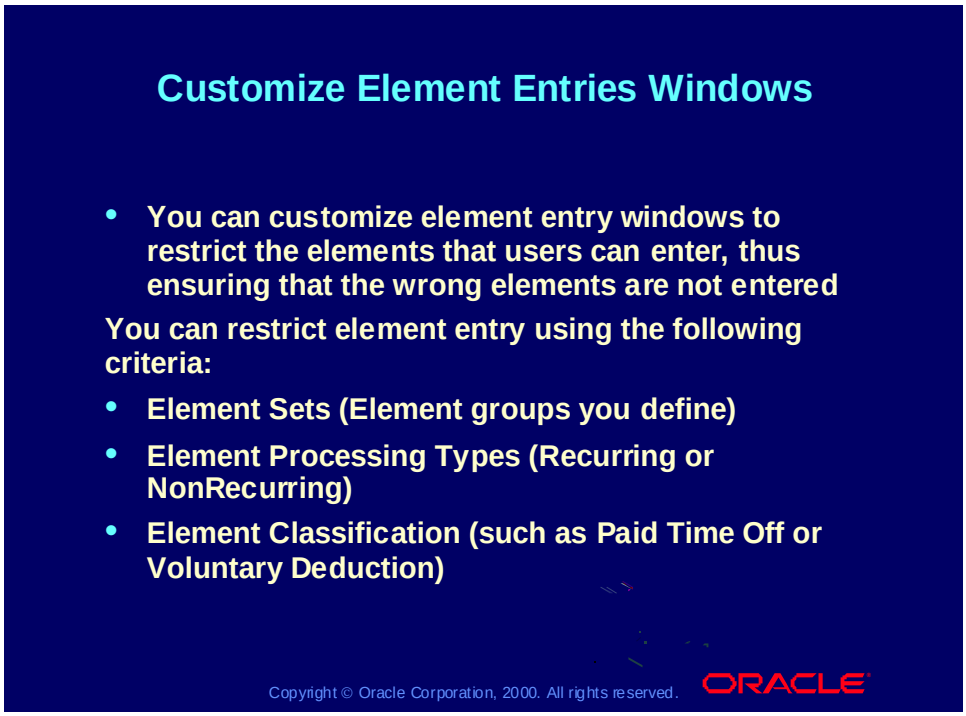

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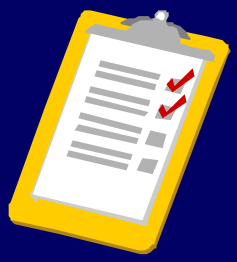
Summary

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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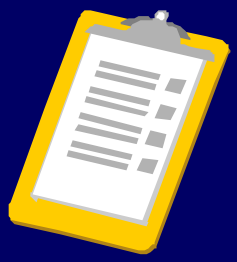
Objective

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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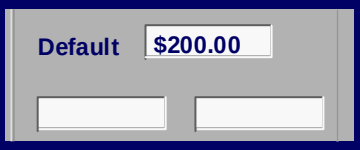
Defaults

- 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



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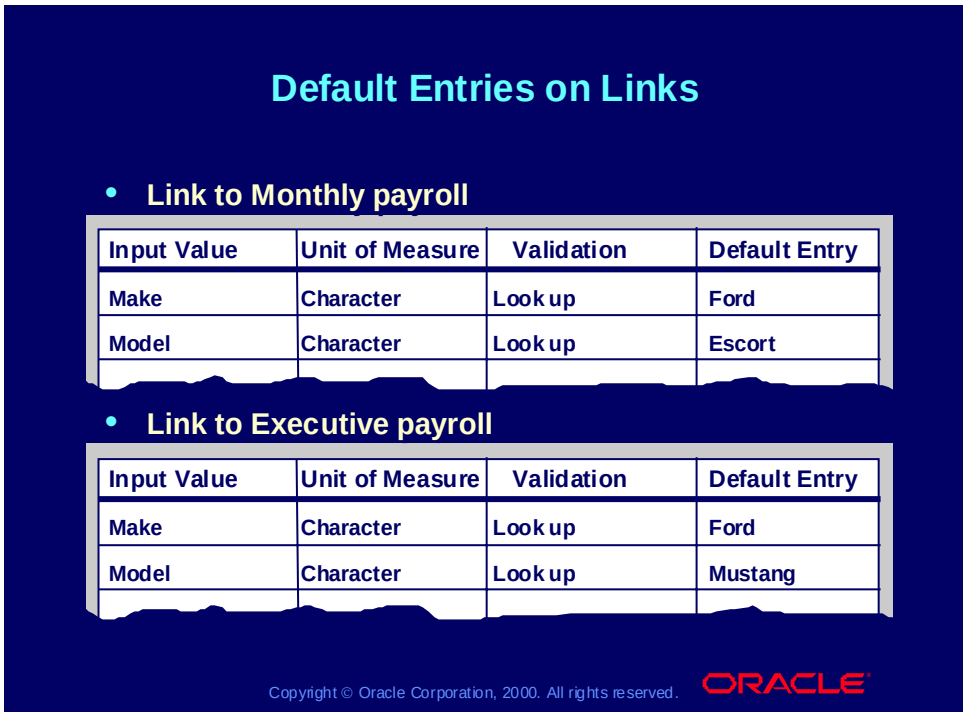

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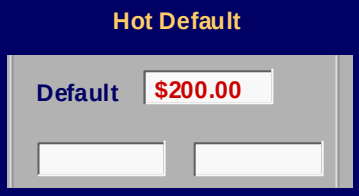
Hot Default

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



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Validation Types

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

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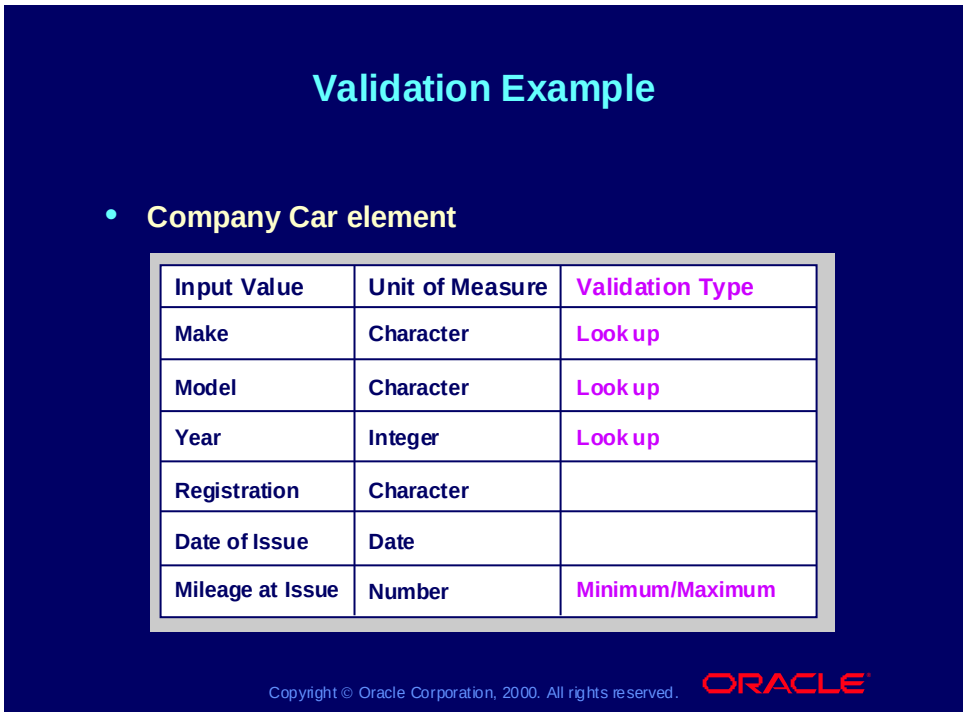

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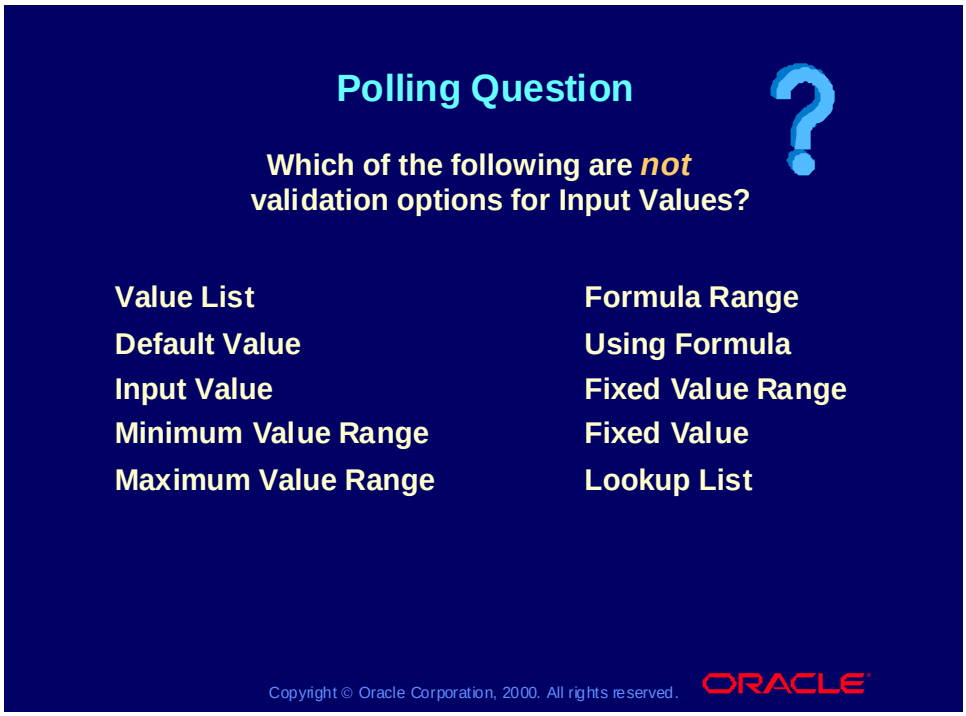
Polling Question



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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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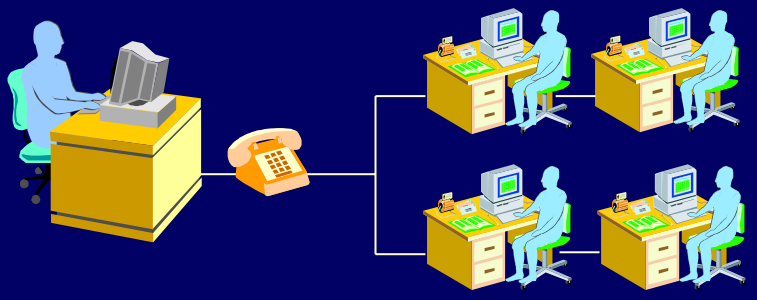
Instructor Demonstration 5-a

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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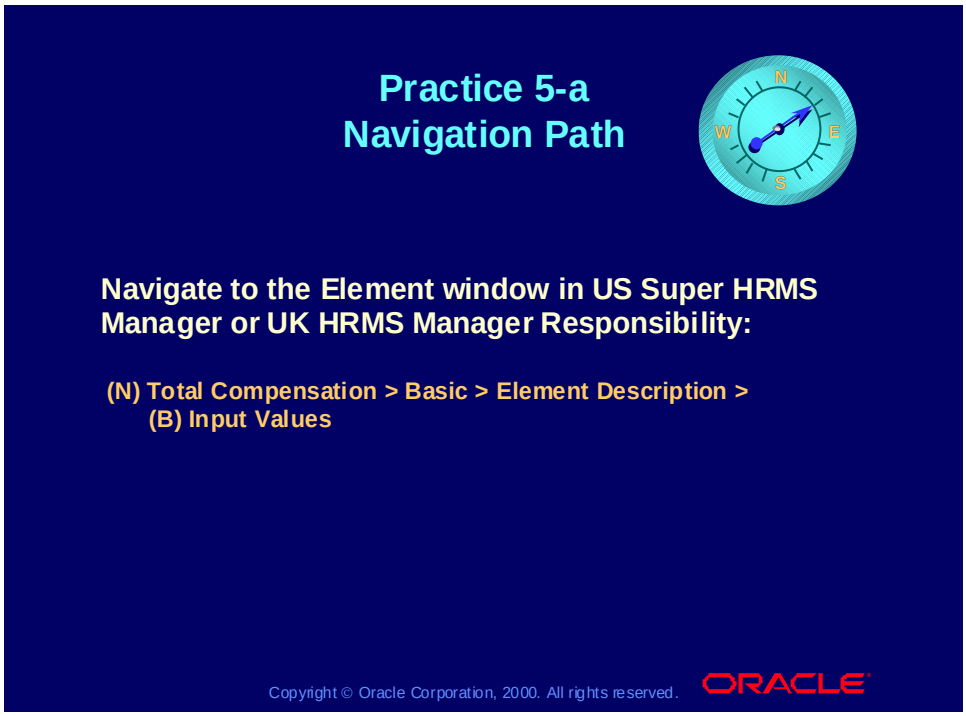

Online Help

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

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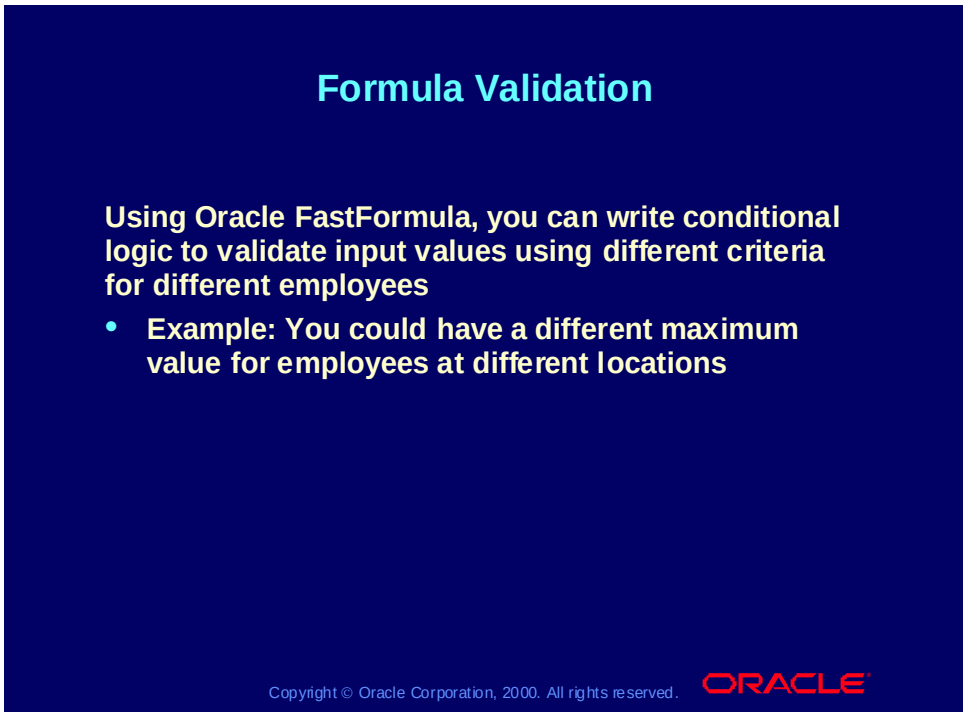

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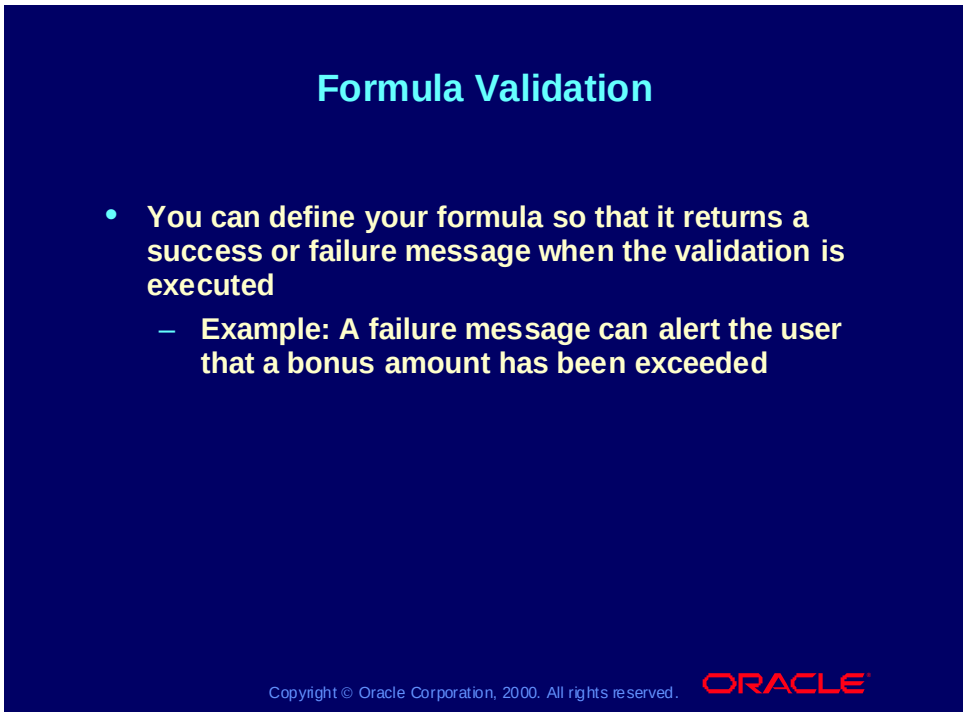

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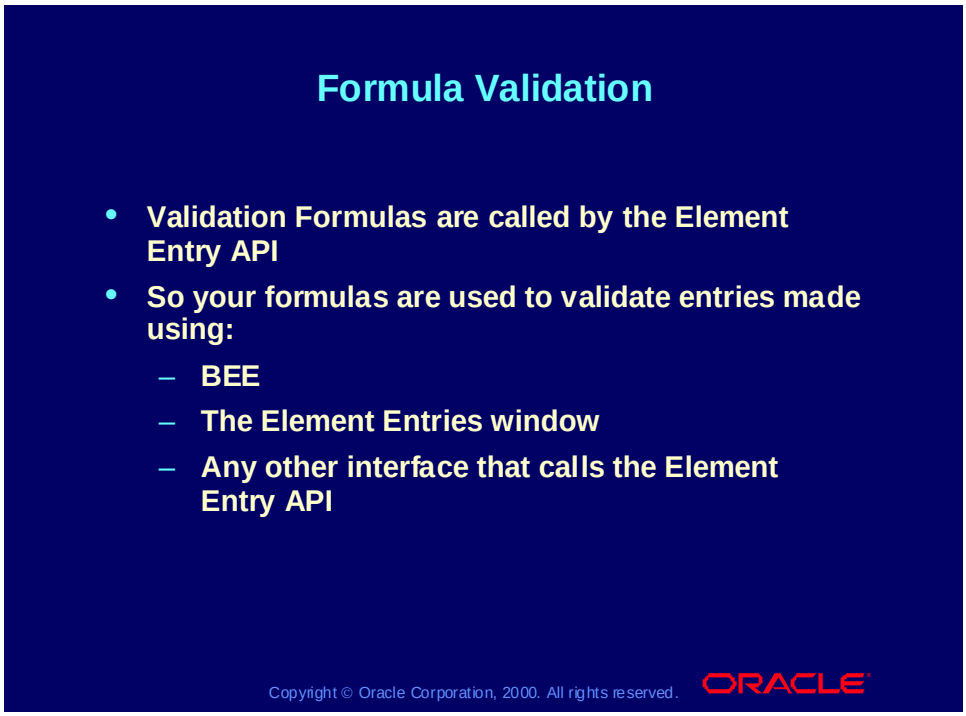

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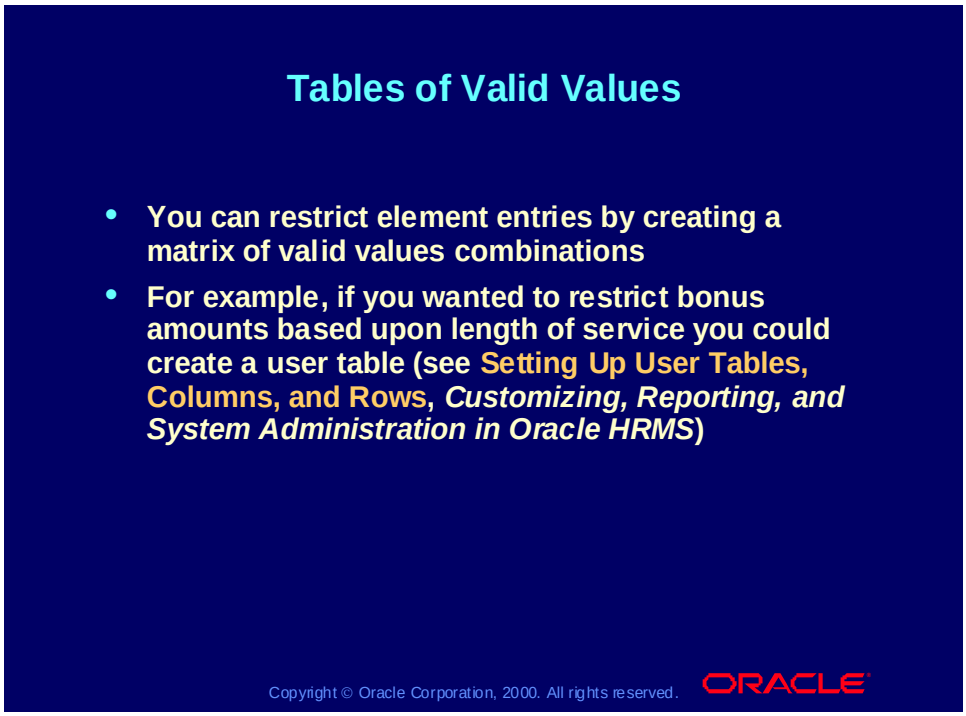

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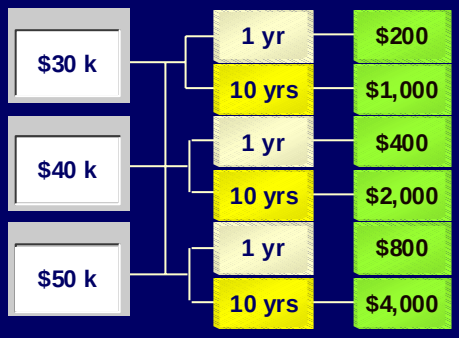
Validating Input Values

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



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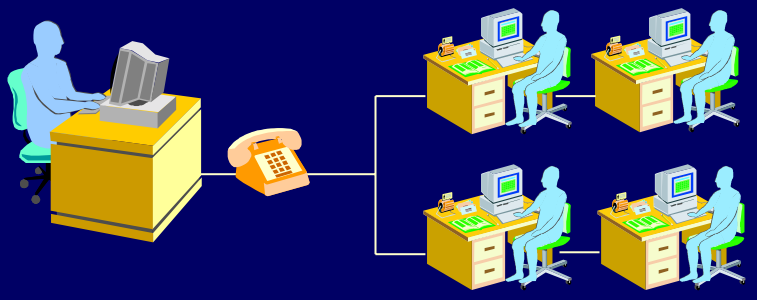
Instructor Demonstration 5-b

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

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

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Practice 5-b Navigation Path

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

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Summary

In this lesson, you should have learned how to:

- Control element entry values at the point of entry

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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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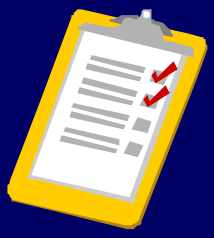
Module Summary

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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