Oracle® Self-Service Human Resources

Deploy Self-Service Capability Guide

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Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*.

Audience

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

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

  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University.
- Oracle Self–Service Web Applications

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.
- Oracle Workflow

  To learn more about Oracle Workflow, read the *Oracle Workflow User's Guide* or the *Oracle Workflow Developer's Guide*.
- The Oracle Applications graphical user interface.

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

See Related Documents for more information about Oracle Applications product information.

See Related Information Sources on page xiv for more Oracle Applications product information.

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HRMS Glossary

Related Information Sources

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 11.5.10 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMS*i*) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMS*i* product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Implementing Oracle Approvals Managemement

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications. Download this guide from Oracle *MetaLink*, Note: 282529.1.

Oracle iRecruitment Implementation Guide

Set up Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Using Oracle Learning Management

Set up and use Oracle Learning Management to accomplish your online and offline learning goals.

Implementing Oracle Learning Management

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self–Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, Auto Patch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms–Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. this manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

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Introduction to Oracle Self-Service Human Resources (SSHR)

Overview

Oracle Self-Service Human Resources (SSHR) extends the functionality of standard Oracle HRMS by enabling both employees and managers to participate in Human Resources management via a web browser. SSHR offers secure self-service business transactions and easy-to-use functionality driven by Oracle's proven web and workflow technologies. These technologies enable the data, views, stored procedures, validation routines, and Application Programmatic Interfaces (APIs) used in the standard Oracle Applications to be shared, thus providing seamless integration between Oracle HRMS and Self-Service HRMS.

Features of SSHR

Key features of SSHR include the following:

- Configurability

  SSHR uses the Oracle Applications Framework (OA Framework) technology to enable flexible personalizations options. For example, you can personalize your self-service pages to reflect your corporate identify, or to reflect the specific business processes in your organization. You can personalize content, appearance, and self-service transactions to suit your requirements and those of the individual user. You can personalize self-service applications to suit role, experience, work content, language, and information needs.

- Intuitive layout

  The pages and windows used in SSHR have an intuitive layout and enable users to carry out business processes and transactions without the need for extensive documentation or instruction. Notes and messages are available on pages if appropriate and meaningful.

- Dynamic routing of transactions

  SSHR utilizes workflow technology to enable you to define dynamic routing and approvals paths for your self-service transactions. You can use Oracle Workflow to configure any process that requires routing, approval, and submission.

- Delivery of workforce intelligence

By providing manager functions in SSHR, you can deliver intelligence and information to managers, HR Professionals, executives. These users can retrieve and query information simply and quickly.

- Improved accuracy of data

  By enabling users to enter and maintain their own information, data input is more accurate and up-to-date. This also reduces repetitive data entry tasks for HR administrators.

- Streamlined business processes

  By allowing managers, HR Professionals, contingent workers, and employees to work in a paperless environment, you can streamline business processes, reduce administration costs, and improve service. Users can make their own decisions about benefits options and work preferences, for example, and view information online including payslips and tax forms.

- Integration with Oracle Approvals Management (OAM)

  Oracle Approvals Management (OAM) enables you to define routing rules for your transactions. By using OAM with SSHR, you ensure that your self-service transactions are received and approved or rejected by the correct user.

Scope of SSHR

SSHR functions are available for all major functional areas in Oracle HRMS: Workforce Sourcing and Deployment, Compensation, Benefits, and Payroll Management, and Enterprise and Workforce Management. Within these functional areas, some functions are available in SSHR only, some are available in the Forms Interface only, and some are available in both SSHR and the Forms Interface.

For information on the self-service functions available for each functional area, see: Self-Service Modules, page 1-5.

What is SSHR?

The following sections answer common questions on SSHR and give an overview of the functionality.

What does self-service mean?

Self-service means that the originator of a task is also the person responsible for that task. Using a standard web browser, the user accesses HR data and performs a specific task, for example, registering a change of address. By transferring the responsibility for the task to the originator of the task, data accuracy is increased and administration costs are reduced.

How do self-service applications differ from traditional HR systems?

The key elements that distinguish self-service applications from other systems are:

- easy-to-use user interfaces
- easy access to functions via web browsers
- complex processes reduced to simple steps

- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrollment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure SSHR web pages to suit user requirements.

How can SSHR meet my enterprise's unique business processes?

SSHR is highly configurable: you can configure web pages and predefined business transactions. You can also create your own business processes. Although SSHR uses the design standards that are common to all Oracle applications, you can change the appearance of the web pages by adding your own logos and by changing field and radio button names. On some pages, you can choose which sections are displayed. If you want to highlight procedures that are specific to your enterprise, you can customize the instructions that provide online help for users.

Introduction to Self-Service

SSHR Licenses

To enable SSHR, you must first purchase the appropriate licence from Oracle. For information on licences, contact your Oracle sales representative.

SSHR delivers particular functionality according to your base product licence. If you have licenced SSHR you have access to all SSHR HRMS functionality with the following exceptions:

- Oracle Advanced Benefits (OAB). Although the self-service Benefits functions are available with Standard Benefits which is included in the HRMS licence, additional functionality is available if you purchase OAB. For example, life event restrictions in the Advanced Benefits model allow you to use Self-Service Benefits at any time during the year.

  > **Note:** For Standard Benefits customers, it is recommended the Benefits Election function be available only during the annual enrollment period. In other words, you should consider taking your enrollment web pages off-line during periods where you do not want benefits participants to make changes to their elections.

- Oracle Training Administration - You must purchase a separate licence to be able to use the self-service training function.
- Payroll - You must purchase a separate licence to be able to use the self-service payroll functions.

Key Concepts in Self-Service Human Resources (SSHR)

This section defines some important terms used throughout this Implementation Guide.

Application Object Library (AOL) function

An AOL function is an item that can be added to a menu. The item can call a screen or web page or be a hidden function.

See also: Self-Service Function

Business Process

Produces the products and services that are recognized outside the business area. They support the organization's objectives, critical success factors, or business objectives. They can be subdivided into sub-processes, for example, the Change Hours workflow process consists of the Work Schedule and Pay Rate subprocesses.

See: The Personalization Framework, page 5-3

MDS (Meta Data Services) Repository

An active repository that stores information on the appearance and behavior of self-service pages. Customers can configure changes to the definitions held in the MDS Repository using the Personalization Framework.

See: The Personalization Framework, page 5-3

Oracle Applications (OA) Framework

The OA Framework is the technical foundation for the Oracle Self-Service Applications (OSSWA).

Personalization Framework

The Personalization Framework allows you to configure the display of Oracle Self-Service Web Applications (OSSWA) without having to make any changes to the underlying code. Your configurations are stored in the MDS Repository and are preserved during upgrades.

Region

A region in the MDS Repository defines a section in a page in Oracle Self-Service Web Applications. The region is defined in terms of elements such as fields and buttons.

Self-Service Function

Self-service functions appear as menu options to the SSHR user. The function determines how the self-service modules are called. For example, the same self-service module is used for Personal Information from both the manager and employee menus but the function determines whether the module is called in Employee or Manager mode.

Self-Service Module

A set of dynamic web pages and related components (for example, workflow process and definitions stored in the MDS Repository, stored procedures). Examples include Personal Information, Competencies, and Assignment.

Transaction

A transaction is a logical unit of work such as a promotion or an assignment change. It may consist of several components, such as changes to salary, locations, and grade, but all the components of a transaction must be handled as a unit to be either approved or rejected.

Workflow Builder

Oracle Workflow is embedded within SSHR and manages the flow of information between the HR professional, the manager, the employee, and the applicant. You use workflow to control who and how these participants take part in HR processes by modifying the underlying process definitions.

See: Self-Service Workflows, page 4-3

Workflow Function

A workflow activity which is defined as a function and which maps to a PL/SQL procedure that is executed by the Workflow Engine when it encounters this activity in the workflow process.

See: Self-Service Workflows, page 4-3

Workflow Process

A workflow process is a series of activities linked by transitions. Each activity can be a function, a notification, or a subprocess.

Self-Service Functionality

This section provides a brief description of the delivered SSHR functionality.

Summary of SSHR Functionality

Note: In the tables below the Manage or Employee/Worker column refers to the type of activities that the responsibility would do, rather than a function that would specifically appear on a Manager or Employee menu.

Common Functionality

The following generic modules provide common, low-level functionality that is reused in many of the higher-level functions.

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Enter Process	Manager	No/No	Global
Manager Actions	Manager	No/No	Global
Return for Correction	Manager	Yes/No	Global
New User Registration	Both	Yes/Yes	Global
Review and Confirm	N/A	Yes/Yes	Global
Release Information	Both	No/Yes	Global
Document Management	Manager	No/No	Global
Personal Actions	Employee/Worker	No/No	Global
Save for Later	Both	No/No	Global

Enter Process

The Enter Process module enables the user to:

- Select a person from a searchable list of people
- Select a person from their supervisor hierarchy or from their position hierarchy
- Add and remove people from their personal list of employees and workers

A Simple Search enables to search for a person by name. With an Advanced Search, a manager can search for a person or persons who meet particular criteria. You can search on personal, assignment or skills criteria.

Integration with Oracle Approvals Management

From version 4.1 onwards, SSHR uses the Oracle Approvals Management (AME) application to define and manage approval logic. For more information on AME, see: *Implementing Oracle Approvals Management* (available on MetaLink).

The existing method of defining customizable PL/SQL packages for approvals is still supported in this release as an alternative to AME.

See: Oracle Approvals Management (AME), page 6-4

Manager Actions

The Manager Actions feature enables the user to first select a person and then the function, or action, to be performed. When the user selects the person, a context-sensitive list of available actions is displayed and the user can choose the required action from the list.

See: Actions Page, page 8-8

Return for Correction

The Return for Correction feature enable managers to return a transaction either to the initiator of the transaction or a prior approver of the transaction for correction. The person to whom the transaction is returned for correction will receive a notification.

See: Return for Correction, page 8-11

New User Registration

New User Registration enables users to register their own details for SSHR and for benefits providers. You set up a generic name and password and you can either enable users to create their own user name or you can use user hooks to create the user name automatically.

See: New User Registration, page 8-56

Review and Confirm

The Review and Confirm module shows details of transactions that a user has updated or details about pending transactions that require approval. The user can review the information displayed to ensure that all the details are correct before the changes are finally submitted to the database. If necessary, the user can return to the previous screen to change incorrect information. The user can also perform What If analyses to ascertain the effect any changes will have on an person's benefits.

See: Review and Confirm, page 8-14

Personal Actions

The Personal Actions module is the employee/worker equivalent of Manager Actions. The user is presented with a context-sensitive list of actions that they can perform on themselves.

See: Actions Page, page 8-8

Document Management

The Document Management modules enables you to automatically generate business documents containing data from self-service actions.

See: Document Management, page 8-18

Save for Later

The Save for Later functionality enables a user to interrupt a transaction before the data is submitted. The transaction is saved in a transaction table from which it can be retrieved and continued at a later time. Users can select those transactions which they have explicitly saved for later, or which were partially saved at the time of a system failure or time-out, from the All Actions Awaiting Your Attention list in the Actions page.

See: Save for Later, page 8-17

Workforce Sourcing and Deployment

People Management

The following section lists the SSHR functions within People Management.

Employee Directory

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Employee Directory	Both	No	Global

Employee Directory

The Employee Directory function provides an easily accessible, highly configurable lookup of people within your organization. Users can search for a specific person against a range of data, and traverse the organization hierarchy to view details of a person's manager or direct reports. The directory can be accessed either from Self Service, Portal, or anonymously from any web page.

Manage Employment Events

Module Name	Manager or Employee/ Worker	Workflow chainable/ Approval	Localization
Assignment	Manager	Yes/Yes	Global
Change Location	Manager	Yes/Yes	Global
Change Manager	Manager	Yes/Yes	Global
Other Employment Information	Manager	Yes/Yes	Global
Employee or Contingent Worker Pay (Pay Rate, Assignment Rate)	Manager	Yes/Yes	Global
Extra Information Types (EITs)	Both	Yes/Yes	Global
Special Information Types (SITs)	Both	Yes/Yes	Global
Employee or Contingent Worker Termination (Termination, End Placement)	Manager	Yes/Yes	Global
Work Schedule	Manager	Yes/Yes	Global

Manage Employment Events (MEE)

The Manage Employment Events (MEE) functionality consists of a set of low-level, workflow-enabled components which can be chained together in various combinations to match your enterprise's business processes. Some chained processes are predefined for you but you can use the Workflow Builder to configure others if you need to. The MEE components are as follows:

Assignment

The Assignment module enables a manager to change a person's assignment information. If the person has multiple assignments, you can display and change any assignment.

See: Assignment, page 9-46

Change Location

The Change Location module enables a manager to change a person's work location.

See: Location, page 9-55

Change Manager

The Change Manager module enables a manager to transfer an employee or worker to another supervisor, move the direct reports of one supervisor to another supervisor and to assemble a new set of direct reports to a new supervisor.

See: Change Manager, page 9-66

Extra Information Types (EITs)

Extra Information Types for SSHR enable you to store additional person and assignment information.

See: Extra Information Types (EITs), page 9-59

Other Employment Information

The Other Employment Information module enables you to update and retrieve assignment and employment information in assignment descriptive flexfields and localization-enabled flexfields.

See: Other Employment Info, page 9-62

Pay Rate

The Pay Rate module enables a manager to change a person's overall pay rate or update an individual component of the pay rate.

See: Pay Rate, page 9-63

Assignment Rate

The Assignment Rate module enables a manager to enter and record contingent worker rates, per assignment, based on assignment rate types, such as overtime or weekend rates.

See: Assignment Rates, page 9-64

Special Information Types (SITs)

Special Information Types enable you to store additional information that is not currently captured by the system.

See: Special Information Types (SITs), page 9-56

Termination

The Termination module enables a manager to end a person's relationship with their employer. You can also use the Change Manager workflow process to reassign a terminated supervisor's reports.

> **Note:** You cannot reverse a termination in SSHR.

You can combine the Termination module with the ICD module to create a severance pay process if required.

See: Termination, page 9-51

End Placement

The End Placement module enables a manager to end a contingent worker's work relationship, and specify a reason. You can also use the Change Manager process to reassign the contingent worker's reports.

See: End Placement, page 9-52

Work Schedule

The Work Schedule module enables a manager to change a person's work schedule.

See: Work Schedule, page 9-54

Organization Management

Module Name	Manager or Employee/ Worker	Workflow chainable/ Approval	Localization
Organization Manager	Manager	Yes/Yes	Global

Organization Manager

The Organization Manager module enables a manager to maintain organization manager relationships.

> **Note:** Organization manager relationships can only be initially created in the Professional Forms Interface.

See: Organization Manager, page 9-69

Personal Information

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Basic Details	Both	Yes/Yes	Global
Main Address	Both	Yes/Yes	Global
Other Address	Both	Yes/Yes	Global
Phone Number	Both	Yes/Yes	Global
Emergency Contacts	Both	Yes/Yes	Global
Dependents and Beneficiaries	Both	Yes/Yes	Global
Contact Extra Information	Both	Yes/Yes	Japan
Documents of Record	Both	No/Yes	Global

Personal Information

The Personal Information function enables users to update and maintain their personal records. The Personal Information function covers the following areas:

- Basic personal details

  See: Basic Details, page 9-4

- Address

  See: Main Address, page 9-6
- Other addresses

  See: Other Address, page 9-8
- Phone number

  See: Phone Numbers, page 9-9
- Dependents and beneficiaries

  See: Dependents and Beneficiaries, page 9-13
- Emergency contacts

  See: Emergency Contacts, page 9-11

The Personal Information function can also be chained with Special Information Types (SITs).

See: Personal Information, page 9-3

Contact Extra Information

The Contact Extra Information function enables you to enter and maintain additional contact information in SSHR. For example, statutory regulations may require that you provide specific information on dependents and beneficiaries for health insurance and income tax purposes. SSHR enables you to store this information using Extra Information Types (EITs).

See: Contact Extra Information (Japan), page 9-14

Documents of Record

The Documents of Record function enables you to store documents such as work permits, visa information, and medical certificates in one place. If required, you can also upload electronic versions of document.

See: Documents of Record, page 9-17

Employment Verification

The Employment Verification function enables you to release employment information and, optionally, salary information, to an external organization for a specific purpose, for example, to complete a mortgage or loan agreement.

See: Employment Verification, page 9-30

Professional Details

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Academic Rank	Both	No/Yes	US
Competency Profiles	Both	No/Yes	Global
Education and Qualifications	Both	No/Yes	Global
Resume	Both	No/No	Global
Other Professional Qualifications	Both	No/Yes	Global
Tenure Status	Both	No/Yes	US
Work Preferences	Both	No/No	Global

Professional Details

The Professional Details modules enable users to maintain professional details. They can be used by both employees and their managers, however, certain functions can be restricted for manager access only.

The Professional Details menu contains the following functions:

Education and Qualifications

The Education and Qualifications module enables employees and managers to store details on their academic qualifications.

See: Education and Qualifications, page 9-19

Other Professional Qualifications

The Other Professional Qualifications module enables employees and managers to store details on professional qualifications.

See: Other Professional Qualifications, page 9-22

Competency Profiles

The Competency Profile module enables employees and managers to store information on skills and competencies.

See: Competency Profile, page 9-23

Work preferences

The Work Preferences module enables employees and managers to store information such as relocation preferences and travel preferences.

See: Work Preferences, page 9-26

Resume

The Resume module enables employees and managers to store a resume.

See: Resume, page 9-27

Tenure Status (US)

The Tenure Status module enables managers to store information on an person's tenure (completion of professional criteria and extended probationary period).

See: Tenure Status, page 9-28

Academic Rank (US)

The Academic Rank module enables managers to store information on the academic rank for employees within Higher Education.

See: Academic Rank, page 9-29

Views

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
My Information	Employee/Worker	No/No	Global
My Employee Information	Manager	No/No	Global
HR Views	HR Professional	No/No	Global

My Information/My Employee Information

My Information and My Employee Information offer users access to employment and assignment records containing information about employment, salary, performance, training, absence, and job applications. Employees can view their personal records and managers can view the records for the people they manage.

See: My Information and My Employee Information, page 9-72

HR Views

The HR Views module offers a summarized view of specific information: Personal Information, Assignment Details, Compensation Activity, and Termination History. This module is used by the HR Professional.

See: HR Views, page 9-71

Recruiting and Hiring

Module Name	Manager or Employee/ Worker	Workflow chainable/ Approval	Localization
Apply for Job	Employee/Worker	No/No	Global
Candidate Offers	Manager	No/Yes	Global
Hire	Manager	No/Yes	Global
French New Hire	Manager	No/Yes	France
French Applicant Hire	Manager	No/Yes	France
Contingent Worker Placement	Manager	No/Yes	Global

Apply for a Job

The Apply for Job functionality enables employees and workers to search and apply for jobs online.

For more information, see: Apply for a Job, page 9-95

Candidate Offers

The Candidate Offers functionality is used by managers to seek approval for a job offer, send it to an applicant, and track the applicant's response.

For information on Candidate Offers, see: Recruitment Workflows, *Oracle HRMS Implementing Oracle Self-Service Human Resources 3.4*.

Hire

The Hire process is used by managers to enter details about new employees and hire them into their enterprise.

See: Hire or Placement, Place Contingent Worker Processes, page 9-96

Contingent Worker Placement

You can use the Contingent Worker Placement process to bring contingent workers into the organization and give them an assignment.

See: Hire or Placement, Place Contingent Worker Processes, page 9-96

Talent Management

> **Note:** The Training, External Training, and Training Plans functions, which were previously available from the Employee Self-Service menu, are now available from the Learner Self-Service responsibility and the Learner Home and External Learning functions. For all other training functionality, see: Oracle Learning Management, *Oracle Learning Management User Guide*.

Career and Performance Management

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Appraisals	Both	No/Yes	Global
Apply for a Job	Both	No/Yes	Global
Employee Reviews	Both	No/Yes	Global
Events and Bookings	Both	No/No	Global
Suitability Matching	Both	No/No	Global
Succession Planning	Manager	No/No	Global

Appraisals

The Appraisals module enables a manager and employee or worker to evaluate employee performance and competencies and to set objectives and actions.

See: Appraisals, *Oracle HRMS Workforce Sourcing, Deployment, and Telend Management Guide*

Succession Planning

The Succession Planning module enables a manager to plan for future vacant positions by identifying possible successors for the positions.

For general information on Succession Planning, see: Career and Succession Planning, *Oracle HRMS Enterprise and Workforce Management Guide*.

Events and Bookings

The Events and Bookings module enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and employees, enabling managers to book their subordinates onto events.

See: Events and Bookings, page 10-3

Suitability Matching

The Suitability Matching functionality enables managers to find suitable people for an existing or planned work opportunity, or find suitable work opportunities for a person. Employees can find opportunities for themselves.

For general information on Suitability Matching, see: Suitability Matching, *Oracle HRMS Enterprise and Workforce Management Guide*.

Employee Reviews

The Employee Review functionality enables employees/workers and managers to create or update reviews. Employees and workers can create their own reviews and managers can create reviews for their employees and workers. Both managers and employees can invite reviewers to attend the review.

See: Employee Review, page 10-4

Compensation and Benefits Management

Leave and Absence Management

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Absences	Both	No/Yes	Global

The Absences functionality enables employees or managers to enter absence-related information using a self-service interface. Users can submit and update absence requests. Planned, confirmed, and updated requests are then submitted for approval.

See: Absences, page 11-3

Benefits

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Benefits Enrollment	Both	No/No	Global
Benefits Enrollment	Employee/Worker	No/No	Federal

Benefits Enrollment

Benefit Enrollments enables an person to:

- Review their current benefit enrollments
- Select benefits

- Add, update, or remove dependents
- Add, update, or remove beneficiaries
- Search for and select primary care providers

See: Self-Service Benefits Enrollments, page 11-7

For information on US federal self-service benefits, see: Federal Health Employee Benefits Overview, *Oracle HRMS Compensation and Benefits Management Guide (US Federal)*

Compensation

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Compensation Workbench	Manager	No/Yes	Global
Individual Compensation Distributions (ICD)	Manager	Yes/Yes	Global

Compensation Workbench

The Compensation Workbench enables managers to determine and allocate compensation awards such as salary increases, bonuses, and stock options using a self-service interface. Managers can also view details on their direct reports, prepare budgets, and generate reports.

See: Compensation Workbench, page 11-45

Individual Compensation Distributions (ICD)

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, page 11-126

Payroll

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Online Payslip	Both	No/No	Australia, US, UK, Canada, Hong Kong, Korea New Zealand, Singapore, South Africa, Netherlands
Personal Payment Methods (Direct Deposit)	Both	No/Yes	Global
Online Tax Form (W-4)	Both	No/No	US
Online W-2 Form	Employee/Worker	No/No	US
Commutation Information	Both		Japan

Online Payslip

The Online Payslip enables a user to view their payslip using a Web browser when the required payroll processes have been run. Payslips are available for all assignments for which payroll has been completed. Employees can display payslips for the most recent payroll period or for previous payroll periods.

See: Online Payslip, page 12-8

Tax Information Form (W-2)

The Tax Information form gives summary tax information for tax years from 2001 onwards. The form is used for information purposes only as it contains no updateable fields and cannot be submitted in place of the paper version of the form.

See: Tax Information Form (W-2) (US), page 12-19

Tax Withholdings Form (W-4)

The Online Tax Form enables a user to submit US Tax Withholdings forms (W-4 tax forms) using a Web browser. The user can use the form to update withholding information. A defined contact person will then receive notification of the changed information.

See: Tax Withholdings Form (W-4) (US), page 12-17

Voluntary Deductions

You can use the Individual Compensation Distributions (ICD) functionality if your enterprise uses voluntary deduction plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, page 11-126

Personal Payment Methods

The Personal Payment Methods functionality enables a user to determine how they are paid. The available payment methods are cash, check, deposit, or a combination.

See: Personal Payment Methods, page 12-3

Commutation Allowance

The Commutation Allowance functionality enables a user to view and modify their commutation and transportation allowance details.

See: Commutation Allowance, page 12-22

Getting Started

Overview

This section gives you a brief overview of the minimum tasks you need to complete to set up SSHR.

See: Minimum Requirements for an SSHR System, page 1-23

For a list of all implementation steps, see Implementation Steps for SSHR, page 7-3

Notes on Migrating from SSHR Version 3

The following notes provide you with information that is useful if you are upgrading your SSHR installation from 3.x to 4.x or 5.x:

- SSHR 4.x/5.x may be installed in the same instance as SSHR 3.x
- SSHR 3.x components are still supported
- You can have both SSHR 4.x/5.x and SSHR 3.x functions on the same menu
- You can set up equivalent 4.x/5.x functions when they become available. In doing this, you would compare the new and old workflow processes and reapply workflow changes as required.

  See: Self-Service Workflows, page 4-3

  > **Note:** Some 3.x workflow attributes are obsolete in SSHR 4.x/5.x as they have been replaced by the Personalization Framework functionality.

- When ready, simply migrate your users to the 4.x/5.x functions. You can switch over to 4.x/5.x functions one at a time, if required.

Understanding a Typical SSHR Function

This chapter examines a typical SSHR function, Personal Information, and introduces the underlying concepts.

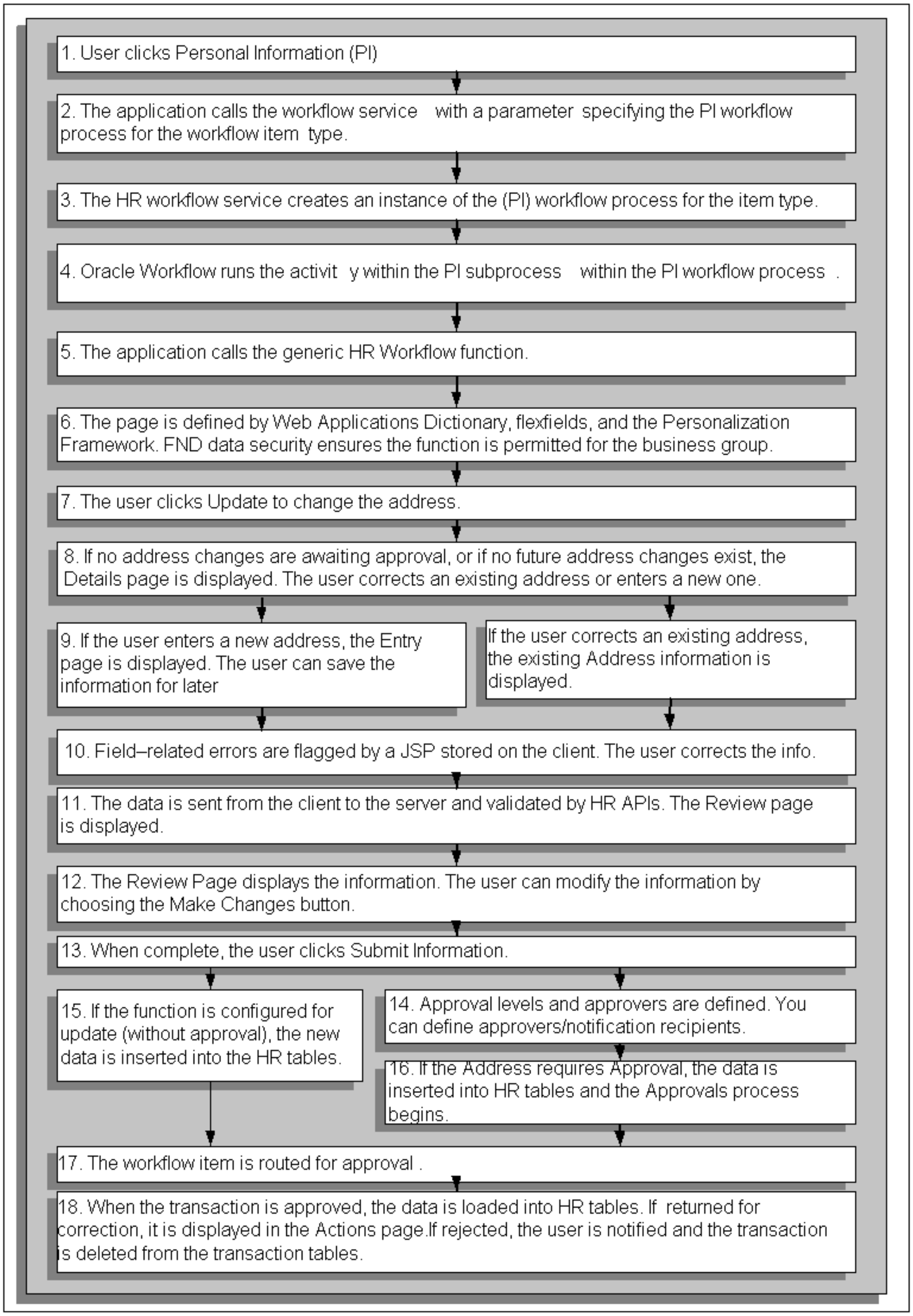
By following the functional flow of the Personal Information function, you should understand how information is passed from the web browser to Oracle Applications, how Workflow is used by SSHR, how the page layout is controlled by the definitions held in the MDS Repository and the Personalization Framework, and how the approvals process operates. The general principles described here can be applied to any other SSHR function.

The chapter includes an example of a typical SSHR Web page to illustrate the different elements that you can configure.

The configuration steps for SSHR functions and their web pages are discussed in detail in the subsequent chapters of the Implementation Guide.

How an SSHR Function Works

The following flowchart and accompanying text describe the functional flows that occur when a user changes a main address using the Personal Information function.



1. The user chooses the Personal Information function from the user menu.
2. The application calls the HR workflow service (OA.jspsOA.jsp?akRegionCode= HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800) with a parameter

specifying the Personal Information workflow process for the workflow item type (HR_MAINT_PERSONAL_DETAILS_PRC).

See: Self-Service Workflows, page 4-3

3. The HR workflow service creates an instance of the Personal Information workflow process for the item type.

   The FND data security is checked to make sure that this function is permitted for the legislation code of the current user's business group. Personal Information is a global function that is available for all legislation codes.

   See: User Access and Security, page 2-3

4. Oracle Workflow runs the Maintain Personal Information activity (HR_PERINFO_OVERVIEW_JSP_FCT) within the Personal Information subprocess (HR_PROCESS_PERINFO_JSP_PRC) within the Personal Information workflow process (HR_PERSONAL_INFO_JSP_PRC).

5. The application calls the generic HR_WORKFLOW_SERVICE.BLOCK function. The HR Activity Type Value workflow attribute for this process activity is set to HR_OVERVIEW_TOP_SS with the Activity Type as JSP.

6. A page is displayed based on the definition of the OverviewPG document in the MDS Repository. The page is influenced by any context-sensitive flexfields and the cumulative effect of any Personalization Framework configurations that relate to this document.

   See: The Personalization Framework, page 5-3

7. If no past address changes are awaiting approval or correction, or if no future-dated address changes exist, the Details page is displayed. The user specifies whether they want to correct an existing address or enter an entirely new one.

   The button displayed to the user will be either Update/View Future Changes or View Pending Approval.

8. If the user chooses to enter a new address, the Entry page is displayed. The user enters the information.

   If required, the user can save the information and submit the transaction later. In this case, the changes entered so far are saved to the transaction tables without server-side validation.

   See: Save for Later, page 8-17

   If the user chooses to correct an existing address, the existing Address information is displayed. The user corrects the information.

9. When the user has entered the information (or is ready to complete the transaction), they click the Continue link at the bottom of the page. Any field-related errors (bad formatting, missing fields, and so on) are flagged by a JavaScript procedure stored on the client and the user is asked to correct this information.

10. Web page data is sent from the client to the server and server-side validation is performed by HR Application Programming Interfaces (APIs). If all fields are validated, the Review page is displayed.

    See: Review and Confirm, page 8-14

11. The Review page displays the information that the user has entered. If the user now wants to modify the address information, they can choose the Back button to return to the update page to make changes.
12. When the changes are complete, the user returns to the Review page and clicks the Submit Information link to save the changes.
13. The number of approval levels and approvers is determined by the configuration of Dynamic Approvals. If applicable, the user can insert additional approvers and/or notification recipients.

    See: Dynamic Approvals, page 6-7
14. If the Main Address part of the Personal Information function is configured for update without requiring approval, the new address data is inserted directly into the HR tables. (This step is the same process as step 18 for changes requiring an approval.)
15. If the Main Address part of the Personal Information function is configured to require approval, the data is inserted into HR transaction tables and the Approvals process begins for that item.
16. The workflow item is routed for approval according to the configuration of the Approvals process.
17. The approver can either approve or reject the transaction or return it to the user for correction.

    If the transaction is returned for correction, it is displayed for the user in the All Actions Awaiting Your Attention list in the Actions page. The user can reopen the transaction. The previous values are reloaded from the transaction tables ready for the user to make the required changes and resubmit.

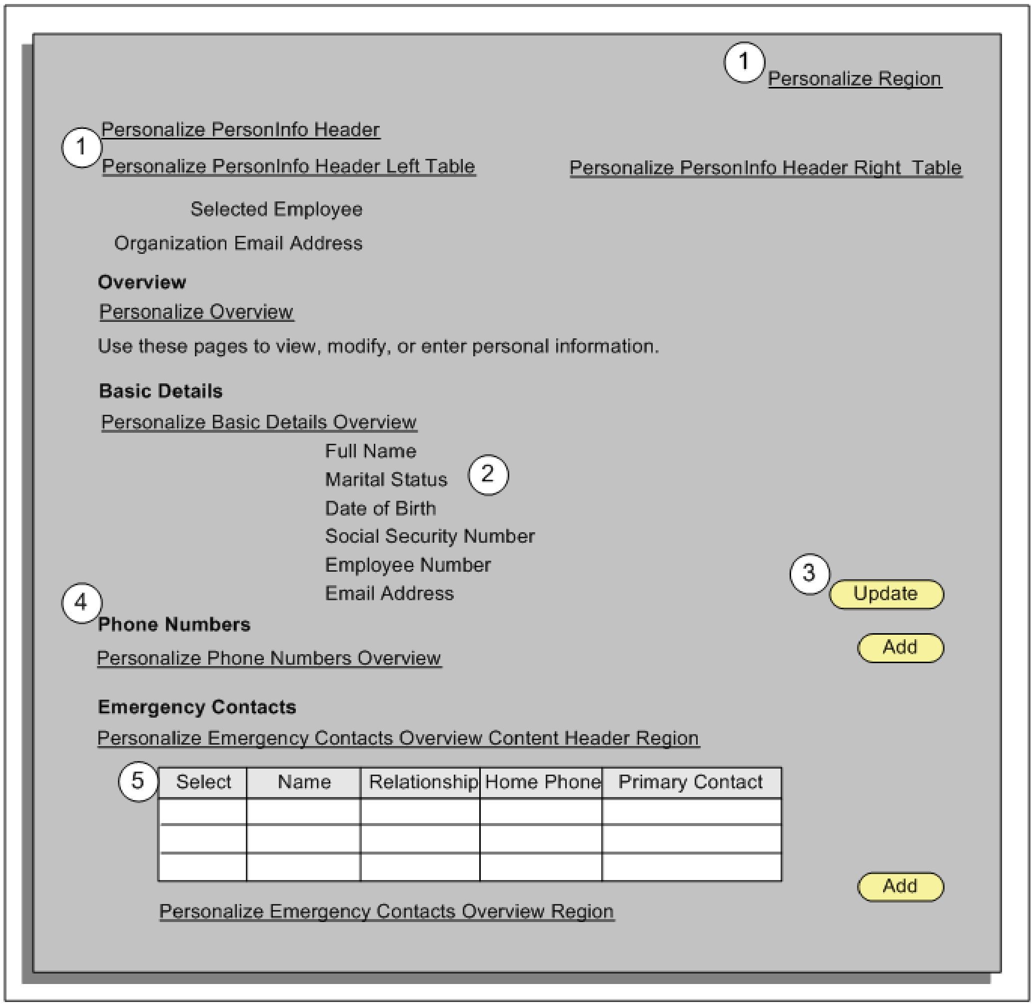
    See: Save for Later, page 8-17

    When the approver approves or rejects the transaction, the user is notified of the transaction status and the transaction details are deleted from the transaction tables. If the transaction is approved, the data is loaded into the HR tables.

A Typical SSHR Web Page

The following diagram shows a simplified sample web page for the Personal Information function. The different elements that you can configure in the Personalization Framework are listed below.

Sample Web Page



The graphic above shows the following elements which you can configure using the Personalization Framework:

1. Add or remove links to enable personalization configuration
2. Change the sequence of fields
3. Add or remove buttons to control user's ability to update fields
4. Rename region items
5. Configure table views

See: The Personalization Framework, page 5-3

Getting Started with SSHR

The following procedure gives you the basic implementation steps that are required to enable you to run SSHR in a test environment. For information on running SSHR in a production environment, please see the detailed chapters in this Implementation Guide and also the Implementation Steps, page 7-1.

To set up an SSHR system:

1. Ensure that Oracle Human Resources 11*i* is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.
2. Ensure that at least one business group has been set up in Oracle HRMS with at least two employee records (one record should be defined as the supervisor for the other).

   See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*
3. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self-Service Web Applications Implementation Manual* (available on Metalink).
4. Apply the patch for SSHR and make sure that all prerequisites are met, including those for the OSSWA Framework.
5. Complete the install and set-up of the OSSWA Framework.

   See: *Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications* (available on Metalink - technical note number: 139863.1)
6. If you have licensed SSHR, set the following profile option to "Yes" at the site level.
   - HR: Self Service HR Licensed

     If you have not licensed SSHR, please contact your Oracle sales representative for information on purchasing a licence.

     See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
7. Add the Manager Self Service and Employee Self Service responsibilities to your users (use either new or existing users).

   See: Self-Service Responsibilities and User Menus, page 2-12

   See: Responsibilities, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
8. Link the users to (new or existing) employee records in HRMS.

   See: Defining User Access and Menus, page 3-8

   See: Users Window, *Oracle Applications Systems Administrator's Guide*

   For information on a typical SSHR function, please see: Understanding a Typical SSHR Function, page 1-19

2

SSHR and User Access

User Access Overview

SSHR uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses SSHR, which information they can access, and how they access it.

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

This documentation identifies the key concepts relating to SSHR user access and security and to provide information on how to apply these concepts to address the needs of your enterprise.

Managing User Access in SSHR

The following section answers common questions on SSHR and user access and gives an overview of the functionality.

How can the HR Department control the self-service activities available to each user?

The security controls - responsibilities, menus, and security profiles - used in standard Oracle applications also apply to self-service users. The seeded SSHR menus (Employee Self Service, Manager Self Service, and Contingent Worker Self Service) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self-service user's record; the manager functions allow the user to select an person from a list of available employees and workers and carry out the required function. The seeded SSHR responsibilities corresponding to each of these menus are useful for exploring the functionality delivered with the product, although they are not intended for production use. Instead, customers can configure their own variations of these menus and responsibilities, combined with appropriate security profiles, to restrict different groups of users to specific functions and employee groups. The Personalization Framework and Workflow Builder tools offer considerable flexibility in controlling the user's access to specific functions and require that users' transactions are approved before they are committed to the database. You can also control the user's access by configuring the base products. For example, Benefits eligibility profiles and enrollment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

How do I control access to employee information?

In addition to controlling which self-service functions a user can access, you can also control which employee records a user can access. Employees can only access their own personal information. Manager and HR professionals can access the personal information for selected employees. This access is controlled by security profiles which restrict different groups of users to accessing specific employee groups. When a manager selects a function from the self-service menu, the list of subordinate employees and workers is displayed in a hierarchy. If appropriate, you can permit managers to search for employees and workers in other business groups or organizations and if required, you can restrict this access to view-only and prevent managers from performing any transactions on employees outside of their business group.

But what happens if an employee wishes to release their personal information to a third party?

In certain situations, for example, after an applying for a different position, an employee may wish to release their personal information to a third party, for example, a new manager. In this case, the employee can use the Release Employee Information function to enable the new manager to access the employee's personal information.

How are users created for SSHR?

You can follow the standard Oracle procedures to create users and enable self-service by adding the self-service responsibilities to the user. Alternatively, you can use a batch process to create multiple users at one time. The batch processes are particularly useful if you need to create large numbers of accounts after initial installation, or for the new hire process.

SSHR and User Access

User Access and Security

The following description gives an overview of the standard security mechanisms used in Oracle HRMS and discusses how they relate to Oracle SSHR.

Responsibilities

A responsibility combines low-level elements of user access configuration to control which functions the user can access (User Access to Functions) and on whom they can perform these actions (see User Access to People).

You define SSHR responsibilities in the same way as you define responsibilities for Oracle HRMS applications.

> **Note:** When you define your responsibilities, make sure they are available from Oracle Self-Service Web Applications.

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

As an administrator, you can view a list of all owned responsibilities using the Responsibility Ownership functionality in SSHR. This functionality enables you to display a list of people with access to each of your owned responsibilities and revoke access to the responsibilities if appropriate.

See: Responsibility Ownership, page 2-14

User Access to People

The primary users of SSHR can be divided into two main groups: managers and employees (non-managers).

Employees (non-managers)

Employees and workers can only access their own employee records.

Managers

Managers can process the records for other employees and workers after selecting them from the Enter Process page. In the Enter Process page the manager can switch between View as:

- **Hierarchy**

  This view presents a hierarchical view of the employees and workers reporting to the current user. This view is based on either the supervisor or supervisor assignment hierarchy but can be configured to use the position hierarchy by setting the profile option HR: Self-Service Display Position Hierarchy to Yes.

  For more information on supervisor hierarchies, see Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

  > **Note:** Although Oracle recommend using either a position or supervisor-based hierarchy, you can set up other security structures in Oracle HRMS if you prefer.

- **My List**

  This view contains a user-defined list of people for quick reference.

  > **Note:** If the profile option HR:Expand Role of Contingent Worker is set to Yes, contingent workers will be able to manage other employees.

Person Search

The Enter Process page enables managers to perform a basic search for any employee within the underlying security profile. Alternatively managers can access the Advanced Search page to apply more detailed search criteria.

The manager can process employees and workers in the resulting list directly or add them to My List for future reference.

> **Note:** You can extend the security profile for managers by enabling the Release Employee Information function.
>
> See:Release Employee Information, page 8-12

Some functions enable managers and HR Professionals to search for ex-employees and terminated employees.

See:

- Online Payslip (Generic), page 12-8
- Appraisals, page 10-5
- Tax Information Form (W-2) (US), page 12-19

This extended search functionality is controlled by a function parameter.

See: Menu Function Parameter Descriptions, page 3-23

Configuration Options

You can control user access to the People Search functions by excluding certain functions if required, for example, you can hide the Person Search function so that managers can only process the records for the employees and workers displayed in their hierarchy.

See: Defining User Access and Menus, page 3-8

You can also control how managers search for employees and workers by assigning profile options. For example, you can apply the HR: Cross Business Group profile option to enable managers to search across business groups. If you then set the HR: Restrict Transactions Across Legislations in SSHR profile to Yes, the names of the employees and workers in other legislations will be disabled.

Security Profiles

SSHR uses security profiles to control a user's access to person records. For example, a security profile can give a manager access to the records for all the employees and workers in the department.

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

Employees (non-managers) and contingent workers

You can use the default View All security profile for the corresponding business group for the employee (non-manager) responsibilities because the employee functions restrict the user to accessing only their own record.

Managers

If you allow your managers to access the Search functions, you must create suitable security profiles. For most SSHR managers, the most appropriate security profile is a profile based on a supervisor hierarchy. This type of security profile dynamically generates a list of available employees and workers based on either the supervisor hierarchy or the supervisor assignment hierarchy (starting with the current user). The advantage of using a profile of this type is that you can set up a single security profile and use it for multiple users. To activate supervisor security, select either the Restrict by Supervisor (person-based) option or the Restrict by Supervisor (assignment-based) option in the Security Profile window. In this case, the manager can see the records for the persons with at least one assignment for which they are the supervisor and the manager can also see the direct reports for this person.

See: Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration in Oracle HRMS*

You can choose to build your supervisor hierarchy based on individual assignments. This means that your SSHR manager can only view and update a person's record if the manager is the supervisor for the specific assignment.

See: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration in Oracle HRMS*

Multiple Assignments

If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR:Enable Multiple Assignments in SSHR system profile to allow this.

> **Note:** If you are using assignment-based security, you must enable this profile option.

If the profile is set to No, managers can only view and update primary assignments. If the profile is set to Yes, managers can view and update only the assignments that are reporting to them through the security hierarchy.

> **Note:** In the Security Profile window, on the User-Based Security tab, select the Primary Assignments Only check box to restrict managers to viewing and updating primary assignment information only.

See: Defining a Security Profile, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Alternatively, you can choose to disable the Search functions for an SSHR manager responsibility. In this case, you can assign the View All security profile to the users.

Release Information

You can supplement the list of people who appear in a security profile by enabling the Release Information function. With this function, users can allow other users (who are outside of the security profile) to access their records. Similarly, managers can use the

Release Information to allow a second manager (who is outside of the security profile) to access the records for one of their employees.

To illustrate a typical use of this function, imagine that an employee wants to transfer to another organization. The new manager may need to review the employee's absence history before the transfer can take place. However, this manager may be outside the employee's current business group and would therefore, be restricted by HRMS security access. The manager cannot access the employee's data from a Person Search because of the defined security profiles. With the Release Information function, the employee granting access can search for the manager's name across all organizations and business groups and grant access to that person. This enables the manager to view the employee's absence history. However, you must ensure that the manager has a responsibility that satisfies the following conditions:

- includes appropriate manager functions, for example, My Employee Information.
- is associated with a security profile which has the "Allow Granted Access" check box flagged.

If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the "Allow Granted Access" option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers' capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as Termination. To do this, disable the "Allow Granted Access" check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

See: Release Information, page 8-12

User Access to Functions

You control user access to specific functions using function security. Functions are attached to menus which are then attached to responsibilities.

Navigation paths

The traditional navigation path for SSHR users is to select a function, for example, Personal Information or Change Manager, directly from a user menu. From SSHR 4.2, SSHR supports this approach but also introduces a new navigation path which uses the Actions pages.

Accessing functions from the Actions pages:

Instead of selecting a specific function from the menu, the user selects either the Personal Actions function (for employees and workers) or the Manager Actions function (for managers). SSHR displays a context-sensitive list of available functions.

Personal Actions

The Actions page displays a list of available functions for the employee or worker. To generate this context-sensitive list, SSHR takes the submenu defined in the HR: Personal Actions Menu profile option and excludes any legislation-specific functions that do match the legislation code of the user's business group.

Manager Actions

The manager is first presented with the Enter Process page from which they can select an employee assignment. They will then proceed to the Actions page which displays a list of functions available for the selected employee or worker. SSHR derives the list of functions by taking the submenu defined in the HR: Manager Actions Menu profile option and excluding any legislation-specific functions that do not match the legislation code of the selected person's business group.

Note: If the manager first selected their own record, the submenu is derived using the HR: Personal Actions Menu profile option.

Accessing functions directly from a menu:

Managers

When a user selects a manager function directly from the menu, they are first presented with the Enter Process page. From this page, they can select an employee for processing. The user is then taken, via the Effective Date page, to the corresponding web page for the function.

Note: Data security starts after the user has selected a person. If the function is specific to a legislation other than the legislation to which the selected person belongs, an error message is displayed.

Other Employees

When a user selects an employee function directly from the menu they are taken, via the Effective Date page if appropriate, to the corresponding web page for the function.

Note: Data security is checked after the user has selected a function. If the function is specific to a legislation other than the legislation to which the user belongs, an error message is displayed.

Legislation-specific Functions

Most SSHR functions are global and can be used on employees in any legislation. However, some functions are legislation-specific and must be restricted to employees in the corresponding legislation.

SSHR uses FND Data Security to enforce this restriction. A data security object has been defined on the combination of person and legislation and data security menus have been created for predefined functions. There is one data security menu for global functions and one for each legislation code. The predefined functions are associated with either the global data security menu or with one or more of the country-specific data security menus as appropriate.

Data security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code.

For example, a function on the global data security menu may be used with any employee but a function that is only on the US data security menu may be used only with employees in a US business group.

In addition to the data security menus that are available for predefined functions, there is a similar set of data security menus to which you can attach your custom functions. The data security grants are already in place.

See: Data Security Menus, page 2-9

Users and Responsibilities

You define SSHR users in the same way as you define users for Oracle HRMS applications.

See: Users Window, *Oracle Applications System Administrator's Guide*

However, the Person field of the Users window is particularly important for SSHR as it acts as the link between the professional forms interface and SSHR. It ensures that the user name is linked to the correct person records. For example, if you were to create a user and assign an SSHR responsibility to this user, the correct employee records would only be displayed in SSHR if the user's name is entered in the Person field.

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

New User Registration

The New User Registration functions enable new users to register their own details and create their own users for SSHR. You can also add a user hook which generates the user name when the user clicks a button on the web page.

You can enable the New User Registration functions for both employees and non-employees. The non-employee registration form is usually used in conjunction with Advanced Benefits.

See: New User Registration, page 8-56

User Profiles

You apply user profiles to control how the SSHR application runs. You can set profile options at site level, application level, responsibility level, and user level. The individual profile options are specified in the sections on each module.

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

User Access to Functions

Manager and Employee Functions

You can control which functions employees, workers, and managers can access by adding or removing functions from the user menus. For example, you could restrict employee access to the Termination function by only including it in the Manager menu.

See: Defining User Access and Menus, page 3-8

Access Roles for Self-Service Actions

Access roles specify permission to view or update routed transactions, such as self-service actions. You manage access roles for self-service actions in the Maintain Roles window.

SSHR provides two predefined types that you can use to create access roles that govern update permissions in self-service actions:

- SSHR Update Allowed
- SSHR Update Not Allowed

By default, all users can update an action. If you define a role using the SSHR Update Allowed type and assign it to a user, everyone else can no longer update. If you define and assign a role using the SSHR Update Not Allowed type, everyone else can update.

You do not use both types in the same implementation. Your decision to use one type or the other depends on whether the majority of users require update privileges. If they do, use the Update Not Allowed type to remove edit privileges from the remaining users. If the majority do not require permission to update, use the Update Allowed type to grant edit permission to those who do. If your organization has 40,000 people, of whom only 80 require update privileges for self-service actions, it makes more sense to grant privileges to 80 people than to deny them to 39,920.

> **Note:** Position control and budgeting features also use role types to set up roles for routing and approvals. Do not use the predefined role types of Line Manager, HR Manager, or Budget Manager with self-service actions.

See: Defining Workflow Roles for Transactions, *Oracle HRMS Enterprise and Workforce Management Guide*

Self-Service Menus and User Access

SSHR uses four types of menu: top-level menus, submenus, hidden submenus, and data security menus. The following section looks at each of these menus in detail.

The predefined menus are overwritten whenever an SSHR patch is applied so any changes you have made to the menus are lost. For this reason, you should create at least one top-level menu for employees and at least one for managers.

> **Note:** You can avoid having to configure several similar menus by adding all employee and manager functions to each of your menus and then defining menu exclusions against the responsibility to exclude specific functions from groups of users.

See: Defining Menus for SSHR, page 3-8

Types of Menus

Top-level Menus

The top-level menus define the choices that the user sees on their menu when they log in to SSHR. For example, the top-level menu for the Employee Self-Service responsibility is the Employee Self Service menu.

See: Defining User Access and Menus, page 3-8

Submenus

Submenus group together functions in a logical group on the top-level menu, for example, the Professional Details functions are grouped together in the Manager Professional Details submenu. The predefined submenus for SSHR include:

- Professional Details (for Employee Self-Service)
- Manager Professional Details (for Manager Self-Service)

Hidden Submenus

By attaching a submenu to the top-level menu without defining a prompt, you can assign functions to the responsibility but hide them from the user. This means that the user cannot select these functions directly. The following hidden submenus are predefined for SSHR:

- Submenus for Actions
  - Manager Actions Menu (for Manager Self-Service)
  - Personal Actions Menu (for Employee Self-Service)
  - Contingent Worker Personal Actions Menu (for Contingent Worker Self-Service)
  - Appraisals Menu
- Submenus for Pages (Employee Self-Service)
  - Suitability Matching Employee Personal menu
  - Suitability Matching Pages menu
  - HR Self-Service Pages submenu
  - My Information Functions menu
- Submenus for Pages (Manager Self-Service)
  - HR Self-Service Pages submenu
  - Suitability Matching Manager menu
  - Suitablility Matching Pages menu
- Self Service Contingent Worker Functions
- HR Manager Self Service Pages
  - My Employee Information Functions menu
  - SSHR hierarchy and search functions

SSHR uses these submenus to determine the availability of functions in other places. For example, the Manager Enter Process submenu controls the tabbed regions appearing on the Manager Enter Process page. The Manager Actions menu controls which functions are available on the Actions page for a manager to perform on other employees. The Personal Actions menu controls which functions are available to a user on the Personal Actions page. This menu also controls which functions are available from the Actions page when the manager selects their own record.

Data Security Menus

SSHR uses the data security menus to determine which functions are global and which are for specific legislations.

The data security menus for SSHR are:

- HR_GLOBAL_SS_FUNCTIONS_SEED

  Contains all the functions that are accessible across legislations (global functions)

- HR_cc_SS_FUNCTIONS_SEED (where cc is legislation code)

  Contains all the functions that are specific to a legislation

- HR_GLOBAL_SS_FUNCTIONS_CUSTOM

  Contains customer functions that are accessible across legislations

- HR_cc_SS_FUNCTIONS_CUSTOM (where cc is the legislation code)

  Contains customer functions that are specific to a legislation

Menus for Employees (Non-Managers)

If you create a new employee menu and want to use the Personal Actions functionality, you need to add the following submenu to your new menu:

- Personal Actions Menu (or your configured copy of this menu)

If you intend that contingent workers use your new employee menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

You must also add the following functions to your new menu:

- Personal Actions (or your configured copy of this menu)
- Suspended Actions

You must also make sure that, for any responsibilities that use your new employee menu, the values for the following profile options match the names of the personal actions submenus you selected above.

- HR:Personal Actions Menu
- HR:Contingent Worker Personal Actions Menu

Menus for Managers

If you create a new Manager menu and want to use the Manager Actions functions, you need to add the following submenus to your new menu:

- Personal Actions Menu (or your configured copy of this menu)
- Manager Actions Menu (or your configured copy of this menu)
- SS Hierarchy and Search Functions

If you intend that contingent workers use your new manager menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

You must also add the following functions to your new menu:

- Suspended Actions Mgr

You must also make sure that, for any responsibilities that use the new manager menu, the values for the following profile options match the names of the manager actions and personal actions submenus you selected above.

- HR:Manager Actions Menu
- HR:Contingent Worker Manager Actions Menu
- HR:Personal Actions Menu

Predefined Self-Service Responsibilities and User Menus

SSHR modules are accessible from predefined responsibilities, each with a corresponding top level menu.

In this version of SSHR, the predefined responsibilities are:

- Employee Self-Service
- Manager Self-Service
- HR User Self Service
- New User Registration
- HR Professional
- Payroll Professional
- Contingent Worker Self-Service
- Responsibility Ownership

The predefined US Federal responsibilities are:

- US Federal Employee Self-Service
- US Federal Manager Self-Service
- US Federal HR Self-Service

The predefined responsibilities for the HR Foundation application are:

- Employee Self Service Foundation
- Manager Self Service Foundation

The additional responsibilities provided by OSSWA (Oracle Self-Service Web Applications are:

- Workflow User Web Applications
- Preferences

> **Note:** These responsibilities are provided as a starting point only. You should create your own responsibilities and menus using the predefined SSHR responsibilities and menus as examples. Otherwise, your changes may be lost during an upgrade.
>
> See: User Access and Security, page 2-3

User Menus

SSHR includes several predefined top-level menus:

- Employee Self Service
- Manager Self Service
- HR Professional

- Payroll Professional
- Contingent Worker Self Service
- Employee Self Service Foundation

  Which includes the following functions/submenus:

  - Suspended Actions
  - Personal Actions
  - Employee Enter Process submenu
  - Personal Actions Foundation submenu
  - Professional Details
- Manager Self Service Foundation

  Which contains the following functions/submenus:

  - Suspended Actions Manager
  - Manager Actions Tree View
  - Manager Enter Process submenu
  - Manager Actions Foundation
  - Personal Actions Foundation
  - Manager Professional Details

US Federal SSHR includes predefined top-level menus:

- Benefits
- My Information
- My Employee Information
- Employee Information

The Employee Self Service menu contains the functions that employees can perform on their own records, for example, the Personal Details function. The Manager Self-Service menu contains the same functions as the employee menu plus additional functions that the manager can carry out for the employees for whom they are responsible.

The HR Professional menu is available for HR professionals who wish to view summarized information on employees.

You can also use the following menu for administration purposes:

- HR Web Administrator

See: Self-Service Menus, page 2-9

Navigation Options for Functions

Both employees and managers can access functions in one of two ways. They can either use the above menus and select the function using the corresponding menu option or they can display the Actions page through the Manager Actions or Personal Actions menus and select the required function from the list of available actions.

Legislation-specific Menus

SSHR provides legislation-specific menus to give users access to the functions that are specific to a country.

See: Self-Service Menus, page 2-9

Responsibility Ownership

The Responsibility Ownership function enables you (as an administrator or implementor) to view a list of owned responsibilities. You can expand the list of responsibilities to display the menus and functions attached to each responsibility. From the list of responsibilities, you can see the number of people with access to each responsibility both within the organization (in other words, within your HR security access environment) and outside of the organization (outside of your HR security access environment). By clicking on the number of people, you can display the user ID and other information for each user with access to the responsibility and if required, you can revoke access directly in the self-service page. If you choose to revoke access to a responsibility, the affected user receives notification of the change.

> **Note:** When the application generates the notification, it also triggers a business event. You can subscribe to this business event and call Application Programmatic Interfaces (APIs) to end date the responsibility access.
>
> See: Event Subscriptions, *Oracle Workflow Developer's Guide*

You can use the Responsibility Ownership functionality as an extra security measure to review and restrict the number of people outside of your organization with access to particular responsibilities. You can also monitor the number of people with access to each responsibility for auditing purposes.

Menu and Function Names

You access this module can be accessed from the following menus and functions:

User Menu Name	Function Name
Responsibility Ownership	Responsibility Ownership

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Profile Options

Not applicable

Additional Configuration Steps

1. Before you can use the Responsibility Ownership function, you must create data security grants to link responsibilities to your users.

   See: Creating Data Grants for Responsibility Ownership, page 2-20

   See: Create Data Grant (*Oracle Applications System Administrator's Guide*)

2. You should create code to subscribe to the following business event:

   - oracle.apps.per.selfservice.respowner.revoke_access

   This code should trigger the fnd_user_resp_groups_api.update_assignment API to end date the responsibility assignment.

   See: Sample Code for Subscribing to Business Event (Responsibility Ownership), page 2-15

Sample Code for Subscribing to Business Event (Responsibility Ownership)

If you are using the Responsibility Ownership function, you should write a PL/SQL code to subscribe to the following business event:

- oracle.apps.per.selfservice.respowner.revoke_access

  Important: The code should call the following Application Programmatic Interface (API) which end-dates the responsibility assignment:

  - fnd_user_resp_groups_api.update_assignment

Sample code is provided below. You can use this as a basis for your own code.

Code Package Header

```
SET VERIFY OFF
WHENEVER OSERROR  EXIT FAILURE ROLLBACK;
WHENEVER SQLERROR EXIT FAILURE ROLLBACK;
SET SCAN OFF;
REM --------------------------------------------------------------
-------------+
REM Name        : cust_resp_owner_bevent (HEADER)
REM File        : cust_resp_owner_bevent.pkh
REM Description : Used to revoke fnd_users' responsibility
REM
REM Change List
REM -----------+
REM
REM Version Date        Author      Bug       Description of Chang
e
REM -------+-----------+----------+---------+---------------------
-----+
REM 01-JAN-2005         Developer             Created
REM --------------------------------------------------------------
------------+

CREATE OR REPLACE PACKAGE cust_resp_owner_bevent AUTHID CURRENT_US
ER AS

FUNCTION revoke_access_wfevent_subscrb
( p_subscription_guid  in raw,
  p_event              in out NOCOPY wf_event_t)
RETURN VARCHAR2;

END cust_resp_owner_bevent;

/
--sho err;
commit;
exit;
```

Code Package Body

```
Set Verify Off
whenever sqlerror exit failure rollback;
WHENEVER OSERROR EXIT FAILURE ROLLBACK;
REM --------------------------------------------------------------
-------------
REM Name        : cust_resp_owner_bevent (BODY)
REM File        : cust_resp_owner_bevent.pkb
REM Description : Used to revoke fnd_users' responsibility.
REM
REM Change List
REM -----------
REM
REM Version Date        Author     Version    Description of Chang
e
REM -------+-----------+----------+---------+---------------------
------------
REM 01-JAN-2005         Developer  115.0      Created.
REM --------------------------------------------------------------
```

```
------------+

CREATE OR REPLACE PACKAGE BODY cust_resp_owner_bevent AS
--
--private procedure called by remove_resp
--this is a sample of how u can achieve the action
--
PROCEDURE archive_data
  (p_user_id  IN  NUMBER,
   p_user_name IN VARCHAR2,
   p_resp_id IN NUMBER,
   p_resp_appl_id IN NUMBER,
   p_security_group_id IN NUMBER,
   p_justification IN VARCHAR2,
   p_status IN VARCHAR2) IS

  l_login_person_id number;

BEGIN

  l_login_person_id := fnd_global.user_id;

  INSERT INTO CUST_RESP_OWNER_ARCHIVE
     (REVOKE_ID,
      USER_ID,
      RESPONSIBILITY_ID,
      REVOKE_JUSTIFICATION,
      REVOKE_DATE,
      REVOKED_BY,
      STATUS)
  VALUES
     (CUST_RESP_OWNER_ARCHIVE_S.nextval,
      p_user_id,
      p_resp_id,
      p_justification,
      sysdate,
      l_login_person_id,
      p_status);

EXCEPTION
  WHEN OTHERS THEN
    NULL;

END archive_data;

--
--private procedure called by revoke_access_wfevent_subscrb
--
PROCEDURE remove_resp
  (p_user_id  IN  NUMBER,
   p_resp_id IN NUMBER,
   p_resp_appl_id IN NUMBER,
   p_security_group_id IN NUMBER,
   p_error OUT VARCHAR2,
   p_justification IN VARCHAR2) IS

  cursor csr_user_name(v_user_id in number) is
  select user_name
```

```
  from fnd_user
  where user_id = v_user_id;

  cursor csr_user_resp_groups is
  select description
    from fnd_user_resp_groups
   where user_id = p_user_id
     and responsibility_id = p_resp_id;

  l_user_name fnd_user.user_name%type;
  l_owner_name fnd_user.user_name%type;
  l_description varchar(2000);
  l_login_person_id number;

BEGIN

  l_login_person_id := fnd_global.user_id;

  OPEN csr_user_name(p_user_id);
  FETCH csr_user_name into l_user_name;
  CLOSE csr_user_name;

  OPEN csr_user_name(l_login_person_id);
  FETCH csr_user_name into l_owner_name;
  CLOSE csr_user_name;

  OPEN csr_user_resp_groups;
  FETCH csr_user_resp_groups into l_description;
  CLOSE csr_user_resp_groups;

  BEGIN
    Fnd_User_Resp_Groups_Api.update_assignment(
      USER_ID => p_user_id,
      RESPONSIBILITY_ID => p_resp_id,
      RESPONSIBILITY_APPLICATION_ID  => p_resp_appl_id,
      SECURITY_GROUP_ID => p_security_group_id,
      START_DATE => SYSDATE - 2,
      END_DATE => SYSDATE - 1,
      DESCRIPTION => substr('RO:'||l_owner_name||':'||l_descriptio
n,1,240)
      );

    p_error := 'Status  SUCCESSFUL!';

  EXCEPTION
    WHEN OTHERS THEN
      p_error := SQLERRM;
  END;

  --Helpdesk.remove_resp
  --  (p_username => l_user_name,
  --   resp_code => to_char(p_resp_id),
  --   p_error => p_error,
  --   p_description => substr('RO:'||l_owner_name||':'||l_descrip
tion,1,240));

  archive_data(
    P_USER_ID => p_user_id,
```

```
    P_USER_NAME => l_user_name,
    P_RESP_ID => p_resp_id,
    P_RESP_APPL_ID  => p_resp_appl_id,
    P_SECURITY_GROUP_ID => p_security_group_id,
    p_justification => p_justification,
    p_status => p_error
    );

EXCEPTION
  WHEN OTHERS THEN
    NULL;
END remove_resp;

-- ---------------------------------------------------------------
------------+
-- revoke_access_wfevent_subscrb is called by the workflow busines
s event
-- oracle.apps.per.selfservice.respowner.revoke_access
-- ---------------------------------------------------------------
------------+

FUNCTION revoke_access_wfevent_subscrb
( p_subscription_guid  in raw,
  p_event              in out NOCOPY wf_event_t)
RETURN VARCHAR2

IS

I number := 0;
usrIdCnt number := 0;
l_error varchar2(2000) := null;

BEGIN
usrIdCnt := to_number(p_event.GetValueForParameter('USER_COUNT'));

FOR I IN 1 .. usrIdCnt LOOP

  remove_resp
   (p_user_id => to_number(p_event.GetValueForParameter('USER_ID'|
|to_char(I)))
   ,p_resp_id => to_number(p_event.GetValueForParameter('RESP_ID')
)
   ,p_resp_appl_id => to_number(p_event.GetValueForParameter('RESP
_APPL_ID'))
   ,p_security_group_id => to_number(p_event.GetValueForParameter
                                  ('SECURITY_GROUP_ID'))
   ,p_error => l_error
   ,p_justification => p_event.GetValueForParameter('MESSAGE'));

END LOOP;

COMMIT;

RETURN 'SUCCESS';

EXCEPTION
 WHEN OTHERS THEN
   WF_CORE.CONTEXT('PER_RESPOWNER_UTIL_SS', 'revoke_access_wfevent
```

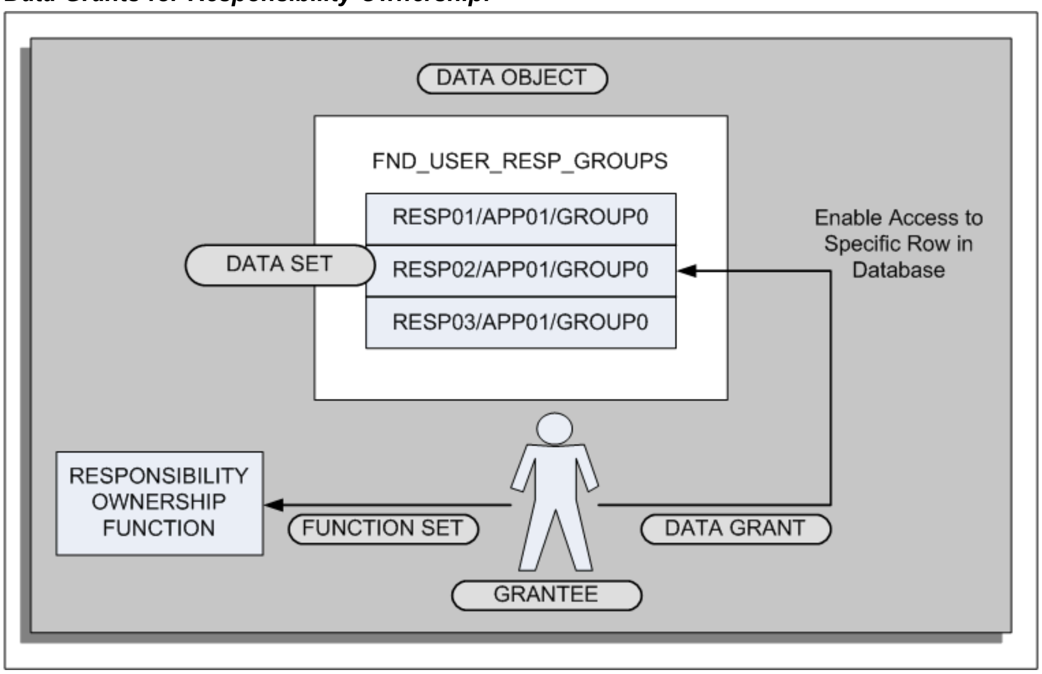
```
_subscrb', p_event.getEventName(), p_subscription_guid);
     WF_EVENT.setErrorInfo(p_event, l_error);
     RETURN 'ERROR';
END revoke_access_wfevent_subscrb;

END cust_resp_owner_bevent;

/
show errors;
commit;
exit;
```

For more information on using PL/SQL, see: Overview of Using PL/SQL in Applications, *Oracle Applications Developer's Guide*

Creating Data Grants for Responsibility Ownership

Data grants enable you to control access to data in the data security system. When you create a data grant, you grant access to a database object to a user. In the case of the Responsibility Ownership function, you use data grants to grant responsibility ownership to a user. The following graphic illustrates the concept of data grants:

Data Grants for Responsibility Ownership:



The data grant links the user (grantee) to a specific data set instance (row in the data object). In addition, you link a function set to the user which enables the user to access particular functionality (in this case, the Responsibility Ownership functionality).

For information on using data grants for other purposes, see: Overview of Data Security (*Oracle Applications System Administrator's Guide*).

To create a data grant for the Responsibility Ownership:

1. First identify which users should be granted ownership of responsibilities. These users would have an administrative role, for example, an HR Manager, Finance Manager, or System Administrator.
2. Use the Functional Administrator responsibility to create grants.
   1. Select the Grants tab.
   2. From the Grants page, click Create Grant to initiate the creation process and define the data grant.
   3. In the Name field, enter a descriptive name for the grant, for example, <*responsibility name*>-Ownership. You can also enter a description.
   4. Specify the effective date for the grant.

      Navigate to the Security Context region to define the context for applying the grant.
   5. In the Grantee Type field, select Specific User.
   6. In the Grantee field, enter the user ID of the person who you are designating as the owner of the responsibility.

      Navigate to the Data Security region.
   7. In the Object field, enter the following delivered object:
      - FND_USER_RESP_GROUPS

        Note: Oracle provides this object for use with the Responsibility Ownership functionality.
   8. For the purpose of the Responsibility Ownership function, you must create a data set that grants access to a *specific instance* in the object table. Select this option (Instance) and continue to the next page to enter the instance information.
   9. The data set instance comprises three segments of information. Enter the information, leaving the remaining fields blank:

Primary Key	Example
Responsibility ID	50101
Application ID	800
Security Group ID	0

Note: To determine the information for the data set, query the user in the Users window and select Help > Diagnostics > Examine from the Responsibilities block. Query the following fields in the Examine Field and Variable Values window:

- RESPONSIBILITY_ID
- RESPONSIBILITY_APPLICATION_ID
- SECURITY_GROUP_ID

10. In the Set field, enter the delivered set PRIMARY_OWNER.

    Note: Oracle provides this function set for use with the Responsibility Ownership functionality.

    In this case, a function set is a data security menu containing the Responsibility Ownership function.

11. Click Finish to complete the data grant creation process. The desginated owners can now log on to SSHR and use the Responsibility Ownership function to administer and control access to their responsibilities.

    See: Responsibility Ownership, page 2-14

You should repeat steps 1 through 11 for each responsibility that you want to review and maintain.

SSHR User Accounts

Batch Creation of User Accounts

Every Oracle HRMS user needs to be registered with a user name, password and responsibility. The creation or deletion of these user accounts can often be time consuming, particularly if you are restricting a user's access with a responsibility associated with a security profile and a menu.

A set of concurrent programs have been created for Oracle HRMS applications to automate the creation and management of large groups of user accounts. These programs are particularly useful if you have to create a large number of user accounts at initial installation, for managing new hire user accounts, or for managing accounts for terminated employees.

> **Note:** The creation of users with effective dates in the future is not supported.

The concurrent programs are:

- User Account Employee Extract Process
- Data Pump Engine
- Data Pump Batch Exceptions Report

Before you can use the concurrent programs however, you must write custom logic to reflect your enterprise's unique business rules. A user hook in the hr_user_acct_api is provided for you to do this.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

Features of the Create Batch Users Process

The Create Batch Users process only creates new responsibilities or profile option values for the new responsibility you create in the batch. This is for Oracle HRMS Applications only. The batch process does not create security profiles either. However, if you create a security profile, in Oracle HRMS, you can assign the security profile to a new responsibility that is created for a user in the batch process. The batch process does not create security attributes for a responsibility or a user.

A naming convention you might use is email ID with a responsibility name. For example, email ID JSMITH associated with the Manager Self Service responsibility could be JSMITH_MSS. If you have set up security profiles for managers in Oracle HRMS you can associate the security profile name to a user, a responsibility and a security profile. For example, the SEC_PF security profile could be JSMITH_MSS_SEC_PF.

You can create a template responsibility for the batch process. If you create a template responsibility, or use the predefined Manager Self Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibilities attributes, by setting values in the communication area, hr_user_acct_utility, of the API.

Creating Batch User Accounts with Concurrent Programs

To create batches of users you must first write user hooks with your own custom logic.

See: Writing User Hooks to Create Batch User Accounts, page 2-27.

When you have created user hooks, you can run a set of concurrent programs to manage the batch creation of users on an ongoing basis.

You run the concurrent programs from the Submit Requests window.

To create batch user accounts with concurrent programs:

1. Run the User Account Employee Extract Process

   This program extracts employee records and creates a batch file of user accounts to be created or deactivated.

2. Run Data Pump Engine

   This program uses the batch from the employee extract process and calls the HR API to create or deactivate user accounts.

3. Submit Data Pump Batch Exceptions Report

   This program reports errors in the Data Pump Engine.

User Account Employee Extract Process

This extract process produces output records which are used by the Data Pump Engine. The Data Pump Engine calls the hr_user_acct_api to create or deactivate user accounts.

The batch name is written to the HR_PUMP_BATCH_HEADERS table. The extracted employee records are written to the HR_PUMP_BATCH_LINES table. The batch line table has defined generic attributes but for each API, the Data Pump generates a view on the HR_PUMP_BATCH_LINES table to reflect the parameters of the API.

The specific views tailored for the hr_user_acct_api are:

- hrdpv_create_user_acct

  Records for creating new user accounts can be mapped to this database view

- hrdpv_update_user_acct

  Records for terminated employees whose user accounts are to be inactivated can be mapped to this database view

  > **Note:** You must use a meaningful batch name. For example, run type and date range or another parameter. The batch name is the only way you can identify which batch to select in the Employee Data Pump process and the Data Pump Batch Exceptions Report processes.

To run the user account employee extract process:

1. Access the User Account Employee Extract Process concurrent program.
2. Enter a batch name to identify the batch.
3. Enter the following date input parameters:
   - Start Date

defaults to SYSDATE. This parameter sets the start date from which the records are extracted

- End Date

  defaults to SYSDATE. This parameter is used in conjunction with the start date parameter to set a date range for the extraction of the records

4. Enter the following organization input parameters:
   - Organization

     this parameter comprises a list of all the business group organizations that the responsibility is associated with. If you select an organization from the list of values, the program only extracts records from the selected organization.

     > **Note:** If you enter values in the Organization parameter, they are superseded by any values you enter in the Organization Hierarchy, Organization Hierarchy Version, and Parent Organization parameters. These parameters always take precedence and replace the values entered in the organization parameter and work together as a set.

   - Organization Hierarchy

     organization hierarchy name for the responsibility's business group. This parameter contains an list of all the organizations hierarchies in the business group.

   - Organization Hierarchy Version

     organization hierarchy version for the responsibility's business group. This parameter contains an list of the organization hierarchy versions selected in the organization hierarchy parameter.

   - Parent Organization

     parent organization within the hierarchy. Selecting the parent organization will extract records from this organization and any organizations below the parent organization.

5. Enter the Run Type input parameters by selecting a processing option from the list of values. The processing options are:
   - Create User Account for New Hires

     selects all employees hired between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

   - Create User Accounts for All Employees

     selects all employees as of the end date, within the organization or organization hierarchy. The start date parameter will be ignored and employees terminated before the end date will not be selected either. This run type is used on the initial implementation and is usually used once.

   - Inactivate User Account for Terminated Employees selects all employees terminated between the start date and end date parameter within the organization or organization hierarchy. Once selected, the user account for the terminated employee or worker is end dated. This run type is used on an ongoing basis to end date accounts for terminated employees and workers within the date range.

- Create and Inactivate User Accounts runs two queries. The first query selects all employees and workers hired between the start date and end date within the organization or organization hierarchy. The second query selects all employees and workers terminated between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

  Note: Each employee or worker extracted from the database is recorded in the hr_pump_batch_line table. The hrdpv_create_user_acct view has been defined to map create user accounts to the hr_pump_batch_line table. The hrdpv_update_user_acct view has been defined to map inactivate user accounts to the hr_pump_batch_line table. You can access these views because the API column name is used to identify the record rather than the generic names used in the hr_pump_batch_lines table.

Data Pump Engine

The Data Pump Engine will call the hr_user_acct_api to perform data validation and loading operations. The employee data is recorded in the hr_pump_batch_lines table.

> **Note:** You must run the User Account Employee Extract Process before you run the Data Pump Engine process. The Data Pump Engine depends on the batch id the User Account Employee Extract process creates.

To run the Data Pump Engine concurrent program:

1. Access the Data Pump Engine concurrent program.
2. Enter the following parameters:
   - Batch Name

     you must enter the same batch name as you did in the Employee Extract Process. The Batch Name is the only information you have to identify which batch to run
   - Validation Mode

     you can set two values, YES or NO. A YES value enables you to review errors in the batch, or related records in a batch, and change them before any are committed to the database.

     A NO value will commit the data to the database if there are no errors. If there are errors the data will not be committed to the database and you can fix the errors and rerun the batch.

     DataPump will set the Line Status to one of the following values:

     - E - Error
     - C - Completed
     - U - Unprocessed
     - V - Valid

   See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*

Employee Data Pump Exceptions Report

Each person record is recorded in an individual batch line. The data pump exceptions report will show whether the error is from the batch header or batch line. You can identify which person record is in error from the person id in the exception report.

> **Note:** You must run the User Account Employee Extract Process before you run the Data Pump Engine and Data Pump Batch Exception Report processes. The Data Pump Engine and Data Pump Batch Exception Report processes depend on the batch id the User Account Employee Extract process creates.

To run the Data Pump Batch Exceptions report:

1. Access the Data Pump Process Exceptions Report concurrent program.

   > **Note:** You can run the Data Pump Engine and Data Pump Batch Exception Report processes in sequence. See: Overview of Concurrent Processes, *Oracle Applications Systems Administrator's Guide*

   See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*

Writing User Hooks for the Batch Creation of User Accounts

Before you write your user hook, you must review your user population and create a standard user name format, responsibility, and security profile for your enterprise. When you have defined a standard and created any security profiles or security groups you need, you can begin to write your user hook.

You can create a template responsibility for the batch process. If you create a template responsibility or use the predefined Manager Self-Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibility's attributes by setting values in the communication area of the API, hr_user_acct_utility.

You can find sample user hook code in the following package:

- $PER_TOP/patch/115/sql/hrhksmpl.pkb

To set up the prerequisites for writing user hooks:

1. Create a security profile in Oracle HRMS and, using your naming standard, associate the security profile and responsibility to a new user in your user hook code.
2. Implement security groups to manage security profiles with the Enable Security Groups profile option. By implementing security groups, you can associate more than one security profile to a single responsibility.

   > **Note:** Before you write user hooks, run the Security List Maintenance concurrent process. This ensures that the security profiles work.

   > **Note:** If you plan to use security groups in a responsibility defined for use in Oracle Self-Service Web Applications, or plan to create a new responsibility for use in Oracle Self-Service Web Applications, set the Enable Security Groups profile option at the application level: Oracle Self Service Web Applications.

3. Set up a guest user account in Oracle Applications by setting the GUEST USER PASSWORD profile option. This must be in the format <username/password>. You can obtain and verify the guest user account with your Database Administrator.
4. Use the Define System Profile Option Value in System Administrator responsibility to set a security profile at Site or Application level. This is necessary because security profile option values can be set at Responsibility or User level with the batch process.

> **Note:** The sample user hook is called hrhksmpl.pkb and each code block is documented. You can also find a copy of the sample in the following directory $PER_TOP/patch/115/sql.

See: API User Hooks, *Oracle HRMS Implementation Guide*

See: Sample Code, *Oracle HRMS Implementation Guide*

Tables Updated in the Batch Process

The batch process inserts records into the following FND tables:

- FND_USER
- FND_USER_RESP_GROUPS

  to enable a new user to use a designated responsibility
- FND_RESPONSIBILITY

  if new responsibilities are created in the custom user hook module for the new user
- FND_RESPONSIBILITY_TL

  stores the translated value of responsibility name
- FND_RESP_FUNCTIONS

  if the new responsibility has function exclusion rules
- FND_PROFILE_OPTION_VALUES

  to set profile option values for any newly created responsibility for the user.
- PER_SEC_PROFILE_ASSIGNMENTS

  if security groups are enabled.

The batch process automates the functionality of the Define User Form and inserts records into the following FND tables:

- FND_USER
- FND_RESP_GROUPS

> **Note:** Security attributes for a user cannot be created in the batch process

The batch process automates the functionality of the Define Responsibility Form and inserts records into the following FND tables:

- FND_USER_RESP_GROUPS
- FND_RESPONSIBILITY_TL

> **Note:** Security attributes for a responsibility cannot be created in the batch process

The batch process automates the functionality of the Profile Option Value Form and inserts records into the following FND table:

- FND_PROFILE_OPTION_VALUES

To write batch user hooks with your own custom business logic:

1. To create batches of users you need to write PL/SQL programs in the user hooks of the following API:

    - hr_user_acct_api

    This API contains two procedures:

    - hr_user_acct_api.create_user_acct

      used to create a new user

    - hr_user_acct_api.update_user_acct

      used to inactivate user accounts, for example on termination of an employee or worker

To set up the Create User API procedure:

1. Write a PL/SQL program to communicate to the API the user name, password, responsibility, and profile to use when it creates a new user account for the employee or worker in the process.

    There are two user hook points in the create user procedure:

    - hr_user_acct_bk1.create_user_acct_b

      before-process hook point

    - hr_user_acct_bk1.create_user_acct_a

      after-process hook point

    Use the before-process hook for the PL/SQL program. The program enters these values into the global variables or record structures in hr_user_acct_utility.

    > **Note:** You can supply passwords for the new user account or leave the API to generate a random string. The string will be in an 8 character alphanumeric format.

2. Write a PL/SQL program for the after-process hook if you leave the API to generate a password. The program must save the password of the new user account to a file that can be accessed by a system administrator. This is necessary because the password created by the API is encrypted when it is saved to the FND_USER table in the database. You must capture the password before it is encrypted so that you can notify employees of their initial password.

    > **Note:** If you supply a password, you may not need to write a user hook for this after-process hook point.

To set up the Update User API procedure:

The update user API procedure is used to inactivate employees. The API end dates the employees record in the FND_USER and FND_USER_RESP_GROUPS tables and is not meant for general purpose update.

There are two user hook points in the update user procedure:

- hr_user_acct_bk2.update_user_acct_b

  before process hook point

- hr_user_acct_bk2.update_user_acct_a

  after process hook point

  The before process user hook point is used for your extra validation. The API will not pick up any values from your user hook.

  The after process user hook point executes any extra logic after the main API validation and processing logic has successfully completed and the update process is finished.

To carry out the remaining steps:

1. Compile the custom package you have created after you have written your user hooks.
2. Register and link your custom package procedures to the appropriate API user hooks when you have compiled the package.

   See: API User Hooks, *Oracle HRMS Implementation Guide*

   A sample script to register and link your custom package and procedures is provided below.

   Sample code

```
DECLARE

 ln_api_hook_call_id NUMBER;

 ln_object_version_number NUMBER;

 ln_api_hook_id NUMBER;



  BEGIN



 -- get api_hook_id for the seeded before process user hook packag
e procedure

 SELECT ahk.api_hook_id

 INTO  ln_api_hook_id

 FROM  hr_api_hooks ahk

   ,hr_api_modules ahm

 WHERE ahm.module_name = 'CREATE_USER_ACCT'

 AND ahm.api_module_type = 'BP'
```

```
AND ahk.hook_package = 'HR_USER_ACCT_BK1'

AND ahk.hook_procedure = 'CREATE_USER_ACCT_B'

AND ahk.api_hook_type = 'BP'

AND ahk.api_module_id = ahm.api_module_id;


-- insert a row into HR_API_HOOK_CALLS for before process user ho
ok custom package procedure


hr_api_hook_call_api.create_api_hook_call(

 p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

 p_api_hook_id   => ln_api_hook_id,

 p_api_hook_call_type => 'PP',

 p_sequence   => 1,

 p_enabled_flag  => 'Y',

 p_call_package  => 'MY_USER_ACCT', -- your custom package name

 p_call_procedure => 'CREATE_USER_ACCT_B', -- your custom package
procedure name

 p_api_hook_call_id  => ln_api_hook_call_id,

 p_object_version_number => ln_object_version_number

);



-- get api_hook_id for the seeded after process user hook package
procedure

SELECT ahk.api_hook_id

INTO  ln_api_hook_id

FROM  hr_api_hooks ahk

  ,hr_api_modules ahm

WHERE ahm.module_name = 'CREATE_USER_ACCT'

AND ahm.api_module_type = 'BP'

AND ahk.hook_package = 'HR_USER_ACCT_BK1'
```

```
 AND ahk.hook_procedure = 'CREATE_USER_ACCT_A'

 AND ahk.api_hook_type = 'AP'

 AND ahk.api_module_id = ahm.api_module_id;



 -- insert a row in HR_API_HOOK_CALLS for after process user hook
custom package procedure

 hr_api_hook_call_api.create_api_hook_call(

  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

  p_api_hook_id   => ln_api_hook_id,

  p_api_hook_call_type => 'PP',

  p_sequence   => 1,

  p_enabled_flag  => 'Y',

  p_call_package  => 'MY_USER_ACCT',

  p_call_procedure => 'CREATE_USER_ACCT_A',

  p_api_hook_call_id  => ln_api_hook_call_id,

  p_object_version_number => ln_object_version_number

 );


  EXCEPTION

 when others then

  dbms_output.put_line('Error in seeding user hook procedures: ' |
| sqlerrm);

  END;


  /

  commit;

  exit;
```

Execute User Hook Pre-Processor

When you have registered and linked your custom package procedure to the API you should execute the user hook pre-processor program. Run the hrahkone.sql found in $PER_TOP/patch/115/sql directory to do this. However, you'll need to know the internal api_module_id for the HR_USER_ACCT_API before running the script. To find the internal api_module_id you should run the script below:

```
 SELECT api_module_id

 ,api_module_type

 ,module_name

FROM  hr_api_modules

WHERE module_package = 'HR_USER_ACCT_API';
```

You should see results similar to those below:

```
API_MODULE_ID API_MODULE_TYPE     MODULE_NAME

---------------------------------------------------------

     383 BP                       CREATE_USER_ACCT

     384 BP                       UPDATE_USER_ACCT
```

> **Note:** Your api_module_id will be different from the one above.

Use your own API module id when executing hrahkone.sql. If you have a customer package for UPDATE_USER_ACCT hook point, you will need to run hrahkone.sql twice. Once for the api_module_id for CREATE_USER_ACCT hook call and second for the UPDATE_USER_ACCT hook call.

3. Enter any new message text for the messages that you issue in your custom package when you have run the pre-processor program. Use an Application Developer responsibility in Oracle Applications to create your message text.

4. Ensure you have set the application level correctly if you use security groups to manage security profiles. For example, in SSHR you must set the application level to Oracle Self Service Web Applications. Set the security profile option to the application level if you need to associate the responsibility with another HRMS application.

   This updates the following tables: per_sec_ profile_ assignments, and fnd_user_resp_groups

5. Make sure that the Enable Security Groups profile option is Yes.

6. Set the Data Pump error parameters. These parameter control aspects of the Data Pump Engine process.

   See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*.

   > **Note:** You must set the MAX_ERRORS_ALLOWED parameter to see all the errors logged during the run. This parameter controls how many errors are issued before the engine stops processing. The

default value for the parameter is 20 or the chunk size. If you do not set this parameter value, the engine will stop processing after 20 errors.

7. Test the custom packages by running the following programs:. To test, run the User Account Employee Extract concurrent program to create batches of extracted employees. Run the Data Pump Engine concurrent program to process your batch, and run the Data Pump Batch Exceptions

   - User Account Employee Extract concurrent program - to create batches of extracted employees
   - Data Pump Engine concurrent program - to process your batch
   - Data Pump Batch Exceptions concurrent program - to report any errors.

   If necessary, you can rerun the batch after fixing any errors.

   > **Note:** You can use the Pipemon utility to help you debug your code.

   See: Creating Batches of Users with Concurrent Programs, page 2-24

3
Extending SSHR

Configuration Overview

All Oracle Self-Service Applications, including the SSHR modules, are built on the Oracle Applications (OA) Framework to enable maximum flexibility. Although the SSHR modules are delivered with predefined settings which meet the HRMS requirements of the majority of enterprises with little or no configuration, there are many configuration options available to ensure that all your enterprise requirements are met.

This chapter provides an overview of the different configuration steps for SSHR and introduces a common configuration method that you can apply to any SSHR module in conjunction with the function-specific configuration steps. For detailed information on the configuration steps, see the following topics:

- User Access, page 2-1
- Workflow, page 4-1
- Page Layouts, page 5-1
- Approvals, page 6-1

Extending SSHR

Guidelines for Configuring SSHR Functions

The best approach to take when configuring SSHR is to first configure a sample function, test it until you are satisfied with the results, and then repeat the steps for the other functions.

Start your configuration process by configuring a module for a particular group of users. It is important to consider both the module and the intended audience at the same time because, if required, you can configure multiple variations of the same module to suit different groups of users. For example, you might choose to implement one version of the Personal Information module for all employees, another version for one set of managers, and another version for a second set of managers.

> **Note:** If function-level personalizations have been delivered by Oracle for a function you wish to copy, be aware that you will lose these personalizations if you create a custom version of the function.
>
> See: Function-level Personalizations, page 5-3

See Supplied Functions, page 3-13 and Menu Function Parameters, page 3-23 for information on parameter use in functions.

User Access

You make your new version of the SSHR module available to your target group of users by creating an AOL function and attaching it to a menu. The menu is attached to a responsibility which you assign to your users.

You specify whether the AOL function is restricted to the user's own records or whether a manager can use the function to select from a list of employees and workers.

For each responsibility (or combination of responsibility and user), you need to define a security profile to restrict the user to an appropriate business group and, if required, a subset of a business group. A typical subset would be all employees in a specific organization or all employees reporting to the current user.

You also need to consider whether to allow users to access people in other business groups and whether users can access additional people who may grant them access to their records using the Release Employee Information function.

See: User Access and Security, page 2-3

Process Flows

If the SSHR modules are workflow-enabled (see: Summary of SSHR Modules table, page 1-6), you can choose to modify the predefined process flow if required. For example, you can chain two modules together (where permitted) or introduce additional branching logic.

See: Self-Service Workflows, page 4-3

Approvals

You must decide whether changes that users make using your modified function are subject to approval and who the approvers are. You can either use the Workflow Builder, PL/SQL, or Oracle Approvals Management to control transaction approvals.

See: Approvals, page 6-7

Page Layouts

In most cases, the predefined page layouts contain all the fields that users need to perform a transaction. However, you may decide that some changes are required. For example, you could change the field prompts to match terminology used by your enterprise. You can also add more detailed instructions to the web pages, display selected flexfield segments, and hide fields or sections of web pages.

You modify page layouts using the Personalization Framework.

See: The Personalization Framework, page 5-3

Module-specific Configuration Options

Detailed information on the configuration options for each module is given in the corresponding sections. Each section contains the following information:

- menu and function names
- workflow process names and attributes
- region, tip, and instruction names
- profile options

Transaction History

The history of all transactions and changes to transactions is stored on the database. If you need to investigate transaction history you can query the tables below using either SQL*Plus, Discoverer workbooks, or Report*Writer reports.

Data Mining Action History tables

Table name	Description	Primary Key
PQH_SS_TRANSACTION_HISTORY	**Transaction History** This table holds historical information that identifies each transaction. The data in this table is unlikely to change over the course of a transaction.	Transaction ID
PQH_SS_APPROVAL_HISTORY	**Approval Changes** This table tracks actions taken by approvers. Each action taken by an approver constitutes a separate entry.	Transaction Id and Approval Id
PQH_SS_STEP_HISTORY	**Step History** The Step History table stores changes to existing transactions.	Transaction Id, Transaction Step Id and Approval Id
PQH_SS_VALUE_HISTORY	**Transaction Value History** This holds transaction values for every step history created.	

Managing Dates in SSHR

Effective Dates

When a user initiates an action the application prompts the user for an effective date. The user can elect for the changes to take place as soon as final approval is made. Or the user can supply an effective date. The application checks the hire date and tells the user to select a later date. The application also informs the user of any pending changes to that person's record.

The application validates the entry to make sure the data is correct using specific criteria. The following checks are carried out in a chained process:

- hire_date

  Checks that the effective date entered is later than the hire date. If it is not, an error will be issued and the user will be unable to continue.

- termination_date

  Checks that the effective date entered is earlier than the termination date. If it is not, an error will be issued and the user will be unable to continue.

- pending_workflow

  Checks if there are changes pending in the workflow tables for the selected person.

  If there are pending changes, the user will be unable to continue with the action unless the profile option HR:Allow Concurrent Self Service Actions is set to Yes.

- future_assignment

Checks if there are any future assignment changes with respect to the effective date entered.

- insert_mode

  Issues a warning (alert) only if the effective date of the assignment is less than a future-dated change.

  To configure the outcome of the above checks, see Handling Concurrent Transactions, page 3-5 below.

Handling Concurrent Transactions

The application supports multiple simultaneous actions on the same employee or worker. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes.

Enabling concurrent transactions can give rise to potential data conflicts from either intervening actions or actions dated in the future. Two profile options enable you to control the potentially conflicting data: HR:Refresh Self Service Actions With Data From Intervening Actions, and HR:Manage Self Service Actions When Future-Dated Changes Exist.

Intervening Actions

If someone approves an action on an employee or worker while a manager is performing a transaction on the same employee or worker, and the effective date of the approved action is prior to the current action's effective date, then a potential conflict exists. The system profile, HR:Refresh Self Service Actions With Data From Intervening Actions, enables you to deal with this potential conflict.

- If you set the system profile to Yes, the application displays a warning message listing the attributes that have been changed by the prior approved action. A refresh of the current data will occur. The manager will then be able to proceed with the transaction.
- If you set the system profile to No, the application displays a warning with the following message: "The database contains future-dated changes to this person's record. Your current setup does not allow you to complete this action. Contact your system administrator." The current transaction will fail.

Future-Dated Changes

When the application encounters a pending change to the manager's selected person's record, effective subsequent to the current action's effective date, the future-dated change poses a potential conflict with the current action. You can manage these potential conflicts by setting the profile option, HR:Manage Self Service Actions When Future-Dated Changes Exist, to one of the values below:

- Allow Approval (Notify HR Rep)

  After completing the chain of approval, a notification of the transaction will be sent to an HR Representative who can review the change, then apply the necessary changes to the database manually.

  You must define a role based on the predefined type HR Representative, and assign it to each HR manager you want to receive the notification. The first HR manager to act on the notification and apply manual changes does so on behalf of all HR Representatives.

- Stop with an Error

  The manager will be forced to choose an Effective Date subsequent to the future-dated change.

  > **Important:** If you enable the system profile HR:Manage Self Service Actions When Future-Dated Changes Exist by setting it to Allow Approval (Notify HR Rep), Oracle highly recommends that you also enable HR:Refresh Self Service Actions with Data from Intervening Actions. Otherwise you should disable HR:Refresh Self Service Actions with Data from Intervening Actions.

  > **Note:** A system administrator or other implementer of Self-Service Benefits can access the Change Session Date menu option for testing future dated enrollments. You should remove this menu item in your production environment so that benefits participants do not alter their enrollment date. To remove the Change Session Date item from the menu, query the BEN_SELF_SERVICE_BENEFITS menu option in the Menus window and delete the Change Session Date menu entry.

Legislation and Customer Overrides

An override enables a user to customize field values and data in a code package . An override is different from a user hook, which enables users to write code and update both fields and HRMS database tables.

Within SSHR, you can use overrides in the following situations:

- To customize the fields used when loading data from Oracle HRMS tables to the Employee Directory repository tables to meet user and legislation requirements. For example, to enable single sign on for the Employee Directory you use an override to add the FND_USER field to the Employee Directory tables..

  For more information, see: Enabling Customer Overrides for the Employee Directory, page 9-39.

- To populate the Employee Directory with data.

  For more information, see: Legislation and Customer Overrides for the Employee Directory, page 9-42.

- To configure the read-only display of job and position fields in the following pages.
  - My Information and My Employee Information

    See: My Information and My Employee Information, page 9-72.
  - Person Header and Assignment Headers in all Manager Self-Service pages.
  - Selected Enter Process pages
    - People in Hierarchy page

      (supervisor hierarchy and position hierarchy)
    - My List page
    - Simple Search page

> **Note:** The overrides are not used in the Advanced Search page as the job and position fields are used for searching.

- Person Detail page

See: Examples of Overrides, page 3-7

To enable an override, you must carry out the following steps:

1. Open the required package. This package may be one of the following:
   - perwscor.pkb (for My Employee Information)
   - peredcor.pkb (for the Employee Directory)

     > **Note:** The packages reside in the following directory:
     >
     > $PER_TOP/patch/115/sql directory

2. Modify the override flag in the package to enable the customer override. The override flag is similar to the following line of code:

   ```
   g_override_flg BOOLEAN:=FALSE
   ```

   Change the BOOLEAN value to TRUE.

3. Insert your code for the override. For examples of code, see the documentation relevant to your function:
   - Customer Overrides for Single Sign On, page 9-39
   - Legislation and Customer Overrides for the Employee Directory, page 9-42
   - My Information and My Employee Information, page 9-72

4. Compile the override and apply to database.

   When the override packages are implemented, they are called by the application.

Examples of Overrides

Displaying Position or Job Names

You can use customer overrides to configure a user-defined format for displaying position or job names. For example, you can choose to replace the defined format for displaying a user's job with a user-defined name format consisting of fewer segments.

For example, instead of displaying a job as:

12345.Global Development.Development Manager.12B

you can display only the third segment (Development Manager).

To make this change, you need to modify the perwscor.pkb code package to include the following code:

> **Note:** The packages are available within $PER_TOP/patch/115/sql directory. The file containing the package header is perwscor.pkh.

```
FUNCTION getJobName(
  p_job_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2//Actual MLS job name
)
return varchar2
```

To make a similar change to the position field, you need to modify the package to include the following code:

```
FUNCTION getPositionName(
  p_pos_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2
)
return varchar2
```

You also need to change the job override and/or position override flag to TRUE in the package. In the following example, only the job override flag is set to TRUE.:

```
g_job_override_flg   BOOLEAN:=TRUE;
g_position_override_flg BOOLEAN:=FALSE
```

Defining Menus for SSHR

The predefined self-service responsibilities are linked to a menu that contains a number of functions. We recommend that you create a menu based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your organization's structures and business processes. You can base your configuration on the sample menus provided although you should not change the predefined menus directly.

You configure menus in the Menus window.

To set up menus for self-service:

1. Review the sample functions in the Employee Self-Service User Menu, Contingent Worker Self Service Menus, and the Manager Self-Service User Menu. Decide which functions you want to include in your user menus.

   > **Note:** For US Federal, review the Federal Employee Self-Service, the Manager Self-Service, and the Federal HR Self-Service menus.

   See: Self-Service Responsibilities and User Menus, page 2-12

   See: Menu Window, *Oracle Applications System Administrator's Guide*

2. Create your own menu based on the predefined menus.

3. Make sure that all the functions you require are listed in the Function column of your menu.

4. Make sure the following submenus are attached to your custom menu:

   - Employee Enter Process menu - for employee, worker, and manager menus
   - Personal Actions menu - for employee, worker, and manager menus
   - Manager Actions menu - for manager menus
   - HR Self-Service Pages sub menu - for manager menus

- SSHR hierarchy and search functions - if your menu calls the Hierarchy, My List, and Search functions

5. Make sure that the following functions are attached to your custom menu:
   - Personal Actions V4.0 (or a configured copy) - for employee and worker menus
   - Manager Actions V4.0 (or a configured copy) - for manager menus
   - Suspended Actions - for employee, worker, and manager menus
6. Save your work.

Defining User Access to Self-Service Functions

To define user access to self-service functions, you need to define a user, assign a responsibility, assign profile values, and assign a menu to the responsibility. The following process takes you through the separate procedures.

We recommend that you create a different responsibility for each target group of users.

To define a responsibility for a self-service application:

1. Follow the standard procedure for creating a responsibility.

   See: Defining a Responsibility, *Oracle Applications System Administrator's Guide*
2. Define your responsibilities to be available from Oracle Self-Service Web Applications.
3. Consider whether you should create menu or function exclusions to restrict the employee and contingent worker menus.

To set your system profiles:

1. Set the system profiles for security groups.

   If Security Groups are not enabled, use the System Profile Values window to link your responsibility to a security profile in the appropriate Business Group.

   If Security Groups are enabled, you can set the security profile at the user level using the Assign Security Profiles window.

   > **Note: Self-Service Benefits users:** If you do not link your responsibility to your business group using the HR:Security Profile, any benefits participants who attempt to enroll will receive an error message indicating that they cannot enroll.

2. Set any additional required profiles.
   - HR: Security Profile
   - HR:Cross Business Group (if you want users to be able to select employees from different business groups in lists of values)
   - HR:Restrict Transactions across Business Groups in SSHR (if you want to stop your users from performing transactions on employees from different business groups. This profile option works together with the HR:Cross Business Group profile option).
   - HR:Personal Actions Menu (for SSHR)

- HR: Manager Actions Menu (for SSHR)

> **Note:** You need to restart the Apache listener after changing profile options.

To define a user:

- Define the people you would like to access Self-Service. There are two ways to do this. You can follow the typical steps for defining a new user and then assign each individual user to a responsibility that enables access to self-service benefits.

See: Users Window, *Oracle Applications System Administrator's Guide*

Alternatively, you can set up concurrent programs to automate this manual process.

See: Creating Batch User Accounts with Concurrent Programs, page 2-24

Defining Functions for SSHR

If required, you can create your own SSHR functions using the predefined functions as a basis.

You can then configure how the function is accessed, for example, whether it is available from the Actions pages or from the People Search page.

For information on modifying the related workflow processes, see Configuring Workflow Objects, page 4-7

You create the function in the Form Functions window using the system administrator responsibility.

To create a function based on a predefined SSHR function:

1. Query the function on which you want to base your function, for example, Personal Information (HR_PERINFO_SS).
2. Insert a new record beneath it in the table.
3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above.

   > **Note:** The Function Name and User Function Name fields must be unique so insert your standard prefix in front of the value duplicated from the previous record.

4. In the Parameter field, note that the pItemType parameter value is 'HRSSA' (the internal name for the predefined HR workflow item type). Leave this value unchanged but change the pProcessName parameter from HR_PERSONAL_INFO_JSP_PRC to the name of your configured process.

   See: Self-Service Workflows, page 4-3
5. Change the OAFunc parameter to your configured function name, for example HR_PERINFO_SS
6. If you have created a custom manager function or an Enter Process function (Hierarchy, My List or Search page), you can display a navigation link, or breadcrumb on the web page. To do this add the addBreadCrumb parameter with value N.

See: Menu Function Parameter Descriptions, page 3-23

7. If you are using Oracle Approvals Management (AME) for your function, add the following parameters:'
   - pAMETranType=SSHRMS
   - pAMEAppId=800

   See: Configuring SSHR Functions to Use Oracle Approvals Management (AME), page 6-12

8. Enter the parameter values in the HTML call field. You enter the parameters as follows: Note that the HTML call field is made up of several parameters:
   - akRegionCode

     You can use a different person selection page instead of the Hierarchy Page. For example, you may want to launch the Search page as the initial page. This is typically used if you are creating functions for an HR Professional user. Enter the parameter values as follows:
     - HR_PERSON_TREE_TOP_SS

       For the Hierarchy page
     - HR_PERSON_SEARCH_TOP_SS

       For the Person Search page
     - HR_MY_LIST_TOP_SS

       For the My List page
   - akRegionApplicationId

     This value is 800.

To make the function available globally or for specific legislations:

1. If this function is for a specific legislation, add it to the appropriate HR_cc_SS_FUNCTIONS_CUSTOM data security menu. Otherwise, add it to the HR_GLOBAL_SS_FUNCTIONS_CUSTOM data security menu.

   > **Note:** You do not need to enter a prompt for the function. Also, make sure that the Granted check box is unchecked.

2. Save your work.

To add the function to an employee or contingent worker menu in the Menus window:

1. Use the system administration responsibility to display the Menus window.
2. Add the function to the top-level menus and/or submenus as appropriate. For example, you may want to add the function to your configured copy of the Employee Self-Service menu.

   See: Defining Menus for SSHR, page 3-8

To make a function available from the Actions pages:

1. If this function is appropriate for employees and workers to perform on themselves, add it to your configured copy of the Personal Actions menu.
2. If this function is appropriate for managers to perform on other employees, add it to your configured copy of the Manager Actions menu.

   Note: You only add the employee version of the function to the Manager Actions menu.

To make a function available from the Manager menus via the People Search page:

To make this function available to managers directly from the menu via the People Search page, you need to create a matching function. Model your matching function on the corresponding predefined manager function.

You create your matching function in the Form Functions window.

1. Query the predefined manager function on which you want to base your function, for example, Personal Information Manager (HR_PERINFO_MGR_SS).
2. Insert a new record beneath it.
3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above. Insert your standard prefix where required.
4. In the Parameter field, change the pCalledFrom parameter to match the name of your original custom function (as created in the above procedure)

   The HTML call field is OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800. This corresponds to the Person Search page. When the user selects a person from this page, SSHR calls the AOL function specified by the pCalledFrom parameter, appending the selected person_id to the pPersonID parameter specified for that function.
5. Save your work.
6. Add the function to the top-level menus and/or submenus as required.

   Note: There is no need to add this type of function to the data security menus or to the actions menus.

Menu Function Parameters

Supplied Functions

This section provides you with a list of all the supplied functions for each delivered menu. Against each function you will see the Web HTML call, and a list of parameters which are also used in the Web call, as they appear in the Forms user interface. The next section will provide descriptions of the parameters.

Payroll Professional Menu

Function Name	User Function Name	Web HTML Call	Parameters
PAY_MGR_EMP_SEARCH	Employee Search	OA.jsp?akRegionCode= HR_PERSON_ SEARCH_TOP_SS& akRegionApplicationId=800	pCalledFrom=PAY_ MGR_EMP_SEARCHp& Destination=PAY_ MGR_PAYSLIP_SS& pManagerEnabled=N

HR Professional Menu

Function Name	User Function Name	Web HTML Call	Parameters
BEN_CWB_HOME_ SWT_MGR_PAGE	Compensation Workbench Home for Administrators	OA.jsp?akRegionCode= BEN_CWB_HOME_PAGE& akRegionApplicationId= 805& displayDate=N& displaySwitchManager=Y& OAFunc=BEN_CWB_HOME_ PAGE	None
HR_VIEWS_SEARCH_ INITIAL	HR Views Person Search Initial Screen	OA.jsp?akRegionCode=HR_SU PER_PERSON_SEARCH_TO P1_SS& akRegionApplication Id=800& pViewMenu=HR_ VIEWS& pDestination= & OAFunc=HR_VIEWS_ SEARCH_INITIAL	OAFunc=HR_VIEWS_ SEARCH_INITIAL
HR_ALLOCATED_ CHECKLIST_SS	Allocated Checklist Function	OA.jsp?page=/oracle/apps/ per/checklist/allocated/webui/ AllocatedChecklistPG	pCalledFrom=HR_ ALLOCATED_CHECKL IST_SS &OAFunc=HR_ ALLOCATED_CHECKL IST_SS

Manager Self Service Foundation Menu

Function Name	User Function Name	Web HTML Call	Parameters
HR_MY_SUS_ACTIONS_ MGR_SS	Suspended Actions Mgr	OA.jsp?akRegionCode= HR_PROCESS_MY_ SUSPENDS_TOP_SS& akRegionApplicationId= 800	pMode=LMDA
HR_PERSON_TREE_SS	Manager Actions Tree View	OA.jsp?akRegionCode= HR_PERSON_ TREE_TOP_SS& akRegionApplication Id=800	pDestination=HR_ACT IONS_SS& pCalledFrom=& addBreadcrumb=Y

Employee Self Service Foundation Menu

Function Name	User Function Name	Web HTML call	Parameters
HR_MY_SUS_ACTIONS_ SS	Suspended Actions	OA.jsp?akRegionCode= HR_PROCESS_MY_ SUS_EDA_TOP_SS& akRegionApplicationId=800	pMode=EDA& pFromMenu=Y
HR_PERSONAL_ PROCESS_SS	Personal Actions	OA.jsp?akRegionCode=HR_ PERSONAL_PROCESS_TO P_SS& akRegionApplication Id=800	pAssignmentID=& pPerson ID=

Manager Self Service Menu

Function Name	User Function Name	Web HTML call	Parameters
BEN_CWB_HOME_ PAGE	Compensation Workbench Home	OA.jsp?akRegionCode= BEN_CWB_HOME_PAGE& akRegionApplicationId= 805& displayDate=N& WFHomeWorklist=Y& OAFunc= BEN_CWB_HOME_PAGE	None
BEN_SS_MGR_ICD_ SRCH	Self Service Individual Distribution-Manager	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=BEN_SS_MGR_ ICD& OAFunc=BEN_SS_MGR_ ICD& pDestination=HR_ACT IONS_SS& pManagerEnabled= N&addBreadCrumb=Y
BEN_SS_MGR_SRCH	Self Service Benefits Enrollment-Manager	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=BEN_SS_ MGR_ENRT& OAFunc= BEN_SS_MGR_ENRT& addBreadCrumb=Y
CANDIDATE_OFFERS	Candidate Offers	hr_offer_form_web.SETUP	None
HR_APPLHIRE_MGR_ SS	Applicant Hire Mgr	OA.jsp?akRegionCode=HR_ SEARCH_HIRE_APPL_TOP_ SS& akRegionApplicationId=800& OAFunc=HR_NEWHIRE_SS	pCalledFrom=HR_APPLHIRE_ SS

Function Name	User Function Name	Web HTML call	Parameters
HR_CAED_MGR_SS	Release Employee Information Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CAED_SS&AddBreadCrumb=Y
HR_CCMGR_SS	Organization Manager	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_CCMGR_SS	pAMETranType=SSHRMS&pAMEAppId=800& p ProcessName=HR_CCMGR_JSP_PRC& pCalledFrom=HR_CCMGR_SS& p ItemType=HRSSA& p PersonID=& pFromMenu=Y& pManagerEnabled=N
HR_CHANGE_HOURS_MGR_SS	Change Hours Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHANGE_HOURS_SS& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y
HR_CHANGE_JOB_MGR_SS	Change Job Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHANGE_JOB_SS& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y
HR_CHANGE_JOB_TERMS_MGR_SS	Change Job and Employment Terms Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHANGE_JOB_TERMS_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N&addBreadCrumb=Y
HR_CHG_COST_LOC_SUP_MGR_SS	Change Cost Center Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHG_COST_LOC_SUP_SS&pDestination=HR_ACTIONS_SS& pManagerEnabled=N&addBreadCrumb=Y
HR_CHG_COST_TRM_LOC_SUP_MGR_SS	Change Cost Center and Employment Terms Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHG_COST_TRM_LOC_SUP_SS&pDestination=HR_ACTIONS_SS& pManagerEnabled=N&addBreadCrumb=Y
HR_EIT_MGR_SS	Extra Information Types Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_EIT_SS&addBreadCrumb=Y
HR_EMPDIR_ADVSRCH_SS	Advanced Search	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/AdvanceSrchPG	None
HR_EMPDIR_EMPDETAIL_SS	Employee Detail	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpDetailPG	None
HR_EMPDIR_EMPPROFILE_SS	Employee Profile	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpProfilePG	None

Function Name	User Function Name	Web HTML call	Parameters
HR_EMPDIR_HIERARCHY_SS	Organization Hierarchy	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/HierarchyPG	None
HR_EMPDIR_PICPREVIEW_SS	Photo Preview	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/PicPreviewPG	None
HR_EMPDIR_PROXY_SS	Proxy Page	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpDirProxyPG	OAFunc=HR_EMPDIR_PROXY_SS
HR_EMPDIR_SIMPLESRCH_SS	Simple Search	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/SimpleSrchPG	None
HR_EMP_STATUS_CHG_MGR_SS	Employee Status Change Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_EMP_STATUS_CHG_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_EMP_TERMS_CHG_MGR_SS	Employee Terms of Employment Change Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_EMP_TERMS_CHG_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_FR_APPLHIRE_MGR_SS	French Applicant Hire Mgr	OA.jsp?akRegionCode=HR_SEARCH_HIRE_APPL_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_FR_APPLHIRE_SS
HR_FR_NEWHIRE_MGR_SS	French New Hire Mgr	OA.jsp?akRegionCode=HR_CREATE_SRCH_NEWHIRE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_FR_NEWHIRE_SS
HR_LOA_MGR_SS	Leave of Absence Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_LOA_SS& addBreadCrumb=Y
HR_MANAGER_MGR_SS	Change Manager Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_MANAGER_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N&addBreadCrumb=Y
HR_MY_SUS_ACTIONS_MGR_SS	Suspended Actions Mgr	OA.jsp?akRegionCode=HR_PROCESS_MY_SUSPENDS_TOP_SS& akRegionApplicationId=800	pMode=LMDA
HR_NEWHIRE_MGR_SS	Hire Mgr	OA.jsp?akRegionCode=HR_CREATE_SRCH_NEWHIRE_TOP_SS& akRegionApplicationId=800& OAFunc=HR_NEWHIRE_SS	pCalledFrom=HR_NEWHIRE_SS
HR_CWKPLACE_MGR_SS	Contingent Worker Placement Mgr	OA.jsp?page=/oracle/apps/per/selfservice/newhire/webui/CWKPlacementPG=HR_NEWHIRE_SS	pCalledFrom=HR_CWKPLACE_SS

Function Name	User Function Name	Web HTML call	Parameters
HR_CWKPLACE_SS	Contingent Worker Placement	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_NEWHIRE_SS	pAMETranType=SSHRMS& pAMEAppId=800&p ProcessName=HR_NEWHIRE_ JSP_PRC&pItemType=HRSSA& pCalledFrom=HR_CWK PLACE_SS&pFromMenu=Y& pFlowname=CWKPlacement& pEffectiveDate=
HR_PAY_RATE_MGR_ SS	Change Base Salary Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_PAY_RATE_ SS& pDestination=HR_ACT IONS_SS& pManagerEnabled= N&addBreadCrumb=Y
HR_PERINFO_MGR_SS	Personal Information Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_PERINFO_ SS&addBreadCrumb=Y
HR_PERSON_TREE_SS	Manager Actions Tree View	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pDestination=HR_ACT IONS_SS& pCalledFrom=& addBreadcrumb=Y
HR_SIT_MGR_SS	Special Information Types Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_SIT_SS& addBreadCrumb=Y
HR_SUCCESSION_ PLANNING	Succession Planning Menu	hr_succ_plan_menu_web.setup	None
HR_SUIT_MATCH_ MENU	Suitabilty Match Menu	hr_suit_match_menu_web.setup	None
HR_TERMINATION_ COMP_MGR_SS	Termination with Compensation Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800& OAFunc=HR_TERMINATION_ COMP_SS	pCalledFrom=HR_TERM INATION_COMP_SS& pDestination=HR_ACTIONS_ SS& pManagerEnabled=N& addBreadCrumb=Y
HR_TERMINATION_ MGR_SS	Termination Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800& OAFunc=HR_TERMINATION_SS	pCalledFrom=HR_TERMINAT ION_SS& pDestination= HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_TRANSFER_MGR_ SS	Transfer Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_TRANSFER_ SS& pDestination=HR_ACT IONS_SS& pManagerEnabled= N&addBreadCrumb=Y
HR_VIEWS_MGR	Manager Views	hr_mee_views_web.setup	p_called_from=HR_VIEWS_ MGR
HXC_TIMECARDS_ MGR	TimeCard Manager	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HXC_TIME_ ENTER&addBreadCrumb=Y
OTA_ADD_TRAINING_ MGR_SS	External Training Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=OTA_ADD_TRA INING_SS&addBreadCrumb=Y

Function Name	User Function Name	Web HTML call	Parameters
OTA_TRAINING_MGR_SS	Enroll and Cancel Training Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=OTA_ENROLL_SS&addBreadCrumb=Y
OTA_TRNG_PLAN_MGR_SS	Training Plans Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=OTA_TRNG_PLAN_VIEWS_SS&addBreadCrumb=Y
PER_APPRAISAL_PERSON_SEARCH	Appraisal Mgr	hr_person_search_tree_web.setup	p_called_from=PER_APPRAISAL_EMPLOYEE
PQH_ACADEMIC_RANK_MGR	Academic Rank Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=PQH_ACADEMIC_RANK& pDestination=HR_ACTIONS_SS&addBreadCrumb=Y
PQH_EMP_REVIEWS_MGR	Employee Reviews Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=PQH_EMP_REVIEWS&addBreadCrumb=Y
PQH_EVENT_BOOKING_MGR	Events and Bookings Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=PQH_EVENT_BOOKING&addBreadCrumb=Y
PQH_TENURE_STATUS_MGR	Tenure Status Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=PQH_TENURE_STATUS&addBreadCrumb=Y
HR_ALLOCATED_CHECKLIST_SS	Allocated Checklist Function	OA.jsp?page=/oracle/apps/per/checklist/allocated/webui/AllocatedChecklistPG	pCalledFrom=HR_ALLOCATED_CHECKLIST_SS&OAFunc=HR_ALLOCATED_CHECKLIST_SS

Employee Self Service Menu

Function Name	User Function Name	Web HTML Call	Parameters
BEN_SS_BNFT_ENRT	Self Service Benefits Enrollment-Employee	OA.jsp?akRegionCode=BEN_EFFECTIVE_DATE_PAGE&akRegionApplicationId=805	displayDate=N& allowEnrt=Y& sessionDate=& sendFYINotification=N& wfProcessName=FYI_NOTIFICATION_PRC
HR_APPLY_FOR_JOB_SS	Apply for Job	OA.jsp?page=/oracle/apps/per/irc/candidateSelfService/webui/EmpJobSearchPG&akRegionApplicationId=800&SeededSearchFlag=N	None
HR_CAED_SS	Release Employee Information	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_CAED_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_CAED_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_CAED_SS& pPersonID=& pFromMenu=Y

Function Name	User Function Name	Web HTML Call	Parameters
HR_EIT_SS	Extra Information Types	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_EIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_EIT_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_EIT_SS& pPersonID=& pFromMenu=Y
HR_LOA_SS	Leave of Absence	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_LOA_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_LOA_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_LOA_SS& pPersonID=& pFromMenu=Y
HR_MY_SUS_ACTIONS_SS	Suspended Actions	OA.jsp?akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS& akRegionApplicationId=800	pMode=EDA&pFromMenu=Y
HR_PERINFO_SS	Personal Information	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_PERINFO_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_PERSONAL_INFO_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_PERINFO_SS& pPersonID=& pFromMenu=Y
HR_PERSONAL_PROCESS_SS	Personal Actions	OA.jsp?akRegionCode=HR_PERSONAL_PROCESS_TOP_SS& akRegionApplicationId=800	pAssignmentID=&pPersonID=
HR_SIT_SS	Special Information Types	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_SIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_SIT_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_SIT_SS& pPersonID=& pFromMenu=Y
HR_VIEWS_EMP	Employee Views	hr_mee_views_web.setup	p_called_from=HR_VIEWS_EMP& p_mgr=FALSE
OTA_ADD_TRAINING_SS	Enroll and Cancel Training	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_ADD_TRAINING_SS	pProcessName=OTA_ADDTRNG_JSP_PRC& pCalledFrom=OTA_ADD_TRAINING_SS& pItemType=HRSSA& pFromMenu=Y
OTA_ENROLL_SS	Academic Rank Overview	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_ENROLL_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC& pCalledFrom=OTA_ENROLL_SS& pItemType=HRSSA& pTrainingViewCode=10& pFromMenu=Y

Function Name	User Function Name	Web HTML Call	Parameters
OTA_EXTERNAL_LINKING_SS	External Training	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_EXTERNAL_LINKING_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=OTA_EXT_LINK_JSP_PRC& pCalledFrom=OTA_EXTERNAL_LINKING_SS& pItemType=HRSSA& pActivityVerId=& pEventId=& pFromMenu=Y& pOATrngFunc=OTA_ENROLL_SS& pTrngProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC
OTA_TRNG_PLAN_VIEWS_SS	Training Plan Views	OA.jsp?page=/oracle/apps/ota/trainingplan/webui/ViewTrainingPlansPG& retainAM=Y	pAMETranType=SSHRMS& pAMEAppId=800& pCalledFrom=OTA_TRNG_PLAN_VIEWS_SS& pItemType=HR& pFromMenu=Y
PAY_EMP_PAYMENTS_SS	Manage Payroll Payments	OA.jsp?akRegionCode=PAY_MPP_TOP_REGION& akRegionApplicationId=801& OAFunc=PAY_EMP_PAYMENTS_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=PAY_PAYMENTS_JSP_PRC& pItemType=HRSSA& pCalledFrom=PAY_EMP_PAYMENTS_SS
PAY_PAYSLIP_SS	Payslip	OA.jsp?akRegionCode=PAY_PAYSLIP_TOP_SS& akRegionApplicationId=801	pCalledFrom=PAY_PAYSLIP_SS& pPersonID=
PAY_W2_SS	Employee W2	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=PAY_W2_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=PAY_EMPLOYEE_W2_PROCESS& pItemType=HRSSA& pCalledFrom=PAY_W2_SS& pPersonID=& pFromMenu=Y
PAY_W4INFO_SS	Employees W4 Information	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=PAY_W4INFO_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=PAY_CHANGE_W4_INFO_JSP_PRC& pItemType=HRSSA& pCalledFrom=PAY_W4INFO_SS& pPersonID=& pFromMenu=Y
PER_APPRAISAL_EMPLOYEE	Appraisal	hr_workflow_service.create_process	P_PROCESS_NAME=HR_APPRAISAL_DETAILS_PRC& P_ITEM_TYPE=HRSSA& P_PERSON_ID=
PQH_ACADEMIC_RANK_OVRVW	Tenure Status Overview	OA.jsp?akRegionCode=PQH_ACADEMIC_RANK_OVRVW_TOP& akRegionApplicationId=8302	pCalledFrom=PQH_ACADEMIC_RANK_OVRVW& pPersonID=

Function Name	User Function Name	Web HTML Call	Parameters
PQH_EMP_REVIEWS	Employee Reviews	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=PQH_EMP_REVIEWS	pCalledFrom=PQH_EMP_REVIEWS& pProcessName=PQH_EMP_REV_JSP_PRC& pItemType=HRSSA& pPersonID=
PQH_EVENT_BOOKING_OV	Events and Bookings Overview	OA.jsp?akRegionCode=PQH_EVENTS_SEARCH_TOP& akRegionApplicationId=8302	None
PQH_TENURE_STATUS_OVRVW		OA.jsp?akRegionCode=PQH_TENURE_STATUS_OVRVW_TOP& akRegionApplicationId=8302	pCalledFrom=PQH_TENURE_STATUS_OVRVW& pPersonID=
PAY_JP_CMI_SS	Japan Commutation Information Self Service	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akakRegionApplicationId=800&OAFunc=PAY_JP_CMI_SS	pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=PAY_JP_CMI_JSP_PRC&pItemType=HRSSA&pCalledFrom=PAY_JP_CMI_SS&pPersonID=&pFromMenu=Y
PAY_JP_CMI_MGR_SS	Japan Commutation Information Manager Self Service	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=PAY_JP_CMI_SS&addBreadCrumb=Y
PAY_JP_CMI_MAIN_SS	Japan Commutation Information Main Page	OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiMainPG	None
PAY_JP_CMI_INSERT_SS	Japan Commutation Information Insert Page	OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiInsertPG	None
PAY_JP_CMI_UPDATE_SS	Japan Commutation Information Update Page	OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiUpdatePG	None
PAY_JP_CMI_DELETE_SS	Japan Commutation Information Delete Page	OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiDeletePG	None
PAY_JP_CMI_VIEW_FUTURE_SS	Japan Commutation Information View Future Change Page		OA.jsp?page=/oracle/apps/pay/selfservice/jpcommutationinfo/webui/CmiViewFuturePG

Contingent Worker Self Service Menu

Function Name	User Function Name	Web HTML Call	Parameters
HR_EIT_SS	Extra Information Types	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_EIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=HR_EIT_JSP_ PRC& pItemType=HRSSA& pCalledFrom=HR_EIT_SS& p PersonID=& pFromMenu=Y
HR_MY_SUS_ACT IONS_SS	Suspended Actions	OA.jsp?akRegionCode=HR_ PROCESS_MY_SUS_EDA_TOP_ SS& akRegionApplicationId=800	pMode=EDA& pFromMenu=Y
HR_PERINFO_SS	Personal Information	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_PERINFO_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=HR_PERSONAL_ INFO_JSP_PRC& pItemType= HRSSA& pCalledFrom=HR_ PERINFO_SS& pPersonID=& pFromMenu=Y
HR_PERSONAL_ PROCESS_SS	Personal Actions	OA.jsp?akRegionCode=HR_ PERSONAL_PROCESS_TOP_SS& akRegionApplicationId=800	pAssignmentID=& pPersonID=
HR_SPECIAL_ INFO	Special Information	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_SIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=HR_SIT_JSP_ PRC& pItemType=HRSSA& pCalledFrom=HR_SIT_SS& p PersonID=& pFromMenu=Y
OTA_ADD_TRAIN ING_SS	Enroll and Cancel Training	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_ADD_TRAINING_ SS	pProcessName=OTA_ADDTRNG_ JSP_PRC& pCalledFrom= OTA_ADD_TRAINING_SS& p ItemType=HRSSA& pFromMenu=Y
OTA_ENROLL_SS		OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_ENROLL_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=OTA_ENROLL_ IN_TRAINING_JSP_PRC& pCalledFrom=OTA_ENROLL_ SS& pItemType=HRSSA& pTrainingViewCode=10& pFromMenu=Y

Function Name	User Function Name	Web HTML Call	Parameters
OTA_EXTERNAL_ LINKING_SS	Training Link Access	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=OTA_EXTERNAL_LINK ING_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=OTA_EXT_L INK_JSP_PRC& pCalledFrom= OTA_EXTERNAL_LINKING_SS& pItemType=HRSSA& pActivityVer Id=& pEventId=& pFromMenu= Y& pOATrngFunc=OTA_ENROLL_ SS& pTrngProcessName=OTA_ ENROLL_IN_TRAINING_JSP_ PRC
PQH_EVENT_ BOOKING_OV	Events and Bookings Overview	OA.jsp?akRegionCode=PQH_ EVENTS_SEARCH_TOP& akRegionApplicationId=8302	None

Menu Function Parameter Descriptions

This section provides the information you need when configuring your own functions. It tells you how self service functions are defined in the Forms user interface, and lists each menu function parameter, together with the parameter use.

For more information on configuring functions see Guidelines for Configuring SSHR Functions, page 3-1.

The function type for all SSHR functions is SSWA JSP FUNCTION (JSP). The Context Dependence is Responsibility. The Maintenance Mode Support is not relevant to self-service functions. These values should be copied into your own functions.

A function Web HTML call has the following format:

OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplictionID=800& OAFunc=HR_CHANGE_JOB_SS

where the Web HTML call parameters listed in the Forms user interface are separated by "&".

All functions that end in "_SS" (but not those ending in "_MGR_SS") use the following parameters, which are described in greater detail below:

- pAMETranType=SSHRMS
- pAMEAppId=800
- pProcessName=WORKFLOW_PROCESS_NAME
- pItemType=HRSSA
- pCalledFrom=EDA_FUNCTION_NAME
- pEffectiveDate=

The following table describes all available menu function parameters:

> **Note:** References to "_SS" functions exclude "_MGR_SS" functions.

Parameter	Description
OAFunc=<function>_SS	Add this parameter to all the self service _SS functions, providing your own function name. This parameter enables you to do personalization for a specified <function>_SS level.
pAMEAppId=800	Add this parameter to all the _SS functions that contain pAMETranType=SSHRMS to specify the application Id for the transaction type.
pAMETranType=SSHRMS	Add this parameter to all functions that use AME to process approvals. The parameter provides the transaction type name of SSHRMS. If you define your own transaction type provide that transaction type name here.
pCalledFrom=EDA_FUNCTION_NAME	Add this parameter to all the _SS functions that are launched through workflow. It indicates which function calls the current function. Replace EDA_FUNCTION_NAME with the corresponding _SS function name.
pDestination=HR_ACTIONS_SS	Add this parameter to the _MGR_SS functions if the workflow process attached to this function can navigate through the Actions page.
pEffectiveDate=	Add this parameter to the _SS function if this function needs the effective date field to be displayed in the actions screen. No value should be set.
pFlowName=<processname>	Use this parameter for functions that require special processing. The process names are "COBRA Registration", "Benefits Registration" & "New Hire".
pGroupName=<documentgroupshortname>	Use this parameter to provide the Document Group short name for a PDF merge
pItemType=HRSSA	Add this parameter to all the _SS and _MGR_SS functions to provide the Item Type.
pManagerEnabled=N	Add this parameter to _MGR _SS functions if managers are not allowed to select themselves in the hierarchy tree; the Action icon for the logged-in manager will be disabled.
pMode=<value>	Add this parameter to your manager or personal action functions with the value of LMDA for manager action functions and EDA for personal action functions.
pPayRate=Y	Use this parameter to indicate that Pay Rate page should be part of the process.
pProcessName=WORKFLOW_PROCESS_ NAME	Add this parameter to all the _SS functions that are launched through workflow. Replace WORKFLOW_PROCESS_NAME with the corresponding workflow process name, for example HR_PERSONAL_INFO_JSP_PRC .

Parameter	Description
pSalChange=Y	This parameter indicates that the process is purely a Salary Change process and does not include Assignment Pages. An appropriate message will be presented on the Effective Date page. If this parameter is absent it defaults to 'N', which indicates that the process includes Assignment related pages.
addBreadCrumb=Y	Add this parameter to MGR_SS functions or Enter Process functions if you want to display a navigation link, or breadcrumb, on the page.
&pEnableTerms=Y	This parameter enables users to include ex-employees (terminated employees) in a person search. This parameter is enabled for selected Manager and Professional functions with a default setting of Y.

4
SSHR and Workflow

Workflow Overview

Oracle Self-Service Web Applications utilize the capabilities of Oracle Workflow to manage transaction flows. The workflows are embedded within SSHR and control the flow of information between the HR professional, the manager, the employee or worker, and the applicant.

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

SSHR uses workflow processes to combine related functions into a single transaction (for example, to add Special Information Types to Change Assignment or to Personal Information). and to control the transaction flow between the initiating user and other users such as a manager, an HR professional, or an applicant.

You use the Workflow Builder to look at the delivered processes which have been designed to support typical business processes. If necessary, you can configure different versions of the workflow processes to suit your business processes. You link a workflow process to one or more functions using the Form Functions window. When you have linked the workflow process to the function, you can include or hide the function in your user menus.

See: Defining Functions for SSHR, page 3-10

Setting Up Workflow for SSHR

How does Oracle Workflow increase the flexibility of SSHR?

In addition to configuring self-service functions and menus, you can also configure the underlying workflow processes on which SSHR functions are based. You can configure the workflow attributes and process flows to suit the particular requirements of your enterprise.

Can I change the delivered workflow processes for SSHR?

Although Oracle provides a set of workflow processes for SSHR, we recommend that you leave these processes intact and create your own processes if any process changes are required. The Oracle Workflow Builder enables you to copy the delivered processes and modify them to suit your requirements. The delivered workflow processes are within the HRSSA item type. Although you can make changes within this item type, for example, you can create new processes within this item type, the access level security provided by the Workflow Builder ensures that delivered processes are not modified.

How can I use the Workflow Builder to create new processes?

You can use the Workflow Builder to create new processes by chaining together separate modules. For example, the Manage Employment Events modules can be chained together as required to create a custom workflow process.

Workflow processes often create redundant transaction information. Are there any cleanup procedures?

Yes. Oracle provides a workflow cleanup process which clears any redundant transaction data from temporary tables. Such data is created if the system crashes, or if a user ID is removed or disabled, for example.

Does Workflow generate automatic notifications?

Yes. When Oracle Workflow executes specific events, it generates workflow notifications for specified users, or roles. For example, a manager may receive notification of a training enrollment or salary increase, where the manager must approve the event. Alternatively, a user may receive a notification purely for information purposes, for example, as confirmation that a change to personal details has been submitted to the database.

SSHR and Workflows

Self-Service Workflows

This chapter describes how to use the Workflow Builder to review the delivered process flows and to configure alternative flows if desired.

For more information on the Workflow Builder, see Overview of Oracle Workflow for Users, *Oracle Workflow Users Guide*

Approvals Processes

You also use the Workflow Builder to configure your approvals processes. For more information, see: Approvals, page 6-7

Access Roles and Workflow

You use access roles to determine whether a user has permission to update and approve self-service transactions. If a function is marked for approval in the Workflow Builder, SSHR submits the transaction to the automated approval process (AME or Dynamic Approvals). The approvers then receive a notification in their Worklist with a link to open the action. The permissions and privileges defined by the access roles determine whether they can edit, change the effective date, or attach supporting documents to these transactions.

For more information on Access Roles, see Access Roles for Self-Service Actions, page 2-8

Workflow Objects and Item Types

In Oracle Workflow, all processes are associated with an item type. An item type can include one or more processes and related objects, such as item attributes, functions, and messages. Oracle SSHR delivers a number of predefined workflow item types containing workflow processes that you can work with.

- HR (HRSSA)
- HR Self-Service Benefits
- HR Offer Letter (HR_OFFER) (for SSHR 3.4 only)
- HR Standard (HRSTAND) (for SSHR 3.4 only)

Previous versions of this implementation guide advised customers to make their configuration change to a copy of the delivered item type. Workflow processes that have been implemented using this approach will still be supported, however, for new configurations, you should make your changes to the delivered item type using the approach described below. The new approach utilizes Oracle Workflow's access level features for preserving customizations.

You update the workflow item type in the Workflow Builder.

> **Note:** We recommend that you do not change the item type directly in the database. Instead, download the item type to a .wft file which you then source control. Make the changes to this file and then upload it to the server.
>
> See: Opening and Saving Item Types, *Oracle Workflow Guide*

Workflow Access Levels:

The access protection levels ensure that your customizations are preserved during an upgrade. As long as you set your own access level to 100 or (higher) while working on changes, the access protection ensures that when an upgrade takes place, the "read-only" objects are updated and that customizations made to the "customizable" objects are preserved.

You can change objects if your access level is less than or equal to the object's protection level and greater than or equal to the object's customization level.

> **Note:** If you copy workflow objects and change the access level to 100, the copied objects are displayed without a red tag on the icon. The original objects have a red tag. The absence of the red tag indicates that you can customize the objects.

The following table shows typical settings for workflow objects within the HRSSA item type. The customization level of a customizable object is set to the user's access level at the time when the user customized the object.

	Most Objects (Default)	Customizable Objects (as delivered)	Customizable Objects (after changes)
Protection level	20	1000	1000
Lock at this level	Yes	No	No
Customization level	20	20	100
Preserve customizations	No	Yes	Yes

Notifications

Oracle Workflow generates a workflow notification for a user when the Workflow Engine executes a specific activity within a workflow process. For example, workflow may generate a notification for a manager if a direct report requests leave or enrolls on a training course. This notification may be for information purposes only or may require that the recipient perform an activity, for example, approve a transaction.

For more information on workflow notifications, see: Overview of Notification Handling, *Oracle Workflow User's Guide*.

All the required information appears in the notification message, regardless of how the user receives the information (for example, in an E-mail or using SSHR). The information includes details of the transaction along with personal information and approval information. In addition, changed information is highlighted with a blue dot, enabling you to easily see which information has changed in the self-service transaction. The format and content of the workflow notifications are essentially the same as the Review page.

> **Note:** A self-service user can receive notifications as e-mails by setting the Notification Preferences in the User Preferences web page. To enable E-mail delivery of notifications, the workflow administrator must set up a notification mailer.

For more information, see Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*

From the notification you can select the Printable Page button to display the information in a format suitable for printing. If enabled, you can use the Generate Document link in the Related Applications region to generate a pdf version of the document.

See: Document Management, page 8-18

Note: The Generate Document link is not available from E-mail notifications.

Accessing Workflow Notifications

SSHR users access their notifications using one of the following methods:

- Using the Workflow User Web Applications responsibility.
- Using the All Actions Awaiting My Attention function from the Manager, Professional, Employee or Worker responsibilities.
- As an E-mail sent to the user's inbox.

Note: The worklist may also contain additional system-generated notifications.

Personalizing Notifications

You can use the Personalization Framework to configure the notifications to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see:

- Configuring Web Pages, page 5-3
- Adding Instructions to Web Pages, page 5-25

If you personalize your notification regions by selecting the Personalize Page link and setting the scope of the personalization to the appropriate page value, the changes are only applicable to the specific Notification page and E-mail page. If you select a shared region as the personalization scope, the personalizations are replicated in the other pages that use this shared region.

Notification Messages

The following table provides a list of messages used within workflow notifications.

Note: The table only contains the messages that have changed with SSHR 11.i.10.

Message Name	Workflow Message Name	Workflow Display Name
HR_TRANSFER_TO_APPRAISEE_MSG	HR_EMBED_APPR_TRANSFER_MSG	Notify Appraisee on Appraisal Transfer

Message Name	Workflow Message Name	Workflow Display Name
HR_APPRAISAL_COM_AP PRAISEE_MSG	HR_EMBED_APPRAISEE_ MSG	Notify Appraisee of Appraisal Complete (New)
HR_APPRAISER_MSG	HR_EMBED_APPRAISER_ MSG	Notify Appraiser (New)
HR_MAIN_APPRAISER_MSG	HR_EMBED_MAIN_APPRA ISER_MSG	Notify Main Appraiser (New)
HR_NEW_MAIN_APPRA ISER_MSG	HR_EMBED_NEW_MA_MSG	Notify New Main Appraiser (New)
HR_APPRAISAL_OTHER_ PARTIC_MSG	HR_EMBED_OP_MSG	Notify Other Participant (New)
HR_PART_TO_MAIN_APPRA ISER_MSG	HR_EMBED_PART_TO_MA_ MSG	Notify Main Appraiser on Participation Completion
HR_APPRAISAL_REV IEWER_MSG	HR_EMBED_REVIEWER_ MSG	Notify Reviewer (New)
HR_NOTIFY_PAYROLL_ CONTACT_MSG	HR_EMBED_NTF_PAY_ CONTACT_MSG	Notify Payroll Contact of Salary Basis Change (Embedded)
HR_NOTFY_APPROVER_ MSG	HR_EMBED_RN_NTF_APPR_ MSG	Notify Approver (Embedded)
HR_ON_APPROVAL_NOT IFY_HR_REP	HR_EMBED_ON_APPR_ NTFY_HR_REP	On Approval Notify HR Representative (Embedded)
HR_V5_RFC_INITIATOR	HR_EMBED_V5_RFC_INIT IATOR	Return for correction (Initiator- Embedded)
HR_V5_RFC_OTHER	HR_EMBED_V5_RFC_OTHER	Return for correction (Other than Initiator - Embedded
HR_TXN_ERROR_MSG	HR_EMBED_TXN_ERROR_ MSG	Transaction Error Message (Embedded)
HR_NOTIFY_ONSUBMIT_ FWD_MSG1	HR_EMBED_NTF_ONSUBM IT_FWD_MSG1	Notify Reviewer Onsubmit (Embedded)
HR_V5_SFL_INITIATOR	HR_EMBED_SFL_INITIATOR	V5.0 Saved for Later (Initiator - Embedded)
HR_V5_SFL_OTHER	HR_EMBED_SFL_OTHER	V5.0 Saved for Later (Other than Initiator - Embedded)
HR_CREATOR_COMMAP PLERR_V4_MSG	HR_EMBED_INIT_COMMAP PLERR_MSG	Commit Application Error To Creator V4.0 Embedded
HR_CREATOR_ COMMSYSERR_V4_MSG	HR_EMBED_INIT_SYSAP PLERR_MSG	Commit System Error To Creator V4.0 Embedded
HR_DEPART_COMMAP PLERR_V4_MSG	HR_EMBED_DEPT_COMMA PPLERR_MSG	Commit Application Error To Department V4.0 Embedded
HR_DEPART_ COMMSYSERR_V4_MSG	HR_EMBED_DEPT_SYSAP PLERR_MSG	Commit System Error To Department V4.0 Embedded

If required, you could use the Workflow Builder to replace the new message with a custom message.

See: Messages, *Oracle Workflow Developer's Guide*

Configuring Workflow Objects

Before you make changes to workflow objects:

1. Open WorkFlow Builder.
2. On the File Menu select Help/About Workflow Builder.
3. Ensure that you are using a version of Workflow Builder that is compatible with the version of Oracle Workflow installed on your server.
4. Set the Access Level to 100.

   See: Workflow Objects and Item Types, page 4-3
5. Deselect the Allow Modifications of Customized Objects check box.
6. Select and display the Human Resources Self-Service Applications item type. Save it to a local file for backup.

   > **Note:** We recommend that you maintain source control for the .wft files so that you can track changes to the original objects, move definitions to other database instances using the Workflow Loader, and revert to previous versions if necessary.

To modify delivered workflow objects:

1. Open WorkFlow Builder.
2. Select and display the Human Resources Self-Service Applications item type or the HR Self-Service Benefits item type.
3. If required, change any configurable item attributes.

   > **Note:** Some item attributes can be customized and other objects, such as processes, notifications, messages, and lookup types, are "read-only". You can change the "customizable" attributes directly in the workflow process. In SSHR item types, the only directly configurable objects are item-level attributes (including enterprise e-mail addresses) and dynamic approval levels.
   >
   > See: Defining Your Enterprise's Email Addresses, page 4-9
   >
   > See: Configuring Approvals with the Workflow Builder, page 6-14
4. If required, create copies of the read-only objects.

   See: Copying Workflow Processes
5. Save your work.

Copying Workflow Processes

To copy a workflow process:

1. Copy the object and rename it.

For example, you can copy the FYI Notification Process (FYI_NOTIFICATION_PRC) for use with Self-Service Benefits Enrollments. Make sure the new process has the same item type as the original process.

> **Note:** Prefix your copies with a consistent code, for example, a consistent numeral or a four-letter acronym for the company.

2. You may have to copy multiple levels of the process, for example, to make changes to the Basic Details subprocess within the Personal Information process, you would have to copy the overall process (Personal Information) and the subprocesses (Process Basic Details and Process Personal Information).
3. If you have copied (and modified) a subprocess, you will have to insert your copy of the subprocess into your copy of the higher level process in place of the original subprocess.
4. Save your work.
5. Create at least one function to point to the new process.

   See: Defining Functions for SSHR, page 3-10

After applying a patch:

During the application of an SSHR patch, the workflow loader utility ensures that your server has the latest versions of any delivered workflow objects. This upload overwrites any "read-only" objects but preserves any customizations that have been made to "customizable" objects.

If a patch includes new features or bug fixes for delivered objects that you have copied, you need to apply the same changes to your copied objects. Refer to the patch readme file for instructions. You may have to compare your copied object with the original read-only object.

Configuring Workflow Attribute Values

Workflow attribute values are the values for item types. They are variables that can be set by the application that maintains the item.

You configure workflow attributes in the Workflow Builder.

If you want to modify a predefined process, first make a copy of the process.

See: Self-Service Workflows, page 4-3

To configure workflow attributes:

1. Open Workflow Builder.
2. If necessary, create a copy of the workflow process you want to modify.
3. Open the Human Resources Self-Service Applications Item Type or the HR Self-Service Benefits Item Type depending on which Item Type you want to modify.

   See: Workflow Objects and Item Types, page 4-3
4. Double-click the process you want to modify. This opens the Process window.
5. Double-click an activity in the Process window to open the Control Properties window.

6. Choose the Node Attributes Tab and select a value name. For information on the attributes that are relevant for each process, see the function-specific documentation.
7. Edit any values defined in a procedure in the Value drop down list.
8. Click OK and save your work.

Configuring Workflow Error Processes

Every workflow-enabled function has an error process. The process runs when a system error occurs. The process sends a notification and a description to the System Administrator's ID.

To configure a workflow error process:

1. Edit the workflow error process:
   - HR_STANDARD_ERROR_PRC
2. Change the text of the error message by editing the Self-Service HR System Error Message:
   - HR_SYSTEM_ERROR_MSG
3. Save your work.

Defining Your Enterprise's Email Addresses

E-mail addresses of key people in your enterprise may be displayed in various pages or error messages throughout SSHR.

You set up the e-mail addresses for your enterprise in the Workflow Builder.

To change email addresses:

1. Open the Oracle Workflow Builder.
2. Open your configured HR item type (HRSSA).
3. Select Attributes.
4. Select the following attribute and enter the appropriate email address in the Default Value field:
   - HR Department Email ID

     Note: You configure the Training Administrator ID (if using Enroll in a Class or Cancel Enrollment) and the Recruitment Supervisor ID (if using Candidate Offers) in the Professional Forms Interface.
5. Save your work.

Running the Workflow Cleanup Process

The workflow cleanup process enables you to remove workflow processes that are left running if a system crashes or a user ID is disabled or removed. The process cleans up temporary tables by removing redundant transaction information. You can specify which transactions are queried by the process by setting the Transaction Status parameter.

You run the cleanup process by running the concurrent program Complete Defunct HR Workflow Processes from the Submit Request Set window.

Before you run the cleanup process, you must define a request set that runs the Purge Obsolete Workflow Runtime Data (FNDWFPR) concurrent program before the Complete Defunct HR Workflow Resources (HRWFDFCT) concurrent program.

> **Note:** From SSHR 4.1, the Complete Defunct Workflow Processes concurrent process is registered under Oracle Human Resources instead of Oracle Self-Service Web Applications. If you previously scheduled this concurrent process to run when still registered under Oracle Self-Service Web Applications, you must cancel the process and resubmit it using the new Complete Defunct HR Workflow Processes registered under Oracle Human Resources.
>
> See:Concurrent Programs Window, *Oracle Applications Developer's Guide*
>
> See: Overview of Concurrent Programs and Requests, *Oracle Applications System Administrator's Guide*

To run the request set:

1. In the Request Set field, enter the name of your request set.
2. Place your cursor on the Parameters field in the row for the Purge Obsolete Workflow Runtime Data process to open the Parameters window.
3. Select the item type for which you want to remove obsolete workflow runtime data. If you leave the field blank, the process will purge obsolete data for all item types.
4. If applicable, enter an item key.
5. Enter the number of days for which you want to run the process. For example, if you want to purge obsolete data for the last 7 days, enter 7.
6. Select the persistence type of the data to be purged (Temporary or Permanent).
7. Choose OK to close the Parameters window.
8. Place your cursor on the Parameters field in the row for the Complete Defunct HR Workflow Processes process to open the Parameters window.
9. Select the item type to be included in the process.
10. Enter the number of days for which you want to run the process. For example, if you want to run the cleanup process for the last 7 days, enter 7.
11. Select the transaction statuses to be queried in the program. The permitted values for the transaction status parameter are as follows:

Transaction Status Values

Parameter Value	Description
ALL	All transaction statuses are queried in the program.
C	Transaction returned for correction (in modules with SSHR V4.x and earlier)
RO	Transactions returned to approver for correction
ROS	Transactions returned to approver for correction and saved for later
RI	Transactions returned to initiator for correction
RIS	Transactions returned to initiator for correction and saved for later
D	Deleted transactions
E	Transactions with errors
N	Transactions initiated but not submitted for approval
S	Transactions saved for later
W	Transactions in progress

12. Choose the Submit button.

5
SSHR Page Layouts

Page Layout Overview

The OA (Oracle Applications) Personalization Framework, a component of the OA Framework, enables you to modify the appearance and behavior of self-service pages. You can customize your web pages in line with corporate standards and data requirements, and streamline your self-service process flows to reflect working practices.

Meta Data Services Repository

The MDS (Meta Data Services) Repository stores the base page definitions for self-service pages and you can create personalizations are which are stored separately from the base page definitions. Your personalizations are preserved during upgrades because upgrades only affect the base page definitions.

For more detailed information on the OA Framework and the OA Personalization Framework, please see the following documentation:

Overview of Oracle Self-Service Web Applications, *Oracle Self-Service Web Applications Implementation Manual*

Oracle Applications Framework Release 11i Documentation Roadmap(Metalink Note # 275880.1)

For more information on using the Personalization Framework with SSHR, see: Configuring Web Pages, page 5-14.

Setting Up Page Layouts for SSHR

How does the Personalization Framework improve the flexibility of self-service functions?

The Personalization Framework enables you to modify the delivered SSHR web pages to suit the requirements of your enterprise. For example, you can include a company logo on a page or hide/show particular fields. You can also restrict the information displayed to a user and define how information is entered by adding radio buttons, flexfields, lists of values, and read-only fields. You can also configure the sequence of pages and reorder regions and region items to better suit the requirements of your enterprise.

Can anyone use the Personalization Framework?

For security reasons, not everyone has access to the Personalization Framework functionality. You control access to the Personalization Framework using profile options. If the profile options are set for your user or responsibility, you can access the Personalization Framework.

See: The Personalization Framework, page 5-3.

How does the Personalization Framework improve security in my enterprise?

The Personalization Framework can control the data that is displayed to a user on a self-service page and can restrict the functions that a user can perform, for example, by defining fields as read-only.

Can I control approvals?

Yes. You can use SSHR with Oracle Approvals Management (AME) or use standard and dynamic approvals to determine how managers and HR professionals approve self-service transactions.

Can I use the Personalization Framework to provide instructions to SSHR users?

Yes. You can use the Personalization Framework and Oracle HRMS to create long or short messages for your SSHR users. You can also create field text to assist users when entering data in particular fields. You can replace delivered instructions and messages or add text to items or regions that are delivered without text.

Can I use the Personalization Framework to configure notifications?

Yes. If your system administrator has enabled the Personalization Framework functionality, you can configure notifications to suit your requirements. You can specify whether notifications are delivered using e-mail or using Oracle Workflow, or use both delivery methods.

Can I add objects or content to my SSHR pages?

Yes. With OA Framework 11.i.10 you can add new items and objects. Available items include flexfields, buttons, tips, and messages.

See: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note #275880.1)

Can I change the flow of self-service pages?

Yes. You can take advantage of the extensibility functions offered by the OA Framework and change your process logic to suit your business requirements. You can change the sequence of self-service pages and add additional pages and regions if required.

For more information on using the Personalization Framework with SSHR, see: Configuring Page Layouts, page 5-14

SSHR Personalizations

The Personalization Framework

Oracle Applications Framework (OAF) technology (which includes the Personalization Framework) enables you to configure web pages for distinct audiences. For example, you can create one set of personalizations for a line manager and one set for an employee. Alternatively, you may personalize a self-service page differently for localizations, organizations, and sites. To enable this flexibility, the OA Framework provides two levels of personalization privileges: *administrator* level and *end-user* level. Administrators can choose to create personalizations at a number of different levels, for example, at the responsibility, site, or function level. These levels are arranged in a hierarchy where lower level personalizations take precedence over higher level personalizations.

See: Personalization Framework Hierarchy, page 5-3

Users can create personalizations for specific regions and items, for example, a user can hide or display particular columns in a table. A user can also personalize a portlet to hide or display particular information. User personalizations are only seen by the creating user.

Personalization Framework Hierarchy

Configure web pages for different audiences by creating personalizations at different levels. This list shows the available personalization levels (with an example of a typical personalization):

Administrator Level Personalizations

Personalization Level	Example
Function	Make certain fields read-only for particular functions.
Localization	Rename or hide fields for a particular localization.
Site	Define a table format for your site.
Organization	Add a corporate logo to all web pages used by your organization.
Responsibility	Add display or hide a flexfield for a responsibility.
Admin-seeded end user	Create default views for your users.

User Level Personalizations

Personalization Level	Example
Portlet	Personalize the portlet to display news headlines.
User	Create personalized views for tables.

> **Note:** The lower level personalizations, for example, user-level personalizations, take precedence over the higher level personalizations, for example, site-level personalizations.
>
> Not all personalization levels may be available for your self-service application. For example, for iRecruitment, use only site and responsibility levels.

To enable administration-level personalizations, the system administrator sets the personalization profile options for the user in question. The user then logs on to the self-service application and selects a responsibility. If the profile options are set correctly, the user sees the Personalize Region and Personalize Page links on the web page. By clicking on these links, the user can customize the page to the level required.

For a complete list of typical administration-level personalizations, see: *OracleApplications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

To enable user-level and portlet personalizations, the system administrator defines region items as user-configurable by using the User Personizable attribute in the Personalization Framework. For user and portlet-level personalizations, this attribute generally applies to tables. If a table can be personalized, you can define *views* for the table. For example, you can hide or display columns, filter data, select the number of rows to display, and define searches. You can then select the required view from a drop-down list. You can also define a default view.

Personalization and Extensibility

Enhanced extensibility functionality enables you to add new functionality and override or extend the delivered business logic. For example, you can add new pages to a functional flow or add new items, such as a field, to a delivered page.

For more information on extending SSHR in this way, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1)

Function-Level Personalizations

Some delivered SSHR functions include function-level customizations which you cannot update or delete. Currently, the following functions include function-level personalizations:

- Change Cost Center, Location and Manager
- Change Cost Center, Terms and Manager
- Change Job
- Change Job and Terms
- Worker Status Change
- Change Worker Status and Terms
- Hire/Applicant Hire/Contingent Worker Placement
- Termination
- Termination with Compensation
- Transfer

See: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

To personalize one of the above functions, you can either make the personalizations at the site or responsibility level (and override the delivered function-level personalizations) or you can create a copy of the function and make your own personalizations accordingly. However, if you prefer to work with your own custom functions rather than the delivered functions, you should be aware that you will lose any delivered function-level personalizations.

See: Defining Functions for SSHR, page 3-10

See: Function-level Personalizations, page 5-6

Configurable Profile Options

The following table lists the configurable profile options used with the Personalization Framework.

Profile	Configurable Levels	Values	Default
Personalize Self-Service Defn (FND_CUSTOM_OA_DEFINITION)	Site, Responsibility, User	Yes/No	No
FND: Personalization Region Link Enabled (FND_PERSONALIZATION_REGION_LINK_ENABLED)	Site, Application, Responsibility, User	Yes/No	No
Disable Self-Service Personal (FND_DISABLE_OA_CUSTOMIZATIONS)	Site, Application, User	Yes/No	No

Personalize Self-Service Defn

This profile option enables or disables the global Personalize Page link that appears on each self-service web application page. This profile option must be set to enable personalization at the administrator level. When an administrator displays the Page Hierarchy personalization page from the Personalize Page link, the administrator must navigate to the region or item to be personalized by expanding the hierarchy.

FND: Personalization Region Link Enabled

This profile option enables the Personalize Region link above each region in a SSHR web page. You can set this profile option *in addition to* the Personalize Self-Service Defn profile option. The advantage of setting this profile option is that the Page Hierarchy personalization page focusses on the specific region and the administrator does not have to expand the branches of the hierarchy.

Disable Self-Service Personal

If this system profile option is set to Yes, the configurations you make will not be applied, regardless of the level at which you make the configurations. Only the original definition of each self-service page will be displayed.

Function-level Personalizations

Oracle delivers a number of SSHR processes with function-level personalizations. If you copy of one of these processes to create your own version, you lose the function-level personalizations.

The following tables show which personalizations are included in the delivered processes, so you can replicate them if you require. The tables show where the behavior of a region item for a particular process is different than in a standard module. For example, for the Change Job process, the Department item, which is normally displayed in the Assignment page, is hidden. Any region item not included in this table behaves in the default way.

See: The Personalization Framework, page 5-3

Function Name	Region Name	Hidden Region Items	Displayed Region Items
Change Job (HR_ CHANGE_JOB_SS)	Assignment	HRInstruction	
		Department	
		Position	
		Grade	
		People Group	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Location	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	
Change Job and Terms (HR_CHANGE_JOB_TERMS_SS)	Assignment	Department	
		Position	
		Grade	
		People Group	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Department Name	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Location	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	
Change Cost Center, Location and Manager (HR_CHG_COST_ LOC_SUP_SS)	Assignment	HRInstruction	
		Job	
		Position	
		Grade	
		People Group	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Job Title	
		Location	
		Employee is a Manager	
		Normal End Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	
Change Cost Center, Terms and Manager (HR_CHG_COST_ TRM_LOC_SUP_SS)	Assignment	Job	
		Position	
		Grade	
		People Group	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Job Title Location Employee is a Manager Normal End Time Normal Start Time People Group Key Flex Performance Review Period Performance Review Frequency Position Name Salary Basis Salary Review Frequency Salary Review Period Work Hours Additional Information Payroll Name	
Employee Status Change (HR_EMP_ STATUS_CHG_SS)	Assignment	Position Grade Assignment Status Other Assignment Information Statutory Information Payroll Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Location Normal Start Time Normal End Time Position Name Work Hours Additional Information Payroll Name	
Change Worker Status and Terms (HR_EMP_TERMS_CHG_SS)	Assignment	Position Grade Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Location Normal End Time Normal Start Time People Group Key Flex Position Name Work Hours Additional Information Payroll Name	
Transfer (HR_ TRANSFER_SS)	Assignment	Position Grade Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Location Normal End Time Normal Start Time Performance Review Period Performance Review Frequency Position Name Salary Basis Salary Review Frequency Salary Review Period Work Hours Additional Information Payroll Name	
Termination with Compensation (HR_TERMINATION_COMP_SS)	SSHR Process People	PerInfo Header Assignment Selection	
Termination (HR_TERMINATION_SS)	SSHR Process People	PerInfo Header Assignment Selection	
Hire (HR_NEWHIRE_SS)	Assignment	Position Grade Assignment Status	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Establishment Name Grade Name Position Name	
	Basic Details Review	Effective Date Employee Number Disability Code Full Name Effective Date Full Name	Hire Date Gender Person Type Hire Date Gender
	Employment Type	Date of Last Change	
	Main Address Update	Effective Date	
	Main Address Review	Effective Date	
	Other Assignment Information	Assignment Flex Employee Category	
	Other Employment Information	Configurable Pay Info	
	PayRate Misc Fields Table	Changed On Last Pay Change	

Configuring Web Pages

The Oracle Applications Framework functionality enables you to personalize and extend the predefined web pages and web page regions to suit your business requirements. For example, you can hide or display particular fields or arrange fields or pages in a more appropriate sequence. Alternatively, you can add instruction text to your web pages or to add a company logo. You can carry out all these configuration activities using the Personalization Framework.

> **Note:** You cannot hide fields from display if they are mandatory or required for user input.

For overview information, see: The Personalization Framework, page 5-3.

For more detailed information, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1)

1. Make sure that you are using a responsibility with administration-level personalization access.

   See: The Personalization Framework, page 5-3

2. Navigate to the web page you want to configure.

3. Click the Personalize Page link for the web page or the Personalize Region link for a specific region.

   The Choose Personalization Context page appears, displaying the following personalization levels:

   > **Note:** If applicable, you can populate these fields with the values for you (as the person logged on) by clicking on the Set to My ... button.

   - Scope

     This is the name of the region or page that you are personalizing. You can switch to a different region within the page by selecting a value from the list.

   - Function
   - Location
   - Organization
   - Responsibility
   - Site

   > **Note:** When you define the personalization context, you should take care to consider the personalization hierarchy. For example, if you personalize a function and only enter a value in the Function field, the personalizations are also applicable if the function is used elsewhere, for example, with other responsibilities. If you only select a value in the Responsibility field, the personalizations are only applicable to that responsibility.
   >
   > See: Personalization Framework Hierarchy, page 5-3
   >
   > Similarly, you should take care when selecting the Scope. If you select the page as the scope and navigate to the required region on the following page, the personalizations only apply to the region in that particular page. However, if you select a shared region in the Scope field, the personalizations are replicated wherever the region appears throughout the application.

4. Click Apply to continue to the next page.

   The Personalize Page or Personalization Region page appears.

Making Your Personalization Changes

5. The page or region contains a hierarchy (Personalization Structure). If you are personalizing a page, the hierarchy contains all nodes for the page. If you are personalizing a region, the hierarchy contains the region and any subregions. Expand the hierarchy to display the required region.

Tip: If required, you can search for particular styles or items within the page or region by expanding the Search region.

See: Personalizing Page Styles and Items in *Oracle Applications Framework Personalization Guide* (Metalink Note #268969.1).

6. The Personalization Structure table contains links to the personalization functions. Although the content of this table may vary according to the type of element you have selected for personalization, common functions include:

   - Personalize

     Click on this icon to display the Personalization Properties.

     See: Personalization Properties, page 5-16

   - Reorder

     You can change the sequence of regions in a page or items in a region.

     See: Reorder Contents Page, page 5-17.

   - Add Content

     You can add predefined content regions to a selected region.

     See: Add Content Page, page 5-17.

   - Create Item

     You can add items to a selected region.

     > **Note:** You can only add an item at the Site, Localization, or Function levels.

     See: Create Item Page, page 5-18

   - Update Item

     You can update the properties for an item created using the Create Item function.

   - Delete Item

     You can delete an item from a page or region.

   Select the required function.

Personalization Properties Page

7. If you select the Personalize icon, the Personalization Properties page appears. The properties and functions available vary according to the type of page element you have selected for personalization.

   For more information, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

   The personalization properties are arranged in a table. The columns have the following significance:

   - Original Definition

     This shows the base definition as stored in the MDS (Meta Data Services) Repository.

- Columns for personalizations

  The columns displayed depend on the personalization levels you selected for the personalization context. They are displayed in order of precedence (lowest to highest). You can enter a value for each of the available personalization levels. If a field does not contain a personalization, it has the value Inherit. In this case, the field inherits its value from the corresponding field in the preceding column. For example, if you enter the prompt Employee Name for a page element at the function level, you can ensure that the same prompt is used for all subsequent personalization levels by selecting the Inherit value for these levels.

- Result/Source

  This column displays the final personalization.

The rows displayed in the Personalization Properties table also vary according to the page element selected for personalization. The rows relate to the attributes that you can personalize for your page element. Common attributes include:

- Prompt

  Enter a prompt for the page element.

- Rendered

  This attribute determines whether a page element is hidden (False) or displayed (True).

- User Personalization

  This attribute determines whether the page element can be personalized by a user (not an administration-level user).

  > **Note:** You can clear your personalizations for a particular level by selecting a level in the Clear Personalization field.

8. To submit your personalizations, click the Apply button.

Reorder Contents Page

9. To reorder the items on a page, click on the Reorder icon.

   The Reorder Contents page appears. This page contains a reorder region for each personalization level and also displays the base definition.

10. Select the personalization level at which you want to reorder the items on the page. If you do not reorder the items for a specific level, the level inherits the order from the personalization level above it.
11. Use the arrows at the side of the reorder region to region the page items.
12. To submit your personalizations, click the Apply button.

Add Content Page

13. To add a content region to a page, click on the Add Content icon.

    The Add Content page appears.

14. Select a predefined content region to add to the page.

Note: You can only add a content region to a boxed layout region that contains only content regions.

15. To submit your personalizations, click the Apply button.

Create Item Page

16. To create a new item for your page or region, click on the Create Item icon. To update the properties for an item that you have created using the Create Item page, click on the Update Item icon.

    The Create Item page appears.

17. Select the item type to be created or updated. For example, you can select flexfield, button, or tip.
18. Enter the ID for the new item. This ID should not exceed 30 characters.

    Note: The properties displayed for the new item depend on the type of item you are creating. For more information on the properties that you must enter for each item type, please see: Oracle Applications Framework Release 11i Documentation Roadmap (Metalink Note # 275880.1).

19. To submit your personalizations, click the Apply button.

Configuring Page Headers

Self-service pages often include a header region which provides summary information for the user. Manager self-service pages, for example, usually include headers to provide information such as the employee (or worker) name, employee number, job, and department for the person on whom they are carrying out a transaction.

In SSHR there are two header regions: Person Header and Assignment Header. Each header region contains several fields although some fields are delivered as hidden. In other words, the Rendered attribute for the field is set to False. To display these fields, use the Personalization Framework.

Name Format Personalizations

The Header regions display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Configurable Flexfields

The following tables show which flexfields are included in the Person and Assignment Headers:

Note: US Federal HR does not include these flexfields in the Person and Assignment headers.

Person Header

Flexfield Name	Flexfield Code
Further Person Information	Person Developer DF
Additional Personal Details Flex	PER_PEOPLE

Assignment Header

Flexfield Name	Flexfield Code
Add'l Salary Admin Details	PER_PAY_PROPOSALS
Additional Assignment Details	PER_ASSIGNMENTS

Personalizing Page Headers:

1. Navigate to the page or header region that you want to personalize and choose the appropriate link (Personalize Region or Personalize Page).
2. In the Choose Personalization Context page, select one of the following values in the Scope field:
   - /oracle/apps/per/selfservice/common/webui/SummaryContainerRN

     to personalize the top-level header region containing the Person and Assignment headers
   - /oracle/apps/per/selfservice/common/webui/PersonSummaryRN

     to personalize the Person header
   - /oracle/apps/per/selfservice/common/webui//AsgSummaryRN

     to personalize the Assignment header
3. Make your personalizations.

   See: Configuring Web Pages, page 5-14

   > **Caution:** Be aware that if you personalize the header regions, the changes are reflected throughout the application. In other words, if you personalize the Person header to hide the Contingent Worker Name field, this field will not appear on the Person header regions throughout SSHR.
4. Choose Apply to submit your changes.

Configuring Flexfields

Flexfields are user-defined data structures which are provided with many of the applications database tables. Key flexfields are used to uniquely identify a record. Descriptive flexfields add attributes to an existing object. Each flexfield can consist of multiple flexfield segments, each with its own validation rules.

See: Overview of Flexfield Concepts, *Oracle Applied Technology Guide*

If the self-service function you are using has flexfields enabled, you can access them using the Personalization Framework. The flexfields are not automatically displayed so you can choose to hide or display the flexfields using the Personalization Framework. However, not all self-service functions use flexfields. For a list of the available flexfields for each self-service function, please see the corresponding functional description in this Implementation Guide.

> **Note:** It may be the case that flexfields available in the Professional Forms Interface are not available in SSHR.

You can also add flexfields to regions of your web pages using the Personalization Framework.

To modify the flexfields displayed in a region:

1. Select the region.
2. Configure the region by choosing the Personalize Region link.

To personalize existing flexfields

1. Expand the hierarchy structure and click Personalize to open the Personalization Properties page.
2. To hide or display a flexfield, change the value in the Render column to True (to display the flexfield) or False (to hide the flexfield).
3. To display all flexfield segments, leave the Flex Segment List field blank. To display only selected segments, enter the segments in the Flex Segment List using the following format:

   context1|segment1|segment||context2|segment 1

   For example,

   Global Data Element|New Employer|Address||US|Zip Code
4. Click Save to submit your changes.

To add new flexfields to a region or page

1. Select the region to which to add the flexfield.
2. Select Create Item.
3. Select the item style Flex.

   The appropriate fields for this item style appear. For information on populating the individual fields, see: *Oracle Applications Framework Personalization Guide* (Metalink Note # 268969.1).
4. The Segment List field determines how the segments for your flexfields are displayed on the web page. To display all flexfield segments, leave the Segment List field blank. To display only selected segments, enter the segments in the Flex Segment List using the following format:

   context1|segment1|segment||context2|segment 1

   For example,

   Global Data Element|New Employer|Address||US|Zip Code
5. Click Save to submit your changes.

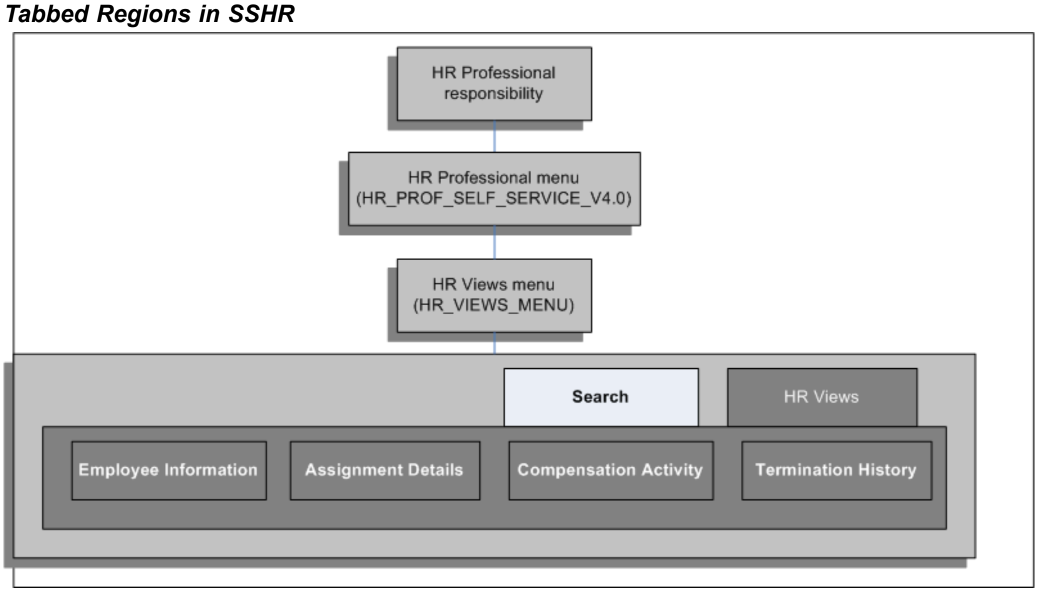
3. Choose Apply to save your personalizations.

Configuring Tabbed Regions

Tabbed regions appear on several SSHR web pages; for example, the Benefits Self Service page includes the Benefits Enrollments and Current Benefits tabs. The self-service Views functions also use tabbed regions and buttons to enable the user to switch between the different views.

The structure of the tabbed regions is defined by a series of menus and submenus. The graphic illustrates a typical example of a tabbed region in SSHR. In this example, the user selects the HR Professional responsibility which calls the HR Professional menu. The HR Professional menu contains the HR Views menu which, in turn, calls the HR Views submenu and the Search function. The Search function and HR Views submenu form the tabs displayed on the self-service page. The functions attached to the HR Views submenu become the buttons displayed under the HR Views tab.

Tabbed Regions in SSHR



The following menus contain tabbed regions:

Menu Structure for Tabbed Regions

Top Level Menu	Submenu/Function	Function	Function
HR Professional (HR_ PROF_SELF_SERV ICE_V4.0)	HR Views (HR_V IEWS_MENU)	Search function	
		HR Views submenu (HR_VIEWS)	View Employee Information Details
			View Employee Compensation Activity
			View Employee Termination History

Top Level Menu	Submenu/Function	Function	Function
			View Employee/ Personal Information
	Search function		
Benefits Self-Service (BEN_SELF_SERV ICE_BENEFITS	Benefit Enrollments function		
	Current Benefits function		
My Employee Information Functions Menu (HR_MGR_V IEWS_FUNC_MENU)	Simple Search		
	Advanced Search		
	My List		
	My Employee Information		
	Person Details		
	My Employee Information Views Sub Tab Menu (HR_MGR_ VIEWS_SUB_TABS)		
		Employment	
		Salary	
		Performance	
		Training	
		Absence	
		Job Applications	
		Effort Distribution	
		Contracts	
	My Information Functions Menu (HR_ EMP_VIEWS_FUNC_ MENU)		
		My Information	
		My Information Views Sub Tab Menu (HR_ EMP_VIEWS_SUB_ TABS)	
			Employment
			Salary

Top Level Menu	Submenu/Function	Function	Function
			Performance
			Training
			Absence
			Job Applications
			Effort Distribution
			Contracts
		Salary Details	
	Salary Details		

Menu Structure for US Federal HR Tabbed Regions

Top Level Menu	Sub menu	Sub Tab	Function
Federal HR Self Service (GHR_HR_MANAGER_ACCESS)	Employee Information (GHR_HR_VIEWS_FUNC_MENU)	Employee Information (GHR_HR_VIEWS_SUB_TABS)	Employment
			Position
			Personal
			Obligation Dates
			Salary
			Benefits
			Awards and Bonuses
			Performance
			Personnel Action
			Training
			Absence
			Job Application
Federal Manager Self Service (GHR_LINE_MANAGER_ACCESS)	My Employee Information (GHR_MGR_VIEWS_FUNC_MENU)	My Employee Information (GHR_MGR_VIEWS_SUB_TABS)	Employment
			Position
			Personal
			Salary
			Awards and Bonuses
			Performance

Top Level Menu	Sub menu	Sub Tab	Function
			Personnel Action
			Training
			Absence
			Job Application
Federal Employee Self Service (GHR_EMPLOYEE_DIRECT_ACCESS)	My Information (GHR_EMP_VIEWS_FUNC_MENU)	My Information (GHR_EMP_VIEWS_SUB_TABS)	Employment
			Position
			Personal
			Salary
			Benefits
			Awards and Bonuses
			Performance
			Personnel Action
			Training
			Absence
			Job Application

See also: Setting Up Self-Service Benefits Web Pages, page 11-28

You can determine which responsibilities can view information by hiding the tabbed region (function exclusion):

- At the responsibility level for a specific responsibility
- At the menu level for all responsibilities

To configure tabbed regions:

To exclude a tabbed region for all responsibilities at the menu level:

Set a function exclusion at the menu level:

1. In the Menus window, query the self-service manager menu, such as HR_VIEWS_SUB_TABS.
2. Locate the row for the prompt and function associated with the tabbed region, such as Training.
3. Click the Grant check box to deselect the tabbed region for all responsibilities that use this menu.
4. Save your work.

To exclude a tabbed region from one responsibility:

Set a function exclusion at the responsibility level:

1. In the Responsibility window, query the self-service manager responsibility.
2. In the Menu Exclusions tabbed region, create an exclusion with the type Function.
3. Select the function you wish to exclude in the Name column. See Menu Structure for Tabbed Regions, page 5-21.
4. Save your work.

To rename the tabbed regions:

1. In the Menu window, query either the menu representing the tabbed region or the menu containing the functions that represent the buttons.
2. Change the name of the tabbed region or button by changing the value in the Prompt field of the Menus window.

   Note: If you change the prompt, the change will be visible for all responsibilities or menus calling that menu or submenu. If you want to use different names for the tabbed regions and buttons for different responsibilities, you must create additional versions of the menu or submenu.

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

3. Save your work.

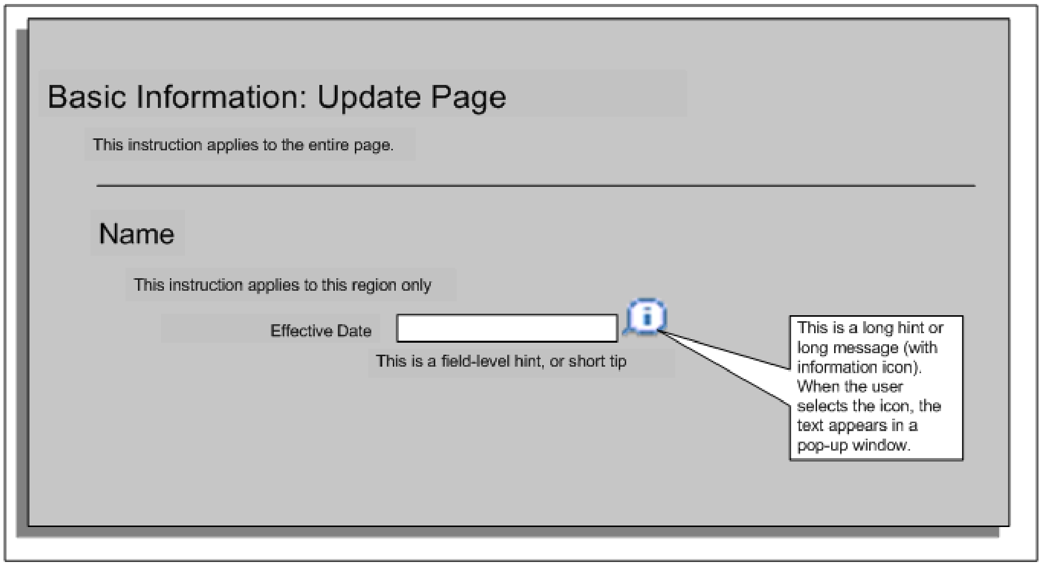
Adding Instructions to Web Pages

You can change the predefined instructions, messages, and tips attached to your web pages to provide relevant information for your users. You can replace delivered texts or create new texts for regions or item delivered without a text attached, using one of three formats:

- Instructions. These texts appear at the top of a region and generally give advice applicable to the whole region or page.
- Long messages. These texts are attached to a field. When the user clicks the Information icon next to a field, the message opens in a separate window.
- Short tips. These texts are also attached to a field, however, they are displayed underneath the field in blue.

The graphic below illustrates examples of the different types of text:

Instructions, Messages, and Tips on a Self-Service Page



Recommended Approach

Create text items in the Messages window using the forms interface and add them to your region or item using the Personalization Framework.

To create a text item in the Messages window:

1. Log on to the database using an Application Developer responsibility.
2. Navigate to the Messages window.
3. Enter the name for your text item.
4. Select Note as the message type.
5. Enter the application and the message text. You can enter a long message, short message, or tip text.
6. Save your work.

To personalize text on a page:

1. Log on to a self-service application using a responsibility that allows configuration.

   Note: To enable configuration, the Personalize Self-Service profile option (FND_CUSTOM_OA_DEFINITION) must be set to Yes at an administration level.

2. Click Personalize Region or Personalize Page.
3. Navigate to the self-service page or region in which you want to replace the text.

   Then select one of the following options:

   - To replace an existing text item, page 5-27
   - To add a text item to a new region or page, page 5-27

To replace an existing text item

1. When the personalization structure is displayed, drill down to the region or page element containing the text.
2. Locate the text item on the page. The text item will be one of the following items:
   - Static Styled Text: <name> - for instruction text
   - Message Text Input - for short tips and long messages
   - Message Choice - for long messages attached to a list of values
3. Select the Personalize icon for the item.
4. Replace the value in the Message Name field with the text item that you created in the Messages window.
5. Click Apply to save your changes

To add a text item to a new region

If you are adding a text item to a region or page that does not contain a text as standard, you need to carry out the following steps:

1. Create an item with one of the following styles:
   - Static Styled Text: <name> - for instruction text
   - Message Text Input - for short tips and long messsages
   - Message Choice - for long messages attached to a list of values

   See: Create Item Page, page 5-18
2. Enter the ID for the item following the standard naming conventions.

   See: *Oracle Applications Framework Personalization Guide Release 11i (11.5.10)* available from Metalink Note 268969.1.
3. Set the CSS Class to OraInstructionText.
4. Enter the application short name in the Message Appl Short Name field..
5. Enter the name of the message in the Message Name field.
6. In the Tip Type field, select the appropriate format for your text.

   > **Note:** If applicable, you can display a date format example next to a date field. In this case, select dateFormat in the Tip Type field. The OA Framework then automatically displays a date example based on the user's date preference.

7. Click Apply to submit your changes.

Configuring the Global Button Bar

The Global Button Bar comprises the following buttons by default:

- Return to Portal
- Log Off
- Select Preferences
- Email

- Self-Service Help

Selecting a button enables a user to access the button's function.

You can configure the Global Button bar by removing any, or all, of the buttons from a user's web page. You edit the contents of the Global Button bar in the Menus window. When you remove a button from display a user can no longer access the button's functionality. You can also rearrange the order of the buttons or use a button bar that you create.

To configure a button on the global button bar:

1. Query the following Menu in the Menus window:
   - ICX_GLOBAL_MENU
2. Consider which of the following functions you want your users to access with the Global Button Bar:
   - Return to Portal
   - Log Off
   - Select Preferences
   - Email
   - Self-Service Help
3. Delete the functions you don't want users to access.
4. Save your work.

   See: User's Window, *Oracle Applications System Administrator's Guide*

To remove the global button bar display:

1. Navigate to the web page you want to configure.
2. Choose Personalize.
3. Hide the Global Button bar.

   See: Oracle Self-Service Framework Version 5.2.2B (available on Metalink)

Personalizing Screen Images

Oracle delivers self-service functions with a default Oracle image in the upper left corner of the page. This image, together with the header text that identifies the function, is known as *branding*.

You can replace the default Oracle image, with your own image if required. Change the default image in one of two ways: overwrite the default image with an image of the same name or replace the default image with one of your own.

Alternatively, you can add an image to a region or page if required.

The standard size of the branding image and text is *small*. However, if required, you can change the size to *regular* or *medium* by changing the FND: Branding Size profile option value. The profile option settings have the following effect:

- Regular

  - the global buttons appear with corresponding icons and links.

- Medium

  - displays global buttons with links and a lower profile product branding image.
- Small

  - results in global buttons with links and low profile product branding text with a small, generic graphic

To overwrite the default image with your own image:

1. Create an image.
2. Save and name the image:
   - FNDSSCORP.gif (Oracle image)
   - PERBRAND.gif (Human Resources image)
   - IRCBRAND.gif (iRecruitment image)
   - LOGO.gif (log-in image)
3. Place the gif in the $OA_MEDIA/<Language> directory.

   Note: If you have a multilingual install, you must also copy this file to the other language locations.

To replace the default image with your own image:

1. Create a .gif image.
2. Place the gif in the $OA_MEDIA/<Language> directory.

   Note: If you have a multilingual install, you must also copy this file to the other language locations.

3. Query the web page regions or page for personalization.
4. The Image URL attribute defines which graphic appears on the web pages. Overwrite the attribute name with the name of your image.
5. Save your work.

To add a image to a page or region:

1. Query the web page regions or page for personalization.
2. Click Create Item.
3. Create an item with the item style Image.

   See: Create Item Page, page 5-18
4. Click Apply to submit your changes.

Configuring the Effective Date Prompts

The effective date prompt appears at the top of most self-service web pages and indicates whether the current transaction is effective as of a specific date or whether the transaction is effective on approval.

The two prompts are as follows:

- Effective Date:

  Appears if you specify an effective date on the Effective Date Options page.

- Effective as of Approval Date

  Appears if you specify on the Effective Date Options page that changes should take effect as soon as approval takes place.

There are two different procedures for configuring these prompts:

To configure the Effective Date prompt:

You configure the Effective Date prompt in the Messages window.

1. In the Messages window, query the following message:

   HR_EFFECTIVE_DATE_PROMPT

   The message body appears in the lower half of the screen.

2. Change the text of the message as required. For more information on creating messages, see: Messages Window, *Oracle Applications Developer's Guide*

   Adding Instructions to Web Pages, page 5-25

3. Save your work.

When you next log on to SSHR to carry out a transaction, your new effective date prompt appears.

To configure the Effective as of Approval prompt:

1. Click either Personalize Page or Personalize Region.
2. Select the Personalization Context.

   For more information, see: Configuring Web Pages, page 5-14.

3. Navigate through the personalization hierarchy to the element Message Styled Text: <*prompt text*> and click Personalize.
4. To change the text for the prompt, enter the required text in the appropriate personalization level field in the Prompt row. For example, to change the text for all selected personalization levels, enter a new text in the first personalization level column, and select the Inherit value for any other personalization levels.
5. Apply the changes and return to the application.

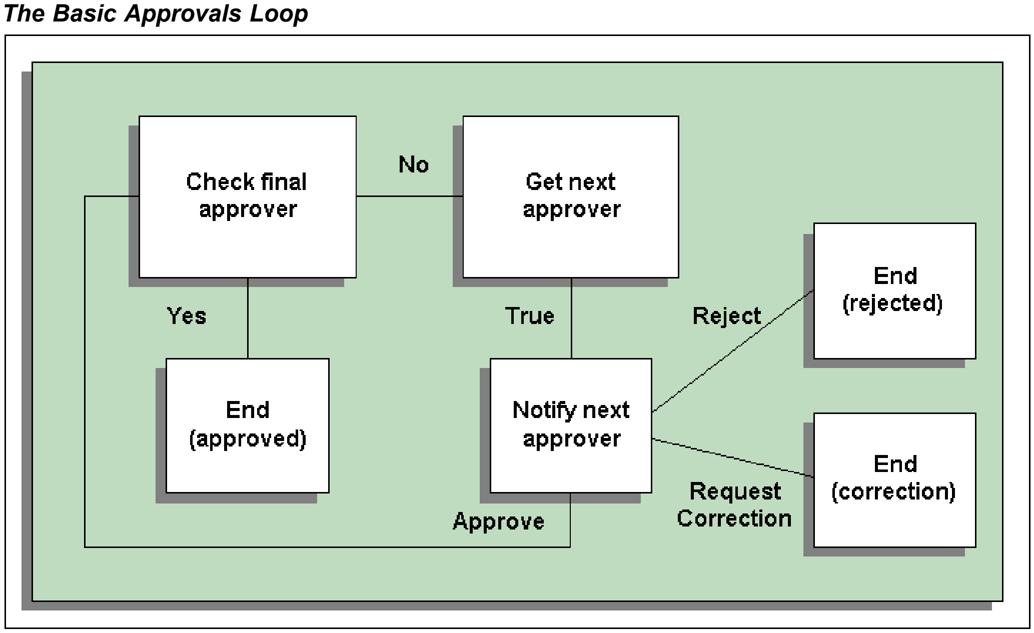
6
Approvals

Approvals Overview

When you define your SSHR functions, you can decide whether they require approval before they are submitted to the HR tables. You can define different approval requirements for different transactions and vary the approval requirements as required. For example, you can configure the workflow processes so that the Address part of Personal Information requires approval but the Phone Numbers part does not. Alternatively, you can vary the Approvals requirements by responsibility so that records changed by employees would need approval but records changed by managers would not.

All approvals mechanisms used in SSHR follow a basic approval loop. The logic checks whether the current approver is the final approver in the hierarchy. If the current approver is not the final approver, the application fetches the next approver who then receives the approval notification. The next approver can either reject the transaction, approve the transaction, reassign the transaction, or send the transaction for correction to anyone in the approvals chain. The approver may also be able to update the transaction, depending on the system configuration.

The Basic Approvals Loop



Within the approvals process, the application uses rules to generate a list of approvers for the SSHR transaction. The way in which the list is generated depends on the approvals mechanism you are using (see Approvals in SSHR).

The application uses dynamic approvals by default. The dynamic approvals functionality comprises:

- A self-service user interface which enables the initiating manager to add additional approvers an notification recipients, display the approvers list, and limit the number of approval levels.
- An application which generates the default approvers. The standard tool is Oracle Approvals Management (AME). Alternatively, you can use the customizable PL/SQL packages.

The dynamic approval workflow processes send notifications to approvers and notification recipients identified in the approver list.

Features of Approvals in SSHR

Does SSHR provide a secure approvals tool?

Yes. Oracle SSHR can use dynamic approvals with Oracle Approvals Management (AME) or with a PL/SQL package to provide a secure approvals environment.

Why does SSHR use both customizable PL/SQL packages and AME for approvals?

Up until SSHR 4.1, customizable PL/SQL packages were used to define approvals in SSHR. From SSHR 4.1, however, the delivered functions used Oracle Approvals Management (AME) as standard. You can choose to use dynamic approvals instead of AME by configuring your self-service functions accordingly, however, Oracle recommends that you use AME for all your approvals as other approval types may not be supported in future releases.

What is the advantage of using Oracle Approvals Management?

Oracle Approvals Management enables you to define business rules to control your approvals processes. You can define conditions, rules, and attributes to define an approvals process to meet the requirements of your enterprise. For example, you could create an approvals process in which approval from a particular user is only required if a salary raise is above a set amount. Alternatively, you could set up an approvals process for a particular business process.

Can the approvals chain be configured to meet my requirements?

Yes. You can configure your approvals processes to include specific approvers or managers. You can also specify that particular users should receive notification of the approval. If you are using Dynamic Approvals, you can still configure your processes using the Workflow Builder.

Do I need a separate license to use Oracle Approvals Management?

No. Oracle Approvals Management is included if you purchase any application license.

Approvals

Approvals in SSHR

The Approvals interface for SSHR functions differs according to the type of approvals you have implemented. From release 4.1, SSHR uses Oracle Approvals Management (AME) to define and manage approval logic for all delivered SSHR functions. You can also use AME with all custom functions that use SSHR version 4 and above.

See: Implementing Oracle Approvals Management (AME), page 6-12

Oracle recommends that you use Oracle Approvals Management (AME) for all SSHR functions, however, all of the following alternatives are available:

- **Dynamic approvals with Oracle Approvals Management (AME)**

  This interface allows you to add approvers to the approvals chain and specify their position in the approvals chain. You can choose whether the approver receives a For Your Information (FYI) notification or whether the approver must approve or reject the transaction. In addition, you can choose the type of approver. You can add the following approver types to the approval chain:

  - Person

    Add a person, for example, John White.

  - User

    Add a user, for example, JWHITE.

  - Position

    Add a position, for example, Senior Manager - Accounts.

    > **Note:** If you select a position, each person with that position has access to the notification. When the first person holding that position approves or rejects the notification, AME processes the notification by either forwarding the approved notification to the next person in the approval chain, or by returning the rejected notification to the initiator.

  When you have selected an approver, you can specify their position in the approvals chain (the insertion point). You can:

  - Select an existing approver as the insertion point.

    You insert the new approver either before or after an existing approver in the list.

  - Append the new approver to the list.

    You add the new approver to the end of the approval list or specify whether the new approver is the First or Last Post Approver.

    > **Note:** You can also select an order number as the insertion point, for example, Order: 3. In this case, the new approver is always be third in the approvers list.

  For more information on AME, see: *Implementing Oracle Approvals Management* (Metalink note #289927.1)

- **Dynamic approvals without AME**

  This interface comprises the Approvals and Notification Recipient sections, however, the list-modification functionality is less comprehensive than that provided by AME. The manager initiating the SSHR transaction can add additional approvers to the approval chain and nominate additional notification recipients (reviewers). The application sends notifications to these persons on submission or on approval.

  See: Customizing Approvals Using PL/SQL, page 6-8

- **Standard approvals**

  You can disable the insert approvers and add notification recipients functionality and use standard approvals by configuring the Review activity for the workflow process. Oracle does not recommend this approach.

  See: Review and Confirm, page 8-14

  In this case, no configuration options are available, and the approvers list is as defined by the PL/SQL code. You cannot add approvers to or remove approvers from the approvers list.

Oracle Approvals Management (AME) Configuration

Oracle Approvals Management (AME) is a web-based application that is integrated with Oracle Workflow and enables you to define business rules to control your approvals processes.

With AME, you use the following components to define your approvals processes. They are associated with a transaction type for a particular application.

- Attribute - this is a business variable, for example, a salary amount, user ID, or workflow process name.

  See: Standard AME Attributes for SSHR, page 6-5

- Condition - a condition compares an attribute value with a set of allowed attribute values. For example, a condition could look at a salary amount. If the salary is greater than a specified value, a particular approver list is created.
- Approval type and approval specifications - these components define the type of approver list that is generated. For example, to generate a supervisor-based approver list with 5 levels, you use the 'supervisory level' approval type with the 'requires approval up to the first 5 approvers' approval specification.
- Rules - a rule links the other components together by associating one or more conditions with the approval type and approval rule.

For more information on the components used in AME, see: *Implementing Oracle Approvals Management* (Metalink Note #227391.1).

Default Use of AME Configuration in SSHR

Oracle SSHR delivers an AME configuration that emulates functionality delivered in the PL/SQL package. This configuration delivers a supervisor-based approvals hierarchy using AME rules.

The default AME configuration consists of:

- a single AME transaction type 'SSHRMS' with
- the following conditions:
    - WORKFLOW_PROCESS_NAME
    - MID_PAY_PERIOD_CHG
- the following rules:
    - SSHR rule for at most 10 Approvers in supervisor chain

      Requires approvals to the top of the approval hierarchy or to 10 levels above the initiator, whichever comes first
    - SSHR Payroll Contact inclusion rule

      Requires pre-approval from payroll contact if the transaction results in a mid-period pay change

Standard AME Attributes for SSHR

Oracle SSHR provides the following AME attributes to help you define your approvals processes:

Attribute	Description
HR_TRANSACTION_CREATION_DATE_SS	Transaction creation date
HR_IS_CHANGE_PAY_SS	Includes pay change
HR_IS_ASSIGNMENT_CHANGE_SS	Includes change to assignment data
HR_IS_SUPERVISOR_CHANGE_SS	Includes supervisor change
HR_IS_TERMINATION_SS	Includes termination change
HR_IS_LEAVE_OF_ABSENCE_SS	Includes absence change
HR_TERMINATION_REASON_SS	Termination reason
HR_LENGTH_OF_SERVICE_IN_YEARS_SS	Length of service (years)
HR_PROPOSED_JOB_ID_SS	ID of proposed job
HR_PROPOSED_POSITION_ID_SS	ID of proposed position
HR_PROPOSED_GRADE_ID_SS	ID of proposed grade
HR_PROPOSED_LOCATION_ID_SS	ID of proposed location
HR_PROPOSED_PAYROLL_ID_SS	ID of proposed payroll
HR_ASSIGNMENT_CHANGE_REASON_SS	Proposed assignment change reason
HR_ASSIGNMENT_CATEGORY_SS	ID of proposed assignment category
HR_APPRAISAL_TYPE_SS	Appraisal type
HR_SELECTED_PERSON_ID_SS	ID of selected person
HR_PAY_PERCENT_CHANGE_SS	Pay change (percent)
HR_PAY_AMOUNT_CHANGE_SS	Pay change (amount)

Attribute	Description
HR_PAY_BASIS_ID_SS	ID of payroll basis
HR_SELECTED_PERSON_PROPOSED_SUP_ ID_SS	ID of proposed supervisor
HR_IS_PERSON_BASIC_DETAILS_CHANGE_ SS	Includes change to basic details
HR_IS_SELECTED_PERSON_ADDRESS_ CHANGE_SS	Includes address change
HR_IS_SELECTED_PERSON_CONTACT_ CHANGE_SS	Includes contact change
HR_IS_RELEASE_INFORMATION_SS	Includes change to release information
WORKFLOW_PROCESS_NAME	Workflow process name
CURRENT_ASSIGNMENT_ID	ID of current assignment
CURRENT_EFFECTIVE_DATE	Current effective date
HR_PROPOSED_SALARY_BASIS_SS	Proposed salary basis
HR_ABSENCE_TYPE_ID_SS	ID of absence type
HR_IS_MID_PAY_PERIOD_SS	Includes mid-period change to pay

For more information on using attributes in SSHR, see: *Implementing Oracle Approvals Management* (Metalink Note #227391.1).

Configuring SSHR Approval Levels in AME

To meet your business needs, you may add additional rules, conditions, or attributes within the delivered SSHRMS transaction type, or you can define a custom transaction type.

For more information on configuring AME rules, conditions, and attributes, see: *Implementing Oracle Approvals Management* (available on Metalink).

It is relatively easy to make minor changes to the delivered AME configuration and some examples are provided below.

To define a different approval level for all SSHR workflow processes:

- For example, to specify two approval levels: The approval level is currently defined in the rule 'SSHR Rule for at most 10 approvers in Supervisor chain'. You would edit this default rule and change the approval level for the supervisory level approval type to 'requires approval up to the first two superiors at most'.

To define a different approval level for a specific workflow process:

- First you create a new condition with the attribute WORKFLOW_PROCESS_NAME and enter the workflow processes which will have the different approval level as the attribute values.
- Then you create a new rule, for example, '2 approvers in supervisor chain'.

- Use the 'supervisory level' approval type with the 'requires approval up to the first two superiors at most' approval
- Finally, attach your new condition to the rule.

To define a new approval level (if the delivered approvals do not meet your requirements):

1. You create a new approval (for example, 'requires approval up to the first 15 superiors at most') in the 'supervisory level' approval type.

To define a particular user as the final approver, or final authority (even if they are not the last person in the approval chain):

- You create a List Modification Condition and specify a user, for example, a manager, as the final approver. You would add this list modification condition to your rules so that the approval chain would stop at this specified approver. Alternatively, you could create a new rule, add the approval type for final approver and add the WORKFLOW_PROCESS_NAME condition so that this final approver rule would apply to selected processes.

For more information on the configuration options offered by AME, see: *Implementing Oracle Approvals Management* (available on Metalink).

For information about function parameters associated with AME, see Supplied Functions, page 3-13

For descriptions of function parameters, see Menu Function Parameter Descriptions, page 3-23

Further Approvals Options

Allow updates of pending transactions

An approver can update an action themselves, or return an action for correction to any recipient on the approval chain. However, the ability to update depends on two configurations:

- The system profile option HR: Allow Approver Updates to Self Service Actions must be set to Yes.
- The recipient must have a workflow role that allows edits.

To update pending transactions, approvers must have a workflow role with the appropriate role type attached to allow them to edit actions. They can then update actions regardless of their position in the approval chain.

There are two supplied role types that control approvers' ability to update pending transactions: SSHR Update Allowed and SSHR Update Not Allowed. These role types should not be used in conjunction with each other; use whichever is simplest.

- SSHR Update Allowed

  If you associate a role with this role type, any approver with that role can update a pending transaction. No one else can perform updates on pending transactions.

- SSHR Update Not Allowed

If you associate a role with this role type, all approvers with that role are prevented from updating pending transactions; all other approvers can update pending transactions.

Use the Maintain Roles window to associate a role with a role type.

Route actions to HR representative

You can route actions to an HR representative. The application sends the action to all persons having a role associated with the seeded HR Representative role type. Use the Maintain Roles window to associate a role with this role type.

The first HR representative to process the action does so on behalf of all HR. This is especially useful in situations where the application encounters a future-dated change to a person's record. See Future-Dated Actions in Managing Dates in SSHR, page 3-4.

Defer Update After Approval

By default, the save of the SSHR transaction to the database is deferred after the final approval. This is to prevent any delay between the final approver clicking the approve button and moving on to the next notification.

The transaction is saved automatically when the Workflow Background Process runs. The system administrator needs to schedule this process to run periodically as needed.

When you run the Workflow Background Process you need to set the following parameters:

- Item Type = HR
- Process Deferred = Yes
- Process Timeout = No
- Process Stuck = No

See Submitting a Request, *Oracle Applications System Administrator's Guide*

If you need to modify the default behavior so that transactions are saved immediately after final approval, set the system profile HR:Defer Update After Approval to No at User/Responsibility/Application/Site level.

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

Sample Code for Modifying Approvals Using PL/SQL

If necessary, you can review the logic in the check_final_approver and get_next_approver functions and modify them as required. These functions are within the HR_APPROVAL_CUSTOM package.

Make sure that your returned values are of the correct data type.

The following code shows the logic for the approval functions. If required, you can customize the code to use different approvals routings or to stop at a different grade level.

```
??-- -Check_final_approver


function check_final_approver
```

```
           (p_forward_to_person_id in per_people_f.person_id%type

           ,p_person_id            in per_people_f.person_id%type
)
         return varchar2 is
--
  cursor csr_pa(l_effective_date in date) is

    select  paf.person_id

    from    per_all_assignments_f paf

    start   with paf.person_id = p_person_id

      and     paf.primary_flag = 'Y'

      and     l_effective_date

      between paf.effective_start_date

      and     paf.effective_end_date

    connect by prior paf.supervisor_id = paf.person_id

      and     paf.primary_flag = 'Y'

      and     l_effective_date

      between paf.effective_start_date

      and     paf.effective_end_date;

--

  l_person_id per_people_f.person_id%type := null;

--

begin

  -- loop through each row. the rows are returned in an order whi
ch makes

  -- the last row selected the top most node of the chain.
```

```
  for csr in csr_pa(trunc(sysdate)) loop

    -- set the l_person_id variable to the row fetched

    l_person_id := csr.person_id;

  end loop;

  if p_forward_to_person_id = l_person_id then

    return('Y');

  else

    return('N');

  end if;

exception

  when others then

       return('E');

--

end check_final_approver;
()
```

- -Get_next_approver

```
function get_next_approver

           (p_person_id in per_people_f.person_id%type)

         return per_people_f.person_id%type is

--

  cursor csr_pa(l_effective_date in date

               ,l_in_person_id   in per_people_f.person_id%type)
is

    select  ppf.person_id
```

```
    from    per_all_assignments_f paf
           ,per_people_f      ppf
    where   paf.person_id             = l_in_person_id
    and     paf.primary_flag          = 'Y'
    and     l_effective_date
    between paf.effective_start_date
    and     paf.effective_end_date
    and     ppf.person_id             = paf.supervisor_id
    and     ppf.current_employee_flag = 'Y'
    and     l_effective_date
    between ppf.effective_start_date
    and     ppf.effective_end_date;
--
  l_out_person_id per_people_f.person_id%type default null;
--
begin
  -- [CUSTOMIZE]
  -- open the candidate select cursor
  open csr_pa(trunc(sysdate), p_person_id);
  -- fetch the candidate details
  fetch csr_pa into l_out_person_id;
  if csr_pa%notfound then
    -- if the cursor does not return a row then we must set the o
ut
```

```
    -- parameter to null

    l_out_person_id := null;

  end if;

  -- close the cursor

  close csr_pa;

  return(l_out_person_id);

end get_next_approver;
()
```

For more information on using PL/SQL, see Overview of Using PL/SQL in Applications, *Oracle Applications Developer's Guide*

Implementing Oracle Approvals Management (AME)

There are several settings that you must configure in AME before you can use the functionality in SSHR.

Also, any custom functions you created prior to release 4.1 will use the customizable PL/SQL package as the default approvals mechanism. However, you can modify any custom SSHR functions to point to AME by adding two new function parameters.

> **Note:** The AME rules and conditions always override any other workflow attribute settings that apply to approvals, for example, the attribute settings for the Review activity. If the Approvals Required workflow attribute is set to Yes for a workflow process but AME does not return any approvers, the process completes without requiring approval. As a general set-up recommendation, you should set up processes that currently do not require approval as follows:
>
> - Set the Approvals Required workflow attribute to Yes
> - Configure AME so that no approvers are returned
>
> If you subsequently need to add approvals to your process, you can simply use a different AME condition.

To set up AME for SSHR:

1. Use an AME Administrator responsibility to check that the value of the following variables is Yes:
   - AllowFYINotifications
   - AllowAllApproverTypes

     If the value for this variable is No, you cannot use the Position approver type.
2. Use the Workflow Builder to set the Timeout value for the Notification activity in your workflow processes.

See: To Define Nodes in a Process, *Oracle Workflow Developer's Guide*

See: Timeout Transitions, *Oracle Workflow Developer's Guide*

3. If you have created custom workflow processes, use the Workflow Builder to replace the existing notification processes with the new process Notification Process for Approvers and Notifiers.

   See: Diagramming a Process, *Oracle Workflow Developer's Guide*

To link a custom function to AME:

You define additional function parameters in the Form Functions window. You should also check the workflow attributes for your workflow process using the Workflow Builder.

1. Query your function.
2. Navigate to the Form tabbed region.
3. Add the following parameter information to the Parameters field for your function:
   - pAMETranType=SSHRMS
   - pAMEAppId=800
4. Save your work.

To add a custom workflow process to the list of values for the condition attribute for the SSHRMS AME transaction type (required if using the delivered SSHR transaction type):

1. Log on to Oracle Approvals Management.

   > **Note:** You need to use one of the following AME responsibilities (AME is the Oracle internal abbreviation for AME):
   >
   > - AME Application Administrator
   > - AME General Business User
   > - AME Limited Business User

2. Select the SSHRMS transaction type.
3. Select the Conditions tab and click on the WORKFLOW_PROCESS_NAME condition.
4. Choose the Add Text Value button and enter the name of your new workflow process as an attribute value.
5. Save your work.

Technical Information:

Workflow Processes

- Notification Process for Approvers and Notifiers, which includes the following subprocesses:
  - FYI Notification Process (HR_FYI_NOTIFICATION_PRC)
  - Approvers Notification Process (HR_APPROVAL_NTF_PRC)

- RFC Notification Process (HR_RFC_NTF_PRC)

  Note: If you do not use AME.A or above, the workflow processes are as follows:

  - Approvals Process with Correction V5.0 (for dynamic approvals)
  - Approvals Process (for standard approvals)

Configurable Workflow Attributes

Process Name	Function Name	Attribute Name	Description
FYI Notification Process	Notify	Message Name	Specifies the name of the message for the notification. You can create separate messages for notifications sent on submission of the transaction and on approval, for example.
FYI Notification Process	Notify	Expand Roles	To assign this notification to a role consisting of multiple users and to send an individual copy of this notification to each user in the role, select Yes. If you select No, only one copy of the notification is delivered to the role as a whole.
FYI Notification Proces	Notify	Performer	The role to whom the notification is sent. You can select a constant role name or an item type attribute that dynamically determines the role at runtime.

Configurable Profile Options

For information on profile options to control whether users can update pending transactions, see: Further Approvals Options, page 6-7.

Configuring Approvals in the Workflow Builder

If you are not using Oracle Approvals Management (AME), you configure the predefined approvals processes in the Workflow Builder. You set up the approvals process using workflow attributes.

> **Note:** Oracle recommends that you use AME for your approvals instead of the customizable PL/SQL packages.

To configure approvals in the Workflow Builder:

1. Open the workflow item type.
2. Navigate to the process you want to modify and double click to open the workflow diagram.
3. Open the Review Page activity for your workflow process.

   Note: You may have to drill down through several subprocesses until you reach the correct Review Page activity.

4. Make a copy of the process and any affected subprocesses. For example, if you are modifying the approvals for the Process Personal Information process, you would have to copy the Process Personal Information process, and the related subprocesses, for example, the Process Basic Details subprocess.

   See: Updating Workflow Objects, page 4-3

5. Select the Review Page activity for your process/subprocess and set the Approval Required workflow attribute (HR_APPROVAL_REQ_FLAG) to YES. This activates approval for your process/subprocess.

   Note: The default value varies for different modules.

   See: Review and Confirm, page 8-14

6. Decide how a process should pass through the entire approval chain, in other words, how many levels of approval are required. Set the approval level using the Approval Level attribute (HR_DYNAMIC_APPROVAL_LEVEL). Add an approval level value to the Default Value field. A value of 1 for example will pass the approval one level up the supervisor chain.

   Note: The default number of level is 0, meaning that the number of levels is unlimited.

7. Save your work.

7

SSHR Implementation Steps

Implementation Steps for Self-Service HR (SSHR)

SSHR is supplied with predefined data and functionality, although you must configure this data and functionality for your own implementation of SSHR.

The Succession Planning function has not yet been migrated to the new technology framework for SSHR version 4.x and above. For information about this function, see Implementing Self-Service Human Resources (SSHR) 3.4 (11*i*.2) on MetaLink.

> **Note:** If you try to configure functionality before you are familiar with Oracle HRMS and Oracle Workflow, you may make mistakes. Before you complete any step, read the referenced topic information.

> **Note:** It is your responsibility to populate data fields.

Implementation Flowcharts

The flowcharts provide you with a summary of the logical sequence you might follow in any implementation of SSHR. It is not the only sequence you could follow but one we recommend.

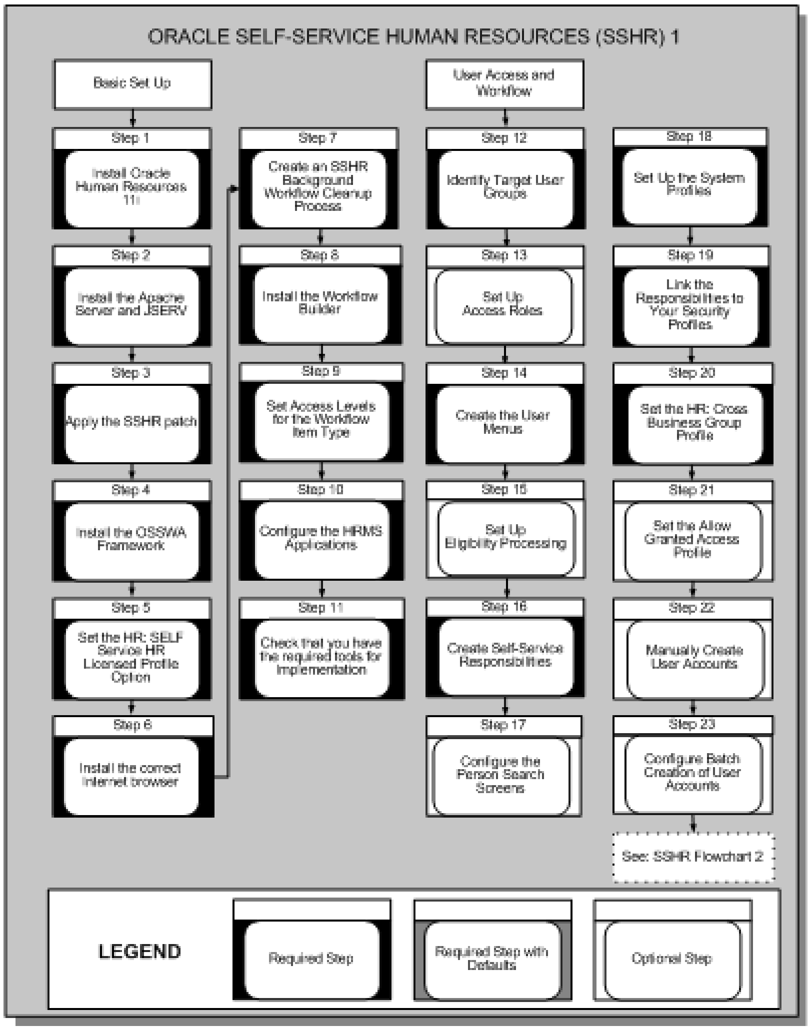
The functional areas of the system you configure to your specific business needs. Steps that are required for all implementations are marked as required.

Some functions have been seeded with default data. The steps where you can use data supplied with the system are marked as seeded.

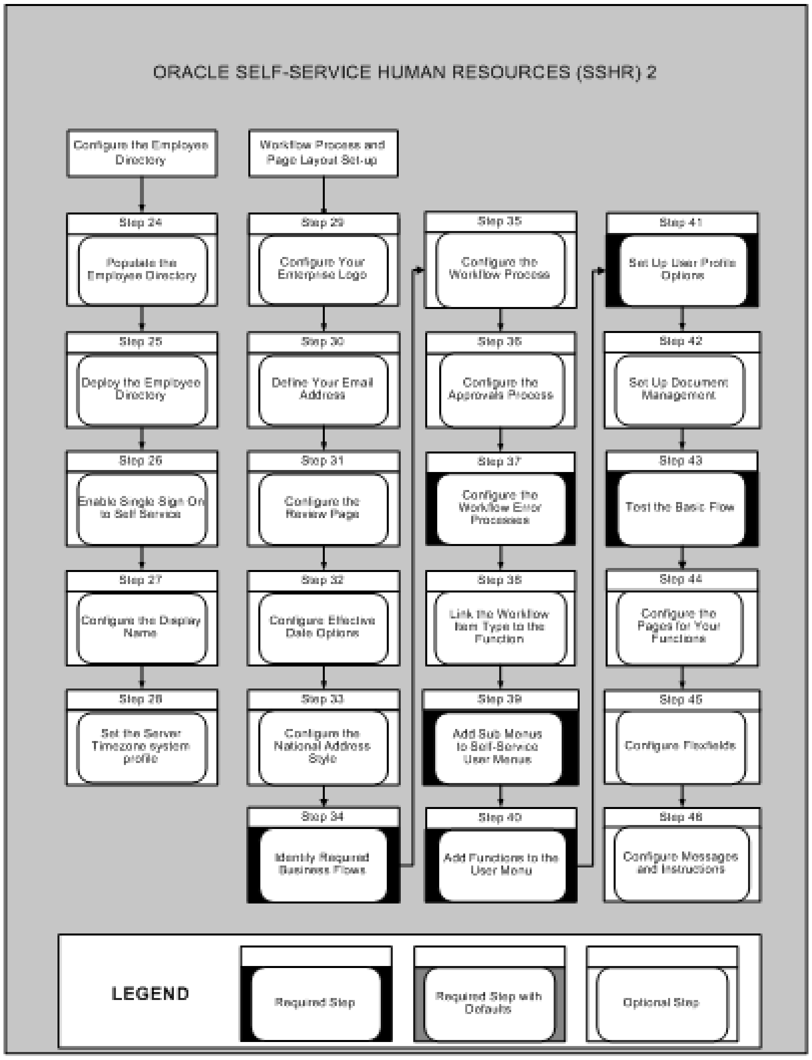
Decision making is an important part of any configuration process. Before you begin to customize SSHR, you must decide how you want to use it alongside your other Oracle HRMS applications.

Adopting a staged, or incremental, approach to configuration lets you focus on those processes you want to use.

Implementation Flowchart for SSHR, part 1



Implementation Flowchart for SSHR, part 2



Implementation Steps for Self-Service HR (SSHR)

To Prepare the Environment for SSHR: *Required Steps*

Step 1: Check HR11*i* Installation *Required Step*

Ensure that Oracle Human Resources 11*i* is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.

Step 2: Check the Apache server *Required Step*

Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self-Service Web Applications Implementation Manual* (available on Metalink).

Step 3: Apply the patch *Required Step*

Apply the patch for the latest version of SSHR and make sure that all prerequisites are met, including those for the Oracle Applications Framework (OAF).

Step 4: Complete the install and set-up of the Oracle Applications Framework (OAF). *Required Step*

See: *Configuring and Troubleshooting the OA Framework 5.7 with Oracle Applications 11.5.8 or Prior Releases* (available on Metalink - technical note number: 139863.1)

Step 5: Set the HR:Self Service HR Licensed profile option *Required Step*

If you have licensed SSHR, set the following profile option to "Yes" at the site level.

- HR: Self Service HR Licensed

If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.

Step 6: Check you have the correct Internet browser *Required Step*

Check that you have the correct Internet browser. You can use Netscape Navigator 4.08 or Microsoft Internet Explorer version 4 or 5 or above.

Step 7: Create an SSHR Background Workflow Cleanup Process *Required Step*

You should remove transaction information from the temporary tables for processes that support Web transactions. To do this, include the Remove Transaction activity in the workflow process.

See: Running the Workflow Cleanup Process:, page 4-9

Step 8: Install the Workflow Builder on Selected Workstations *Required Step*

Members of your Implementation team who will be making changes to workflow process definitions need to have the Workflow Builder installed on their workstations or available from a file server.

Step 9: Set the Access Levels for the Predefined Workflow Item Type *Required Step*

The predefined workflow item type is used as the basis for all future upgrades. Provided the access and protection levels are set correctly, you can work with the delivered item type and your configurations will not be overwritten.

See: Overview of Oracle Workflow Access Protection, *Oracle Workflow Administrator's Guide*.

Step 10: Configure the HRMS applications *Required Step*

Define work structures, key flexfield, descriptive flexfields, lists of values.

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

Step 11: Check you have the tools for SSHR implementation *Required Step*

Check that you now have the required tools for implementing SSHR. You should have now installed the following tools:

- Oracle Workflow
- Oracle Applications
- SSHR
- OSSWA Framework

  See: Getting Started with SSHR, page 1-19

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

User Access Setup (SSHR) *Required Steps*

Step 12: Identify the Target User Groups *Required Step*

Before starting your implementation, it is important to identify any groups of users in your enterprise who may have different requirements. Most enterprises will differentiate between managers and other workers. In your enterprise, you may identify further distinct groups such as HR professionals, managers in a particular department, or senior managers.

Step 13: Set Up Access Roles for Self-Service Actions *Optional Step*

If you want to take advantage of security based on access roles when routing and approving self-service actions, you must first activate the system profile option HR: Allow Approver updates to Self Service actions. Optionally, create and assign roles that grant or deny privileges to update actions. All users can update by default. Define and manage access roles in the Maintain Roles window.

See: Access Roles for Self Service Actions, page 2-8

Step 14: Create the User Menus *Required Step*

User menus group together a number of functions. SSHR includes predefined menus for employees, managers, and system administrators, but we recommend that you create your own user menus using the seeded menus as a basis. To create user menus, use the Menu window.

See: Defining User Access and Menus, page 3-8

Step 15: Create Self-Service Responsibilities *Required Step*

SSHR is supplied with predefined responsibilities, however, we recommend that you create your own responsibilities based on the seeded responsibilities. Assign a menu to them in the Responsibilities window.

See: Self-Service Responsibilities and User Access, page 2-12

Step 16: Set Up Eligibility Processing for Self-Service Actions *Optional Step*

You can configure SSHR to automatically determine if a person is eligible for a self-service action. To do this, you set up eligibility profiles, reporting groups (actions), and plans (sub actions), using SSHR Compensation and Benefits functionality as a generic processing engine.

See: Eligibility Processing Setup Example, page 8-35

Step 17: Configure the Person Search Screens *Required Step*

Three tabs are displayed on the Person Search page. You can choose whether to display all these tabs or whether to hide one or more tabs from the user. You remove a tab from display in the Menu Exclusions Region of the Responsibilities window.

See: Person Tree, page 8-3

Step 18: Set Up the System Profiles *Required Step*

You set up the security profiles to control access to information.

See: User Access and Security, page 2-3

Step 19: Link the Responsibilities to Your Security Profiles *Required Step*

Use the System Profile Values window to link the responsibilities you have created to your security profile.

Step 20: Set the HR: Cross Business Group Profile *Required Step*

If you want your managers to be able to access data for employees in other business groups, also set the HR: Cross Business Group responsibility.

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

Step 21: Set the Allow Granted Access Profile *Required Step*

If you want managers to be able to access data for workers outside their security profile whose information has been released to them using the Release Employee Information function, also set the Allow Granted Access profile option to Yes for the responsibility.

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

See: Release Employee Information, page 8-12

Step 22: Manually Create User Accounts *Required Step*

Create at least one user account manually to test the responsibilities and menus. For a small enterprise, you may choose to create all your user accounts manually and skip the next step.

See: Defining User Access and Menus, page 3-8

Step 23: Configure Batch Creation of User Accounts *Required Step*

To create and manage the batch creation of user accounts, you must first write API user hooks. User hooks enable you to extend the predefined business rules to reflect your enterprise's business rules. You use the user account hooks for example, to set up your customary user name and password format, responsibilities, and profile options you want to associate with a user.

See: Writing User Hooks to Create Batch User Accounts, page 2-24

Configuring Workflow Processes and Page Layouts (SSHR) *Required Steps*

Step 24: Display Your Enterprise Logo *Required Step*

SSHR is delivered with a default Oracle logo in the upper left hand corner of the application. You can replace this logo with your own logo at the Site or Organization level.

Place the logo in the $OA_MEDIA/<Language> directory.

The logos are named FNDLWAPP.gif for SSHR version 3.2 and later, and FNDLOGHR for SSHR 2.0 functions.

See: Replacing the Default Oracle Logo, page 5-28

Step 25: Define your Email Address *Required Step*

Set up the email addresses for your enterprise. Set up the following addresses using the Attributes Value tab in the Workflow Builder:

- HR email address
- Training administrator email address
- Recruitment supervisor email address

  See: Defining Your Enterprise's Email Addresses, page 4-9

Step 26: Configure the Review Page *Optional Step*

The Review page of most self-service actions displays an Attachments region by default. If you want users to see the What If Analysis region, you must enable the display. Hide Attachments or show What If Analysis via Personalizations.

See: Configuring Web Pages, page 5-14

Step 27: Configure Effective Date Options *Optional Step*

The Effective Date page of a self-service action presents users with two choices:

- Manually enter an effective date
- Specify that the action takes effect on approval

You can use personalizations to hide either option, effectively making the other option the default choice for all actions. If you hide the manual entry field, the Effective Date page does not appear.

See: Configuring Web Pages, page 5-14

Step 28: Configure Your National Address Style *Required Step*

To ensure that the correct address style for your country is used in the application, select one of the predefined address styles. The default address style is determined by the legislation of the business group. To select an address style, use the Descriptive Flexfield Segments window.

See Descriptive Flexfields and Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 29: Identify and Prioritize Required Business Flows *Required Step*

SSHR is delivered with a number of business flows incorporating workflow-enabled functions. First identify which business flows you need to implement for your enterprise. Consider the information flows and approval processes within your enterprise.

For each business flow, repeat steps 30 thru 41. Detailed information is available in the relevant chapters as indicated. Details of the configuration options are available for each SSHR module.

Step 30: Configure the Workflow Process *Required Step*

Review the underlying workflow process in the Workflow Builder. If you wish to make changes, first copy the process so that you can make changes to the copy.

See: Self-Service Workflows, page 4-3

Step 31: Configure the Approvals Process *Required Step*

Review the seeded approvals processes and, if necessary, configure changes in the Workflow Builder.

Self-service actions now use Oracle AME as a processing engine for routing and approvals.

See: Oracle Approvals Management (AME), page 6-4

Step 32: Configure the Workflow Error Processes *Required Step*

Each workflow-enabled function has an error process that runs when a system error occurs. The error process sends a notification and a description of the error to the sysadmin ID. You configure the error processes in the Workflow Builder.

See: Configuring Workflow Error Processes, page 4-9

Step 33: Link the Workflow Item Type to the Function *Required Step*

Use the Form Functions Window and the Parameters field to link the workflow item type to functions. The Parameters field is displayed when you select the Form tab.

Step 34: Add Sub Menus to Self-Service User Menus *Required Step*

Add sub menus to user menus that allow users to see the Effective Date, Sub Actions, Return for Correction, Refresh Attributes, and Document Management pages.

See: Defining Menus for SSHR, page 3-8

Step 35: Add the Functions to the User Menu *Required Step*

Make sure that your configured functions are available in your user menus.

See: Defining User Access and Menus, page 3-8

Step 36: Set Up User Profile Options *Required Step*

User profiles control how users access information and how the information is displayed. You define the profiles at either the user or responsibility level in the System Profile Values window.

Step 37: Test the Basic Flow *Required Step*

Test the workflow process to make sure that it is correct.

See: Testing a Workflow Definition (*Oracle Workflow Guide*)

Step 38: Configure the Pages for Your Functions and Notifications *Required Step*

Use the Personalization Framework. Set up user effective date options. See the earlier step, Configure Effective Date Options, page 7-7

See: Configuring Page Layouts, page 5-3

Step 39: Configure Flexfields for the Regions *Required Step*

You can configure the flexfield structures in the Application Developer responsibility, then enable selected segments in the appropriate pages using the Personalization Framework.

See: Configuring Flexfields, page 5-19

Step 40: Create Messages for the Regions *Required Step*

You can add predefined messages to your regions or you can create your own messages if required.

See: Adding Instructions to Web Pages, page 5-25

Step 41: Define the Name Format in Notifications *Optional Step*

Define the way a person's name appears in your workflow notifications.

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

Implementing SSHR Functions *Optional Steps*

Step 42: SSHR Functions *Optional Step*

In addition to implementing the basic SSHR tools and processes, there are also implementation steps for the following SSHR functional areas:

- Absence Management , page 11-5
- Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Document Management, page 7-9
- Employee Directory, page 7-9

Configuring Document Management *Optional Steps*

Step 43: Set Up Document Management *Optional Step*

If you want to make formatted documents available to users that contain merged data from self-service actions, create them from PDF or RFT templates and link them to appropriate menu functions by creating groups in Document Management.

See: Document Management, page 8-18

Configuring the Employee Directory *Optional Steps*

Step 44: Populate the Employee Directory *Required Step*

You must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 9-40

Step 45: Deploy the Employee Directory *Required Step*

You can choose to deploy the Employee Directory from any of the following environments:

- **Self Service Personal Home Page**

Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

See: Self-Service Menus and User Access, page 2-9

The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-27 to configure this menu.

- **Anonymous login**

  Anonymous login uses the standard Self Service Global Menu to provide global buttons, but does not render the Return to Portal or the Log Off buttons.

  For setup details, and how to add additional global buttons, see: Anonymous Access to the Employee Directory, page 9-38

- **Portal**

  For information on how to deploy the Employee Directory from a portal environment, see the following notes on MetaLink:

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=132035.1

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=146469.1

Step 46: Enable Single Sign On To Self Service *Optional Step*

The Employee Directory is read only. To enable users to edit their personal information, provide them with single sign on access to Self-Service.

See: Enabling Single Sign On to Self Service, page 9-39

Step 47: Set the Server Timezone system profile *Required Step*

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Personal Details page.

Step 48: Configure the Display Name *Optional Step*

8

Common SSHR Modules

Common Modules Overview

This chapter contains information on how to configure modules that provide common, low-level functionality used in many of the higher-level functions described in later chapters.

The common modules are:

- Enter Process
- Actions Page
- Return for Correction
- Release Employee Information
- Review and Confirm
- Dates
- Save for Later
- Document Management
- New User Registration

Using Common SSHR Functions

Which common functions does SSHR provide?

SSHR includes a number of common functions which are not associated with any particular area of Oracle HRMS. These functions are useful in the everyday operation of SSHR and are intended to improve your self-service processes. An example of a common function is the Enter Person process which is used in the manager self-service functions to select an employee or worker for a transaction.

Is it always necessary to select the function first and then the employee?

No. If you select the Manager Actions function from the self-service menu, you select your employee or worker first and can then select the required function from a list of all available functions for the person. The list is context-sensitive. If you are an employee or worker, you can select the Personal Actions function from the menu and you can select the required function from a list of available functions. Again, this list is context-sensitive.

Are there any review mechanisms in place?

Yes. Before you submit a transaction to the database (as an employee or manager), you can check your data on the Review page. This page shows a summary of any new or changed information and enables you to make any last-minute changes before submitting the transaction to the database. You can also enter comments for approvers in this page.

Is there any way to provide approvers with additional information?

If you need to provide additional information for an approver, you can add comments in the Review and Confirm page. Also, if the Attachments region is enabled in the Review and Confirm page, you can add an attachment, for example, a file, URL or piece of text.

Can I save transactions before submitting them to the database?

Yes. You can use the Save for Later button on the Review page to save a transaction to be completed at a later point. Approvers can also use this functionality to return transactions to the initiator for additional information or correction. Suspended and returned transactions are accessed from the All Actions Awaiting Your Attention table on the Actions page.

Can SSHR generate notifications and other business documents?

Yes. The Document Management functionality enables you to automatically generate business documents and notifications using the data from self-service transactions. For example, you could use this functionality to create a Notification of Change or a standard letter. You define which fields are included in the documents using the PDF Forms technology.

I want to enable my employees and contingent workers to create their own SSHR users - is this possible?

Yes. You can use the New Employee and Non-employee Registration functionality to enable your users to create their own users. Employees and non-employees can register with the self-service application and create their own user names and passwords.

Common SSHR Modules

People in Hierarchy, My List, and Search Pages

The Hierarchy, My List, and Search pages are collectively known as the Enter Process pages.

The Hierarchy page is generally the starting point for all manager self-service functions. It enables managers to select a user record for processing in SSHR.

The navigation options from the People in Hierarchy page depend on the path that the manager has taken to navigate to the page. There are two possible paths:

- From the generic Manager Actions menu

  In this case, the manager first selects a person the from People in Hierarchy page or the People in My List page. This takes the manager to the Actions page. A context-sensitive list the SSHR modules or actions available for the selected person.

  > **Note:** The parameter pDestination for the Manager Actions Tree View function (HR_PERSON_TREE_SS) has the value HR_ACTIONS_SS (instead of a specific function value) to ensure that the user navigates through the Actions page.

- From a specific manager self-service menu item

  In this case, the manager selects a specific SSHR function and then selects the person for processing in the People in Hierarchy or People in My List page. When the manager selects a person, the selected function appears.

  See:Defining Functions for SSHR, page 3-10

People in Hierarchy

The People in Hierarchy region displays a hierarchical view of the current manager's subordinates. Users can expand or collapse the lower levels of management as desired.

By default, the hierarchy uses a supervisor hierarchy (based either on the supervisor or the supervisor assignment).

> **Note:** If you want to build a hierarchy based on the supervisor's assignments, you must specify the hierarchy type using the HR: Supervisor Hierarchy Usage profile option and you must enable multiple assignments using the SSHR:Enable Multiple Assignments in SSHR profile option. See Multiple Assignments, page 9-47.

However, if you prefer, you can display a position hierarchy. To do this, set the profile option HR:Display Position Hierarchy. Set this profile option to Yes if you prefer to display the position hierarchy.

> **Note:** Oracle recommends that you set up either position or supervisor security if you are using SSHR because the manager self-service functionality enables you to choose whether to display the person hierarchy by either supervisor or position. However, you can set up other types of security if you prefer.

My List

The My List functionality enables managers to store people whose records they frequently access in a list for quick record retrieval. When a manager searches for a person, they can click the Add to My List button to add that person to the list. When the manager next selects the My List option from the People in Hierarchy page, the names of these saved employees are displayed in a table.

Advanced Search Page

As an alternative to the simple search, you can select Advanced Search to specify advanced search criteria. When you select this option, the following standard search fields are available:

- First Name
- Last Name
- Assignment Number
- Job

If these fields are not sufficient, you can add additional fields from a list. You can also specify whether the search must include all criteria or whether records that meet only some of the criteria are valid. If required, you can save the search criteria to use again.

> **Note:** When you search for employees using the Basic or Advanced Search, SSHR excludes the log-in person from the results.

Person Details

A manager can access the personal details for any person included in the Hierarchy or My List simply by clicking the Details icon for the person. SSHR displays the Person Detail view for the person, enabling the manager to display Employment, Salary, Performance, Absence, and Application information for the person. Training information is also available although this tab is hidden as standard. When the Person Details are displayed, the views displayed are summary views. To display more detailed information, expand the view.

For more information, see: Employee Information View, *Oracle SSHR Deploy Self-Service Capability Guide*.

Personalizing Hierarchy, My List, and Search Pages

> **Important: Changes in Oracle HRMS Version 11.i.10**
>
> Oracle HRMS version 11.i.10 delivers new Hierarchy, Search, and My List pages. This means that the base definitions of these pages in the Meta Data Services Repository have changed. As a result, any personalizations that you may have created on these pages are no longer valid.
>
> In addition, SSHR plans to use the enhanced sorting functionality provided by the OA Framework. However, as this is a future development, sorting support is not currently available for the Hierarchy page.

Simple Search Personalizations

From some self-service pages, you can search for a person by entering the person's name in the Name field. If you prefer to use different search criteria, you can use the Personalization Framework to enable a drop-down list displaying the Full Name, Last Name, and First Name as search criteria. You can select any of these criteria to be the default criterion by setting the Initial Value attribute (the Last Name is the standard default value).

1. Select the Personalize Page link.
2. Navigate to the QuickSearch region
3. Personalize the Search Filter item by changing the value in the Rendered field to True.

Searching by First Name

If you choose to personalize the Search function to search by First Name, you must create a function index for the first name (Oracle provides a function index for the last name). To do this, you must use a SQL client to add an additional index to the following table:

- per_people_f

The syntax for creating an index is as follows (for an example, see the function index PER_PEOPLE_F_N2 UPPER("LAST_NAME" which is provided by Oracle):

```
create index <index_name> on <schema_name>.per_all_people_f(upper
(first_name))
```

See: Configuring Web Pages, page 5-14

Name Format

The Enter Process pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Customer Overrides

Customer overrides enable you to configure data without making any changes to database tables. In the Enter Process pages (My List, Hierarchy, Person Search), you can use customer overrides to configure a user-defined format for displaying positions and jobs. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 3-6.

Navigation Links (Breadcrumbs)

The delivered Hierarchy, My List, and Search pages display navigation links to help you navigate through the pages. For example:

Manager Actions: People in Hierarchy > Manager Actions: People in My List

If you choose to include this functionality in custom versions of the Enter Person pages, set the following function parameter:

- &addBreadcrumb=Y

Multiple Assignments

If a person has more than one assignment for a given manager, the manager needs to select the Action icon for the relevant assignment in order to carry out the action.

To enable multiple assignments, set the profile option HR:Enable Multiple Assignments in SSHR to Yes at the required level. This allows managers to update all assignments reporting to them. If you set the profile option to No, managers can only view and edit primary assignments.

> **Note:** If you set this profile option to Yes, Oracle recommends that you create supervisor-based security profiles for SSHR managers. See: Security Profiles in Managing User Access, page 2-3

Transactions Across Business Groups

You can choose to enable your managers to see the names of persons in other business groups but prevent them from performing any transactions on persons in other legislations. To do this, you use the HR:Restrict Transactions Across Legislations in SSHR profile option in conjunction with the existing HR:Cross Business Group profile.

If you set the HR:Cross Business Group profile to Yes, managers can see the names of persons in other business groups and perform transactions on them. If you then set the HR:Restrict Transactions Across Legislations in SSHR profile to Yes, the application disables the names of the persons in other legislations.

Menu and Function Names

User Menu Name	Function Name
Manager Self Service	Manager Actions Tree View and all manager functions

See: Defining User Access and Menus, page 3-8

Workflow

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Display Position Hierarchy	Site	Yes/No	No
HR:Display Brief Person Name	Site, Application, Responsibility, User	Brief Name/Full Name	Brief Name
HR:Enable Multiple Assignments in SSHR	Site, Application, Responsibility, User	Yes/No	No
HR:Cross Business Group	Site	Yes/No	No
HR:Restrict Transactions Across Legislations in SSHR	All	Yes/No	No
HR: Supervisor Hierarchy Usage	Site		

HR:Display Position Hierarchy

If you set this profile option to Yes, the application displays the position hierarchy on the Enter Person page instead of the supervisor hierarchy.

HR:Display Brief Person Name

If you set this profile option to Brief Name (default value), the application displays the person names in the brief format instead of the long name format.

HR:Enable Multiple Assignments in SSHR

This profile option controls whether a manager can view and update multiple assignments for a person in SSHR. If you set the profile option to Yes, the application displays all the assignments for a person on the Enter Process page. Otherwise, the application only displays primary assignments.

HR:Cross Business Group

This user profile option allows SSHR users to see certain information for more than one business group. For example, managers can view persons in other business groups.

HR:Restrict Transactions Across Legislations in SSHR

If you set this profile option to Yes, SSHR managers cannot carry out transactions on persons (within their supervisor hierarchy) who are from different legislations.

HR: Supervisor Hierarchy Usage

This profile option determines how supervisor hierarchies are built within Oracle HRMS and SSHR. You can select either a person-based or assignment-based hierarchy.

Additional Configuration Steps

Search Page

1. To prevent your users from using the Basic or Advanced Search, hide the corresponding region in the Personalization Framework or use function exclusions to exclude the Person Search function at the responsibility level.
2. You can configure the search criteria for the Basic and Advanced Searches. You can rearrange the sequence of the criteria by configuring the displayed fields using the Personalization Framework.

   See: Configuring Web Pages, page 5-14

Actions

The Actions page displays a context-sensitive list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected.

The list is driven by the hidden submenu defined for the HR: Manager Actions Menu profile option. The default menu for this profile option is the predefined Personal Actions Menu (HR_LINE_MANAGER_PERS_FUNCTIONS).

The list of functions displayed in the Actions page is also defined by the person's legislation code.

See: Data Security Menus, page 2-9

The Actions page can be accessed in one of the following ways:

- Managers can click on the Actions icon for a specific assignment to display the actions relevant to the employee or worker
- Self-service users can select the Personal Actions menu option from their menu and display their personal actions

Eligibility

The Available Actions list is, by default, limited to those actions the user is currently eligible for.

For information on setting up eligibility see: Eligibility Processing Setup Example, page 8-35.

For further information on eligibility see: Initiating a Self Service Action, page 8-49.

Viewing and processing of ineligible actions is controlled by two profile options:

- HR:Allow Use of Eligibility for Self Service Actions
- HR:Allow Processing of Ineligible Self Service Actions

When HR:Allow Use of Eligibility for Self Service Actions system profile is set to No (the default), this page does not display the Eligibility column and only eligible actions for the selected person are listed. When this profile option is set to Yes, the page displays the Eligibility column and all actions are listed. The Eligibility column distinguishes between eligible and ineligible actions.

However, a user will not be able to process an ineligible action unless HR:Allow Processing of Ineligible Self Service Actions is also set to Yes. This will enable users to process actions for which the selected person is currently ineligible, but may be eligible by the effective date. The action will still fail if the person is not eligible for the action by the given date.

In order to ensure that the list of eligible actions and sub-actions is up to date, you must periodically run the Participation Batch Process (Run Benefits Manage Life Events Process) for that individual. This can be set to run automatically every time a manager initiates an action by setting the profile option, HR:Run BENMNGLE When Processing a Self Service Action, to Yes.

Concurrent transactions

The application supports multiple simultaneous actions on the same person. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes. When this profile option is set to No, the Pending column is displayed which indicates to the user whether pending transactions are present. The user can then review the pending transaction. When you set the profile option to Yes, the Pending column will not be displayed, and users will be able to perform actions against all assignments.

When concurrent transactions are activated potential data conflicts may arise. For information on how to deal with these see Managing Dates in SSHR, page 3-4.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Manager Actions
Employee Self Service	Personal Actions
Manager Self Service	Suspended Actions Mgr
Employee Self Service	Suspended Actions

See: Defining User Access and Menus, page 3-8

Workflow

Not applicable

Configurable Tips and Instructions

Actions Page

Region	Tip Type	Message Name
Actions Awaiting Your Attention	Instruction	PQH_SS_PERSON_NTF_INT
Available Actions	Instruction	HR_SS_INST_ACTIONS_DUAL
Selected Action	Instruction	HR_SS_INST_ACTIONS_SINGLE
Selected Action	Instruction	HR_INST_ACTIONS_SINGLE_SUS

Effective Date Page

Region	Tip Type	Message Name
Effective Date Options	Instruction	PQH_SS_EFFECTIVE_DT_HDR

Refresh Page

Region	Tip Type	Message name
Intervening Actions Found	Instruction	PQH_SS_CONC_REFRESH_INT

Sub Actions Page

Region	Tip Type	Message name
Assignment Header	Instruction	PER_SS_ASOF_APPROVAL_DT_DESC
Sub Actions	Instruction	PQH_SS_SUB_ACTIONS_INT

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Allow Use of Eligibility for Self Service Actions	Site	Yes/No	No
HR:Allow Processing of Ineligible Self Service Actions	Site	Yes/No	No
HR:Allow Concurrent Self Service Actions	Site	Yes/No	No
HR: Manager Actions Menu	All	All Manager Actions menus	Manager Actions Menu
HR:Personal Actions Menu	All	All Personal Actions menus	Personal Actions Menu
HR:Contingent Worker Manager Actions Menu	All	All Contingent Worker Manager Actions menus	Contingent Worker Manager Actions Menu
HR:Contingent Worker Personal Actions Menu	All	All Contingent Worker Personal Actions menus	Contingent Worker Personal Actions Menu
HR:Actions - Validation	All	All Actions Checked, Preselected Action Checked, All Validation Post Selection	All Actions Checked

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

Return for Correction

The Return for Correction page is available from the Pending Approval Notification page.

When a manager clicks on a Return for Correction link in a notification they navigate to the Return for Correction page. Here they can select a previous approver or the initiator of the action and submit for correction with comments. A notification is sent to the selected user.

The receiver of the Return for Correction can then restart the approval notification from the following places:

- All Actions Awaiting Your Attention page
- Actions Awaiting Your Attention in Perform Action page
- Return for Correction notification

Menu and Function Names

This page can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Self-Service Pages	HR Return for Correction Page

Workflow

Not applicable.

Configurable Tips and Instructions

Return For Correction Page

Region	Tip Type	Message Name
Comments Region	Error	PQH_SS_RFC_RESPONSE_ INT
Person Selection Region	Error	PQH_SS_RFC_SELECT_ PERSON_INT
Top Content Region	Error	PQH_SS_RFC_CONTENT_ INT

Configurable Flexfields

Not applicable.

Release Information

The Release Information function enables an employee or worker to share information about themselves with another person, often a manager, who would not usually have access to their records. Similarly, a manager can use this function to share information about one of their direct reports with a second manager.

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

If the employee or worker subsequently decides that the information should no longer be shared, they can use the Revoke Access functionality to block access to their information.

The Release Information function is available under predefined Manager and Employee responsibilities. Configuration options enable you to set up approvals processes for granting access.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Release Information Mgr
Employee Self Service	Release Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Release Employee Information

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

CAED Page

Region	Tip Type	Message Name
CAED: Grant Access to	Instruction	HR_INST_CAED_GRANT_ACCESS
CAED Granted Employee Header Region	Instruction	HR_INST_CAED_EXISTING_GRANTS
CAED Pending Employee Header	Instruction	HR_INST_CAED_PENDING_GRANTS
CAED Control Access To Employee Data	Instruction	HR_INST_CAED_TOP_TEXT

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:CROSS_BUSINESS_GROUP	Site	Yes/No	No

The Cross Business Group profile option determines whether employees from other business groups are retrieved in the employee search.

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

Additional Configuration Steps

1. Configure the predefined user menus to include the Release Information function.

   See: Defining User Access and Menus, page 3-8

2. If you want your managers to have access to employee and worker data, ensure that the Allow Granted Access check box is flagged for the security profile assigned to the manager. This enables the manager to review the user's data.

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

Review and Confirm

Most functions display at least the Review page. The Review page displays a corresponding region for each web page section that you have updated as part of the preceding transaction. Inside each region is a list of current database and proposed transaction data. Changed information is highlighted with a blue dot, enabling you to easily identify which information has changed in the transaction.

The Confirm page contains a confirmation message and appropriate navigation buttons.

You can use the Personalization Framework to configure the Review and Confirm pages to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see the following documentation:

- Configuring Web Pages, page 5-3
- Adding Instructions to Web Pages, page 5-25

Approvals

If you have configured approvals, users can enter approvals comments in this page. If you are using dynamic approvals , the user can view approvers and pre-approval and post-approval notifiers, and add further approvers and notification recipients.

See: Approvals Overview, page 6-1

When the user chooses the Submit button from the Review page, the transaction is committed to the Human Resources system or sent for approval. The Confirm page is then displayed. The Confirm page contains a confirmation message describing the status of the transaction.

You can set up the approval properties for a process by changing the activity level attributes for the Review workflow functions.

Attachments

If you have enabled the Attachments region in the Personalization Framework, users can attach supporting documents to the current transaction. An attachment can be a file, a URL, or text.

When the user clicks on View Attachments List. The Attachments page is then displayed in which users will then be able to edit, delete or simply view attachments using the Attachments table. The Add Attachment button will display the Add Attachment page.

What-If

If you have enabled the What If region in the Personalization Framework, users can assess the impact of the change on the employee's eligibility for benefits before committing the change or sending it for approval.

> **Note:** The What If feature will only function if you have Oracle Advanced Benefits (OAB) installed.

Printable Pages

The user can print a copy of the submitted transaction for their records if required. Enable the Printable Page button in the Personalization Framework to enable this feature.

When the user clicks on the Printable Page button the transaction data will be formatted for printing. How the data is formatted depends on whether you have configured any documents in Document Management that correspond to this action. You can use Document Management to produce formatted documents containing merged data, using Acrobat Forms technology. See Document Management, page 8-18. If documentation has not been configured, users will simply see a printer-friendly version of the Review page.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Common functionality which is used by all processes.

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
	Review Page	HR_DYNAMIC_APPROVAL_LEVEL
	Review Page	HR_APPROVAL_REQUIRED_FLAG
	Review Page	Confirm Instruction Application Short Name
	Review Page	Confirm Save Instruction Name
	Review Page	Confirm Send for Approval Instruction Name

HR_DYNAMIC_APPROVAL_LEVEL:

This attribute is used to specify the number of levels to which this transaction needs to be forwarded for approval in the approval hierarchy. For example, if the value is 1, the transaction is submitted for approval to one level higher than the initiating person. When the transaction has been approved, it is committed to the HRMS application. By default, this attribute reads the approval level from the APPROVAL_LEVEL (Approval Level) item level attribute. If you specify a value for the item level attribute, you can control the approval level for all the processes. If you specify a value for the HR_DYNAMIC_APPROVAL_LEVEL attribute, it overrides the item level attribute for the process for which you have specified the value.

HR_APPROVAL_REQUIRED_FLAG:

This attribute is used to specify whether the current transaction requires an approval. The valid values are:

- No: the process does not require approval
- Yes: the process requires approval but the dynamic approval user interface will not be shown in the review page. This means that the initiator cannot add additional approvers or notifiers.
- Yes - Dynamic Approval: the process requires approval and the dynamic approval user interface will be shown in the review page. The initiator can add additional approvers and notifiers.

Confirm Instruction Application Short Name:

In addition to the standard confirmation message shown in the confirmation page, you can also configure messages that are specific to the process. You can specify one for a scenario for which approval is required and one for a scenario for which no approval is required. Processes can be set to either Approval Required or Approval Not Required, but not both, using the HR_APPROVAL_REQUIRED_FLAG. For example, you can define a message for Confirm Save Instruction Name and Confirm Send for Approval Instruction Name. You register this message under your custom application.

Confirm Send for Approval Instruction Name:

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process does not require approval.

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process requires approval.

> **Note:** You must copy the delivered processes and make changes to the copy. If you make changes to the delivered processes, they will be overwritten when new patches are applied to your system.

See: Configuring Workflow Attribute Values, page 4-8

Configurable Tips and Instructions

Review Page

Region	Tip Type	Message Name
Additional Information	Instruction	PQH_SS_REVIEW_ATTACH_INT
Additional Information	Instruction Text	PQH_SS_REVIEW_ADDL_INFO_INT

Configurable Flexfields

For a list of flexfields for SSHR review pages, please see the corresponding functional descriptions.

Configurable Profile Options

Not applicable

Save For Later

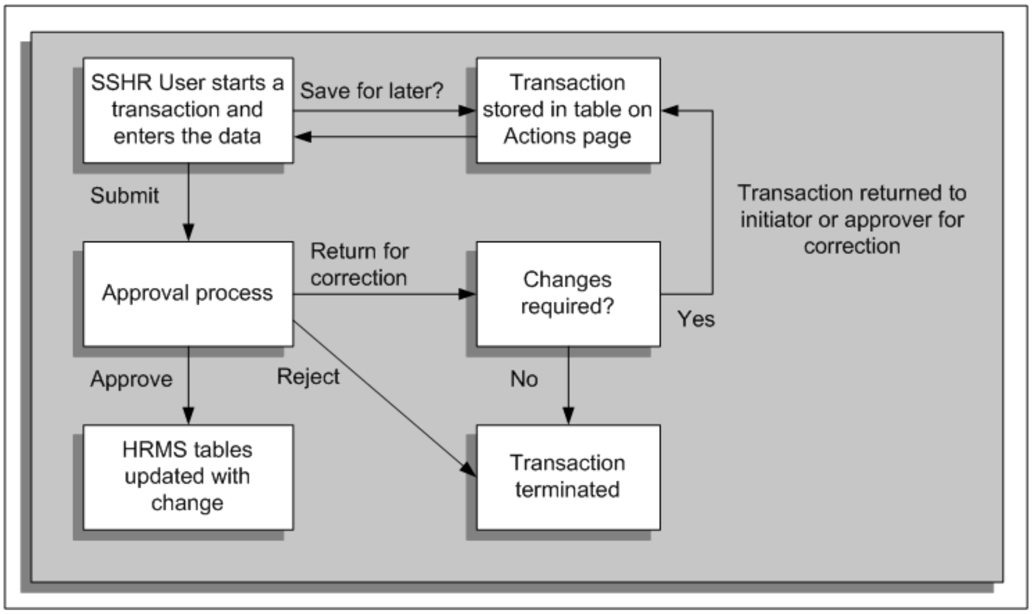
The Save for Later functionality enables a user to interrupt transactions before they are complete. The user can then save them so that they can be completed at a later point. When users save a transaction for later the application sends them a notification.

In addition, approvers can return transactions to the initiator or a previous approver for correction. In this case, the initiator can reopen the transaction, correct the information, and resubmit it for approval. The approvers can include informational notes to clarify the reason for returning the transaction.

Both suspended transactions and returned transactions are displayed in the All Actions Awaiting Your Attention list on the Actions page.

Users can also access their saved functions using the All Actions Awaiting Your Attention menu option on the employee and manager menus.

Save for Later Functionality



The graphic above shows how transactions can be saved for later and returned for correction.

Route 1 (Save for Later): When a user initiates a self-service transaction, or receives a transaction for correction, they can either submit the transaction for approval immediately or save the transaction for subsequent processing. If the user submits the transaction immediately, the transaction is subject to the usual approval processes. If the user chooses to save the transaction for later, it is suspended and the user can restart it or delete it from the All Actions Awaiting Your Attention table in the Actions page.

Route 2 (Return for Correction): When a user has submitted a transaction for approval, the approver can either approve the transaction, reject the transaction, or return it for correction. If the approver returns the transaction for correction, the initiator can subsequently restart or delete it from the All Actions Awaiting Your Attention table in the Actions page of the initiator.

> **Note:** If a transaction is interrupted due to user inactivity, or a system failure, the interrupted transaction is also stored as a suspended transaction and the user will receive a notification.

The application will notify users whenever they have saved a transaction for later.

> **Note:** Users save a transaction for later by clicking the Save for Later button. To disable this button you need to set the profile option HR:Self Service Save for Later to No (the default is Yes). This will hide the Save for Later button on all transaction pages and the Review page.

Document Management

Document Management features enable you to automatically generate business documents containing data from self-service actions. Examples of business documents might include a Request for Action, Notification of Change, standard letter, or contract. You set up your documents in two stages:

- Create formatted PDF documents, using PDF or RTF form fields as place holders for transaction attribute values
- Configure document groups and attribute mappings in the HRMS Document Management function

Create Formatted Documents

PDF Templates

Create formatted documents in any word processing or page layout application, then generate a PDF file. In a PDF editing application, add named form fields to contain data from the action. The form field names are the tags you map to your action's attributes in Document Management.

RTF Templates

Alternatively, you can prepare your document in RTF format and add RTF form fields. When you use an RTF template, the application converts it to PDF format when you generate your document. You can also insert conditional programming statements available using RTF technology to display or hide fields based on the values of other fields. For example, you can display or hide data based on the department or e-mail address.

Configure Document Groups and Attribute Mappings

Using an HRMS Manager responsibility, run Document Management from the Main Menu.

Document Management Page

Use this page to search for existing document groups. Click the Create Group button to navigate to the Define Group page and create a new document group. Use document groups to define a collection of documents and associate them with their corresponding workflow process. To create the link between the document group and the workflow process, add the function parameter pGroupName=<*documentgroupshortname*> using a System Administrator responsibility.

From the Results list, you can add, update, or remove documents from the group. You can also delete a document from the database here.

Define Group Page

From this page, you can create a new document group by entering a Group Name and Short Name. You can also search for existing groups. Enter a Group Name and Short Name. Once you have defined a group, you can also change the Document Type of any documents belonging to the group here.

Map Documents Page

Use this page to add a document to the selected group. You can select from a list of documents in the database that are not yet part of a group, or you can add a new document. You can search by Document Name or Short Name, and Effective Date.

Define Document and Update Document Pages

Use these pages to define or update a document. On the Define Document page, specify a Document Name, Short Name, and Document Category (such as Self Service Human Resources or Compensation Workbench).

Click the Update icon for an existing document to access the Update Document page. You can view Details pages displaying document and group information by clicking the View Document or View Group icons, respectively. You can also maintain versions of documents when their properties or contents change, and keep version histories showing the effective dates. You specify the document's effective date (which automatically end dates any previous version), then upload a new file or select a file that already exists in the database.

Here you also specify any FastFormula you want to use to populate document tags with returned values from the database, or override tag values with literals.

Define Document: Attribute Mapping

Use this page to merge data from transaction data attributes to form fields. The page displays a list of tags (form field names) found in the selected template, with corresponding Transaction Data Attribute fields. To merge data from attribute values to each form field, search for and map available attributes in the attribute field corresponding to the tag.

You can include both current and proposed values in a document, and also Header Information attributes containing details from the selected person's record. For details, see the table Pages and Regions that Support Attribute Mapping. A Value column tells you if the chosen attribute is Current or Proposed. You can delete mappings and maintain datetracked versions within the selected document by changing the effective date of a given tag/attribute combination.

Define Documents Properties

If you select an existing document on the Map Document to Group page and press Continue, the Define Documents Properties page appears. You can also change the Document Type here. Available types include Pre Approval, Post Approval, and Both.

You generate pre-approval versions of documents when you press the Printable Page button on the Review page of an action, while it is still in process. You generate post-approval versions on final approval. Initiators receive a notification containing a link to the Document Information page, containing post-approval versions of available documents.

Delete Document Page

Use this page to delete a document from the database. Alternatively, you can reinstate a previous document version by clicking Delete for that version and choosing to delete all future changes. You can also access Document Details and Group Details from this page.

Pages and Regions that Support Attribute Mapping

HRMS supports mapping attributes from the following pages and regions:

Context	Available Attributes
Assignment Header Region	Current Business Group
	Current Contingent Worker Name
	Current Department Name
	Current Derived Locale
	Current Employee Name
	Current Employee Number
	Current Employment Category
	Current Grade
	Current Job Name
	Current Location
	Current Manager Name
	Current Organization Email Address
	Current Payroll
	Current Position
	Current Salary
	Current Salary Basis Name
	Current Salary Frequency

Context	Available Attributes
Assignment Page	Additional Information
	Assignment Attribute 1-30
	Assignment Attribute Category
	Assignment Status
	Billing Title
	Ceiling Step
	Change Reason
	Current Additional Information
	Current Assignment Status
	Current Ceiling Step
	Current Change Reason
	Current Department Name
	Current Employee Category
	Current Employment Category
	Current Establishment Name
	Current Frequency
	Current Grade Ladder
	Current Grade Name
	Current Internal Address
	Current Job Title
	Current Location
	Current Normal End Time
	Current Normal Start Time
	Current Notice Period Length
	Current Notice Period Units
	Current Payroll Name
	Current People Group Key Flex
	Current Performance Review Frequency
	Current Performance Review Period
	Current Position Name
	Current Probation Period End Date
	Current Probation Period Length
	Current Probation Period Units
	Current Project Title
	Current Projected Assignment End
	Current Purchase Order Line
	Current Purchase Order Number
	Current Salary Basis
	Current Salary Review Frequency
	Current Salary Review Period
	Current Supervisor
	Current Supplier ID for Assignment
	Current Supplier ID for Worker

Context	Available Attributes
Assignment Page	Current Supplier Name Current Supplier Site Current Title Current Work Hours Currently a Home Worker Department Name Employee Category Employee is a Manager Employee is a Manager Currently Employment Category Establishment Name Frequency Grade Ladder Grade Name Home Worker Internal Address Job Title Location Normal End Time Normal Start Time Notice Period Length Notice Period Units Payroll Name People Group Key Flex Performance Review Frequency Performance Review Period Position Name Probation Period End Date Probation Period Length Probation Period Units Project Title Projected Assignment End Purchase Order Line Purchase Order Number Salary Basis Salary Review Frequency Salary Review Period Supervisor Supplier ID for Assignment Supplier ID for Worker Supplier Name Supplier Site Work Hours

Context	Available Attributes
Change Manager Page	Current Manager Name
	Employee Name
	Manager Name

Context	Available Attributes
Change Pay Page	Annual Change Amount
	Change Amount
	Change Percentage
	Comments
	Currency
	Current Comments
	Current Salary
	Current Salary (Annual Equivalent)
	Current Salary Effective Date
	Pay Basis
	Proposal Reason
	Proposed Salary
	Proposed Salary (Annual Equivalent)
	Salary Basis Change Type
	Salary Effective Date

Context	Available Attributes
Competency Profile Page	Current Level
	Current Start Date
	Name
	Proposed End Date
	Proposed Level
	Short Name

Context	Available Attributes
Education and Qualifications Page	Attendance End Date
	Attendance Start Date
	Award On
	Awarding/Examining Body
	Comments
	Completed Amount
	Completed Units
	Current Attendance End Date
	Current Attendance Start Date
	Current Award On
	Current Awarding/Examining Body
	Current Comments
	Current Completed Amount
	Current Completed Units
	Current Fee
	Current Fee Currency
	Current Full-Time
	Current Grade
	Current Group Ranking
	Current Projected/Actual Completion Date
	Current Reimbursement Condition
	Current School
	Current Status
	Current Study Start Date
	Current Title
	Current Total Amount
	Current Tuition Method
	Current Type
	Fee
	Fee Currency
	Full-Time
	Grade
	Group Ranking
	Projected/Actual Completion Date
	Reimbursement Condition
	School
	Status
	Study Start Date
	Title
	Total Amount
	Tuition Method
	Type

Context	Available Attributes
Other Employment Information Page	Bargaining Unit Code
	CAGR Grade
	CAGR Key Flex
	Collective Agreement
	Contract
	Current Bargaining Unit Code
	Current CAGR Grade
	Current CAGR Key Flex
	Current Collective Agreement
	Current Contract
	Current Union Member
	Union Member

Context	Available Attributes
Other Professional Awards Page	Award On Awarding/Examining Body Comments Completed Amount Completed Units Current Award On Current Awarding/Examining Body Current Comments Current Completed Amount Current Completed Units Current Fee Current Fee Currency Current Grade Current Group Ranking Current Projected/Actual Completion Date Current Reimbursement Condition Current Status Current Study Start Date Current Title Current Total Amount Current Tution Method Current Type Fee Fee Currency Grade Group Ranking Projected/Actual Completion Date Reimbursement Condition Status Study Start Date Title Total Amount Tution Method Type

Context	Available Attributes
Personal Information Header Region	Current Business Group
	Current Contingent Worker Name
	Current Employee Name
	Current Employee Number
	Current Organization Email Address

Context	Available Attributes
Personal Information Page	Current Date of Birth
	Current Disability Code
	Current Effective Date
	Current Employee Number
	Current First Name
	Current Full Name
	Current Honors
	Current Last Name
	Current Marital Status
	Current Middle Name(s)
	Current Organization Email Address
	Current Preferred Name
	Current Prefix
	Current Previous Last Name
	Current Social Security Number
	Current Suffix
	Current Title
	Date of Birth
	Disability Code
	Effective Date
	Employee Number
	First Name
	Full Name
	Honors
	Last Name
	Marital Status
	Middle Name(s)
	Organization Email Address
	Preferred Name
	Prefix
	Previous Last Name
	Social Security Number
	Suffix
	Title

Context	Available Attributes
Tenure Status Page	Adjusted Tenure Date Current Adjusted Tenure Date Current Date Determined Current Projected Tenure Date Current Reason for Adjustment Current Subject to Tenure Quota Current Tenure Status Date Determined Projected Tenure Date Reason for Adjustment Subject to Tenure Quota Tenure Status

Context	Available Attributes
Termination Page	Comments Notification Date Reason Termination Date

Context	Available Attributes
Work Schedule Page	Current Employment Category Current Frequency Current Normal End Time Current Normal Start Time Current Work Hours Current Work Schedule Key Flex Employment Category Frequency Normal End Time Normal Start Time Work Hours Work Schedule Key Flex

FastFormula Options

You can do the following using FastFormula:

- Set a value into the document
- Override an existing value in the document

Your formula must be of the type Document Print.

The application provides three predefined input parameters for your use:

- P_SESSION_ID
- P_TRANS_ID
- P_EFFECTIVE_DATE(TEXT)

Setting a Value into the Document

Say you want to set the manager name in the document, but the manager name is not a data field found within the workflow process.

Using an HRMS Localization Seed Data responsibility, create three functions, described below in order of invocation.

1. A FastFormula function that passes the Transaction ID to a database function, returning the manager name
2. A database function that returns the manager name for the specified transaction
3. A second FastFormula function that sets the manager name in the tag (form field)

Function	FastFormula Function1	Database Function	FastFormula Function2
Name	My_FF_Get_Mgr_Name	MyPackage.My_DB_ Mgr_Name_Function	My_FF_Put_Mgr_Name
Definition	MyPackage.My_DB_ Mgr_Name_Function		PQH_SS.PRINT.set_ document_data
Data Type	VARCHAR2	VARCHAR2	Number
Class	External		External
Parameters	Use predefined parameter: **Name**: P_TRAN_ID **Type**: VARCHAR2 **Class**: Input Value	Use predefined parameter: **Name**: P_TRAN_ID **Type**: VARCHAR2 **Class**: Input Value	Use predefined parameters: **Name**: P_TAG_NAME **Type**: Text **Class**: Input Value **Name**: P_TAG_VALUE **Type**: Text **Class**: Input Value
Return Value	mgr_name	db_mgr_name	0 = success

The database function returns the manager name (db_mgr_name) to FastFormula Function1:

```
<local variable1> = My_FF_Get_Mgr_Name(P_TRAN_ID)
```

The second FastFormula function sets the manager name (mgr_name) in the form field:

```
<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME',<local
variable1>)
```

Overriding an Existing Value in the Document

Say you want to override the manager's name with a specific manager's name. You can override the existing value with a literal:

```
<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME','Mar
k Johnson')
```

> **Note:** Performing the tasks described in this section assumes knowledge of FastFormula, including the ability to use SQL queries to create Definitions, such as MyPackage.My_DB_Mgr_Name_Function.

See: Using Oracle FastFormula, available on Metalink.

Menu and Function Names

The following table lists user menu names and function names for this module.

User Menu Name	Function Name
	SSHR Document Management

Workflow

Not applicable

Configurable Tips and Instructions

The following tables list the configurable tips and instructions for each page.

Define Document Page

Region	Tip Type	Message Name
Page	Instruction Text	PQH_SS_DEFINE_DOC_INT
Page	Instruction Text	ICX_POR_INDICATES_REQ_FIELD
Page	Instruction Text	PQH_SS_DEFINE_DOC_U_INT
Error	Error	PQH_SS_DUPLICATE_SHORT_NAME
Error	Error	PQH_PA_NO_TAGS_IN_FILE
Error	Error	PQH_SS_INVALID_FILE_ERR

Define Document: Attribute Mapping Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_ATTR_MAP_INT

Define Document: Attribute Mapping Delete Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_SS_DOC_DELETE_MSG_INT

Define Document Properties Page

Region	Tip Type	Region Name
Select Document Properties	Instruction Text	PQH_PA_DOC_PROP_INT

Document Mapping Page

Region	Tip Type	Region Name
Warning	Error	PQH_PA_DOC_CREATED_INT

Document Delete Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOCUMENT_DELETE_INT
Page	Instruction Text	PQH_SS_DOC_DELETE_INT

Document Update Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOCUMENT_UPDATE_INT
Document Information	Instruction Text	PQH_SS_DOC_UPDATE_ALLOWED_TIP

Document Search Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOC_MGMT_GRP_INT
Results	Instruction Text	PQH_PA_DOC_MGMT_HGRID_INT
Search Group	Instruction Text	PQH_PA_GRP_SRCH_HRD_INT
Confirmation	Information	PQH_PA_RECORDS_SAVED

Document Remove Warning Page

Region	Tip Type	Region Name
Description	Instruction Text	PQH_SS_DOC_REMOVE_DESC
Instruction	Instruction Text	PQH_SS_DOC_REMOVE_INT

Map Documents Page

Region	Tip Type	Region Name
Results	Instruction text	PQH_PA_DOC_SRCH_RSLT_INT
Results	Instruction text	PQH_PA_DOC_SRCH_RSLT_U_INT
Search	Instruction text	PQH_PA_DOC_SRCH_INT

Define Group Page

Region	Tip Type	Region Name
Page	Instruction text	PQH_PA_GRP_HDR_INT
Page	Instruction text	PQH_MANDATORY_MESSAGE_INT

Group Details Page

Region	Tip Type	Region Name
Page	Instruction text	PQH_PA_GROUP_DETAILS_INT

Group Delete Warning Page

Region	Tip Type	Region Name
Description	Instruction text	PQH_SS_DOC_DELETE_GRP_DESC
Instruction	Instruction text	PQH_SS_DOC_DELETE_INSTRUCTION

See .Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Set Up Eligibility Processing

Eligibility Processing Setup Example

The following is a best practice example of how to set up automatic calculation of a person's eligibility for a self-service action, using features available in HRMS Compensation and Benefits as a processing engine. When a user initiates an action, the application runs the Compensation and Benefits BENMNGLE engine, and displays whether or not the selected person is eligible.

To enable eligibility processing, turn on the system profile HR:Allow Use of Eligibility for Self Service Actions. If you want to allow users to process actions for which a selected person is not eligible, turn on HR:Allow Processing of Ineligible Self Service Actions.

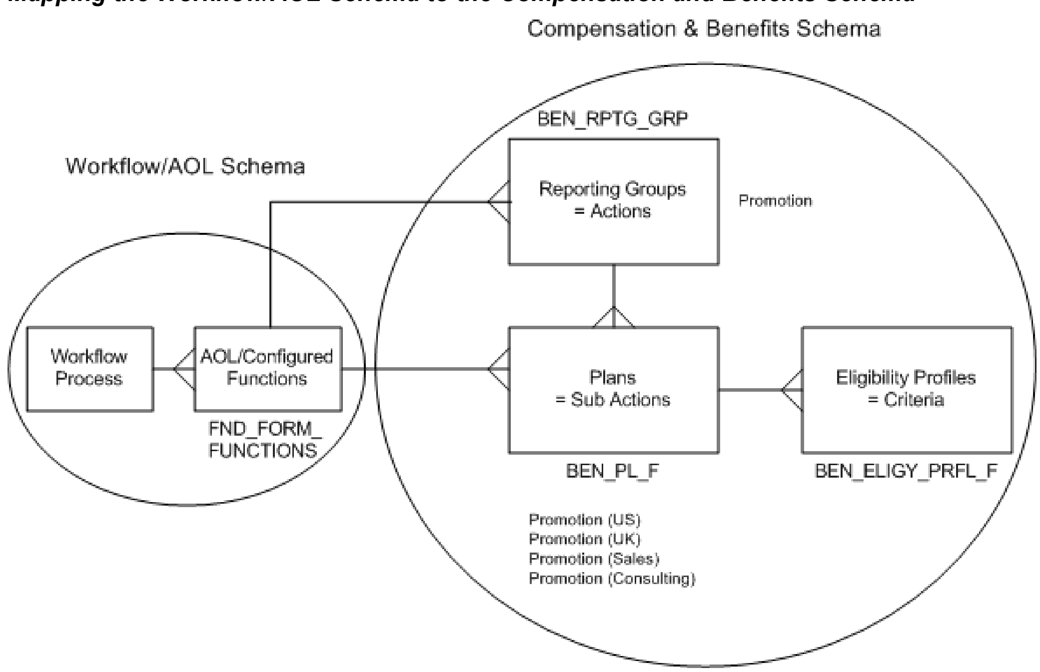
If you are confident that the BENMNGLE engine runs and updates the results tables on a regular basis, you can improve performance by disabling the profile HR:Run BENMNGLE when processing a Self Service action.

The system profiles described above are off by default.

Eligibility for Self-Service Actions

The following figure describes how SSHR has mapped the Workflow and AOL schema onto the Compensation and Benefits schema to provide a generic eligibility processing engine. In a typical implementation, you link your copied and configured form functions to actions, such as Promotion. The actions take on a parent relationship with sub actions such as Promotion (US) or Promotion (Sales), which you define based on the requirements of, say, differing locales or departments.

Mapping the Workflow/AOL Schema to the Compensation and Benefits Schema



For a person to be eligible for a sub action that is legislation-specific, say, Promotion (US), you set up the sub action (plan) in a US business group. You refine the criteria that make a person eligible by defining eligibility profiles and linking them to the sub action. You can link each form function to multiple actions and sub actions, but you can determine eligibility only for sub actions.

> **Note:** The application considers a person who meets all *Required* profiles and at least one *Optional* profile eligible. If you link only one profile to a sub action, you define it as Required.

Setting Up Eligibility Based on Length of Service

In this example, you have already decided to use the Benefits engine to process eligibility, and you have configured the form functions your enterprise wants to make available to users. User-friendly names help users recognize the workflow processes. Examples might include:

- Promotion (Australia)
- Promotion (Manufacturing)
- Transfer
- Award Bonus

This example assumes that you have copied and configured two form functions based on the predefined function Change Job:

- Change Assignment
- Change Assignment with Bonus

You have identified the applicable policies and eligibility rules in effect in your organization, and reviewed the available eligibility profile criteria. You have asked and answered appropriate business questions, including:

- What are the criteria that govern eligibility for each available form function? Examples include:
  - Legislation
  - Organization Unit (department)
  - Job
  - Length of Service
- Which life events can impact eligibility for actions?

In your organization, an employee is eligible for a bonus after one year of service. You set up eligibility processing so that if a person's length of service is less than one year, the person is eligible only for Change Assignment. If length of service is one year or more, the person is eligible for Change Assignment with Bonus.

Generic Steps to Set Up Eligibility

The steps below describe the generic process of setting up eligibility for sub actions.

1. Define eligibility criteria as required
2. In the Participant Eligibility Profiles window:
   - Create eligibility profiles
3. In the Plan Types window:

- Define a plan type

4. In the Plans window:
   - Create plans (sub actions)
   - Link each plan to a form function (Miscellaneous tab)
   - Link eligibility profiles to each plan (Plan Eligibility tab)
5. In the Reporting Groups window:
   - Create reporting groups (actions)
   - Link each reporting group to a form function
   - Link each reporting group to plans (Components tab)

Sample Steps for Length of Service

Using an HRMS Manager responsibility, follow the steps below to set up eligibility based on length of service.

Derived Factors

Specify how the application evaluates length of service criteria by defining two derived factors.

1. Define the first derived factor, in which length of service is less than one year. In the Derived Factors window (Length of Service tab):
   - Name = "LOS < 1 yr"
   - UOM = "Day"
   - Date to Use Code = "Date of Hire"
   - Values: Activate the No Min check box; Max = 364
   - Determination Code = "As of Event Date"
2. Define the second derived factor, in which length of service is one year or more. In the Derived Factors window (Length of Service tab):
   - Name = "LOS >= 1 yr"
   - UOM = "Year"
   - Values: Activate the No Max check box; Min = 1
   - Date to Use Code and Determination Code are the same values as the first derived factor

Eligibility Profiles

Set up two eligibility profiles. The first makes a person eligible with less than one year of service, the other makes a person eligible with a year or more of service. You can set up as many eligibility profiles as you need to qualify a person for an action. You specify if a profile is Required or Optional when you link the profile to a plan, below.

1. Define the first eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "Less Than 1 yr LOS"
   - Assignment Type = "Any Assignment" (Primary and Secondary)

- Status = "Active"
- Applies To = "Benefits Profile"
- Select "Length of Service" from the LOV
- Length of Service = "LOS < 1 yr"

2. Define the second eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "1 yr or More LOS"
   - Select the same values for Assignment Type, Status, and Applies To as the first profile
   - Length of Service = "LOS >= 1 yr"

     Note: If the Assignment Type is Any Assignment, eligibility processing can consider secondary assignments, enabling the application to find all actions for which the person is eligible. In a good implementation, a person is eligible for only one related sub action for each action. If BENMNGLE retrieves more than one eligible sub action, a Sub Actions page appears and displays the available choices.

Sub Actions (Plans) and Actions (Reporting Groups)

Create a plan type to relate your sub actions (plans) to self-service actions eligibility instead of benefits.

1. Define a new plan type to use for self-service actions. In the Plan Types window:
   - Name = "Business Process"
   - Option Type = "Personnel Action"
2. Define a sub action that includes only the assignment change. Link it to a form function and an eligibility profile. In the Plans window:
   - Name = "Change Assignment"
   - Status = "Active"
   - Plan Type = "Business Process"
   - Plan Usage = "May not be in program"
   - On the Eligibility Rates tab, activate the "Track ineligible persons" check box
   - On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment" (or any form function name you have configured to change an assignment)
   - Confirm that you have activated the Plan Years Not Applicable check box
   - Save your work
   - Press the Plan Eligibility button to open the Maintain Plan Eligibility window
   - Press the Eligibility button to open the Eligibility window. Eligibility Profile Name = "Less Than 1 yr LOS"
   - Activate the Required check box
   - Save your work

3. Define a second sub action that additionally includes bonus. The steps are the same as in the first sub action, except for the following:
   - Name = "Change Assignment with Bonus"
   - On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment with Bonus" (or any form function name you have configured to change an assignment and award a bonus)
   - Eligibility Profile Name = "1 yr or More LOS"
4. Define an action and link it to your two sub actions to complete your setup. In the Reporting Groups window:
   - Name = "Change Assignment"
   - Purpose = "Personnel Action"
   - Function Name = "Change Assignment"
   - Save your work
   - Plan = "Change Assignment"; Plan = "Change Assignment with Bonus" (Components tab)

See:

Plan Design, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Requirements for Total Compensation, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Profile Criteria, *Oracle HRMS Compensation and Benefits Management Guide*

Derived Factors, *Oracle HRMS Compensation and Benefits Management Guide*

Defining a Reporting Group, *Oracle HRMS Compensation and Benefits Management Guide*

Self-Service Actions

Overview of Self-Service Actions

Most enterprises adhere to rules, regulations, and reporting requirements when changing the terms of work. Oracle Self Service Human Resources (SSHR) provides a set of configuration tools and web flows for initiating, updating, and approving self-service actions according to prescribed rules.

Self-service actions represent the business processes, or *actions*, that change the conditions of employment in your enterprise. Public sector organizations typically refer to these processes as personnel actions, and they include business actions that manage hiring, training, promotion, transfer, compensation, and termination. Self-service actions are useful for any enterprise that wants to configure business processes using rules to determine eligibility and approval requirements, track action history as well as details, or generate standard documents for specific actions.

Self-service actions fall into three overall types, each with its own unique expectations, rules, and requirements:

- Hiring
- Deployment
- Termination

Oracle SSHR emphasizes business process over data maintenance. Though the interface provides an online form that you fill out in the course of navigating a series of web pages, your implementation team organizes the sequence and content of the data to reflect the standards and practices of your organization. With each self-service action, your implementation team defines a process consistent with the way your organization manages changes to personnel records. You design and implement your own version of each process, and specify the business rules that enable you to route each action for approval automatically.

SSHR provides a transition from technical orientation to functional. This approach enables you to initiate and manage self-service actions as business processes with which you are already familiar, rather than maintaining data in the abstract in application windows. Your focus is on the task you need to perform. Some examples of the predefined SSHR workflow modules supported by self-service actions include:

- Hiring or termination
  - Recruitment
  - New Hire
  - Applicant Hire
  - Termination
  - Termination with compensation
- Deployment or status changes
  - Employee Status Change (assignment, full/part time, grade, movement within pay scale)
  - Transfer
  - Leave of Absence (long term absence, sickness, sabbatical)

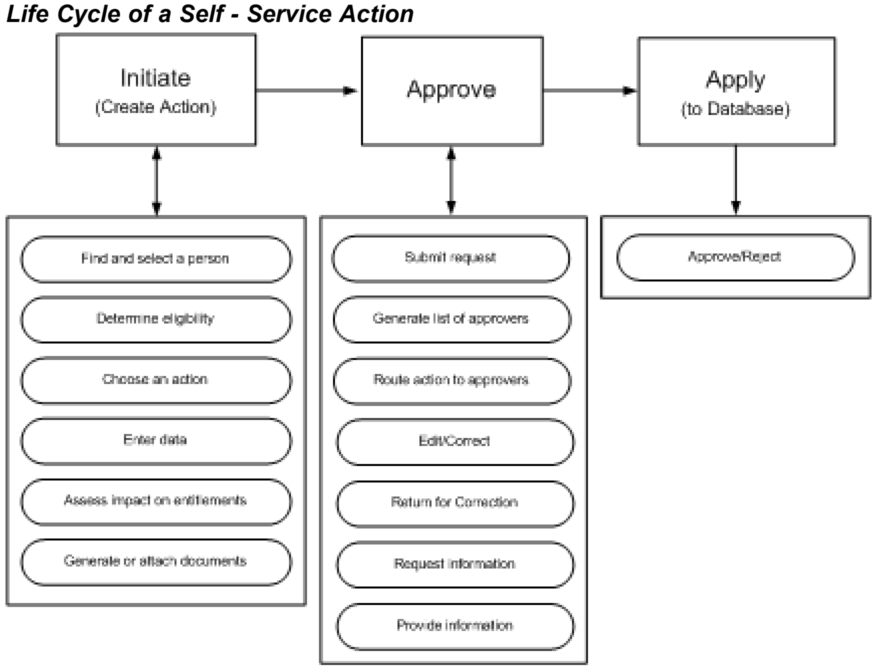
- Special/Extra Information Types (ending training or apprenticeship periods, disciplinary actions)
- Other Employment Information (ending training or apprenticeship periods, disciplinary actions)
- Individual Compensation Distributions (awarding bonuses or other specific pay and allowance types)

You carry out a self-service action in three overall stages that reflect standard business procedures:

- Initiate
- Approve
- Apply

For each stage, your implementation team has a range of options and features to configure unique process flows you recognize as a reflection of the way you do business. The following process flow diagram displays all the features available. What you see may differ, depending on your organization's requirements.

Life Cycle of a Self - Service Action



Initiate

Advanced search capability helps you confirm that you have selected the correct person before initiating an action. The People List and Actions page tell you whether or not a person is eligible for an action on the specified effective date. The Actions page notifies you of your own pending actions on the selected person, actions you have saved for later, and actions on the selected person awaiting approval of others. If your organization's requirements permit, you can specify that your action take effect on a date you specify, or "on approval". You enter the data that your enterprise, rules, and regulations require. What-If analysis gives you a real-time view of the impact of your proposed action on the selected person's entitlements to compensation and benefits. You can generate formatted documents, such as a pre-approval Request for Action, or a standard letter, containing merged values from your action. In addition, you can attach supporting documents, such as a resume, certificate, or Web address. Before submitting your action for approval, you can add to the list of approvers, or add people to notify.

Approve

Self-service actions use Oracle's standard workflow and approvals management tools. Oracle AME generates a list of approvers and Oracle Workflow routes your action automatically. Approvers retrieve notifications from their Worklist. Approvers with appropriate update privileges can modify the action, including its effective date. Recipients can request additional information, or return the action for correction to previous approvers. If the database encounters intervening or future-dated actions on the same person, it refreshes your action with the appropriate values, or routes your action to a Human Resources representative after approval for manual entry of the changes.

Apply

The application applies the action to the database after final approval.

SSHR workflow features enable you to engage in an online collaborative environment in which you can focus on the task of routing and approving actions based on their merits, with near transparency regarding selection and notification of approvers.

See: Configuring Self-Service Actions, page 8-42

See: Managing Conflicting Actions, page 8-44

See: Initiating a Self-Service Action, page 8-49

See: Approving a Self-Service Action, page 8-53

Configuring Self-Service Actions

The sections below describe the process of configuring Self - Service Actions in SSHR. Some procedures are optional, for example, setting up eligibility processing or document management. Implementing the workflow processes and functions your enterprise requires is prerequisite to configuring self - service actions. When you have completed the configuration of workflow processes and functions, you must implement the following procedures:

- Set system profile options
- Define access roles
- Personalize pages
- Add a sub menu to user menus
- Set up eligibility processing
- Set up document management

If previous implementations have not configured Oracle Approvals Management (AME) with the attributes, conditions, approval types, and rules your organization requires to manage routing and approving actions, you must configure these if you want to enhance the default behavior. The default is to route the action to the top of the supervisory hierarchy or 10 levels above the Initiator, whichever comes first.

> **Note:** In order to use the new workflow features associated with self-service actions, you must upgrade to the SSHR V5 approval process.

See: Implementation Steps for Self-Service HR (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

Set System Profile Options

Configure the system profiles at the Site level. The eight profiles directly relating to configuring self-service actions are as follows:

- HR:Allow Approver updates to Self Service actions
- HR:Allow concurrent Self Service actions
- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions
- HR:Display Position Hierarchy
- HR:Allow use of eligibility for Self Service actions
- HR:Allow processing of ineligible Self Service actions
- HR:Run BENMNGLE when processing a Self Service action

If you do not enable HR:Allow Approver updates to Self Service actions, only the Initiator is able to update or change the effective date of an action you return for correction. Approvers will be unable to use attachments.

Oracle recommends that you configure two related options in tandem:

- HR:Manage Self Service actions when future-dated changes exist
- HR:Refresh Self Service actions with data from intervening actions

Enable or disable these two options together. If you set the former to *Allow approval (Notify HR Rep)*, enable the latter as well.

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

Define Access Roles

Create and assign access roles, to grant update privileges to those who approve self-service actions, or deny them to those who do not. The Initiator of an action has privileges based on menu access, and does not need an access role.

See: Access Roles for Self Service Actions, *Oracle HRMS Deploy Self-Service Capability Guide*

Personalize Pages

Personalize self-service pages. Personalizations play a key role in configuring self-service actions, including the following:

- Personalizing workflow processes to display or hide pages or data fields (performed when you configure workflow processes)
- Personalizing the Review page to display or hide What If analysis or attachments
- Personalizing the Effective Date page to allow users to enter the effective date manually, specify that an action takes effect on approval, or both.

See: Configuring Web Pages, page 5-14

See: Self Service Workflows, page 4-3

Add a Sub Menu to User Menus

Attach the sub menu *HR Self-Service Pages sub menu* to user menus so that users can see the following pages:

- Effective Date
- Sub Actions
- Return for Correction
- Refresh Attributes
- Document Manager pages

See: Defining Menus for SSHR, page 3-8

Set Up Eligibility Processing

Optionally, set up automatic determination of a person's eligibility for an action, using SSHR Compensation and Benefits functionality as a generic processing engine. You do this in four stages:

- Define Eligibility Profiles
- Define Plans (sub actions)
- Define Reporting Groups (actions)

See: Eligibility Processing Setup Example, page 8-35

Set Up Document Management

Optionally, configure documents and groups in Document Manager to provide formatted business documents in PDF format, containing merged data from workflow processes. Examples include Request for Change, Notification of Change, correspondence, or contracts.

See: Document Manager, page 8-18

Managing Conflicting Actions

A typical implementation for self-service actions allows you to process multiple changes to a person's record at the same time. Another common configuration allows any approver on the chain of recipients to change the effective date of an action. The ability to process concurrent actions and choose an effective date at any point in the approval process adds both flexibility and complexity. For example, what if another manager submits a status change that affects a person's grade at the same time you are processing a job change on the same person? What if you submit a change of working hours, and another manager approves a transfer while your action is in process? What if choosing a retroactive effective date for a bonus means that another bonus (already approved) becomes effective on a future effective date to your own?

The flexibility of processing multiple changes simultaneously requires the application to handle complex interactions among three dates associated with each action:

- **Initiation date**: the date you submit your action for approval (usually the system date)
- **Effective date**: the date your approved action takes effect (not necessarily the approval date)
- **Approval date**: the date you save your action to the database

The application helps you manage complex situations arising from interactions among multiple actions and dates in three ways. Consider three scenarios:

1. **Concurrent Actions:** The application processes multiple actions on a selected person at the same time. On final approval, each action takes effect on its own effective date, superseding any actions with a previous effective date.
2. **Intervening Actions:** After your action is in process, the application encounters an approved action on the same person with an effective date that falls between your initiation date and effective date. Your setup can help you manage which information prevails, and (as appropriate) replace values in your action.
3. **Future-Dated and Retroactive Actions:** After your action is in process, the application encounters an approved action on the same person with a later effective date. Your setup can allow you to route your action to a Human Resources representative on final approval, for manual entry of all appropriate changes.

Concurrent Actions

When you begin an action, the application checks the person/assignment combination for other actions currently in process:

- Saved for Later
- Returned for Correction
- Awaiting Approval of Others

Most implementations allow concurrent actions. Otherwise, if you try to begin an action on a person with pending changes, you cannot proceed beyond the Actions page. But in a typical setup, existing actions on the selected person appear as actions Awaiting Your Attention or Awaiting the Approval of Others.

Intervening Actions

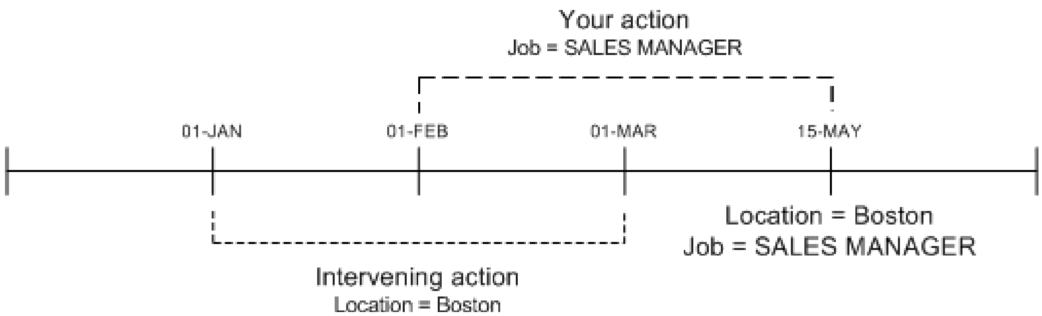
Intervening changes can occur for a variety of reasons, most often due to delays between request and approval. Another manager can approve a change to your selected person's record after your own action has entered the approval process. When the application encounters approved changes to your selected person's record, effective somewhere between your own action's initiation date and effective date, it manages them in one of two ways. Consider two scenarios:

1. After you submit your job change for approval, an HR manager approves a transfer on the same person while your action is still in process. In this case, the intervening change of location prevails, because your action does not specify a location. You may still need to know about the transfer, however, in order to decide whether to approve, update, send back for correction, or cancel your job change.
2. Your action's proposed job change conflicts with an intervening change from another manager that specifies a different job. Because both your action and the intervening action specify a job, your action's proposed job prevails, because your action has the later effective date. Nevertheless, you may need to know about the intervening

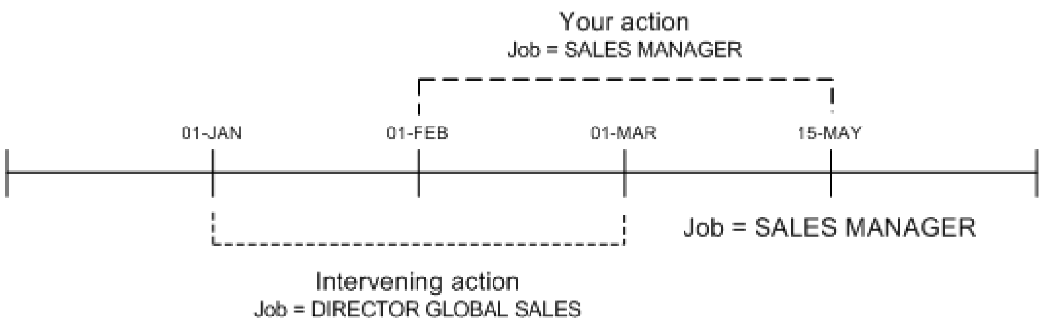
job change in order to make a more informed decision about your own proposed job change.

In the following illustrations, broken lines connect the initiation date and effective date of each action. Another manager approves an intervening action while yours is still in the approval process.

Scenario 1: Intervening Action Specifying Different Attributes



Scenario 2: Intervening Action Specifying the Same Attributes



Data refresh options enable you to manage potential conflicts by replacing your action's values with the changed information from the intervening action (scenario 1), or preserving the values from your action (scenario 2). The application displays a Refresh page with a table informing you of the original, intervening, and prevailing values.

> **Note:** The application may also display a Refresh page if you change the effective date of your action. A new effective date can create potential conflicts with values in effect at a different point in time.

Future-Dated and Retroactive Changes

When the application encounters an approved change to your selected person's record, effective subsequent to your action's effective date, configuration options can help you to manage potential conflicts by routing your action on approval to a person with an HR Representative role. On review, the HR representative applies all necessary changes to the database manually.

You can perform an action on a person retroactively by choosing a past effective date. The application treats changes to the person's record subsequent to your effective date as future-dated actions, and routes your action on final approval to an HR representative.

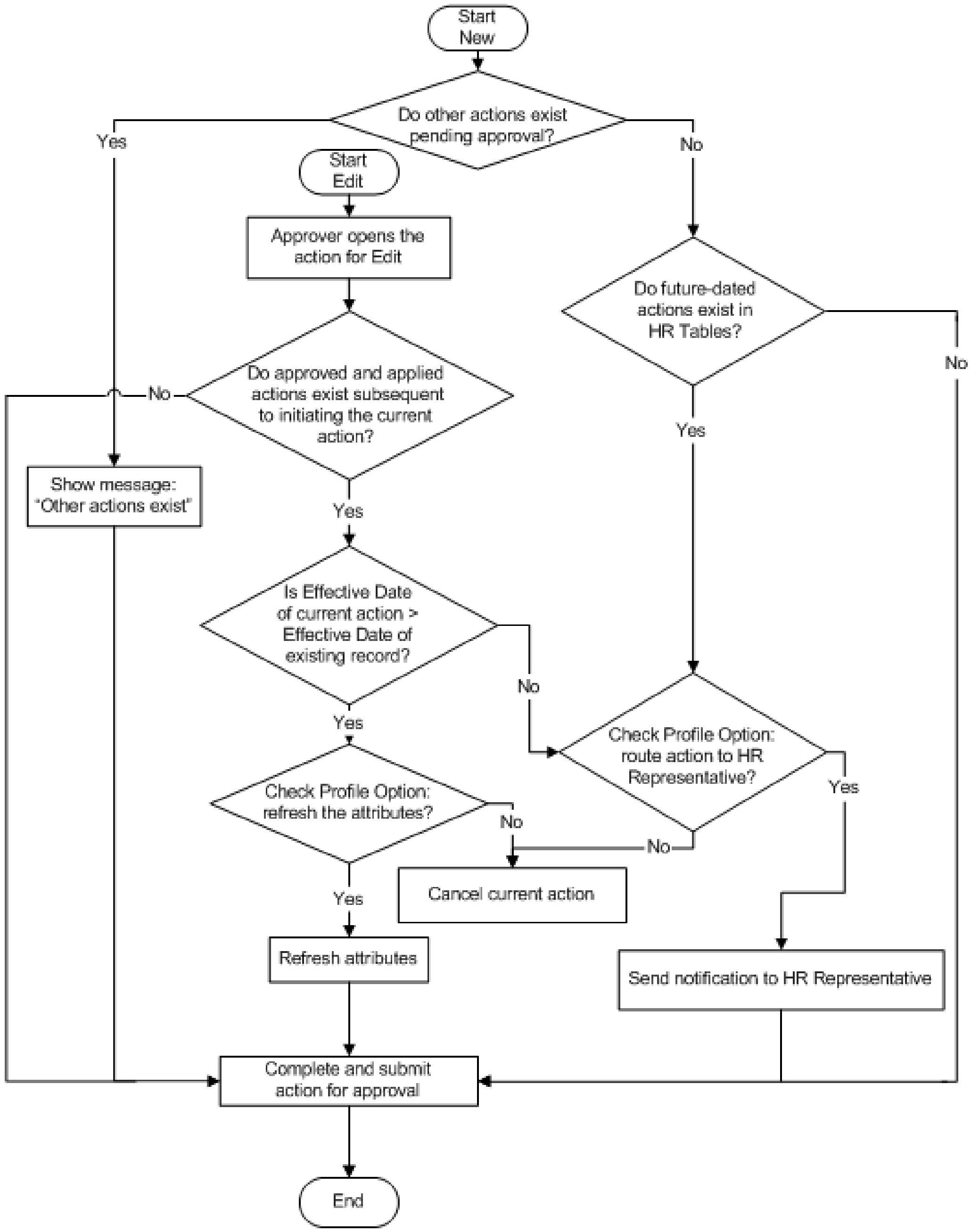
Process Flow

No automated system can resolve every scenario involving conflicting data. In some cases, an HR representative applies all appropriate changes manually. On the whole, managers prefer to get their actions in process and approve them. Your configuration accommodates most scenarios automatically by setting the following options:

1. Refresh your action with valid information as of your effective date, or require that your action fail on final approval (intervening actions)
2. Allow approval of your action with subsequent routing to an HR representative, or terminate it with an error (future-dated actions)

The process flow diagram below describes in greater detail how the application manages data conflicts when intervening or future-dated actions exist. The figure assumes that concurrent transactions are allowed.

Managing Conflicting Actions



Note: If an action has an effective date matching that of an existing change, the application assumes it to be a correction to the existing record.

For more information about date tracking in Oracle HRMS, see the Oracle white paper, *How Date Track Works*, available on Metalink.

Initiating a Self-Service Action

Oracle delivers a powerful and flexible set of tools in self-service actions. Your implementation team has many options to choose from as it decides which features are available, and how your process flow looks and feels. The following sections describe how to initiate an action, and possible exceptions resulting from implementation choices.

Enter Process Page

Begin a self-service action by opening a list of persons from the Main Menu.

Your implementation team chooses to display a supervisory hierarchy of your direct reports and subordinates, or a position hierarchy. You can also select a MyList view, displaying people you choose. Your implementation team determines whether the hierarchy or MyList view is the default. View options include expanding and collapsing nodes on the tree, and focusing on one person and his or her subordinates.

> **Note:** HR representatives typically use the MyList view to display people for whom they are responsible.

Your implementation team also determines whether multiple assignments appear in person/assignment combinations, and whether contingent workers appear.

Advanced Search criteria enable you to refine a person search by specifying criteria such as business groups, person types, department, or position.

To request a change, choose the Action icon associated with a person. The Actions page appears.

> **Note:** From any person/assignment row, you can optionally choose a Details icon that provides information about that person and assignment.

Navigation Options

Your implementation team may choose to display preselected actions on your Main Menu, consistent with older versions of SSHR. Oracle recommends that you open your person list by selecting Manager Actions from the Main Menu. From this single point of entry, you can see all available actions, and the selected person's eligibility for them. With preselected actions, you restrict yourself to the single action you have selected. If your selected person is ineligible, and your setup does not allow processing ineligible actions, you may have to begin again with a new action.

> **Note:** Some processes are only available via preselected actions, such as New Hire or Organization Manager.

Selecting an Action

If you use Manager Actions to enter the process, the Actions page lists available changes, and the selected person's eligibility for them. Pressing the Start button initiates the selected action, and the Effective Date page appears.

> **Note:** If you use a preselected action from the Main Menu, and no pending actions exist for your selected person, the application skips the Actions page and takes you directly to the Effective Date page.

Eligibility Processing

Your implementation team can configure the application to determine your selected person's eligibility for a proposed action automatically. The application determines eligibility as of the effective date you specify, and displays the results in a table on the Actions page. Eligibility determination is based on personal, employment, or derived-factor criteria, such as Job, Organization, or Length of Service. The process also considers department- or locality-specific criteria to determine eligibility for actions such as Promotion (Sales), or Hire (France).

Infrequently, the selected person may be eligible for more than one version of an action, such as Promotion (Sales) and Promotion (US). In most cases, well-configured eligibility processing will present only one action as a choice. If the person is eligible for more than one version of an action, you select from a list of choices on the Sub-Actions page.

Your implementation team can configure the application to process ineligible actions. For example, you can do this if approvers have the right to override eligibility criteria, or if you want to put an action in process for a person who is not eligible as of the effective date, but may become eligible later.

See: Eligibility Processing Example, page 8-35

Processing Your Action

When processing your action, you need to know how the application manages data conflicts. If your implementation team has configured the application to support concurrent actions, you may encounter messages and warnings about other pending actions on the selected person's record, or actions on this person you have saved for later. The Actions page displays two lists of pending actions on the selected person:

- your own actions
- actions awaiting the approval of others

You can also see a complete list of your own pending actions by choosing Actions Requiring Your Attention from the Main Menu. The application may also encounter intervening or future-dated changes that affect a proposed change, some of which may appear after your action is in the approval process.

See: Managing Conflicting Actions, page 8-40

Effective Date Page

Initiating or approving an action typically begins on the Effective Date page, where you choose one of two options:

1. Enter an effective date manually
2. Specify that the action takes effect on approval

This page also provides information and warnings relating to your action, such as the earliest possible effective date, or other approved or pending actions on this person.

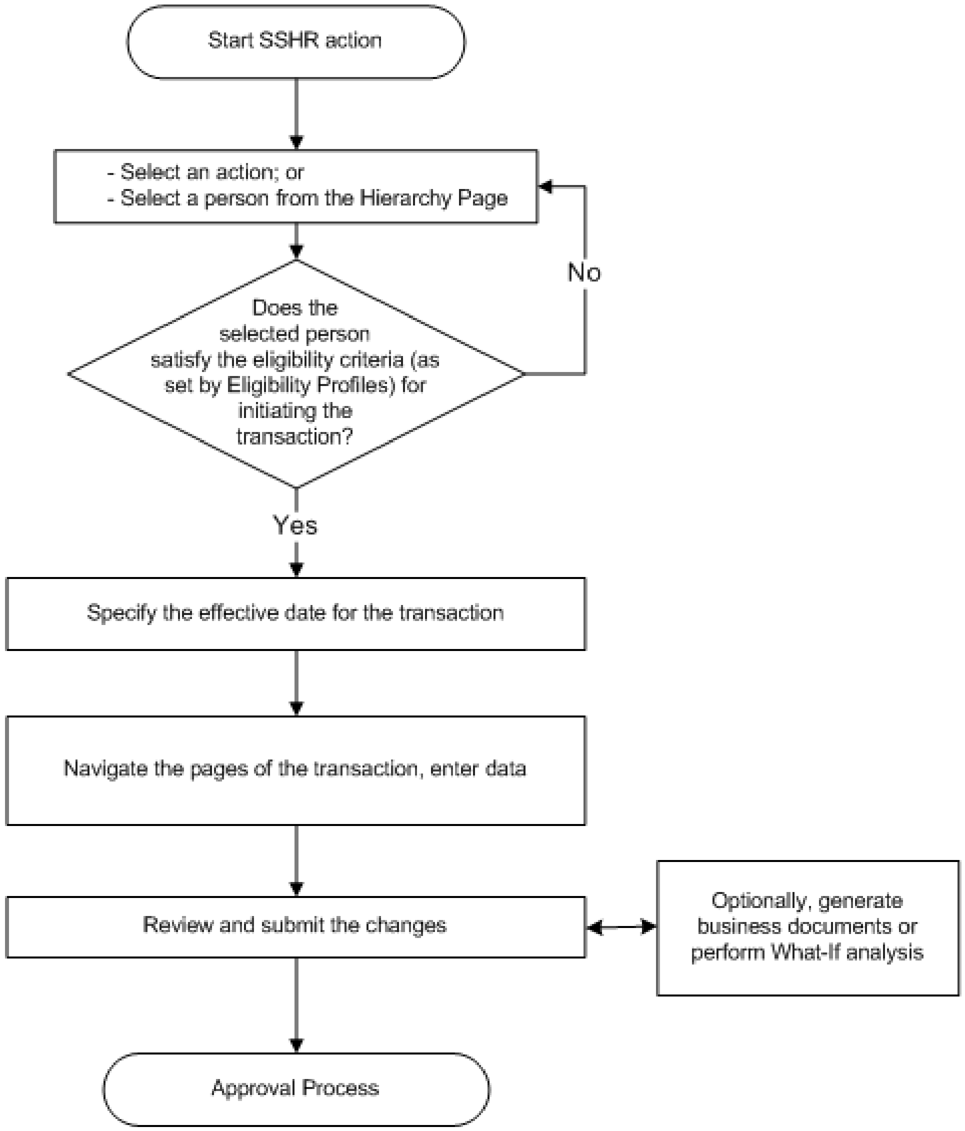
> **Note:** If your implementation team decides to have all actions take effect on approval, the Effective Date page does not appear.

Business Process

Here you enter data related to your action. Available actions may differ, depending on the business processes your implementation team has provided. Examples include:

- Hire a person
- Change location
- Change manager
- Change grade
- Change salary
- Change job
- Change hours
- Award bonus
- Release information for transfer
- Initiate Leave of Absence
- Termination

SSHR Actions



Save for Later

If you Save for Later at any time in the process, you receive a notification as a reminder. If you inadvertently close your browser, or your browser crashes, the application saves your action for you.

Canceling an Action

If you are the Initiator, pressing the Cancel button deletes the action. If you are an approver, or have Saved for Later, Cancel reverts to the previously saved data.

Review Page

In addition to displaying the proposed changes to the person's record and information about the approvers on the chain of recipients, the Review page gives you the opportunity to choose additional approvers, or add people to notify. Other available features include:

- Attachments
- What-If Analysis
- Document Management
- Approvals Management

Press the Submit button to send your action to the next approver on the chain. If you are the final approver, you submit the changes to the database.

Attachments

The Review page includes an Attachments link, which enables you to attach supporting documents, such as a photograph, a copy of a degree or certificate, or a resume. You need update privileges to do this. Oracle does not predefine any document types, so your implementation team supplies the list of available types.

"What-If" Analysis

If you choose the What-If Analysis link on the Review page, the application displays information about your selected person's entitlement to compensation and benefits. Choosing this link runs the BENMNGLE process, which gathers and reports information about compensation objects relating to the person's entitlements. Use this page to assess the impact of your proposed action. Here you can review the unit of currency, current amount, current period, What-If amount, and What-If period.

> **Note:** Performing What-If analysis requires that you run Oracle Advanced Benefits.

Business Documents

Your implementation team can create formatted business documents in Acrobat PDF format, and associate them with selected actions. The application can also include information from your action in the document automatically. For example, documents available for your use could include a Request for Change, Notification of Change, letter, or contract describing the changes to the person's status, such as a new job or effective date. Your setup can provide pre-approval and post-approval versions of a document. If you press the Printable Page button on the Review page, you will see a list of pre-approval documents associated with your action that are available for printing. If no documents are available, pressing Printable Page displays a printer-friendly version of the Review Page.

On final approval, the Initiator receives a notification with a link to a list of available post-approval document versions.

Approving a Self-Service Action

Approvals Management

SSHR actions use Oracle Approvals Management (AME), a rules-based expert system, to route actions via supervisory hierarchy (default), or routing list. Your implementation team can define business rules that generate a routing list automatically, ensuring that SSHR routes your action to the appropriate parties for approval. Your setup can designate approvers who record decisions by external authorities, such as unions or workers councils.

Pressing the Submit button on the Review page sends your action to an approval process that chooses the appropriate approvers automatically. Approvers receive a notification in their Worklist with a link to open the action, and (with update privileges) they can edit, change the effective date, or attach supporting documents. Approvers can return the action for correction to any previous approver on the chain. If you are the final approver, pressing Submit applies the action to the database.

> **Note:** If the database encounters intervening approved actions on your selected person, workflow sends the action to a Human Resources representative on final approval for manual entry of all appropriate changes. You see a warning message if this is the case.
>
> See: Managing Conflicting Actions, page 8-44

The Review page also provides options to add approvers and select additional notification recipients.

Notifications

Workflow users receive notifications in their Worklist. Standard formats include:

- Approval Required
- Saved for Later
- Return for Correction
- FYI
- Queries from other approvers

When an approver or HR representative retrieves a notification requiring approval, the Notification Details page appears, providing notes and warnings related to the action. Notification Details provide the following options:

- Approve
- Reject
- Reassign
- Request Information
- View Action
- Update Action
- Return for Correction

Most options include an opportunity to provide comments or ask questions.

Updating an Action

Unless your implementation team has decided to have all actions take effect on approval, the Effective Date page appears when an approver opens an action. Any approver in the chain of recipients with update privileges can change the effective date here. Approvers may see messages or warnings about intervening or future-dated actions that the database has encountered. See Managing Conflicting Actions, page 8-44

Return for Correction

Any approver can return an action for correction to any previous approver on the chain. In order to make a change, recipients must have a workflow role that grants update privileges.

New User Registration

New User Registration

Self-service registration for new users helps to reduce the workload and costs of HR administration. HR professionals can use this feature to add new employees to the Oracle HRMS database. The self-service approach reduces the rollout effort for large companies where the HR department is not centrally located. You can add or edit user-friendly tips and text messages in the user interface to reduce the need for end user training.

You can also use self-service registration to help shift the workload from the HR department onto the hiring line manager or even the individual employees by allowing them to register their own employee details.

Using the **New Employee Registration** function, employees log on with a generic company user name and supplied password or they access the function directly with a "guest login", which is invisible to users. They complete online registration, giving details such as name, address, employment details, and family members. They can create their own self-service user names and passwords (or you can choose to generate these automatically). Alternatively, HR administrators or line managers can create the employee records and self-service user names for their new hires.

Using the **Non-employee Registration** function, other people can log on to create non-employee records in Oracle HRMS. This is most commonly used by US third party benefits providers using Oracle Advanced Benefits. It enables benefits participants or their dependents who become COBRA qualified due to a life event (such as divorce or termination) to register so they can elect their COBRA coverage through self-service.

Using the **Create User Name** function, people who already have an HR record in the database can create their own self-service user names and passwords. This function provides an alternative to the existing methods of creating users, which are using the Users window or creating self-service users in a batch.

Benefits Registration

If you have implemented Standard Benefits or Oracle Advanced Benefits, benefits participants can register directly with you through the World Wide Web or over a corporate intranet. If you are a third party benefits administrator or provider, this means that employees' HR departments are no longer responsible for transferring HR information to your database.

Once a person completes the registration, they can navigate directly to the Self-Service Benefits functions, which process detected life events that enable benefits elections or unrestricted program elections.

Generic Users and Responsibilities

You give a generic user name and password to people, enabling them to access self-service initially to register. You can choose how many generic user names you create. For example, a third party benefits provider is likely to create one generic user name for each subscriber organization. Employers might create one user name for the entire business group, or different names based on the organization hierarchy structure.

Default Organization

Each user name is associated with an organization using the profile option OAB:User to Organization Link. This defaults the organization for a new employee assignment, but the user can select another organization from the business group during registration. You can set this profile option at the responsibility level--to link each generic user name with a separate organization--or at the site, or application levels.

Default Payroll

Similarly, for each generic user name you can select the default payroll to be assigned, by setting the profile option OAB:User to Payroll Link at the responsibility level. You can also set this profile option at the site, or application levels.

Default Responsibility

By default, all newly registered users are assigned the seeded Self Registered Employee Default responsibility. This responsibility gives them access to a subset of self-service functions, such as Self-Service Benefits enrollment, person name, address, and contact information. You can create your own responsibilities and assign them to responsibilities, or the whole site by setting the OAB: Self Registered User Responsibility profile option at the appropriate level.

New Employee Registration and Non-employee Registration

These modules are available under the predefined New User Registration Responsibility. They can be used as part of employee self-service or manager self-service. Using New Employee Registration, users log on with a generic user name to create their own employee records in Oracle HRMS, and their own self-service user name and password. Using Non-employee Registration, other people can log on to create non-employee records in your Oracle HRMS.

Menu and Function Names

User Menu Name	Function Name
New User Registration	New Employee Registration
New User Registration	Non-employee Registration

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

New Employee Registration Process and COBRA Registration Process

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Ben Life Event Cobra	Message	BEN_COBRA_LIFE_EVENT_DATE
Ben Life Event Cobra	Message	BEN_LIFE_EVENT_COBRA
Ben Life Event Current	Message	BEN_LIFE_EVENT_DATE
Ben Life Event Current	Message	BEN_LIFE_EVENT_CURRENT
Registration user Main Content	Short Tip	HR_INCORRECT_PASSWORD_LENGTH
Verification Content	DATE_FORMAT	

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Region	Flex Name	Flex Code
Verification Content	Additional Personal Details Flex	PER_PEOPLE
Extra Information Type Update	Extra Person Information	Person Developer DDF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: User to Organization Link	All	Organizations	Null
OAB User to Payroll Link	All	Payrolls	Null
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site--set to Yes	Yes/No	No

Create User Name

This module is available under the predefined New User Registration Responsibility. It can be used as part of employee self-service. Using Create User Name, people who already have an HR record in Oracle HRMS can create their own self-service user names and passwords.

Menu and Function Names

User Menu Name	Function Name
New User Registration	Create User Name

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

Create User Name Process

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
New User Creation Verification Content	DATE_FORMAT	
Registration User Main Content	Short Tip	HR_INCORRECT_ PASSWORD_LENGTH

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Region	Flex Name	Flex Code
New User Creation Verification Content	Additional Personal Details	PER_PEOPLE

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site--set to Yes	Yes/No	No

User Hooks To Generate User Names For New User Registration

As supplied, the New User Registration processes (Create New User, New Employee Registration, and Non-employee Registration) include a User ID page where users can enter a user name and password for logging on to self service. Alternatively, you can implement some additional code so that the user name and password are generated by the application when the user clicks a button on this page. You can implement this using user hooks.

There are two user hooks:

- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_B (which we will call the "Before user hook" because it runs before the user name is created)
- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_A (which we will call the "After user hook" because it runs after the user name is created)

They are called in the user api BEN_PROCESS_USER_SS_API. The user hooks communicate with this caller api through a set of globals. These globals are defined in the package BEN_PROCESS_USER_UTILITY. The usage notes within this package explain how to use the globals.

Using the Before User Hook

Use the Before user hook to set globals with user and responsibility information. To set the globals with user information, use G_FND_USER_RECORD. To associate responsibility and security group/security profile information with the user, use G_FND_RESP_RECORD. If you do not set the responsibility and security information using globals, the application uses the responsibility from the *OAB:Self Registered Employee Responsibility* profile option.

Minimum Setup

The minimum you need to do to create a user with today’s date as the start date is to put the following two lines in the Before user hook.

ben_process_user_utility.g_fnd_user_record.user_name := ’testuser’; ben_process_user_utility.g_fnd_user_record.password := ’testpassword’;

You can also set up globals for start_date, end_date, last_logon_date, password_date, password_accesses_left, password_lifespan_accesses, password_lifespan_days, email_address, fax, description, customer_id, and supplier_id.

Important: Never set the employee_id global within the New User Registration processes. If you do so, the global overwrites the employee id created during the process and so the user will not be associated with the correct employee id. If you want to use the user wrapper api outside of the page for creating user name and password, you can then pass in the global for employee id.

Using the After User Hook

Use the After user hook to accomplish something that needs to be done after a user is created. For example, the Before user hook enables you to pass in information about a responsibility, but it does not handle multiple responsibilities. You could pass no information about responsibility in the Before user hook and instead call the appropriate "fnd" api(s) in the After hook to take care of the responsibility, menu, or any profile value that you want to associate with the user.

Another use for the After hook might be to write code to populate some tables--such as communication or extract tables--from where you can extract the information later.

Setting Up a Generic User ID For New User Registration

Follow these steps to create the generic user name and password that will enable new employees, managers, and other users to access self-service to register themselves in your database. These steps are required if you are using any of the following processes:

- New Employee Registration
- Non-employee Registration
- Create User Name

If you are implementing new user registration in more than one business group, see: Setting Up Generic User IDs in Multiple Business Groups, page 8-63. If you are implementing new user registration within a single business group, use the following procedure.

If you are *only* implementing the Create User Name process (that is, you are using self-service to create new users but not to create HRMS records), you can omit steps **7**, page 8-62and**8**, page 8-63.

To set up self-service registration in a single business group:

1. If you are a third party benefits provider, create an organization to represent each subscriber organization or company in which you are providing benefits.

   If you are not a third party benefits provider, you create your HR organization hierarchy as required within your business group. Skip the next step since it applies to third parties who administer multiple companies within a single business group.

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

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

2. **Third party benefits providers using Oracle Advanced Benefits only:** Establish a link between your organizations and the relevant benefits program. For

example, link each subscriber organization to the subscriber's benefit program. Use the Organizations tabbed region of the Programs window.

This link enables the Participation process to select the appropriate benefit programs for a particular organization when processing people within that organization. This enhances system performance by limiting the retrieval of records to the person's organization. The process selects the programs pertaining to that organization and then examines the person's eligibility restrictions.

> **Note:** Set the system profile *Limit By Persons Organization* to Yes to enable this feature for the Benefit Service Center window. Set the *Limit to Organization* parameter to limit the Participation batch process.

See: Defining a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

See: Associating an Organization with a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

3. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   If you only need one generic user name for the business group, you can use the predefined New User Registration responsibility.

   Otherwise, create a copy of the New User Registration responsibility for each organization for which you will create a separate generic user name. You might want more than one responsibility for each organization. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

4. Create a generic user name and password for the business group or for each organization, so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 8-69.

   See: Users Window, *Oracle Applications System Administrator's Guide*

5. Add the New User Registration responsibility (or the responsibilities you created in step *3*, page 8-62) to the generic user name for each organization.

6. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

7. Update the *OAB:User to Organization Link* system profile at the responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   > **Important:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

See:System Profile Values Window, *Oracle Applications System Administrator's Guide*

8. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

   Important: Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

9. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations. If it is not, create any new self-service responsibilities you require.

   Note: The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self-service web pages after the initial registration.

10. If you created just one new responsibility in the previous step, change the profile *OAB: Self Registered User Responsibility* at the site level to point to your new responsibility. If you created a different responsibility for each organization, add it to the profile *OAB: Self Registered User Responsibility* at the responsibility level for the New User Registration responsibility (or your copies).

    Note: Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self-service menu for this seeded responsibility gives access to only a subset of employee self-service transactions.

11. Log into Self-Service with the user name and password you created.

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step *4*, page 8-62. After entering it, you must change the password to a generic password you want the new people to use when accessing self-service initially to register.

12. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB: Self Registered User Responsibility profile (step *10*, page 8-63) to the new user name.

Setting Up Generic User IDs in Multiple Business Groups

This procedure is appropriate for third party benefit providers who are creating a separate business group for each company or subscriber organization. It is also appropriate for employers or third party administrators who have multiple business groups on a single database.

To set up self-service registration in multiple business groups:

1. Third party benefits providers: Create a business group to represent each subscriber organization or company in which you are providing benefits. In each business group, create an HR organization for the subscriber.

   Employers: Decide how many generic user names you want to create. You will need at least one generic user name for each business group. You may want to create separate user names for the organizational hierarchies within each business group.

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

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

2. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non-employee Registration and Create User Name functions in self-service.

   Create a copy of the New User Registration responsibility for each business group. You might want more than one responsibility for each business group. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self-service user name and password. This would reduce errors by giving each person access to one function only.

3. Create a generic user name and password for each organization so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 8-69.

   See: Users Window, *Oracle Applications System Administrator's Guide*

4. Add your copy of the New User Registration responsibility to the generic user name for each organization.

5. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

6. Update the *OAB:User to Organization Link* system profile at the user or responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

   > **Important:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

   See: System Profile Values Window, *Oracle Applications Systems Administrator's Guide*

7. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

> **Important:** Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

8. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations.

   - If it is not, create any new self-service responsibilities you require.
   - If it is, create a copy for each organization.

   Update the system profile *HR:Business Group* at the responsibility level to point to the correct business group.

   > **Note:** The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self-service web pages after the initial registration.

9. Update the system profile *OAB: Self Registered User Responsibility* at the responsibility level with the name of the responsibility to use for that organization (created in step).

   > **Note:** Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self-service menu for this seeded responsibility gives access to only a subset of employee self-service transactions.

10. Log into Self-Service with the user name and password you created.

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step *3*, page 8-64. After entering it, you must change the password to the generic password you want new people to use when accessing self-service initially to register.

11. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step **9**, page 8-65) to the new user name.

Configuring the New Employee and Non-Employee Registration Processes

These processes are part of the Human Resources Self-Service item type. The New Employee Registration process displays the pages for new employees to create HR records and self-service user names for themselves. The Non-employee Registration process creates person records in the HRMS system for people who are not employees. This process is used by US benefit providers who have licensed Oracle Advanced Benefits to display pages for participants or dependents to register on the system to elect COBRA coverage.

These processes include, by default, the following pages:

Page	Required?	Purpose
Introduction	No	This page includes a checklist of information that new users must have when entering their registration, and a legal agreement that users must agree to before proceeding.
Verification	No	This page has the user enter minimal information about themselves. This way the system can check for their existence on the database before they attempt to register their data.
Basic Details	Yes	Users enter marital status, and other personal data.
Main Address	Yes	Users can enter a primary address and two other addresses.
Phone Numbers	No	Users can enter the phone numbers they require.
Assignment	Yes, for New Employee process (not in non-employee process)	Employees can fill in information about their organization, job, position, grade, payroll, assignment status, people group, and additional employment information.
Family Member Coverage	No	This page simply asks users whether they wish to enter details of other family members. If they confirm that they do, the Add Family Members page appears.
Add Family Members	No	Users can enter names, addresses, phone numbers, and additional personal information for as many contacts as they require.

Page	Required?	Purpose
Life Events	No	**Relevant to US Third Party Benefits providers only.** Users can select the life event that has made them eligible for a benefits program. This creates a potential life event for the person. NOTE: Employers must remove this page from the process.
User Name	No	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

> **Note:** It is not currently possible to route the information entered by the user for approval by workflow. You can set up Alerts to notify the HR administrator that a new person record has been created.

To configure the Registration processes, you make some changes using Workflow Builder and others using the Personalization Framework.

Using Workflow Builder

To configure the New Employee and Non-employee Registration workflows:

1. Decide which pages you want to use in the process. You *must* include Personal Details, Main Address, Review, Cancel, and--for the New Employee Registration process only--Employment Details (to identify the correct organization).

To delete pages, delete the corresponding activities from the workflow process.

Employers must delete the Life Event page from the registration process. Oracle Advanced Benefits customers can use life event triggers in the database to determine benefit enrollment opportunities. There are no life event restriction capabilities in Standard Benefits.

2. Decide in what sequence you want pages to appear. The Introduction page normally appears first, followed by Personal Details. The only pages that can come before Personal Details are Introduction and Verification. For the Non-employee Registration workflow, the life event page must be before the Personal Details page.

   To change the sequence of pages, edit the workflow process diagram.

   See: Configuring Workflow Objects, page 4-7

Using the Personalization Framework

For each region, decide which region items you want to display. If you have implemented Standard Benefits or Oracle Advanced Benefits, ensure you are including all the fields that capture information required to assess benefits eligibility.

On the Personal Information page:

- You must display the Last Name, Gender and Hire Date fields.
- If you use rates, and therefore need a Payroll, you must require a birth date.
- In non-US countries, you should hide the field Covered Under Medicare.
- Make the Employee Number field enterable if you do not generate employee numbers in your business group.

On the Employment Information page (New Employee Registration only):

- You must display the Organization field.
- If you use rates or element entries, you must display the Payroll field.
- In localizations that use GRE, you should display the GRE field.

On the Verification page:

- You can add fields to assist the search, such as national identifier (for example, social security number), person descriptive flexfields, employee number, and email address.
- If the information entered on the Verification page matches more than one person, the application displays a tables of the duplicates so the user can choose one. Decide what information to include in this table. You can add birth date, Social Security Number, employee number, person descriptive flexfields, and FND username.

For a list of configurable regions, see: New Employee Registration and Non-employee Registration, page 8-57.

See also: Configuring Web Pages, page 5-14

Setting Up Life Events (Advanced Benefits only)

This section is relevant only to third party benefits providers who are including the Life Events page in the process flows. Employers who use Oracle Advanced Benefits should rely on life event triggers to determine the necessary processing instead of using this page.

You determine which life events appear on the Life Events page by the *Selectable for Self-Service* code you enter when you define the life event in the professional user interface. The code choices are:

- All--meaning that the life event can be selected in all self-service processes that use the Life Events page.
- Basic Registration--meaning that the life event can be selected in the New Employee Registration process
- COBRA Registration--meaning that the life event can be selected in the Non-employee Registration process
- Basic and COBRA Registration--meaning that the life event can be selected in both the New Employee and the Non-employee Registration processes

Colliding Life Events:

When a person selects a life event from this page, the process will insert the event as a potential life event for the person. By completing the rest of the registration process, the person may have other life events detected due to life event triggers in the business group. Ensure that your life event collapsing and collision logic leaves a user with just one "winning" potential life event during the Participation Process. You could do this by one of the following approaches:

- Ensuring that all life events that can be selected in Registration have the Override check box selected (and other life events that might be triggered do not). Then, during setup of collapsing life events, you could choose which event should win if there is more than one overriding event.
- Turning off automatic triggering of life events
- Removing Life Event page from workflow and configuring life event triggers in the business group to be detected based on data entered by the person during the registration process. This is the approach that employers should use to determine data changes that may give the person an opportunity to make benefit election changes.

Configuring the Create User Name Process

The Create User Name Process workflow within the Human Resources Self-Service item type displays the pages for people who already have a record on the HR database to create their own self-service user names and passwords.

This process includes, by default, the following pages:

Page	Required?	Purpose
Verification	Yes	This page has the user enter minimal information about themselves. This page must find one and only one person matching the information entered so that the User is connected to the correct HR record
User Name	Yes	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

To configure the Create User Name process:

1. Decide whether users should log on to use this process with a generic company ID or with a guest ID (which would happen automatically and be invisible to the user).
2. If you decide to use a company ID for extra security:
   - Decide whether to create an ID specific to this process, or shared with the new employee registration process. This determines whether the user sees a menu of processes after logging on, or is taken straight to the Create User Name process.
   - Decide how to communicate the company IDs to your users. One approach--if you have licensed Oracle Advanced Benefits--is to create a new communication type and use the Determine Communications batch process. This approach will only work for people currently in the database.
3. If you decide to use a guest ID, there are three approaches you can use. Do ***one*** of the following:
   - In the Users window, create the guest user with the user name GUESTOAB and the password GUESTOAB. You can grant this user the predefined New User Registration responsibility or your copy of it. Log on using this user to change the password to WELCOME.

     Call the supplied pl/sql procedure ben_guest_user_api without passing a user name and password. The procedure uses user name GUESTOAB and the password WELCOME. It passes the user name and unencrypted password into the call to oraclehomepage.home().

Note: Call ben_guest_user_api from a URL in this way: [APPS_WEB_AGENT]ben_guest_user_api.login?i_1=USERNAME&i_2=PASSWORD&rmode=2

- In the Users window, create the guest user with any name and password. Log on using this user to change the password.

  Call the supplied pl/sql procedure ben_guest_user_api, passing a user name and unencrypted password. (For the format of the call, see the Note above) If the user name is passed in, the password must be too, or the procedure returns an error. The procedure passes the user name and unencrypted password into the call to oraclehomepage.home().

- Call oraclehomepage.home directly passing a user name/password if desired. (For example, oraclehomepage.home?userid=<your user name>&password=<your password>).

4. On the Verification page:

   - Decide what information a user must enter on the Verification page of the system to identify the existing HR person record. By default this information is: first name, last name, and birth date. You can add the following fields: national identifier (such as social security number), employee number, email address, supervisor, organization, location, address, and person flexfields.

   - Decide what to display if the information entered on the Verification page matches more than one person. By default, the application displays an error.

   For a list of configurable regions, see: Create User Name, page 8-58.

5. Decide what should happen if users try to create a user name when they do not have an existing HR record. By default the application issues an error directing the user to retry or Cancel to the menu and contact their administrator. You can configure the message text and the URL associated with the Cancel button. For example, the Cancel button could take them straight to the New Employee Registration process, rather than to the menu.

6. Determine which responsibility to assign to the new users. By default, all new users are granted the responsibility set in the OAB:Self Registered User Responsibility profile option. You may wish to configure this to vary the responsibility by the person type (especially employee versus non-employee).

   To do this, you can create different generic IDs (and responsibilities) for different groups of users and change the OAB:Self Registered User Responsibility profile option at responsibility level.

Generating Self-Service User Names and Passwords

When a person has registered themselves in the HR database, you can choose to generate their self-service user name and password, rather than have them create their own. You can implement this using user hooks.

To generate user names and passwords:

1. Write the PL/SQL to generate the user names and passwords as you require, using the user hooks.

See: User Hooks To Generate User Names for New User Registration (appendix), page 8-60.

2. Optionally, edit the instruction text on the User ID page, hide the user name and password fields, and change the button label from Next to Generate.
3. Consider how you will inform users of their user name. One approach--for Oracle Advanced Benefits customers--is to use a user hook to call your own code that populates the communication tables, and use this information to alert your users. Another approach is to generate the user names in a standard and predictable way from users' names or national identifiers.

9

Workforce Sourcing and Deployment

Workforce Sourcing and Deployment Overview

SSHR provides self-service functions within the following area of Workforce Sourcing and Deployment:

- Recruiting and Hiring
- People Management

This chapter looks in detail at the self-service functions available within this area and provides information on the functionality and configuration options for each function.

Using SSHR for Workforce Sourcing and Deployment

How can I use SSHR for my workforce sourcing and deployment processes?

You can use the New Hire processes to hire applicants and to bring contingent workers to your enterprise. These processes enable you to enter data in a series of web pages and to then finally hire the applicant or contingent worker.

Can I modify these processes to suit the requirements of my enterprise

Yes. The sequence of web pages used in the New Hire processes is defined in the Workflow Builder. To modify this sequence, you can create your own version of the New Hire processes and chain together the required modules in a different sequence.

Does SSHR carry out any checks when I hire an applicant or contingent worker using the self-service interface?

As in the Professional Forms Interface, SSHR can check for any duplicate persons within the system if required. If you activate this functionality, SSHR displays a list of any possible duplicate persons.

Can I access the iRecruitment functionality using the self-service interface?

Although iRecruitment uses a self-service interface and the Oracle Applications Framework functionality, you cannot access iRecruitment directly from SSHR. To access the iRecruitment functionality, you must purchase the appropriate license.

What are the advantages to the HR Department of using SSHR?

Potential self-service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to more complex tasks, such as informing employees of their current vacation allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

How does SSHR improve the accuracy of employee data?

Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay check is mailed to the correct address. With SSHR, employees can maintain their own data and ensure that it is correct.

How does SSHR improve a manager's access to information?

Managers using SSHR can access the information for their employees using a hierarchy tree or, if enabled, the Person Search function. Security mechanisms ensure that managers can only retrieve information for those employees to whom they have access.

In addition, the Employee Directory provides contact information for employees within the enterprise. Users can search for people using different search criteria and look up contact and organizational information.

Can I use SSHR to carry out standard HR procedures?

Yes. You can use the Manage Employment Events functionality to carry out such procedures as granting a salary increase, reassigning an employee to a new position, or terminating an employee. You can use the Workflow Builder functionality to chain different modules together to create enterprise-specific procedures.

Can workers use SSHR to apply for jobs online?

Yes. Employees and contingent workers can use the Apply for Job module to search and apply for jobs online. Search criteria includes job location and vacancy date. They can attach a resume to their job application.

Employee Demographics

Personal Information Modules

The Personal Information function enables self-service users to enter and update their own personal records. This function is integrated within Oracle Workflow. By using Oracle Workflow and the Personalization Framework, you can design a process to control which personal details a user can change or display. You can also design an approval process for any changes made by employees, workers, or managers. You use the Personal Information function to update basic details such as Marital Status, Title, First and Last Name, Addresses, and Emergency Contacts.

Personalizing the Personal Information Functions

There are several personalization options available to you for the Personal Information functions. Function-specific personalizations are listed in the relevant functional documentation, however, you should note the following general points:

- You can include Extra Information Types (EITs) and Special Information Types (SITs) in your Personal Information process flows.

  See: Configuring Workflow Objects, page 4-7

- You can personalize the Personal Information Overview page to display the Dependents and Beneficiaries region.
- You can make the Personal Information pages read-only by hiding the Update buttons.
- You can add selected fields to the Personal Information pages. To display information on the available fields, click the "About this Page" link at the bottom of the Personal Information pages. This page displays subtabs that display information on the page including the view objects and associated entity objects and attributes.

  > **Note:** If the "About this Page" link is not displayed, check the value of the FND: Diagnostics profile option. Set this profile to Yes at the required level.

  For more information on the "About this Page" feature, see: Discovering Page, Technology Stack and Session Information, in the *Oracle Applications Framework: Developer's Guide* (Metalink Note: 268969.1).

- If you personalize a field in one of the Personal Information modules, for example, Phone Numbers, and want to replicate this change throughout the Personal Information function, you also need to make the change in the appropriate pages, for example, the Personal Information: Overview page.

Future-Dated Transactions

There are restrictions on future-dated transactions. If you submit an address change with an effective date of 6 months in the future, for example, you cannot enter another address change before the initial transaction is effective. When you display the Personal Information Overview page, you can view any future transactions by clicking the View Future Changes button. This button only appears if a future change exists.

Note: This does not apply to the Phone Number module which does not require an effective date.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Personal Information

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Basic Details

The Basic Details module records information such as a user's name and marital status.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Basic Details

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Basic Details Page

Region	Tip Type	Message Name
Basic Detail Update Name Entry	Long Message	HR_TIP_EFFECTIVE_DATE
Basic Detail Update Name Entry	Long Message	HR_TIP_PREFIX
Basic Detail Update Name Entry	Long Message	HR_TIP_SUFFIX
Basic Detail Update Name Entry	Long Message	HR_TIP_PREFERRED_NAME
Basic Detail Update Name Entry	Long Message	HR_TIP_PREVIOUS_ LASTNAME
Basic Detail Update Name Entry	Instruction	HR_INST_BASIC_DETAILS_ FORM
Basic Details Update Entry	Instruction	HR_PERINFO_FUTURE_ CHANGES

Basic Details Action Page

Region	Tip Type	Message Name
Basic Details Action Type	Instruction	HR_INST_BASIC_DETAILS_ TOC

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Basic Details Page

Region	Flex Name	Flex Code
Basic Detail Update Other Entry	Further Person Information	Person Developer DF
Basic Detail Update Other Entry	Additional Personal Details	PER_PEOPLE

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Main Address

The Main Address module stores the worker's primary address. You cannot delete this primary addressl.

You choose how to display your address in SSHR by configuring the Personal Address Details descriptive flexfield.

Address styles for new addresses

When you enter a new address in SSHR, you must select a country. The SSHR application uses the localization code for this country to select an address style from the segment inclusion list. For example, if you select United States as the country, the application retrieves the first segment with the prefix US from the segment inclusion list. The order of the segment list determines which style is selected by the application. For example, if the segment list contains US_CUSTOM before US and US_GLB, the application chooses US_CUSTOM.

Address styles for existing addresses

If you are updating an existing address and you are not required to select a country, or if the address is read-only, the application uses the existing style. The required style must be available in the segment list.

Generic address styles

You use the GENERIC address style to provide a style for localizations without a defined style in the flex segment list. For example, if you select India (IN) as the country when entering a new address, and if no IN segment is available in the flex segment inclusion list, the application uses the GENERIC style. For this reason, you must always include a GENERIC style in the flex inclusion list.

If required, you can create your own generic style with the name GENERIC_<*name*>, for example, GENERIC_CUSTOM. If the application finds the GENERIC_CUSTOM style before the GENERIC style in the segment list, the application uses the custom style.

Changing Address Styles

If you change from one style to another, you may see differences between the styles and the address may not appear as expected.

For example, you enter applicant details in iRecruitment and use the US_IRC address style. This style uses the following segments:

- segment1 (Street)
- segment2 (Town or City)
- segment3 (District)

Then you hire the applicant and display address information in SSHR using the US address style. This style uses the following segments:

- segment1 (Street)
- segment2 (Town or City)

- segment4 (Country)

Both segment1 and segment2 are included in both styles and displayed on the SSHR page. However, segment3 from the US_IRC style is not displayed because it is not included in the US style. segment4 is displayed but has no value as it was not available in the original address entry page.

> **Note:** This behavior applies whenever you switch from a XX_xxxx style to a XX style.

For information on the Personal Address Details descriptive flexfield, see: Changing the Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Main Address

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Main Address Page

Region	Tip Type	Message Name
Main Address Update	Long Message	HR_TIP_MADDR_EFFECTIVE_DATE
Main Address Update	Long Message	HR_TIP_MADDR_ADDRESS_TYPE
Main Address Update	Instruction	HR_INST_MAIN_CORRECT_ADDRESS
Main Address Update	Instruction	HR_INST_MAIN_NEW_CHG_ADDRESS
Main Address Update	Instruction	HR_INST_VIEW_FUTURE_CHANGES

Main Address Action Page

Region	Tip Type	Message Name
Main Address Action Type	Instruction	HR_INST_MAIN_ADDRESS_TOC

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Main Address Page

Region	Flex Name	Flex Code
Main Address Update	Personal Address Details	Address Structure
Main Address Update	Additional Address Details	PER_ADDRESSES

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Secondary Address

The Secondary Address module stores additional addresses for a self-service user. Unlike the Main Address, you can delete the Secondary Address for an individual.

For information on address styles for SSHR, see: Main Address, page 9-6

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Secondary Address

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Other Address Page

Region	Tip Type	Message Name
Second Address Update	Instruction	HR_TIP_SADDR_EFFECTIVE_DATE
Second Address Update	Instruction	HR_TIP_SADDR_ADDRESS_TYPE
Second Address Update	Instruction	HR_INST_SCND_CORRECT_CHANGES
Second Address Update	Instruction	HR_INST_SCND_NEW_CHG_ADDRESS
Second Address Update	Instruction	HR_INST_VIEW_FUTURE_ADDRESS

Other Address Action Page

Region	Tip Type	Message Name
Secondary Address Action	Instruction	HR_INST_SECONDARY_ADDRESS_TOC

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Other Address Page

Region	Flex Name	Flex Code
Secondary Address Update	Personal Address Information	Address Structure
Secondary Address Update	Additional Address Details	PER ADDRESSES

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Phone Numbers

The Phone Numbers module stores the telephone information for an self-service user.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Phone Numbers

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Personal Information Overview Page

Region	Tip Type	Message Name
Phone Numbers Overview	Instruction	HR_PERINFO_PHONES_ ABOVE_LIMIT
Phone Numbers Update	Instruction	HR_INST_PHONES_FORM

Other Addresses Page

Region	Tip Type	Message Name
Second Address Update	Instruction	HR_INST_SCND_NEW_ CHG_ADDRESS
Second Address Update	Instruction	HR_INST_VIEW_FUTURE_ CHANGES

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Phone Numbers Details Page

Region	Flex Name	Flex Code
Phone Number Details	Additional Telephone Number Details	PER_PHONES

Phone Details Review Page

Region	Flex Name	Flex Code
Details Review	Additional Telephone Number Details	PER_PHONES

Configurable Profile Options

Not applicable

Emergency Contacts

The Emergency Contacts module stores the contact information for emergency contacts (telephone information and address). Self-service users can add and delete people from the list of emergency contacts as required. When the user has created or edited a contact, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the contact until it has been approved or rejected by the approver.

Personalizing the Emergency Contacts Page

The standard layout for the Emergency Contacts page includes three telephone numbers. You can, however, personalize the page to display your custom phone types if required.

You can also personalize the page to create a read-only view if required.

Creating Contacts Using SSHR Only

If you choose to create an emergency contact or dependent using only SSHR (Personal Information function), instead of the forms-based interface, the following situation applies:

- The application creates two records in the per_contact_relationships table:
  - one record with the value EMRG in the contact_type column
  - one record with the value of the actual relationship (for example, spouse, brother) in the contact_type column

    Note: Information on whether or not the contact is the Primary Contact is held only for the Emergency Contact record (record with the EMRG value in the contact_type column). This record may have also the primary_flag set to Y or N.

- For the actual relationship record only, the personal_flag column contains the value Y (for Yes).

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Contacts

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Contacts Page

Region	Tip Type	Message Name
Contacts Main Table Region	Instruction	HR_289383_CONT_EMRG_ MAIN_MSG
Contacts Main Table Region	Long Message	HR_TIP_SUFFIX
Contacts Main Table Region	Long Message	HR_TIP_PREFIX
Contacts Main Table Region	Long Message	HR_289371_DEP_BNF_FLAG_ TIP
Contacts Main Table Region	Long Message	HR_289373_PRMRY_REL_MA IN_TIP
Contact Phone Numbers	Instruction	HR_INT_PHONES_FORM
Contact Address	Instruction	HR_INST_MAIN_CORRECT_ ADDRESS

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Region	Flex Name (SSHR)	Flex Title	Flex Code
General Information	Contact Additional Details	Add'l Contact Rel'ship Det's	PER_CONTACTS
	Person Developer DF	Further Person Information	Person Developer DF
	HrFurtherContRel	Further Contact R'ship Information	Contact Relship Developer DF
	HrAddPerDetFlexSs	Additional Person Details	PER_PEOPLE

Configurable Profile Options

Not applicable

Dependents and Beneficiaries

The Dependents and Beneficiaries module stores the names and contact information for a user's dependents and beneficiaries. When the user has created or edited a dependent or beneficiary, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the dependent or beneficiary until the addition or change has been approved or rejected by the approver.

Creating Contacts Using SSHR Only

If you choose to create a dependent or beneficiary using only SSHR (Personal Information function), instead of the forms-based interface, the following situation applies:

- The application creates a record in the per_contact_relationships table.
- The record contains the value of the actual relationship (for example, spouse, brother) in the contact_type column.
- The record contains the value of Y (for Yes) in the personal_flag column.

The situation is slightly different if you create an emergency contact.

See: Emergency Contacts, page 9-11

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 3-8

Workflow

Not applicable

Configurable Tips and Instructions

Contacts Page

Region	Tip Type	Message Name
Contacts Main Table Region	Instruction	HR_289383_CONT_EMRG_MAIN_MSG
Contacts Main Table Region	Long Message	HR_TIP_SUFFIX
Contacts Main Table Region	Long Message	HR_TIP_PREFIX
Contacts Main Table Region	Long Message	HR_289372_EMRG_CONT_FLAG_TIP
Contacts Main Table Region	Long Message	HR_289373_PRMRY_REL_MAIN_TIP
Contact Phone Numbers	Instruction	HR_INT_PHONES_FORM
Contact Address	Instruction	HR_INST_MAIN_CORRECT_ADDRESS
Contacts Main Table Region	Instruction	HR_289371_DEP_BNF_FLAG_TIP

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Region	Flex Name (SSHR)	Flex Title	Flex Code
General Information	Contact Additional Details	Add'l Contact Rel'ship Det's	PER_CONTACTS
	Person Developer DF	Further Person Information	Person Developer DF
	HrFurtherContRel	Further Contact R'ship Information	Contact Relship Developer DF
	HrAddPerDetFlexSs	Additional Person Details	PER_PEOPLE
Address	HrAddressFlex	Personal Address Details	Address Structure
	HrAdditionalAddress	Additional Address Details	PER_ADDRESSES

Configurable Profile Options

Not applicable

Contact Extra Information (Japan)

The Contact Extra Information function enables you to enter and maintain additional contact information in SSHR. Statutory regulations often require that employees and workers provide specific information on dependents and beneficiaries for health insurance and income tax purposes and SSHR enables you to store this information using Extra Information Types (EITs).

Both employee/workers and managers can use the Contact Extra Information function. If you are a manager, you first select the person for whom you are entering information, and then select the dependent or beneficiary from the Choose Contact page. If you are an employee, you access the Choose Contact page directly.

> **Note:** You create the dependent and beneficiary information using the Dependents and Beneficiaries page of the Personal Information function.
>
> See: Dependents and Beneficiaries, page 9-13

When you have selected the dependent or beneficiary, the application displays the available EITs for the dependent or beneficiary. You can create one EIT for each of the following groups:

- Health Insurance Law

  Create **one** of the following information types:

  - Health Insurance Dependent - dependent (non-spouse) information for health insurance and pension purposes. The information includes occupation, income, and qualification information.
  - Health Insurance Spouse - information on a spouse for health insurance and pension purposes. The information includes pension number, qualification information, occupation, income, nationality, and disqualification information, if applicable.
- Income Tax Law

  Create **one** of the following information types:

  - Income Tax Dependent - dependent information required if income tax is deducted from the main income earner. The information includes occupation, income, and disability information, if applicable.
  - Income Tax Dependent on Other Employee - dependent information required if income tax is deducted from an alternative income earner. The information includes occupation, transfer details, and relationship details.
  - Income Tax Dependent on Other Payroll - dependent information required for deduction of income tax from a secondary income earner. The information includes employer details, income, and transfer details.

Menu and Function Names

You can access this module from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Contact Extra Information
Employee Self Service	Contact Extra Information

> **Note:** The function is also included in the Manager and Personal Action submenus.

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Contact Extra Information Types

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Dependents and Beneficiaries	Instruction	HR_CEI_CONTACT_NOT_SELECTED
Extra Information Types	Message	HR_CEI_CANNOT_UPDATE_DELETE_SS
	Message	HR_CEI_CANNOT_UPDATE_FT_CHG_SS
	Message	HR_CEI_CANNOT_UPDATE_FT_DEL_SS
	Message	HR_CEI_CANNOT_DELETE_FT_CHG_SS
	Message	HR_CEI_CANNOT_DELETE_FT_DEL_SS
	Message	HR_CEI_DEL_ACT_ENTER_DATE

Configurable Flexfields

Region	Flex Name	Flex Code
Extra Information Types	Extra Contact Information	Extra Contact Info DDF

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Display Person Name	Site, Application, Responsibility, User	Brief Name, Custom Name, Full Name	Brief

HR:Display Brief Person Name

If you set this profile option to Brief Name (default value), the application displays the person names in the brief format instead of the long name format.

Documents of Record

The Documents of Record function enables you to store information on documents such as work permits, visa information, and medical certificates in one place. If required, you can also upload electronic versions of documents as attachments.

As a worker, you can create, maintain, and delete your own documents of record. If your document requires authorization, the verifier receives a notification.

> **Note:** The person who registers the document type defines whether it requires authorization.

The default verifier is your supervisor. On verification, you also receive a notification.

> **Note:** If the subject of the document is a contact or other person who does not exist as a user in Oracle HRMS, no notification is received.

As a manager or HR Professional, you can create, maintain, and delete documents for your direct reports and for other individuals whose records you can access.

> **Note:** HR Professional users access the Documents of Record functionality using the forms-based interface. Self-service users (individuals and managers) access the functionality using the appropriate self-service menu.

Using the Documents of Record Function

The initial pages for the Documents of Record function differ according to the navigation path selected. If you use the Employee Self-Service responsibility, the first page lists your existing documents of record. Similarly, if you use the Manager Self-Service responsibility, the first page lists any existing documents of record for the worker selected in the hierarchy. From here, you can view, create, maintain, or delete documents of record.

If you are using a HR Professional responsibility and accessing the function from the forms-based interface, you can display a search page (by navigating to People > Search Documents of Record). Alternatively, to view, create, or maintain the documents of record for a person, display the person's record in the People window and access the Documents of Record function through the task flow (Others button).

As an HR Professional, you can also access the Documents of Record pages by selecting Fastpath > Documents of Record, and then selecting a person for the transactions.

Menu and Function Names

You can access this module from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Documents of Record
Employee Self Service	Documents of Record
HRMS Navigator (HR Professional menus)	People > Search Documents of Record People > Enter and Maintain > Documents of Record (access from task flow). FastPath > Documents of Record.

Workflow

The workflow details for this function are listed below:

Workflow Process Display Name:

Document of Record Reviewee Process

Document of Record Reviewer Process

Configurable Workflow Attributes:

The following attributes are used in the Document of Record Reviewee process and Document of Record Reviewer process:

Activity Display Name	Attribute Display Name	Description
Notify Document of Record Reviewee/Notify Document of Record Reviewer	Reviewee	Name of person whose document of record is created.
	Document of Record Type	Type of document being created.
	Valid From	Validity start date for document.
	Valid To	Validity end date for document.
	Here	URL of document of record page.
	Reviewer	Name of person who reviews document of record.
	Review Action	Action being carried out, for example, creation or deletion of document.
	Effective Date	Effective date for transaction.

Configurable Flexfields

Region	Flex Prompt (SSHR)	Flex Name
Extra Information	Document Type	Extra Document Information
Additional Document Details	AddDocDtlsDff	Extra Document Info Details

Configurable Profile Options

None

Additional Configuration Steps

To supplement the delivered document types, categories, and subcategories, you can create your own objects to suit your business requirements.

See: Creating Document Categories, Subcategories, and Types, *Configuring, Reporting, and System Administration Guide*

Professional Details Modules

There are five modules within Professional Details: Competence Profiles, Education and Qualifications, Other Professional Awards, Work Preferences, and Resume. In addition, there are two modules for the US localization (Tenure Tracking and Academic Rank). Employees can maintain their own details or managers can maintain the details for their direct reports.

Education and Qualifications

This module allows users to update a list of qualifications or create a new list of qualifications. The qualifications are academic qualifications obtained at an educational institution. The user can also add, edit, and delete the major subjects for the qualifications. When the user has created or edited a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

The Education and Qualifications overview page shows the list of approved education qualifications for a person and also those qualifications that are pending approval.

> **Important: Personalizing Table Header Prompts for Education and Qualifications**
>
> With the introduction of version 11.i.10 of the Oracle Applications Framework (OAF), Oracle has changed the definition of some elements in the Education and Qualifications Review page. If you have previously personalized this page by changing the table header prompts for the tables within the Education and Qualifications Review page, Oracle recommends that you check the personalizations and make the changes again if necessary.
>
> See: Configuring Web Pages, page 5-14

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Education and Qualifications Mgr
Employee Self Service	Education and Qualifications

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Education and Qualifications

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Education and Qualifications Overview Page

Region	Tip Type	Message Name
Qualification Approved Header	Instruction	HR_INST_NO_QUALIFICATION_FOUND
Qualification Overview Page	Instruction	HR_INST_ADD_QUALIFICATION
Qualification Approved Header	Instruction	HR_INST_QUALIFICATION_FOUND

Add Qualifications Page

Region	Tip Type	Message Name
Qualification Add Main Page	Instruction	HR_INST_NEW_QUALIFICATION
Qualification Add Main Page	Instruction	HR_INST_EDIT_QUALIFICATION
Add Qualification Add School		HR_INST_SCHOOL_NAME

Add Subject Page

Region	Tip Type	Message Name
Qualification Add Subject Main Page	Instruction	HR_INST_AWARD_ADD_ SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_AWARD_EDIT_ SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_QUA_ADD_ SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_QUA_EDIT_ SUBJECT

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Add Qualifications Page

Region	Flex Name	Flex Code
Qualification Add Qualification	Additional Qualification Details	PER_QUALIFICATIONS
Qualification Add Qualification	Further Qualification Information	Qualification Developer DF
Add Qualification Add School	Additional Establishment Attendance Details	PER_ESTABLISHMENT_ ATTENDANCES

Add Subject Page

Region	Flex Name	Flex Code
Add Subject	Additional Subjects Taken Details	PER_SUBJECTS_TAKEN
Add Subject	Further Subject Information	Subject Developer DF

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Free Text School Name Allowed in Self Service	All	Null, Yes/No	Null

The following profile option controls a user's ability to enter school names

HR: Free Text School Name Allowed in Self Service

Users can add a school names either in free text, or they can select the school name from a list of values. You can prevent users from entering the school name in free text and only allow them to select the school name from a list of values, by setting the profile option

HR: Free Text School Name Allowed in Self Service. If this is set to Yes or Null (the default), then free form entry of the school name will be possible. If you set this profile option to No, the list of values will be used to validate the entry of the school name.

Other Professional Qualifications

This module allows users to add professional qualifications to an existing list of qualifications or to create a new list of professional qualifications. *Academic* awards are entered in the Education and Qualifications page. When the user has created or edited a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

> **Important: Personalizing Table Header Prompts for Other Professional Qualifications**
>
> With the introduction of version 11.i.10 of the Oracle Applications Framework (OAF), Oracle has changed the definition of some elements in the Other Professional Qualifications Review page. If you have previously personalized this page by changing the table header prompts for the tables within the Other Professional Qualifications page, Oracle recommends that you check the personalizations and make the changes again if necessary.
>
> See: Configuring Web Pages, page 5-14

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Other Professional Qualifications Mgr
Employee Self Service	Other Professional Qualifications

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Other Professional Qualifications

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Qualifications Page

Region	Tip Type	Message Name
Awards Add Main Page	Instruction	HR_INST_NEW_AWARD
Awards Add Main Page	Instruction	HR_INST_EDIT_AWARD

Other Professional Qualifications Overview Page

Region	Tip Type	Message Name
Award Approved Header	Instruction	HR_INST_NO_AWARD_FOUND
Award Approved Header	Instruction	HR_INST_AWARD_FOUND
Award Overview Page	Instruction	HR_INST_ADD_AWARD

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Qualifications Page

Region	Flex Name	Flex Code
Awards Add Qualification	Additional Qualification Details	PER_QUALIFICATIONS
Awards Add Qualification	Further Qualification Information	Qualification Developer DF

Add Subject Page

Region	Flex Name	Flex Code
Add Subject	Additional Subjects Taken Details	PER_SUBJECTS_TAKEN
Add Subject	Further Subject Information	Subject Developer DF

Configurable Profile Options

Not applicable

Competency Profile

The SSHR Competency Profile module enables users to view and update existing competency profiles. The function is available to predefined Manager and Employee responsibilities.

The Competency Profile module comprises the following pages:

Competency Overview	/oracle/apps/per/selfservice/competency/profile/webui/OverviewPG
Add Competencies	/oracle/apps/per/selfservice/competency/profile/webui/AddCompsPG
Correct Competencies	/oracle/apps/per/selfservice/competency/profile/webui/CorrectCompsPG
Enter New Levels	/oracle/apps/per/selfservice/competency/profile/webui/NewLevelsPG
Search and Select: Competencies	/oracle/apps/per/selfservice/competency/profile/webui/SearchPG
Review	/oracle/apps/per/selfservice/competency/profile/webui/ReviewPG
Confirmation	/oracle/apps/per/selfservice/competency/profile/webui/ConfirmPG

Menu and Function Names

Users can access this module from the following menus and functions:

User Menu Name	Function Name
Manager Self Service > Professional Details	Competency Profile (HR_COMPETENCE_PROFILE_SS)
Employee Self Service > Professional Details	Competency Profile (HR_COMPETENCE_PROFILE_SS)

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Self Service Generic Approval Process

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Review Competencies Page

Region	Tip Type	Message Name
Additional Information	Instruction	PQH_SS_REVIEW_ADDL_INFO_INT
Additional Information	Instruction	PQH_SS_REVIEW_ATTACH_INT

Confirmation Page

Region	Tip Type	Message Name
	Instruction	HR_CONFIRM_SMT_4_APPR_SS
	Instruction	HR_CONFIRM_APPLD_CHGS_SS

See: Adding Instructions to a Web Page, page 5-25

Configurable Flexfields

Competency Overview Page

Region	Flex Name	Flex Code
Person Summary	Further Person Information	Person Developer DF
Person Summary	Additional Personal Details	PER_PEOPLE
Proposed Changes Table	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS
Current Competencies Table	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS
History Table	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Add Competencies Page

Region	Flex Name	Flex Code
Person Summary	Further Person Information	Person Developer DF
Person Summary	Additional Personal Details	PER_PEOPLE
New Competencies Table	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Correct Competencies Page

Region	Flex Name	Flex Code
Person Summary	Further Person Information	Person Developer DF
Person Summary	Additional Personal Details	PER_PEOPLE
Correct Competencies Table	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Enter New Levels Page

Region	Flex Name	Flex Code
Person Summary	Further Person Information	Person Developer DF
Person Summary	Additional Personal Details	PER_PEOPLE
New Levels Table	Add'l Competence Element Det's	PER_COMPETENCE_ ELEMENTS

Review Competencies Page

Region	Flex Name	Flex Code
Person Summary	Further Person Information	Person Developer DF
Person Summary	Additional Personal Details	PER_PEOPLE
Corrected Competencies Table	Add'l Competence Element Det's	PER_COMPETENCE_ ELEMENTS
New Levels Entered Table	Add'l Competence Element Det's	PER_COMPETENCE ELEMENTS
New Competencies Table	Add'l Competence Element Det's	PER_COMPETENCE_ ELEMENTS

Configurable Profile Options

Not applicable

Work Preferences

The Work Preferences function enables users to store information about their preferred work location and their relocation and travel preferences. Employees can enter the information for themselves and managers can enter the information for their direct reports.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Work Preferences Mgr
Employee Self Service	Work Preferences

See: Defining Menus for SSHR, page 3-8

Workflow

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Work Preferences	Instruction	HR_INST_WORK_ PREFERENCES

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Region	Flex Name	Flex Code
Domestic Options	Add'l Deployment Factor Det's	Add'l Deployment Factor Det's

Configurable Profile Options

Not applicable

Resume

The Resume module enables you to use standard attachment functionality to store and update their own resume. You can upload a resume, add a link (URL) to an online resume, or edit the resume text. A manager can also store a resume for an employee or worker or update the resume with new information.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Resume Mgr
Employee Self Service	Resume

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Resume	Instruction	HR_INST_TEXT_RESUME

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Tenure Status (US)

Tenure is a unique term in the "Education Industry" that means the completion of professional criteria and an extended probationary period. This results in a person attaining permanent employment with the institution. The Tenure Status module captures the following information:

- Tenure status
- Date determined
- Projected tenure date
- Adjusted tenure date
- Reason for adjustment
- Subject to tenure quota?

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Professional Details	Tenure Status
Professional Details	Tenure Status Overview
Employee Self Service	Tenure Status
Manager Self Service	Tenure Status

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Tenure Status

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Region	Attribute Name	FlexField Name
Tenure Status Flex	Descriptive Flexfield	Extra Person Info DDF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Academic Rank (US)

The Academic Rank module is a method for promotional progression within Higher Education. The Academic Rank module captures the following information:

- Academic rank
- Start date and end date
- Next academic rank
- Projected date

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Academic Rank
Manager Self Service	Academic Rank

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Academic Rank

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Region	Attribute Name	FlexField Name
Academic Rank Flex	Descriptive Flexfield	Extra Person Info DDF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Employment Verification

The Employment Verification function enables you (as an employee) to release employment and salary information to an external organization to complete a mortgage or loan application, for example.

To release this information, you select the required template (Employment Information or Employment with Salary Information) and provide the recipient's e-mail details. By default, the recipient's access to the released information expires after either 5 days or 5 visits, whichever occurs first.

The recipient of the information receives an e-mail notification containing an access URL, which links to an HTML page containing the released information.

> **Note:** The external recipient sees current data, in other words, data that is valid at the time of request by the verifier. If an employee releases the information today and the recipient views it tomorrow, they see the current employment information about the employee. If the employee has been terminated, an error message is displayed and no information is available.

Personalizing the Employment Verification Pages

As a system administrator, you can personalize the Employment Information and Employment with Salary Information templates. You can use the Personalization Framework to display items that are hidden by default, and you can create new items to display, if applicable.

See: The Personalization Framework, page 5-3

> **Note:** Any personalization changes that you make to the template pages are also apparent in the pages displayed to the external recipient.

You can also change the default values for the expiry period and maximum number of visits by changing the initial value of the Expires in or Visits item in the Recipient Information region.

Menu and Function Names

You can access this module from the following menus and functions:

Menu Name	Function Name
Employee Self-Service	Employment Verification
Employment Verification Global Menu	Employment Verification External

Workflow

There are no workflow processes for this function. The following workflow item type contains the associated workflow messages:

- HRVERF (Employment Verification)

Configurable Flexfields

Region	SSHR Flex Name	Flexfield Title
	Person Developer DF	Further Person Information
	PerPeople DDF	
	Salary Flex	
	PerAsg DFF	Additional Assignment Details
Employment and Salary	Person Developer DF	Further Person Information
	AddnPersonDetails	Extra Person Information
	AssignDescFlex	Extra Assignment Information
Employment	Person Developer DF1	Further Person Information
	AddnPersonDetails1	Extra Person Details
	AssignDescFlex	Extra Assignment Information

Configurable Profile Options

HR: Verification External Node

You use this profile option to set the URL for the external node, for example, http://abc1234.us.organization.com. This node redirects the access request from outside the security firewall to the HTML page containing the released information.

Additional Configuration Steps

1. To enable the workflow to send notifications to the external recipients, you must configure the Workflow Mailer.

   See: Implementing Notification Mailers, *Oracle Workflow Administrator's Guide*

2. You can run the following purge processes with the Employment Verification functionality:

- To purge obsolete runtime data, for example, workflow role information and FYI notifications:

  See: Running the Workflow Cleanup Process, page 4-9

Employee Directory

The Employee Directory Module

The Employee Directory provides an easily accessible, highly configurable lookup of people within your enterprise. Users can search for a specific person against a range of data, and navigate through the organization to view details of a person's manager or direct reports. You can set up the Employee Directory to search for people from a single business group or from multiple business groups as required.

The directory extracts information from the Employee Directory repository. The repository tables hold a snapshot of de-normalized HRMS data. In addition, users can upload their personal picture to the repository.

The Employee Directory includes the following features:

- **Anonymous access to the Employee Directory repository with simple and advance search features**

  You can provide users with anonymous access to the read-only directory. Users can use basic or advanced search facilities to find people and their assignment details.

- **Controlled access to the HRMS data during major reorganization processes within the company**

  The repository data is independent of the HRMS data, and therefore remains static if your organization is undergoing internal change. The directory data will not change until you refresh the repository.

- **Constant and immediate availability**

  The directory is available continuously, and supports concurrent users.

- **Presentation of complex Oracle HRMS data**

  The associated HRMS data is de-normalized into the Employee Directory repository tables, enabling users to view a range of data relating to workers and their assignments in a simple layout. In addition, the directory is not dealing with temporal data.

- **Time zone support**

  The Employee Details page can display the local time at the worker's location.

- **MLS support**

  If your configuration includes the MLS dictionary, you can display organization, position, and job values in the local language.

- **Multi-assignment support**

  You can view multiple assignments for each worker.

- **Support for multiple data sources**

  You can import data from heterogeneous data sources.

Search Facility

The simple search field enables users to enter a value to match against any of the following columns in the repository for the worker's primary assignment:

- First Name
- Last Name
- Full Name
- Preferred Name
- E-mail Address
- Work Phone Number
- Alternate First Name
- Alternate Last name

> **Note:** To search on a telephone number enter the numbers only, without spaces or other characters. The telephone number search format can be altered using the override packages. For an example, see: Customer Override for Single Sign On, page 9-39

The Advanced Search page enables users to search on multiple values. You can configure this page to display the most appropriate search fields for your requirements.

See Configuring Web Pages, page 5-14

Deploying the Employee Directory

You can choose to deploy the Employee Directory in any of the following ways:

- **Self Service Personal Home Page**

  Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

  See: Self-Service Menus and User Access, page 2-9

  The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-27 to configure this menu.

- **Portal**

  For information on configuring Portal, see the following notes on MetaLink:

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=132035.1

Populating the Employee Directory

Before you can use the Employee Directory you must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 9-40

Editing Personal Details

From the directory, users can log on to Self Service modules to update their personal information. For example, a user can log on to the employee directory to update a phone number or change name information. See: Enabling Single Sign On to Self Service, page 9-39

Personal Picture

Users can upload their personal picture into the repository using the Update Profile page if you have enabled Single Sign On. See: Enabling Single Sign On To Self Service, page 9-39.

The repository stores the images as locally.

Name Fields

The Display Name is a format which is used in the following places:

Page	Item
Employee Detail	Header title (Employee Detail Region)
	Name
	Tree
	Manager
	Representative1
	Representative2
	Representative3
	Representative4
Organization Hierarchy	Employee Name
Simple Search	Employee Name
Advanced Search	Employee Name
Employee Profile	Page title
Profile Preview	Page title

You can change the format of the Display Name by using the override procedures. The change will affect the format of the name in all of the above items.

The following fields display a value depending on the legislation associated with a person:

Field name	Description
First Name	Displays a value for the person's first name
Last Name	Displays a value for the person's last name
First Name Alternate	Displays a multi-byte first name
Last Name Alternate	Displays a multi-byte last name

The values held by each of the above fields can be altered by using the override procedures.

See: Setting Up Legislation and Customer Overrides, page 9-42

You can configure the pages at the required levels to display whichever name fields are appropriate for your enterprise.

Page Layout Configuration

You can configure the Employee Detail page at all personalization levels. You can configure the other pages at Function, Responsibility, User, and Site levels.

> **Note:** Responsibility and User level personalizations are not available for Anonymous access.

On the Employee Detail page, the application automatically displays the Employee Detail region. If you enable other regions, the application will only display them if they contain data.

If you enable additional telephone number fields, map them to a lookup code of type "PHONE_TYPE".

See: Configuring Web Pages, page 5-14

Menu and Function Names

User Menu Name	Function Name
Employee Directory Functions Menu	Employee Directory

See: Defining User Access and Menus, page 3-8

Workflow

Not applicable

Configurable Tips and Instructions

Simple Search Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_SIMPLE_SEARCH_INSTR
Search Results Region	Instruction	HR_EMPDIR_MULTI_ASG_INSTR

Advanced Search Page

Region	Tip Type	Message Name
Search Header Region	Instruction	HR_EMPDIR_ADV_SEARCH_INSTR
Search Results Region	Instruction	HR_EMPDIR_MULTI_ASG_INSTR

Employee Detail Page

Region	Tip Type	Message Name
Employee Detail Cell	Instruction	HR_EMPDIR_EMPDETAIL_INSTR

Organization Hierarchy Page

Region	Tip Type	Message Name
Hierarchy Region	Instruction	HR_EMPDIR_HIERARCHY_INSTR

Employee Profile Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_EDITPROFILE_INSTR
Photo Region	Instruction	HR_EMPDIR_PIC_INSTR
Edit Employee Information Region	Instruction	HR_EMPDIR_EMPUPD_INSTR

Picture Preview Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_PREVIEW_PIC_INSTR

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

With anonymous login, the application has no context of business groups, responsibilities, or personal profiles, to support flexfields. However, you can import flexfields using the override packages. If you do so, it is your responsibility to map the flexfields to MLS if you require multi-lingual support.

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Employee Directory Global Menu	Site	Any menu name with menu type of Global	Employee Directory Global Menu
Server Timezone	Site, User	List of values based on FND_TIMEZONES_VL	None

HR:Employee Directory Global Menu

This system profile enables you to specify a menu to provide global buttons in addition to the standard Self Service Global Menu buttons when the Employee Directory is accessed anonymously.

Server Timezone

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Employee Details page.

> **Note:** The Client Timezone profile option also exists within Oracle applications. If you enable this profile option at User level, there will be implications for other windows and pages. This is because other DATETIME fields on other windows and pages are automatically converted to the time zone defined by the Client Timezone profile. This time zone may be inconsistent with the time zone defined by the Server Timezone profile option. To avoid this situation, the system administrator should carry out the following steps:
>
> - Prevent the Client Timezone profile option being set at the User level. To do this, use an Application Developer responsibility to change the delivered profile option definition. See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
> - Use the Personalization Framework functionality to remove the Time Zone field from the Preferences page.

Anonymous Access to the Employee Directory

Follow the steps below to set up anonymous access and to configure the global button bar.

To provide users with anonymous access to the Employee Directory:

1. Ensure your HTML form includes an Action referencing "/OA_HTML/EmpdirLogin.jsp". This action takes the user to the simple search field, logged in anonymously. See the example code below.
2. Ensure the HTML form has the following two elements:
   - A Text element with the name "srchText"

     This element places a text field in your form into which the user can enter search criteria in order to access people in the Employee Directory.
   - A Hidden element with the name "L", and the required language code for MLS

     This element provides field labels and data for the directory in the chosen language.

   See the example code below.
3. Function level personalization is not automatically available for anonymous access. If you want to enable Function level personalization, add a Hidden element with the name "OAFunc" pointing to the function being personalized.

   See the example code below.

Example HTML form

```
<form NAME="people"
ACTION="http://qapache.us.oracle.com:5122/OA_HTML/EmpdirLogin.jsp"
 METHOD="POST" target="_top">
     <table WIDTH="100%" cellpadding="0" cellspacing="0">
     <tr><td WIDTH="1%" valign="TOP">
     <table WIDTH="130">
     <tr><td valign="TOP">
     <input TYPE="text" NAME="srchText" SIZE="9">
     <input TYPE="hidden" NAME="L" value="US">
     <input TYPE="hidden" NAME="OAFunc" value="ORACLE_PROXY_SS">
--this line is optional
</form>
```

To configure the Global Buttons for anonymous login:

1. If you require additional buttons, such as Files Online, or Calendar, make entries to the Employee Directory Global Menu, or to any customer defined menu of menu type Global.

   Note: Global buttons are defined as FND Form functions.

2. Set the system profile HR:Employee Directory Global Menu to point to the Employee Directory Global Menu (the default), or the menu you have defined in the previous Step.

Enabling Single Sign On to Self Service

The Employee Directory is read only. To enable users to edit their personal information, or to add or edit their image, follow the procedures below to provide them with single sign on access to Self-Service:

1. Define an FND user for each person that requires access to Self-Service, if they are not defined as FND users already.

   See: Defining User Access to Self-Service Functions, page 3-9

2. In the Descriptive Flexfield Segments window, configure a segment in the Additional Personal Details Descriptive flexfield to hold the FND_USER names, using any available attribute.

   See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

3. Map the segment to the USER_NAME column in the PER_EMPDIR_PEOPLE repository table by editing the PER_EMPDIR_PEOPLE_OVERRIDE package body. See: Customer Override for Single Sign On, page 9-39

Enabling Customer Overrides for the Employee Directory

You can use overrides with the Employee Directory to customize the fields available when you synchronize the data from Oracle HRMS tables with the Employee Directory repository tables. For example, to enable single sign on to self-service applications from the Employee Directory, you can perform a customer override to add your FND_USER names to the directory. This means that the Employee Directory repository tables are modified in line with the customer or legislation override.

Note: If legislation and customer overrides exist, customer overrides take precedence over legislation overrides.

All customer override package bodies are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information on overrides, see: Legislation and Customer Overrides, page 3-6.

Set up Customer Override for Single Sign On:

1. Open the package body PER_EMPDIR_PEOPLE_OVERRIDE in a text tool.
2. Modify the line

   ```
   g_override_flg BOOLEAN := FALSE;
   ```

   to

   ```
   g_override_flg BOOLEAN := TRUE;
   ```

   This change enables the override package.
3. Add the following code into the before_dml procedure:

   ```
   IF p_srcSystem = 'PER' THEN
      per_empdir_ss.personTbl.person_key(p_rec_locator) :=
               upper(per_empdir_ss.personTbl.attribute26(p_rec_locato
   r))
               ||' '||per_empdir_ss.personTbl.person_key(p_rec_locato
   r)
               ||' '||substr(personTbl.work_telephone(p_rec_locator),

                                       length(personTbl.work_telephone(p_
   rec_locator))-4, 4);
      per_empdir_ss.personTbl.user_name(p_rec_locator) :=
               upper(per_empdir_ss.personTbl.attribute26(p_rec_locato
   r));
   END IF;
   ```

   Instead of "attribute26", use the attribute name you used to configure the segment in the Additional Personal Details Descriptive flexfield.

   The preceding code assigns the user name to an available column in the repository. In addition it adds the user name to the person_key, which enables searches on the user name.

   It also formats the work telephone number and adds it to the person_key, enabling searches on a preferred telephone format. This is where you can determine how the telephone number is formatted for the simple search field.

Populating the Repository

Use the following procedures to load HRMS data into the Employee Directory repository. Prior to loading the data, you can optionally configure the data for your legislation and country requirements.

1. Use the supplied override packages to override values in the repository table columns for individual legislation teams and customers if required. The overrides are effective when you refresh the repository in either Complete or Incremental refresh mode.

See: Setting up Legislation and Customer Overrides, page 9-42

2. In the Submit Request window, run the concurrent program Refresh Employee Directory. This program populates the repository with data from HRMS tables.

   See: Submitting a Request, *Oracle Applications User's Guide*

   The Refresh Employee Directory concurrent program uses the following parameters:

Parameter	Options	Description
Refresh Mode	Complete/Incremental	Use the Complete refresh mode for the initial population of data to the Employee Directory repository tables and intermittently in the future. A Complete refresh rebuilds all the data in the repository and clears deletes. This process requires downtime. Perform a full refresh once every six months or so to clear deletes from the repository, depending on the rate of staff turnover. Use Incremental refresh mode at regular intervals to synchronize the data between Oracle HRMS and the Employee Directory. The frequency depends on how current you require the data to be.
Refresh Date	Leave this blank to use the system date.	The concurrent program will collect data applicable to this date. **Warning:** *Oracle recommends you leave this parameter blank for scheduled refreshes.* If you insert a date, every time the concurrent program runs, it will collect data for the same date - in other words, the data will never be updated.
Source System	A valid host system	This parameter identifies the host system. You should select 'PER'. By default 'PER' identifies Oracle HRMS.
Process Multiple Assignments	Yes/No (default)	Use the default option of No to process only primary assignments. Set it to Yes to process secondary assignments as well.

Note: If you run the Refresh Employee Directory concurrent program in Complete Refresh mode with Process Multiple Assignments set to Yes, subsequent runs in Incremental Refresh mode with Process Multiple Assignments set to No will have no effect. Incremental Refresh mode does not remove previously populated secondary assignments.

Conversely, if you run this program in Complete Refresh mode with Process Multiple Assignments set to No, then subsequently run in Incremental Refresh mode with Process Multiple Assignments set to Yes, secondary assignments will be populated.

Legislation and Customer Overrides for Employee Directory

When you refresh the repository data, the system calls override packages to populate the repository tables with data from Oracle HRMS. You can edit these packages to override values at legislation or customer level.

All customer override package bodies for the Employee Directory are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory. The legislation override package body is in the peredlor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information, see: Customer and Legislation Overrides, page 3-6.

1. Identify which segments you want to override for any table in the Employee Directory repository, and note the attribute name for each.
2. Identify the correct override call to edit.

   The following table shows which Employee Directory repository tables map to the Oracle HRMS tables:

Entities Denormalized from Oracle HRMS

EMPDIR table name	HRMS table name
PER_EMPDIR_PEOPLE	PER_ALL_PEOPLE_F
PER_EMPDIR_ASSIGNMENTS	PER_ALL_ASSIGNMENTS_F
PER_EMPDIR_ORGANIZATIONS	HR_ALL_ORGANIZATION_UNITS, HR_ ALL_ORGANIZATION_UNITS_TL
PER_EMPDIR_JOBS	PER_JOBS, PER_JOBS_TL
PER_EMPDIR_POSITIONS	HR_ALL_POSITIONS_F, HR_ALL_POSIT IONS_TL
PER_EMPDIR_LOCATIONS	HR_LOCATIONS_ALL
PER_EMPDIR_LOCATIONS_TL	HR_LOCATIONS_ALL_TL
PER_EMPDIR_PHONES	PER_PHONES

The following table shows which override call to use to override values in the repository tables at legislation or customer levels.

Legislation and Customer Override Calls

Table	Legislation Override Call	Customer Override Call	Record Structure (Instance)
PER_EMPDIR_PEOPLE	PER_EMPDIR_LEG_OVERRIDE. PEOPLE	PER_EMPDIR_PEOPLE_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS.PersonTblType (personTbl)
PER_EMPDIR_ASG	PER_EMPDIR_LEG_OVERRIDE. ASG	PER_EMPDIR_ASG_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. AsgTblType (asgTbl)
PER_EMPDIR_ORGS	PER_EMPDIR_LEG_OVERRIDE. ORGS	PER_EMPDIR_ORGS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. OrgTblType (orgTbl)
PER_EMPDIR_JOBS	PER_EMPDIR_LEG_OVERRIDE. JOBS	PER_EMPDIR_JOBS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. JobTblType (jobTbl)
PER_EMPDIR_POSITIONS	PER_EMPDIR_LEG_OVERRIDE. POSITIONS	PER_EMPDIR_POSITIONS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. PosTblType (posTbl)
PER_EMPDIR_LOCATIONS	PER_EMPDIR_LEG_OVERRIDE. LOCATIONS	PER_EMPDIR_LOCATIONS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. LocTblType(locationTbl)

3. In the package body modify the line

```
g_override_flg BOOLEAN := FALSE;
```

to

```
g_override_flg BOOLEAN := TRUE;
```

This change enables the override package.

4. Edit the procedure to override data, using the attribute name you identified in Step 1. For an example showing how to edit an override call, see: Customer Override for Single Sign On, page 9-39

If you have enabled the override packages, they are called when the repository data is refreshed. See: Populating the Repository, page 9-40

Manage Employment Events

Manage Employment Events Modules and Workflow

The Manage Employment Events module groups together workflow processes that relate to changes in an employee's assignment. The functions available enable you to control all actions relevant to your employees in your organization, from hiring employees through their separation from the organization.

You can build and configure these workflow processes to suit the requirements of your enterprise. The basic Manage Employment Events modules are: Assignment, Location, Work Schedule, Change Manager, Employee or Contingent Worker Termination (containing Termination and End Placement), Employee or Contingent Worker Pay (containing Pay Rate and Assignment Rate), Individual Compensation Distributions, Special Information Types, and Other Employment Information.

Chained Manage Employment Events Processes

Oracle Workflow enables you to combine different Manage Employment Events modules into one workflow process. Such processes are known as chained processes. SSHR includes a number of predefined chained processes that appear as functions on the user menus.

> **Note:** You can also include the Individual Compensation Distributions (ICD) module in chained processes, if required.

The following table gives a list of the delivered chained processes.

Manage Employment Events Chained Processes:

Manage Employment Events Chained Process	Contains the following Manage Employment Events modules:
Change Pay	Employee or Contingent Worker Pay
Change Conditions	Assignment, Location, Work Schedule
Change Cost Center, Terms and Manager	Assignment, Other Employment Info, Location, Change Manager
Change Cost Center, Location and Manager	Assignment, Location, Change Manager
Change Extra Information Types	EIT, EIT Update
Change Hours	Work Schedule, Pay Rate
Change Job	Assignment
Change Job and Terms	Assignment, Other Employment Info
Change Location	Location
Change Manager	Change Manager
Change Pay Rate Process	Employee or Contingent Worker Pay
Change Special Information Types	SIT, SIT Update
Change Supervisor Process	Change Supervisor
Deploy Person	Assignment, Location, Work Schedule, Change Manager
Worker Status Change	Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay, SIT
Change Worker Status and Terms	Assignment, Other Employment Info, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay
ICD and Termination Integration	Termination Page, Change Manager
Employee or Contingent Worker Termination (Termination, End Placement)	Termination (or End Placement) Page, Change Manager, Organization Manager Detail
Termination with Compensation	Termination Page, Change Manager, Organization Manager Detail, Other Compensation
Transfer	Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay

Ordering Manage Employment Events Workflow Processes

The order of workflow processes must be carefully designed to ensure business rules are maintained and implemented. If you choose to create your own chained processes and functionality, you must consider the following rules when designing the sequence of functions:

Function	Restriction
Assignment	If the Assignment module is present in a chained process, it must appear first.
Change Manager	If used in a chain with Employee or Contingent Worker Termination, it should follow the Termination or End Placement page.
Extra Information Types	Can appear anywhere in the chain
Individual Compensation Distributions	Can appear anywhere in the chain
Location	Can appear anywhere in the chain
Other Employment Information	Can appear anywhere in the chain
Employee or Contingent Worker Pay (Pay Rate, Assignment Rate)	Can appear anywhere in the chain
Special Information Types	Can appear anywhere in the chain
Employee or Contingent Worker Termination	If used in a chain with Supervisor, it should precede Supervisor

You can configure your own processes in any number of ways but they must comply with the restrictions listed above. For example, you could configure a process that follows this sequence:

- Step 1: Assignment
- Step 2: Location
- Step 5: Work Schedule

But, you cannot configure a process in this order, as you will break business rules:

- Step 2: Location
- Step 1: Assignment
- Step 5: Work Schedule

As long as you maintain the order of steps you can configure whichever workflow processes your enterprise needs.

Assignment

The Assignment module is used in some delivered Manage Employment Events menu functions, for example, the Employee Status Change chained process. It can be added in any of your own business processes that you model in the Workflow Builder.

Assigning a Salary Basis

You use a salary basis in Oracle HRMS to establish the duration of a salary. For example, an hourly salary basis (for example, 1,000 yen per hour) or an annual salary basis (for example, 18,000 pounds per year).

For more information on salary bases, see Salary Basis, *Oracle HRMS Compensation and Benefits Management Guide*.

If you enable the Salary Information region, users can assign newly hired employees and workers to a salary basis, or change the salary basis of an existing employee or worker. If they change the salary basis mid-way through a payroll period, the application ends the existing salary element entry. This may not be desirable for payroll calculations, therefore if a user changes the salary basis of an employee or worker assigned to a payroll on any effective date other than the first day of the payroll period, the application sends a notification to a payroll contact as part of the approval process. The payroll contact can accept or reject the change, or return it to the originator requesting a change to the effective date (normally setting it to the first day of the next payroll period).

> **Note:** This notification is sent only for employees and workers assigned to a payroll. Also, this notification is sent to your payroll contact only if you have enabled approvals for this transaction. You must also set up the payroll contact using a workflow item attribute (Payroll Contact User Name). This notification is only sent for *changes* to salary basis and not for new hires or the first assignment of a salary basis to an existing employee or worker.

If you want to enable self-service users to assign a salary basis, you must enable the Salary Information region item in the HR_ASSIGNMENT_SS and HR_ASSIGNMENT_REVIEW_SS regions.

If a salary basis is assigned without a pay proposal, the Description and Salary fields on the Pay Rate page will be mandatory if the profile option HR: Base Salary Required is set to Yes.

Multiple Assignments

If an employee or worker has more than one assignment, the manager must select the relevant assignment before carrying out the employee action.

> **Note:** To enable a manager to select an assignment, the profile option HR: Enable Multiple Assignments in SSHR must be set to Yes at the required level.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Assignment

The Assignment module is used in several example chained processes including:

- Employee Status Change
- Change Job
- Transfer

Configurable Workflow Attributes:

Function Activity Display Name	Function Activity Attribute Display Name
Assignment	Use Grade Points
	Set Grade Ceiling
	Use Step/Grade No Update
	Display Job Attachment
	Display Position Attachment
	HR Element Warning
	Asg Change Reason Lookup Codes
	HR Use Default Location
Item Level Attributes	Item Attribute Display Name
	Payroll Contact User Name

See: Configuring Workflow Attribute Values, page 4-8

Use Grade Points

Defines whether the ceiling point can be displayed.

Set Grade Ceiling

Defines whether the ceiling point can be updated.

Use Step/Grade No Update

Defines whether the grade can be changed if grade steps exist.

HR Element Warning

Controls whether hr element changes are displayed as a warning or an error.

Asg Change Reason Lookup Codes

Allows system administrator to specify which change reason lookup codes should be displayed (subset of change reason lookup codes). You enter the codes as follows:

- Reason1|Reason21|...

Display Job Attachment

Whether attachments are displayed for the job when there are no job comments. If there are comments for the job, no attachments are displayed.

Display Position Attachment

Whether attachments are displayed for the position when there are no position comments. If there are comments for the position, no attachments are displayed.

HR Use Default Location

The location can be changed to the default organization or position locations. If the organization/position is then changed for a user, the user's location will be the default location for the organization/position.

Payroll Contact User Name

The Applications user name of the payroll representative who should be notified when a user changes a salary basis in the middle of a payroll period. This attribute is mandatory if you use the Salary Basis functionality.

Configurable Tips and Instructions

Assignment Page

Region	Tip Type	Message Name
Assignment	Instruction	HR_INST_TOP_COMMON_TEXT
Job	Instruction	HR_INST_ASG_JOB_SS
Position	Instruction	HR_INST_ASG_POSITION_SS
GRE	Instruction	HR_INST_ASG_GRE_SS
Payroll	Instruction	HR_INST_ASG_PAYROLL_SS
Location	Long Message	HR_INST_CHANGE_LOCATION
Location	Long Message	HR_INST_WORK_AT_HOME_LOC

* These instructions are delivered as hidden, although they can be displayed and personalized.

Configurable Flexfields

Assignment Page

Region	Flex Name	Flex Code
Specific Job Information	HrFlex1	Job Developer DF
Extra Position Information	HrFlex1	Extra Position Info DDF
Department Working Conditions	HrFlex1	Org Developer DF
People Group	People Group Key Flex	GRP
Other Assignment Information	Additional Assignment Details	PER_ASSIGNMENTS
Statutory Information	Work Sched Key Flex	GRES_AND_OTHER_DATA

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Use Grade Defaults	Site, Application, Responsibility, User	Yes/No	Yes
HR:Override Grade Defaults	Site, Application, Responsibility, User	Yes/No	No
HR: Position Default Options for SSHR	Site, Application, Responsibility, User	Default with No Warning Default with User Decision Default with Warning No Defaulting	Default with User Decision

The following profile options control a user's ability to use grade defaults and position defaults.

HR:Use Grade Defaults

This profile option determines whether the user can only select a valid grade for a parent organization, job, or position. The list of values for the Grade field is determined by the entry in the Organization, Job, or Position field.

If this profile value is No, the user can select any grade for the organization, job, or position.

HR:Override Grade Defaults

This profile option determines whether the user can select a different (non-default) grade for an organization, position, or job.

If this profile value is No, the user cannot override the default grade.

Interaction of Default Profile Options

The above profile options work together to control the behavior of grades in SSHR. The following situations are possible:

Profile Option		**HR: Use Grade Defaults**	**HR: Use Grade Defaults**
	Value	**Yes**	**No**
HR: Override Grade Defaults	**Yes**	The user can select any valid grade.	The user can select any grade, either valid or invalid.
HR: Override Grade Defaults	**No**	The user can select any valid grade or retain the current grade (even if invalid).	The user can only select valid grades.

HR: Position Defaulting Options for SSHR

These options control whether or not the application displays default information based on the position you select for an assignment. You can set one of four values:

- Default with No Warning
- Default with User Decision
- Default with Warning
- No Defaulting

Termination

The Termination page enables a manager to end an employment relationship. When the manager selects the Termination function from the menu, a person hierarchy is displayed to enable the manager to select an employee or contingent worker for termination. This hierarchy is usually supervisor or position-based.

For more information on the hierarchy, see Enter Process, page 8-3.

Multiple Assignments and Termination

If your organization uses multiple assignments and assignment-level security is enabled, it may be the case that an assignment-based hierarchy only displays a subset of a person's assignments. A person may have secondary assignments that are not visible to the manager.

For more information on security, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

> **Important:** A manager can only terminate an employee if he or she has access to the primary assignment for the person. If a manager only has access to a secondary assignment, the termination process is cancelled and an error message is displayed. An error message is also displayed if a manager tries to terminate a person and that person has other assignments.

Change Manager Function

If the terminated employee or worker has direct subordinates, the system automatically displays the Change Manager page to reassign the terminated supervisor's subordinates to another supervisor.

In the event of the employee or worker also being a manager to an organization, the Update Organization Manager page may appear for you to assign a new manager. This depends on how your security profile is set up.

For more information see: Organization Manager, page 9-69

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Termination Process

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Termination Process	Termination Page	Termination Reason Lookup Codes

Configurable Tips and Instructions

Termination Page

See: Configuring Web Pages, page 5-14

Region	Tip Type	Message Name
Termination Details	Long Message	HR_INST_TERMINATION

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Termination Page

Region	Flex Name	Flex Code
Termination Details	Additional Period of Service Details	PER_PERIODS_OF_SERVICE
Termination Details	Additional Period of Service Information	PER_PDS_DEVELOPER_DF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

End Placement

The End Placement page enables a manager to end a contingent worker's work relationship and specify a reason. This changes the person type to Ex-Contingent Worker and ends all assignments. If the contingent worker has direct subordinates, the system will automatically display the Change Manager page to reassign the contingent worker's subordinates to another supervisor.

If the contingent worker is also a manager of an organization, the Update Organization Manager page may appear to enable you to assign a new manager. This depends on how your security profile is set up.

See: Ending a Placement, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Manager, page 9-69

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Termination Process	Main Process
Employee or Contingent Worker Termination	Sub Process

The Termination process uses the sub process Employee or Contingent Worker Termination. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Termination page (Selected Person Type = Employee) and the End Placement page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Not applicable.

Configurable Tips and Instructions

Termination Page

Region	Tip Type	Message Name
Termination Details	Long Message	HR_INST_CWK_TERMINATION

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Termination Page

Region	Flex Name	Flex Code
Termination Details	Additional Period of Placement Details	PER_PERIODS_OF_SERVICE

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Work Schedule

The Work Schedule workflow process enables a manager to change the work schedule and employment category for an employee or worker. A work schedule is the number of days and hours worked and the start and end times for the employee or worker. The employment category defines the type of employment, for example, full and part-time employment.

> **Note:** Part of the Work Schedule page information is displayed from the Soft Coded Key Flexfield.
>
> See Configuring Flexfields, page 5-19

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Work Schedule

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Work Schedule	Long Message	HR_INST_WORK_SCHED_MAIN
Work Schedule	Short Tip	HR_TIP_WORK_START_TIME
Work Schedule	Short Tip	HR_TIP_WORK_END_TIME

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Region Name	Flex Name	Flex Code
Work Schedule	Soft coded KeyFlexfield	SCL
Work Schedule	Additional Assignment Details	PER_ASSIGNMENTS

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Location

The Location function enables a manager to change the work location for an employee or worker.

The Location function is available under the predefined Manager responsibility. If required, you can set up approvals processes for the Location function.

The Location region includes the Home Worker check box. This check box is available for all localizations, although it is delivered as hidden. **US users:** If you select the Home Worker check box for an employee or worker, the employee or worker is assumed, for tax purposes, to work 100% from their primary address (or tax override address if there is one) for this assignment.

For more information on the tax implications of the Home Worker check box for US users, see Entering Federal Tax Rules for an Employee, *Oracle HRMS Payroll Processing Management Guide*.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Location

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Location	Location	Hr Null Allowed
Location	Location	HR Location Required
Location	Location	Hr Use Defaults
Location	Location	Hr Override Defaults
Location	Location	HR Element Warning

HR Null Allowed:

Allows null location for an employee or worker.

HR Location Required:

Defines whether the location is required for an employee or worker.

HR Use Defaults:

The location can be changed to the default locations which are the user's Organization Location or Position Location. This is enforced by displaying the locations in a poplist.

HR Override Defaults:

The location can be changed to any global location or any location in the user's business group. The locations are displayed in a list of values if this attribute is called.

HR Element Warning:

Defines whether or not to display the HR element warning.

See: Configuring Workflow Attribute Values, page 4-8

Configurable Tips and Instructions

Location Page

Region	Tip Type	Message Name
Change Location	Instruction	HR_INST_TOP_COMMON_ TEXT
Change Location	Long Message	HR_TIP_LOCATION_CODE

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Location Page

Region	Flex Name	Flex Code
Location	Location Address	Address Location
Location	Additional Assignment Details	PER_ASSIGNMENTS

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Special Information Types (SITs)

Special Information Types (SITs) enable you to store additional information that is not currently captured by the system.

Example

Example of a Special Information Type

To capture information on an employee's linguistic ability, you could create an SIT entitled Languages with the following segments:

- Language
- Written fluency level
- Spoken fluency level

Alternatively, you could create a create an SIT to capture an employee's vehicle information and include the following segments:

- Vehicle type
- Value
- License type
- License number

See: Special Information Types, *Oracle HRMS Enterprise and Workforce Management*

Menu and Function Names

Special Information Types

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Special Information Types

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Special Information Page

Region	Tip Type	Message Name
Special Information Type Main Page	Instruction	HR_INST_SIT_OVERVIEW

Special Information Type Update Top Page

Region	Tip Type	Message Name
Special Information Type Update Page	Instruction	HR_SIT_UPDATE_INSTRUC_TEXT_SS

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Special Information Page

Region	Flex Name	Flex Code
Special Person Information Type Details	Personal Analysis Flexfield	PEA

Special Information Type Update Top Page

Region	Flex Name	Flex Code
Special Person Information Type Review	Personal Analysis Flexfield	PEA
Special Information Type Update Page	Additional Person Analysis Details	PER_PERSON_ANALYSES

Review Page

Region	Flex Name	Flex Code
Special Information Type Review	Additional Person Analysis Details	PER_PERSON_ANALYSES
Special Information Type Review	Person Analysis Flexfield	PEA

See: Configuring Flexfields , page 5-19

Configurable Profile Options

Not applicable

Additional Configuration Steps:

1. Decide how you want to use your SIT modules:
   - standalone - as an Employee or Manager menu
   - chained - as part of a self-service action flow
   - chained - as part of a Personal Information flow

   See: Manage Employment Events Functions and Workflow, page 9-44
2. Enable your SITs using the Special Information Types form. You must enable them for each business group and select at least the Enabled and Other check boxes.

   See: Enabling Special Information Types, *Oracle HRMS Enterprise and Workforce Management*
3. Check the title of the SIT type. This title appears as the region header above the data in the self-service module.

4. Use the Personalization Framework to restrict the SIT types that are displayed. By default, all SIT types that are enabled using the above procedure are displayed in the self-service SIT module (defined by the selected person's business group), however, you can use the Personalization Framework to display only specific types.

   To display only certain special information types, personalize the HR_PERSON_SIT_DETAILS_SS region at the appropriate level (for example, responsibility or function) and in the Flex Settings box for HrSitKeyFlex, list the key flexfield structure codes of only the types you wish to appear. After each structure code, list the names of the segments you wish to appear for that special information type. Separate multiple segments with single pipe symbols (|) and separate multiple structures with double pipe symbols (||).

   > **Note:** If you list a structure code with no segment names, the special information type does not appear on your self-service pages.

   If you choose to only display certain SITs, you should also personalize the HR_PERSON_SIT_UPDATE_SS region and the HR_PERSON_SIT_REVIEW_SS region to correspond to the HR_PERSON_SIT_DETAILS_SS region.

   See: Configuring Flexfields, page 5-19

Extra Information Types (EITs)

Extra Information Types (EITs) are a type of flexfield that allows you to set up unlimited amounts of extra information. They are often used by localizations for capturing local information.

Example of an Extra Information Type:

You can capture passport information for an employee or worker by creating an EIT entitled Passport Details with the following segments:

- Country
- Passport number
- Issue date
- Expiry date

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

Although EITs and SITs are similar in appearance, configuration steps differ due to underlying structural differences. You can currently set up EITs for the following HR entities:

- People
- Assignment
- Location
- Contacts

Menu and Function Names

Extra Information Types

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Extra Information Types

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Extra Information Types	EIT	HR EIT TYPE

HR EIT TYPE

This attribute value defines whether the EIT is a Person or Assignment EIT. The possible values are PERSON or ASSIGNMENT, and the default value is PERSON.

See: Configuring Workflow Attribute Values, page 4-8

Configurable Tips and Instructions

Extra Information Type Page

Region	Tip Type	Message Name
Extra Information Type Main Page	Instruction	HR_EIT_INSTRUCTION_ TEXT_SS

Extra Information Type Update Page

Region	Tip Type	Message Name
Extra Information Type Update	Instruction	HR_EIT_UPDATE_INSTRUC_ TEXT_SS

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Extra Information Type Page

Region	Flex Name	Flex Code
Extra Information Type Update	Extra Person Information	Extra Person Info DDF

Extra Information Type Update Page

Region	Flex Name	Flex Code
Extra Information Type Update	Extra Person Information	Extra Person InfoDDF
Extra Information Update Page	Extra Person Info Details	PER_PEOPLE_EXTRA_INFO

Review Page

Region	Flex Name	Flex Code
Extra Information Update Page	Extra Person Info Details	PER_PEOPLE_EXTRA_INFO

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Additional Configuration Steps

1. First, you choose how you want to use your EIT modules:
   - standalone - as an Employee or Manager menu
   - chained - as part of a Manage Employment Events flow
   - chained - as part of a Personal Information flow
2. User responsibilities and business group legislation codes restrict the EITs that appear in a self service module. Before you can add the EIT function to an SSHR process, you must restrict the EITs available to your responsibilities. All EITs are available to all business groups and delivered responsibilities, in other words, there are no predefined legislation restrictions. All EITs are already available to the business group for your responsibility.

   You enable EITs in the Information Types Security window.

   1. Copy the EITs for the delivered Manager Self-Service or Employee Self-Service responsibility to a custom responsibility.
   2. Delete the EITs that are not required for your responsibility.
   3. Save your work.

      Note: The Context Description for the descriptive flexfield context value for the EIT appears as the region header in the self-service module. You configure the Context Description in the Descriptive Flexfield Segments window.

   The self-service EIT module displays all EITs you enable using the above steps.

   If your responsibility only covers one business group, you can specify the required EITs directly in the Information Types region. If your responsibility covers multiple business groups, you need to include the EITs from the other business groups with your responsibility.

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

3. Use the Personalization Framework to restrict which EIT segments appear on your self-service pages.

   To display only certain segments, personalize the region at the appropriate level and list the names of the segments you wish to appear for that EIT. Separate multiple segments with single pipe symbols (|) and separate multiple structures with double pipe symbols (||).

   > **Note:** If you list a structure code with no segment names, the EIT does not appear on the page..

   See: Configuring Flexfields, page 5-19

Other Employment Information

The Other Employment Information module enables you to store assignment and employment information in descriptive flexfields and Developer Descriptive Flexfields (DDFs).

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Other Employment Info

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Other Employment Info	Long Message	HR_INST_TOP_COMMON_ TEXT

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Region	Flex Name	Flex Code
CAGR	CAGR Flexfield	CAGR
Assignment Info	Additional Assignment Details	PER_ASSIGNMENTS
Assignment Info	Soft Coded KeyFlexField	SCL

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Pay Rate

You use the Pay Rate module to enable a manager to change a person's overall pay rate directly (Single Pay Rate) or to create component increases to the previous rate (Multiple Pay Rate). You can change pay rates independently of assignment changes or as part of an assignment change. You can also insert a salary proposal for an employee or worker with or without pay components.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Change Pay	Main Process
New Hire	Main Process
Worker Status Change	Main Process
Change Hours	Main Process
Assignment Rate/Payrate	Sub Process

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Pay Rate page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Pay	HR_P_RATE_JSP_PRC	Pay Rate, Assignment Rate

See: Configuring Workflow Attributes, page 4-8

Configurable Tips and Instructions

Region	Tip Type	Message Name
PayRate Main	Instruction	HR_INST_TOP_COMMON_TEXT

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Region	Flex Name	Flex Code
Pay Rate Salary Admin Flex Cell	Add'l Salary Admin Details	PER_PAY_PROPOSALS
Pay Rate Multiple Table	Proposal Component Addl Info	PER_PAY_PROPOSAL_COMPONENTS

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Base Salary Required	Site	Yes/No	Null

HR: Base Salary Required

When you set this profile option to Yes, if a person's assignment has a salary basis assigned but no pay proposal, the Description and Salary fields will be mandatory. The user will be forced to enter values for these fields.

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

Assignment Rate

If you are not using Oracle Services Procurement to provide purchase order information for contingent workers, the Assignment Rate module enables you to record contingent worker rates. You can change a contingent worker's rate for an existing assignment, or enter a rate for a new assignment. You select the assignment rate name from a list, select the currency, and enter a value. Optionally, you can specify an end date, after which the rate is no longer in effect.

Your implementation team defines one or more assignment rate names in the forms-based interface. An assignment rate name identifies a combination of rate type (such as Standard Rate or Weekend Rate) and rate basis (such as Hourly Rate or Weekly Rate).

If you are using Oracle Services Procurement, the Assignment Rate module displays information from the purchase order line for the assignment. You cannot update this information in the Assignment Rate page.

If you install and license Oracle Services Procurement at a later date, any rate information you recorded using the Assignment Rate module is no longer visible.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Change Pay	Main Process
New Hire	Main Process
Worker Status Change	Main Process
Change Hours	Main Process
Assignment Rate/Payrate	Sub Process

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Pay Rate page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Pay	HR_P_RATE_JSP_PRC	Pay Rate, Assignment Rate

See: Configuring Workflow Attributes, page 4-8

Configurable Tips and Instructions

Region	Tip Type	Message Name
AssignmentRatePG	Instruction	HR_ASSIGNMENT_RATE_INST

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable.

Configurable Profile Options

Profile	Configurable Levels	Values	Default
PO: Services Procurement Enabled	Site	Yes/No	No

If Oracle Services Procurement is installed and licensed, and the user profile option PO: Services Procurement Enabled is set to Yes, assignment rate information is obtained automatically from Oracle Services Procurement.

Change Manager

The Change Manager function enables a user to perform the following operations on a selected employee or worker and assignment:

- specify which other employees or workers report to the selected manager
- reassign the selected employee or worker to report to a different manager
- reassign the subordinates of the selected employee or worker to one or more managers

Multiple Assignments and the Change Manager Function

In a manager-subordinate relationship, the manager's ID is stored against the subordinate's assignment. If the profile HR: Enable Multiple Assignments in SSHR is set to No, only primary assignments are displayed. If the profile HR: Enable Multiple Assignments in SSHR is set to Yes, other assignments will also be displayed. In situations where a subordinate employee or worker has more than one assignment, it is important to select which of the assignments is to report to the manager. In practice, this means that you may have to select between multiple assignments when you select the employee or worker for whom you are using the Change Manager function and when you select the direct reports for the selected employee or worker. In these cases, the lists of values will contain several fields (including Job, Department, Assignment Number, Location, Grade, Position, and Business Group) to help you select the correct assignment. If you are using an assignment-based security profile, you can also specify an assignment for a manager if you are reassigning a selected employee or worker, or the subordinates for the selected employee or worker, to a different manager.

> **Note:** You can choose to display the additional fields mentioned above (Job, Department, Assignment Number, and so on) as fields on the Change Manager pages using the Personalization Framework. If you

display these fields, they are populated when you select a manager assignment.

If you are using assignment-level security, only those assignments for which you are the named supervisor are displayed. This means that you can only perform the Change Manager function on those available assignments.

For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Manager

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Manager	Change Manager	HR_MANAGER_REQUIRED_ INDICATOR

HR_MANAGER_REQUIRED_INDICATOR

If this attribute has a value of "Y", the employee or worker must have a manager. If no manager is entered, the application generates an error. If this attribute has a value of "N", the supervisor_id field of the per_all_assignments_f record can remain blank.

See: Configuring Workflow Attribute Values, page 4-8

Configurable Tips and Instructions

Region	Tip Type	Message Name
New Manager	Instruction	HR_INST_SUPERVISOR_MAIN
Direct Reports of Selected Employee	Instruction	HR_INST_SUPERVISOR_DIRECT
New Direct Reports	Instruction	HR_INST_SUPERVISOR_NEW_DIRECT
Manager Update	Instruction	HR_INST_TOP_COMMON_TEXT
Direct Reports	Long Message	HR_TIP_SUPERVISOR_DR_DATE
New Direct Reports	Long Message	HR_TIP_SUPERVISOR_NDR_DATE

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Organization Management

Organization Manager

The Organization Manager function enables you to maintain organization manager relationships. A manager can only be initially assigned to an organization in the professional forms interface. However, you can view and update organization managers according to your security profile in SSHR.

For more information on organization manager relationships, see Selecting and Viewing Managers for Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*.

If you terminate an employee who is also the manager of one or many organizations, one of the following will occur:

- The Update Organization Manager page displays for you to assign new managers to the organizations for which the terminated person was the manager.
- If you have organization hierarchy security set up and the employee or worker is the manager of multiple organizations, the Update Organization Manager page displays only the records to which you have access and can update.
- If you do not have access to any records, the Update Organization Manager page does not appear.

If you have supervisor security enabled, the Organization Manager Actions Section on the Overview page will automatically display with any records that have been end dated and require you to assign a new manager.

> **Note:** There can only be one organization manager relationship at any single point in time.

Menu and Function Names

This Module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Organization Manager

Workflow

Details of Workflow for this module are listed below:

Workflow Process Display Name:

Organization Manager

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Organization Manager	Organization Manager Overview	Restrict Organization Classification

Description of Attributes

You can restrict the Organization Manager module to one organization classification by entering an organization classification code into the attribute. You can find the organization classification code for a classification from the ORG_CLASS Lookup Type. For example the code for HR Organization is HR_ORG.

Configurable Tips and Instructions

Manager Overview Top Page

Region	Tip Type	Message Name
Organization Manager Actions Section	Instruction	HR_CCMGR_ACTIONS_SS
Organization Manager Overview Form	Instruction	HR_CCMGR_OVERVIEW_INSTR_SS
Organization Manager Search Section	Long Message	HR_CCMGR_DIRECT_REPORTS_TIP
Organization Manager Actions Section	Long Message	HR_PENDING_INSTR_SS

Manager Update Top Page

Region	Tip Type	Message Name
Organization Manager Update Form	Instruction	HR_CCMGR_UPD_PAGE_INSTR_SS

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Additional Configuration Steps

Not applicable

Views

Information Overview

This topic and related links provide configuration details for My Information, My Employee Information, and HR Views pages.

My Information and My Employee Information

My Information enables employees or contingent workers to view their employment and other related details. SSHR previously referred to this function as Employee Views. My Information includes past and present records, and you can also view future changes in the areas of training, absence, and job applications.

My Employee Information enables managers and HR professionals to review the same records available to users of My Information for anyone within their security access. SSHR previously referred to this function as Manager Views. In Details views, past, present, and future data is available.

You can view the details of people by the hierarchy, search results or from 'My List' functionality, giving you immediate access to records that connect people with their work context. You can use advanced search criteria to find people, and save your searches for later reuse. Lists of people display all assignments in addition to the primary, providing you with a complete picture of their duties. You can specify an effective date to review records as of a given point in time.

The application groups the information on six tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications

See: My Information and My Employee Information, page 9-72

HR Views

The HR Views module is aimed at HR Professionals. It offers a summarized view of employee-related information: Personal Information, Assignment Details, Compensation Activity, and Termination History.

Each area of information is displayed on separate pages or tabbed regions. From each page, the user can click a button and display different information.

See: Configuring Tabbed Regions, page 5-21

Navigate to HR Views functionality using the responsibility HR User Self Service and the function HR Views. All information is for viewing only. To modify information, users must log on with the Manager Self Service responsibility.

> **Note:** HR Views show information that is more appropriate for HR professional users hence it is delivered under the HR Professional

responsibility. Employee access using HR Views is controlled by the HRMS security access associated with the current user.

See: Employee Information View, page 9-79

See: Assignment Details View, page 9-80

See: Compensation Activity View, page 9-82

See: Termination History View, page 9-83

See: Search Functions for HR Views, page 9-85

My Information and My Employee Information

My Information enables employees and contingent workers to view their employment and other related details.

My Employee Information enables managers and HR professionals to view the employment and other related details of people within their security access. Managers and HR professionals can view the details of people from hierarchy, search results, or 'My List' views.

> **Note:** If you are using assignment-level security, you cannot access any terminated or expired assignments.
>
> For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

The hierarchy display usually uses the supervisor hierarchy. However, if required, you can display a position-based hierarchy.

For more information, see: Enter Process, *Deploying SSHR Capability*.

Personalizations

Using personalizations, you enable only the functionality, information, and controls you want to make available to users. For example, you can display only the column headings of your choice in Summary and Details views. Consider the following personalizations specific to My Employee Information:

- Enable Manager Actions Icon
- Enable Effective Date
- Enable My List
- Enable Search Filter
- Name Format

Enable Manager Actions Icon

You can navigate to Manager Actions and initiate a self-service action for employees listed on My Employee Information, My List, or Advanced Search pages. To do this, enable the Action icon. Your Employee Type (EMP or CWK) determines whether you navigate to the Manager Actions or the Contingent Worker Manager Actions function. You can enable the Action icon on the following pages:

- My Employee Information
- My List
- Simple Search
- Advanced Search

See: The Personalization Framework, page 5-3

See: Configuring Web Pages, page 5-14

See: *OA Framework Personalization and Extensibility Guide*, available on Metalink.

My Employee Information

The main page for My Employee Information displays information in six categories, grouped on the following sub tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications
- Effort Distribution
- Contracts

> **Note:** The Training, Effort Distribution, and Contracts tabs are hidden by default. To display these tabs, see the section Menu and Function Names, page 9-76, below.

Enable the Action icon for each tab by clicking the Personalize Page link. Apply the default scope of Page: 'Oracle Self Service Human Resources: My Employee Information'.

Using the Employment tab as an example, navigate the following nodes:

- Default Single Column: Manager Views
- Sub Tab Layout: (subTabRN)
- Stack Layout: Employment
- Query: Employment.EmpQueryRN

For each tab, navigate the child nodes beneath Query to enable the Action icon when you view selected people from search results or My List:

- Table: Employment
- Image: Action

For each tab, the sibling nodes beside Query (beneath Stack Layout) enable the Action icon for position hierarchies and supervisor hierarchies. Navigate the following nodes beneath Stack Layout:

- H Grid: [Supervisory Hierarchy|Position Hierarchy]

- Image: Action

To enable the Action icon at the function, location, site, organization, or responsibility level, click the Personalize icon and set the value of the Rendered field corresponding to the level.

Repeat the above steps in a similar way for the remaining tabs.

> **Note:** When you personalize at the page level by selecting a scope using the Page: prefix, as shown here, your personalizations are unique to that page. Shared regions can appear on multiple pages. When you select a scope using the Shared Region: prefix (such as Quick Search), your changes propagate to all instances of the region on all pages that use it.

My List

To personalize the My List page, click the Manage My List link to display the My List page. Set the scope on the Choose Personalization Context page to Shared Region: My List. Navigate the following nodes:

- Stack Layout: MyList
- Table: People in My List
- Image: Action

For information on how to enable the Manage My List link, see Enable My List, page 9-75, below.

Simple Search

To personalize the Simple Search page, enter text in the Quick Search field and press Go to display the page. Click the Personalize Basic Search link, and accept the default scope of Region: Basic Search. Navigate the following nodes:

- Default Single Column: Basic Search
- Table: People
- Image: Action

Advanced Search

To personalize the Advance Search page, click the Advanced Search link to display the page. Click the Personalize Advanced search link, and accept the default scope of Region: Advanced Search. Navigate the following nodes:

- Default Single Column: Advanced Search
- Query: Advanced Search
- Table: People
- Image: Action

Enable Effective Date

Enable the Effective Date field to display snapshot views at a point in time in Hierarchy or My List views.

To do this, click the Personalize Effective Date and View As link, and accept the default scope of Region: Effective Date and View As. To enable the Effective Date field and the Go button, navigate the following nodes:

- Flow Layout: Effective Date and View As
- Row Layout: Effective Date
- Message Text Input: Effective Date
- Submit Button: Go

Enable My List

Enable My List features by adding the My List entry to the context switcher. See Lookups, page 9-77, below.

The Manage My List page enables you to view or delete My List members. Enable the Manage My List link on the My Employee Information or Basic Search page using the Personalize Page link. Navigate the following nodes:

- Page: [My Employee Information|Basic Search]
- Scope: 'Shared Region: Quick Search'
- Row Layout: Quick Search
- Link: Manage My List

The Add To My List button enables you to add selected people to My List. Enable the Add to My List button on the Basic Search and Advanced Search pages using the Personalize Page link. Navigate the following nodes from the Basic Search page:

- Scope: Shared Region: Basic Search
- Default Single Column: Basic Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Navigate the following nodes from the Advanced Search page:

- Scope: 'Shared Region: Advanced Search'
- Default Single Column: Basic Search
- Query: Advanced Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Enable Search Filter

To filter name searches, enable the search filter list for First Name, Last Name, or Full Name on the My Employee Information page, the Basic Search Page, or the My List page. If you do not enable the list, users see only the Name label and the Search field, and the default filter is Last Name. Navigate the following nodes:

- Page: [My Employee Information|Basic Search|My List]

- Scope: Shared Region: Quick Search
- Row Layout: Quick Search
- Message Choice: (SearchFilter)

Name Format

The My Information and My Employee Information pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Overrides

In the My Information and My Employee Information pages, the position and job names are displayed using a concatenated flexfield format. If required, you can use customer overrides to configure a user-defined format for displaying position and job names. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 3-6.

Menu and Function Names

Navigation is available from the Employee or Manager Self Service menu, or new menus you configure. In addition to including the My Employee Information function in new menus, add the following predefined submenus as-is:

- HR_EMP_VIEWS_FUNC_MENU (My Information Functions)
- HR_MGR_VIEWS_FUNC_MENU (My Employee Information Functions)

Submenus provide Oracle Applications Framework page authentication only, you need not copy or recreate them.

> **Note:** HR professionals can enter My Employee Information using Advanced Search. Add the Advanced Search function to the HR Professional menu.

Menu Name	User Menu Name	Function Name
HR_EMPLOYEE_DIRECT_ ACCESS_V4.0	Employee Self Service	My Information
HR_LINE_MANAGER_ ACCESS_V4.0	Manager Self Service	My Employee Information

> **Note:** You cannot change tab sequence, but you can use standard AOL menu exclusion functionality at the responsibility level to show and hide tabs. Make your changes to the My Information Views Sub Tab Menu (HR_EMP_VIEWS_SUB_TABS) or the My Employee Information Views Sub Tab Menu (HR_MGR_VIEWS_SUB_TABS). See: Configuring Tabbed Regions, page 5-21, *To remove a tabbed region or button from display*.

See: Defining Menus for SSHR, page 3-8

Lookups

To enable My List functionality, enable My List in the following lookup.

Lookup	Display Name
HR_MGRV_APPL_CONTEXT	Information Views Application Context Switcher

Note: You must also enable the navigation button Manage My List to the My Employee Information page, and the navigation button Add to My List to Simple and Advanced Search Results pages.

Workflow

Not applicable

Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

My Information

Region Name	Tip Type	Message Name
Employee Views	Instruction	HR_EMPV_PAGE_INSTR
Employee History Table	Instruction	HR_EMPV_EMP_TABINSTR
Salary History Table	Instruction	HR_EMPV_SAL_TABINSTR
Performance History Table	Instruction	HR_EMPV_PERF_TABINSTR
Training History Table	Instruction	HR_EMPV_TRNG_TABINSTR
Absence History Table	Instruction	HR_EMPV_ABS_TABINSTR
Application History Table	Instruction	HR_EMPV_APPLN_TAB INSTR

My Employee Information

Region Name	Tip Type	Message Name
Manager Views	Instruction	HR_MGRV_PAGE_INSTR
Training History Table	Instruction	HR_MGRV_TRNG_TABINST

Configurable Flexfields

The following tables describe available configurable flexfields.

My Information

Region Name	Flexfield Name	Message Name
Employee History Table	Additional Assignment Details	PER_ASSIGNMENTS
Employee History Table	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
Employee History Table	Add'l Period of Placement Det's	PER_PERIODS_OF_ PLACEMENT
Employee History Table	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Performance History Table	Review Addl Information	PER_PERFORMANCE_REV IEWS
Performance History Table	Additional Appraisal Details	PER_APPRAISALS
Absence History Table	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Application History Table	Additional Application Details	PER_APPLICATIONS
Employee Views	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Employee Views	Proposal Component Addl Info	PER_PAY_PROPOSAL_COM PONENTS

My Employee Information

Region Name	Flexfield Name	Message Name
Employment Details	Additional Assignment Details	PER_ASSIGNMENTS
Employment Details	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
Employment Details	Add'l Period of Placement Det's	PER_PERIODS_OF_ PLACEMENT
Employee History Table	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Employee History Table	Add'l Period of Service Det's	PER_PERFORMANCE_REV IEWS
Employee History Table	Add'l Period of Placement Det's	PER_APPRAISALS
Salary Details	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Performance History Table	Review Addl Information	PER_ABSENCE_ ATTENDANCES
Performance History Table	Additional Appraisal Details	PER_APPLICATIONS
Training History Table	Additional Delegate Booking Information	OTA_DELEGATE_BOOKINGS
Training History Table	Add'l Non OTA Training History Info.	OTA_NOTRING_HISTORIES
Employee History Table	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Application History Table	Additional Application Details	PER_APPLICATIONS
Application History Table	Additional Assignment Details	PER_ASSIGNMENTS

Configurable Profile Options

You can display a position hierarchy instead of a supervisory hierarchy in My Employee Information.

Profile Options

Profile	Configurable Levels	Values	Default
HR: Display Position Hierarchy	Site	Yes/No	No
HR: Enable User Personalization	All	Yes/No	No

Employee Information View

The Employee Information view displays the details relevant to an employee or worker. This information need not relate to their job or employment contract.

The Employee Information page displays any specific fields which you have defined as flexfields and can also display a country-specific section which will display localization fields, for example, the national identifier or visa information.

All the information in the Employee Information view relates to the current record for the employee or worker and no history is displayed.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	HR Views

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
EPI Address Detail Region	Personal Address Information	Address Structure
EPI Additional Person Details	Additional Personal Details	PER_PEOPLE
EPI Further Person Information	Further Person Information	Person Developer DF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Assignment Details View

The assignment of an employee or worker identifies their role and payroll within a business group. The assignment is made up of a number of assignment components, for example, the organization and payroll.

The Assignment Details view displays this assignment information for a particular employee or worker, and also enables you to display additional related information, for example, the hire date or assignment number If multiple assignments are enabled, the HR Professional can select which assignment information to display. If multiple assignments are not enabled, the primary assignment information is displayed.

See: Multiple Assignments, page 9-47

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Assignment Details

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
AD Current Assignment Region	Job Flexfield	JOB
AD Current Assignment Region	Position Flexfield	POS
AD Current Assignment Region	Grade Flexfield	GRD
AD Additional Assignment Details Desc Flex Region	Additional Assignment Details	PER_ASSIGNMENTS
AD Assignment History Detail Region	Job Flexfield	JOB
AD Assignment History Detail Region	Position Flexfield	POS
AD Assignment History Detail Region	Grade Flexfield	GRD
AD Assignment Statutory Info	Soft Coded Key Flex	SCL

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Not applicable

Compensation Activity View

The Compensation activity view displays the salary and benefits information for an employee. If multiple assignments are enabled, the HR Professional can select the required assignment.

See: Multiple Assignments, page 9-47

> **Note:** The self-service My Employee Information function also contains a Salary view, although this tab does not contain information about the employee's benefits.

The Compensation Activity view displays all the elements for a worker unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed. If you want to restrict the elements displayed in this view, create an element set (of type Customization Set) containing the elements you want to display, and select this element set in the Element Set Name user profile option.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Compensation Activity

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
CA Work Detail Region	Job Flexfield	JOB
CA Work Detail Region	Position Flexfield	POS
CA Work Detail Region	Grade Flexfield	GRD
CA Additional Salary Details Desc Flex Region	Add'l Salary Admin Details	PER_PAY_PROPOSALS

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Value	Default Value
Element Set Name	All	Element Set	Null

See: Defining an Element or Distribution Set, *Oracle HRMS Payroll Processing Management Guide*

Termination History View

You terminate an employee or worker when he or she leaves your organization. Information about the employee or worker remains on the system but all current assignments are ended.

The Termination History view displays any termination history for an employee or worker. If a worker's contract is terminated and the worker is subsequently rehired, the application updates the information displayed in the view so that the worker is not displayed as *Terminated*.

The worker's record may contain more that one termination, for example, if they have been rehired more than once.

> **Note:** If the worker has been rehired, the SSHR application displays the last termination date.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Termination History

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
TH Work Detail Region	Job Flexfield	JOB
TH Work Detail Region	Position Flexfield	POS
TH Work Detail Region	Grade Flexfield	GRD
TH Additional Periods of Service Desc Flex Region	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
TH Additional Periods of Service Information Desc Flex Region	Add'l Periods of Service Information	PER_PDS_DEVELOPER_DF

See: Configuring Flex Segments, page 5-19

Configurable Profile Options

Not applicable

Search Functions for HR Views

The first Search function for HR Views is displayed when an HR Professional selects the HR Views option from the self-service menu (when using the HR User Self Service responsibility). At this point, the user can only search for a worker.

The second Search function for HR Views is displayed when the HR Professional has searched for a worker. At this point, the user can either view data for the selected worker or search for another worker.

Menu and Function Names

These modules can be accessed from the following menus and functions:

User Menu Name	Function Name
HR User Self Service (HR_USER_SELF_SERVICE_V4.0)	HR Views Person Search Initial Screen
HR Views Menu (HR_VIEWS_MENU)	HR Views Person Search

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Views - US Federal

Information Overview (US Federal)

This topic and related links provide configuration details for My Information (employee view) and My Employee Information (manager view), and Employee Information (HR professional view) pages.

My Information

Employees can use *My Information* to view employment and other related details. My Information displays records as of the current date. Employees can view present and past records for all categories, but future-dated changes only for benefits, training, absence, and job applications.

See: My Information and My Employee Information, page 9-72

My Employee Information

You can use *My Employee Information* to review the same records available in My Information for anyone within your security access.

The self-service application displays information according to the selected hierarchy (Supervisory or Position), in a flat list from user-defined search results, or from 'My List' functionality. You can use the advanced search criteria to find people, and save searches for later reuse.

Using the Details view, you can review a specific employee's past, present, and future-dated records.

> **Note:** If you want to view the summary information as of an effective date, you can personalize the summary to enable the effective date field.

See: My Information and My Employee Information, page 9-72

Employee Information

Of the three views, *Employee Information* displays the most extensive summary of the employee's record. As an HR professional, you can review the same data available to managers as well as data unavailable to managers such as probation and service obligation information, and sensitive data such as the employee's date of birth and social security number. Unlike the manager's My Employee Information view, you can also view Correction and Cancellation records.

You navigate to Employee Information using the responsibility Federal HR Self Service. You can view details on these page, but to change this information, you must switch to a responsibility that gives you edit access to that data. You can view past, present, and future-dated records for employees within your security profile as of the current date.

See: Employee Information View, page 9-93

The Employee Information view includes the advanced search function. You can personalize the search criteria to include other criteria and to rearrange the order (for example, placing the Last Name as the first search criteria). You can further personalize

Employee Information to include the My List feature, and to show or hide attributes and tabs. The self-service application displays the information according to the selected hierarchy (Supervisory or Position), from user-defined search results, or from 'My List' functionality.

See: Search Functions for HR Views, page 9-85

Employee Summaries

The view pages summarize information entered elsewhere in the application. The Employee page lists the records that match your search criteria, and displays high-level details for each employee record. For a detailed summary, you can click the employee's name. The Details page displays information in the header and the following tabbed regions:

- Employment
- Position
- Personal
- Obligation Dates (Employee Information only)
- Salary
- Benefits (on My Information, Employee Information only)
- Awards and Bonuses
- Performance
- Personnel Actions

  You can view:

  - Notification of Personnel Actions (NPAs) using each view
  - Requests for Personnel Action (RPAs) using My Employee Information or Employee Information
  - Cancellation or Correction actions using Employee Information

In addition to these tabs, you can use the Personalization Framework to display the Training, Absence, and Job Application tabs.

Personalize Views

You can take advantage of the Oracle Framework functionality to personalize My Information, My Employee Information, and Employee Information. You can configure these views so that employees, managers, and HR professionals see only the data items that you choose. Through the use of Framework Personalization, you can rename data items, rename columns, hide unwanted items, display delivered hidden items, and reorder data items or columns. For example, you might display data fields that are normally hidden, such as step and rate.

See: Personalization Framework, page 5-3

You can also hide sub-tabs for individual responsibilities or for all responsibilities.

See: Configuring Tabbed Regions, page 5-21

My Information and My Employee Information (US Federal)

My Information enables employees and contingent workers to view their employment and other related details.

My Employee Information enables managers and HR professionals to view the employment and other related details of employees and contingent workers within their security access. Managers and HR professionals can view the details of people from hierarchy, search results, or 'My List' views.

> **Note:** If you are using assignment-level security, you cannot access any terminated or expired assignments.
>
> See: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

The hierarchy display usually uses the supervisor hierarchy. If your organization arranges its reporting lines by position, you can display a position-based hierarchy by changing the HR:Display Position Hierarchy profile. The position hierarchy displays the position attached to the primary assignment.

See: Enter Process, *Deploying SSHR Capability*.

Personalizations

Using personalizations, you enable only the functionality, information, and controls you want to make available to users. For example, you can display only the column headings of your choice in Summary and Details views.

Consider the following personalizations specific to My Employee Information:

- Effective Date
- My List
- Search Filter
- Name Format

See: The Personalization Framework, page 5-3

See: Configuring Web Pages, page 5-14

See: *OA Framework Personalization and Extensibility Guide*, available on Metalink.

Enable Effective Date

The current system date is the default date for the summary and hierarchy views for My Information (employee view), My Employee Information (manager view), and Employee Information (HR view).

For managers who want to view the summary section of My Employee Information as of an effective date, you can enable the Effective Date field. (The hierarchy view always display records as of the current date.) Click the Personalize Effective Date and View As link, and accept the default scope of Region: Effective Date and View As. To enable the Effective Date field and the Go button, navigate the following nodes:

- Flow Layout: Effective Date and View As
- Row Layout: Effective Date

- Message Text Input: Effective Date
- Submit Button: Go

Enable My List

Enable My List features by adding the My List entry to the context switcher. See Lookups, page 9-77, below.

The Manage My List page enables you to view or delete My List members. Enable the Manage My List link on the My Employee Information or Basic Search page using the Personalize Page link. Navigate the following nodes:

- Page: [My Employee Information|Basic Search]
- Scope: 'Shared Region: Quick Search'
- Row Layout: Quick Search
- Link: Manage My List

The Add To My List button enables you to add selected people to My List. Enable the Add to My List button on the Basic Search and Advanced Search pages using the Personalize Page link. Navigate the following nodes from the Basic Search page:

- Scope: Shared Region: Basic Search
- Default Single Column: Basic Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Navigate the following nodes from the Advanced Search page:

- Scope: 'Shared Region: Advanced Search'
- Default Single Column: Basic Search
- Query: Advanced Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Enable Search Filter

To filter name searches, enable the search filter list for First Name, Last Name, or Full Name on the My Employee Information page, the Basic Search Page, or the My List page. If you do not enable the list, users see only the Name label and the Search field, and the default filter is Last Name. Navigate the following nodes:

- Page: [My Employee Information|Basic Search|My List]
- Scope: Shared Region: Quick Search
- Row Layout: Quick Search

- Message Choice: (SearchFilter)

Name Format

The My Information and My Employee Information pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Personalization for End Users

Personalization for end users is disabled by default. To enable it, set the profile "HR: Enable User Personalization" to Yes.

End user personalization is not the same as implementer personalization. The former enables users to create their own view of the data by hiding columns, and filtering the data for each tab. If you enable this feature using OA Framework technology, users can enable items that implementers have disabled.

Overrides

In the My Information and My Employee Information pages, the position and job names are displayed using a concatenated flexfield format.

For more information on overrides, see: Legislation and Customer Overrides, page 3-6.

Menu and Function Names

Navigation is available from the Employee or Manager Self Service menu, or new menus you configure. In addition to including the My Employee Information function in new menus, add the following predefined submenus as-is:

- GHR_EMP_VIEWS_FUNC_MENU (My Information Functions)
- GHR_MGR_VIEWS_FUNC_MENU (My Employee Information Functions)

Submenus provide Oracle Applications Framework page authentication only, you need not copy or recreate them.

> **Note:** HR professionals can enter My Employee Information using Advanced Search. Add the Advanced Search function to the HR Professional menu.

Menu Name	User Menu Name	Function Name	Default Prompt
GHR_EMPLOYEE_DIRECT_ACCESS	Federal Employee Self Service	My Information	My Information
GHR_EMPLOYEE_DIRECT_ACCESS	Federal Employee Self Service	SS Benefits Enrollment - Federal	Benefits
GHR_LINE_MANAGER_ACCESS	Federal Manager Self Service	My Employee Information	My Employee Information

> **Note:** You cannot change tab sequence, but you can use standard AOL menu exclusion functionality at the responsibility level to show and hide tabs. Make your changes to the My Information views sub tab menu

(GHR_EMP_VIEWS_SUB_TABS) or the My Employee Information views sub tab menu (GHR_MGR_VIEWS_SUB_TABS). See: Configuring Tabbed Regions, page 5-21

See: Defining Menus for SSHR, page 3-8

Lookups

To enable My List functionality, enable My List in the following lookup.

Lookup	Display Name
HR_MGRV_APPL_CONTEXT	Information Views Application Context Switcher

Note: You must also enable the navigation button Manage My List to the My Employee Information page, and the navigation button Add to My List to Simple and Advanced Search Results pages.

Workflow

Not applicable

Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

My Information

Region Name	Tip Type	Message Name
Employee Views	Instruction	HR_EMPV_PAGE_INSTR
Employee History Table	Instruction	HR_EMPV_EMP_TABINSTR
Position History Table	Instruction	HR_EMPV_SAL_TABINSTR
Personal History Table	Instruction	GHR_EMPV_POS_TABINSTR
Salary History Table	Instruction	HR_EMPV_SAL_TABINSTR
Benefits History Table	Instruction	GHR_EMPV_BEN_TABINSTR
Awards and Bonuses History Table	Instruction	GHR_EMPV_AWRD_TAB INSTR
Performance History Table	Instruction	HR_EMPV_PERF_TABINSTR
Personnel Actions History Table	Instruction	GHR_EMPV_PA_TABINSTR
Training History Table	Instruction	HR_EMPV_TRNG_TABINSTR
Absence History Table	Instruction	HR_EMPV_ABS_TABINSTR
Application History Table	Instruction	HR_EMPV_APPLN_TAB INSTR

My Employee Information

Region Name	Tip Type	Message Name
Manager Views	Instruction	HR_MGRV_PAGE_INSTR
Awards and Bonuses History Table	Instruction	GHR_MGRV_AWRD_TAB INST
Personnel Actions History Table	Instruction	GHR_MGRV_PA_TABINST
Position History Table	Instruction	GHR_MGRV_POS_TABINST
Personal History Table	Instruction	GHR_MGRV_PRSNL_TAB INSTR
Training History Table	Instruction	HR_MGRV_TRNG_TABINST

Configurable Flexfields

The following tables describe available configurable flexfields.

My Information

Region Name	Flexfield Name	Message Name
Absence History Table	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Application History Table	Additional Application Details	PER_APPLICATIONS

My Employee Information

Region Name	Flexfield Name	Message Name
Training History Table	Additional Delegate Booking Information	OTA_DELEGATE_BOOKINGS
Training History Table	Add'l Non OTA Training History Info.	OTA_NOTRING_HISTORIES
Application History Table	Additional Application Details	PER_APPLICATIONS
Application History Table	Additional Assignment Details	PER_ASSIGNMENTS

Configurable Profile Options

You can display a position hierarchy instead of a supervisory hierarchy in My Employee Information.

Profile Options

Profile	Configurable Levels	Values	Default
HR: Display Position Hierarchy	Site	Yes/No	No
HR: Enable User Personalization	All	Yes/No	No

Employee Information View (US Federal)

The Employee Information view consolidates employee and contingent worker records as of the current date. From the Employee Information self-service page, you can display a more detailed view of a worker's record, including historic and future-dated records, such as salary entitlements.

Note: You can only view details for workers within your security profile.

Menu and Function Names

You can access worker information using the following menu and function.

User Menu Name	Function Name
Federal HR Self Service	Employee Information

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

The following table describes configurable tips and instructions.

Employee Information

Region Name	Tip Type	Message Name
Employee Views	Instruction	GHR_HRV_PAGE_INSTR
Employment	Instruction	GHR_HRV_EMP_TABINSTR
Position History	Instruction	GHR_HRV_POS_TABINST
Personal History	Instruction	GHR_HRV_PRSNL_TAB INSTR
Obligation Dates	Instruction	GHR_HRV_OBLG_DT_TAB INSTR
Salary	Instruction	GHR_HRV_SAL_TABINSTR
Benefits History	Instruction	GHR_HRV_BNFT_TABINSTR
Awards and Bonuses History	Instruction	GHR_HRV_AWRD_TABINST
Performance	Instruction	GHR_HRV_PERF_TABINSTR
Personnel Actions History	Instruction	GHR_HRV_PA_TABINST
Training History	Instruction	HR_MGRV_TRNG_TABINST
Absence	Instruction	HR_MGRV_ABS_TABINSTR
Job	Instruction	HR_MGRV_APPLN_TAB INSTR

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Recruitment

Apply for Job

Employees and contingent workers can use the Apply for Job module to search and apply for jobs online.

Using this module they can:

- Search for available jobs using the location code and date posted criteria. The location code is the name of a location as entered in Oracle HRMS. This code distinguishes between different locations in the same city and identifies exactly where a job is based.
- View job details such as job title, organization name, location, and the date the vacancy is posted.
- Apply for jobs from the Job Details page using the Apply button. Applicants can click the Apply Now icon to apply for a specific job from the job search results table. They can attach a resume to their job application. If a resume exists in the database from a previous application, then the latest resume overwrites the previous one. The fields in the Basic Details region are read-only. For information on updating basic details, see: Basic Details, page 9-4

  Note: Applicants can upload only one document per application. To upload more than one document, such as a resume and a covering letter, they must include both in the same document. Applicants can contact their HR representative to withdraw the job application.

View Application Information

Applicants can view and track their job applications using the My Information module. Currently they can only view applications for vacancies in their own business group.

See: My Information and My Employee Information, page 9-72

Manager Access to Applications

Managers can use the My Employee Information module to see the applications of their direct reports.

They can process the applications using the Oracle HRMS Mass Updates of Applicants window. To view applicants for vacancies, managers must have access to them through the security profile.

See: Updating Applicant Assignments by Group, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See: Hiring an Applicant (People Window and Application Window), *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

See also: Hire or Placement, Place Contingent Worker Processes, page 9-96

Menu and Function Name

Apply for Job function (HR_APPLY_FOR_JOB_SS) is part of the Contingent Worker Personal Actions, Contingent Worker Self Service, Personal Actions, and Employee Self Service menus.

Workflow

Not applicable.

Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

Available Jobs Page

Region Name	Tip Type	Message Name
Search	Instruction	IRC_CUST_APL_JOB_SCH_INSTRUCTS

Enter Application Details Page

Region Name	Tip Type	Message Name
Page Level	Instruction	IRC_412188_UPLOAD_RESUME_APPLY

Flexfields:

The following table presents a list of flexfields:

Enter Application Details Page

Region Name	Item Name	Flexfield Name	Flexfield Code
Basic Details	PersDetsFlexField	Additional Personal Details	PER_PEOPLE
Basic Details	PersonDeveloper Flex	Further Person Information	Person Developer DF
Basic Details	Notification PreferencesFlex	Additional Notification Preference Details	IRC_NOTIFICATION_ PREFERENCES

Note: A system administrator can use Personalization Framework to display any hidden fields or flexfield segments in the Basic Details region. However, note that these are read-only. Applicants cannot update the basic information using this page.

Hire or Placement, Place Contingent Worker Processes

SSHR's workflow processes Hire or Placement and Place Contingent Worker enable you to enter information about new employees or contingent workers, and also hire people for whom you already have applicant assignments with a status of Accepted.

These processes provide you with the ability to hire employees or bring contingent workers into your enterprise, but if you want to configure them to fit your particular business needs, you can chain any of the following modules into the process:

- Personal Information (including basic details, address, and phone numbers)
- Assignment
- Employee or Contingent Worker Pay
- Change Manager
- SIT
- EIT
- Other Employment Information
- Work Schedule (not applicable to Place Contingent Worker)

When creating a chained process, the Hire Details, Applicant Search, or Place Contingent Worker page must be the first page, followed by the Personal Information page. Then you can add the Person EIT, Assignment EIT, or the Assignment pages. Following this, any of the remaining pages can be included.

The following table gives a list of the delivered chained processes and what modules are included in them.

Recruitment Chained Processes:

Chained Process	Contains the following modules:
Hire or Placement	Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager
Contingent Worker Placement	Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager
French Hire	Personal Information, Assignment, Other Employment Information, Work Schedule, Assignment EIT, Employee or Contingent Worker Pay

Note: These processes are delivered with function level personalizations. If you make a copy either of them in order to make your own changes you will lose these delivered personalizations.

See: Function-level Personalizations, page 5-6

Applicant Search

When hiring an applicant, the results displayed in the Search Applicant page are restricted according to your security profile. In addition, any applicant who is also a current or future employee in your enterprise is also excluded from the SSHR Search Applicant page.

Duplicate Person Checking

When entering a new person, if you have the HR: Cross Business Group profile option set to Yes, then the application does a check to see if the person you are entering already has an existing record.

For more information see: People in a Global Enterprise, *Oracle HRMS Enterprise and Workforce Management Guide*

If an existing record is found, then a list of the possible matches is displayed in the Potential Duplicate People page. You can do one of the following:

- If a potential duplicate exists in outside of the current business group you can create a link between the two records by selecting it. This indicates that they are the same person.
- If the potential duplicate exists in the same business group, then when you click on the existing record an error is displayed as you cannot have two record for the same person in one business group.
- If this is a new person select No Match to indicate that the new record is not connected to any other records and continue entering information.

Menu and Function Names

These processes can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Hire
Manager Self Service	Applicant Hire
Manager Self Service	Contingent Worker Placement
Manager Self Service	French Hire
Manager Self Service	French Applicant Hire

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Hire or Placement

French Hire

Configurable Workflow Attributes:

Refer to the individual topics on each of the modules included in your process for information on what configurable workflow attributes are available.

Configurable Tips and Instructions

Search Hire Applicant Page

Region	Tip Type	Message Name
Applicant List	Long Message	HR_GENERIC_PENDING_ INST_SS
Applicant Entry	Instruction	HR_INST_SEARCH_HIRE_A PPLICANT
Applicant Entry	Instruction	HR_INST_SEARCH_APPL ICANT
Applicant Entry	Instruction	HR_INST_APPLICANT_HIRE

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Region	Flex Name	Flex Code
Basic Detail Update Name Entry	hrpersondevdfflex	Person Developer DF
Basic Detail Update Other Entry	hrpersondevdfflex	Person Developer DF
Basic Detail Update Other Entry	Add Per Details Flexfield	PER_PEOPLE
NewHire Main Address	hraddressflex	Address Structure
NewHire Main Address	hraddtladdressflex	PER_ADDRESSES

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Cross Business Group	Site, Responsibility	Yes/No	No
HR: Propagate Data Changes	Site	Yes/No	No
HR: Self Service Hire and Placement Default	Site, Application, Responsibility, User	Yes/No	Yes
HR: Base Salary Required	Site	Yes/No	Null

HR:Cross Business Group

Specifies whether people from business groups other than your own can be retrieved in the Search Applicant page.

HR:Propagate Data Changes

You use this profile option to control the synchronization of your person records where you have multiple records for one person, for example if a person has local records in two different countries

If you want changes made in one business group to be propagated throughout all business groups, then set this profile option to Yes.

> **Note:** You can only propagate changes to business groups in which your security profile allows you to make updates.

For more information see: Person Record Synchronization, *Oracle HRMS Enterprise and Workforce Management Guide*

HR: Self Service Hire and Placement Default

Specifies whether values for the new person record should be defaulted or not.

For the Hire or Placement function, if you set the profile to Yes, the application defaults the Organization value based on the primary assignment, as of the system date, of the person logged in. The application also defaults the following values, but they do not apply to contingent worker placement:

- GRE (if US)
- Payroll
- Salary Basis

The supervisor for the new person defaults to the person logged in.

For both Hire and Applicant Hire, this profile also controls which person type is defaulted.

- If the profile is set to No and there is only one person type available, then this person type is defaulted. If there is more than one available then the field remains blank and you can select a value.
- If the profile is set to Yes and there is only one person type available, then this person type is defaulted. If there is more than one available then the field displays the person type set as the default for the system person type of Employee.

HR: Base Salary Required

See: Pay Rate, page 9-63.

For more information see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Further Configuration Steps

> **Warning:** Hire or Placement functionality uses code 'NEWH' under lookup_type 'PROPOSAL_REASON' to render the PayRate page. *Do not configure this code*, either by disabling the code or by disabling the localization the Hire or Placement process is running. If you do so, the Hire functionality will break.

10

Talent Management (SSHR)

Talent Management Overview (SSHR)

The following topics describe the self-service functions available in the Talent Management area. They provide information about the functionality and configuration options for each function:

- Appraisals (Self-Service), page 10-5
- Questionnaire Administration (Self-Service), page 10-12
- Suitability Matching (Self-Service) , page 10-14
- Events and Bookings, page 10-3
- Employee Reviews, page 10-4
- Competency Profile, page 9-23
- Education and Qualifications, page 9-19
- Other Professional Qualifications, page 9-22
- Work Preferences, page 9-26

> **Note:** To grant your users access to the Training, External Training, and Training Plans functions, which were previously available from the Employee Self-Service menu, you must use the Learner Self-Service responsibility and the Learner Home and External Learning functions. For all other training functionality, see: Oracle Learning Management, *Oracle Learning Management User Guide*.

Using SSHR for Talent Management

Which Talent Management functions can I access from SSHR?

You can access the Appraisals, Competency Profile, Event and Bookings, Employee Review, Suitability Matching, Succession Planning, Work Preferences, Questionnaire Administration, Education and Qualifications, and Other Professional Qualifications functions from SSHR.

From the Talent Management home page, you can access the Appraisals, Education and Qualifications, Competency Profile, and Suitability Matching functions.

Are employee reviews the same as appraisals?

No. The Employee Review function enables you to set up a review meeting and invite reviewers to the meeting. The Appraisals functions enable you to perform an appraisal (for example, an annual performance review) during which you can evaluate a worker's competencies, set or assess objectives, and complete a questionnaire.

What is the difference between the Education and Qualifications function and the Other Professional Qualifications function?

You use the Education and Qualifications function to identify the schools and colleges a person has attended and the qualifications they earned. For example, if an employee has a Bachelor of Arts degree, you use this function to record the qualification and the college or university the employee attended.

You use the Other Professional Qualifications function to record all other recognized qualifications. Such qualifications are typically gained in the work environment.

Can I create a competency profile using SSHR?

No. To create a competency profile, you use the forms-based interface. However, you can use SSHR to view and update a person's competency profile.

How do I include a questionnaire in an appraisal?

To define a questionnaire, you access the Questionnaire Administration function from the HR Professional menu. When you define an appraisal template, you can select the questionnaire you defined. The questionnaire must have the status Published.

Event and Attendance Administration

Events and Bookings

The Events and Bookings function enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and workers, enabling managers to book their subordinates onto events. If a manager books a subordinate onto an event, the subordinate worker receives notification of the booking.

See also: Event and Attendance Administration, *Using Oracle Learning Management*

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Events and Bookings
Manager Self Service	Events and Bookings

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Events Search Criteria	Instruction	PQH_EVENT_SEARCH
Events Create Button	Instruction	PQH_EVENT_ ADDORCANCEL
Events Search And Result Header	Instruction	PQH_EVENT_BOOK
Manager Events Search And Result Header	Instruction	PQH_EVENT_MGR_SEARCH
Events Create Button	Instruction	PQH_EVENT_ ADDORCANCEL

See: Adding Instructions to Web Pages, page 5-25

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Employee Reviews

The Employee Review function enables employees and managers to create or update reviews. Employees can create their own reviews and managers can create reviews for their employees. Both managers and employees can invite reviewers to attend the review. They can also remove these reviewers if necessary. When reviewers are invited to a review or removed from a review, they receive a notification.

See: Event and Attendance Administration, *Oracle HRMS Enterprise and Workforce Management*

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Employee Review
Manager Self Service	Employee Review

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Employee Review

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Evaluations and Appraisals

Appraisals (Self-Service)

The Appraisals module, accessed using the Employee and Manager responsibilities, manages the structure, content, and distribution of the worker appraisal process. Before creating an appraisal, users must create at least one appraisal template.

Configuring the Appraisal

You can perform most standard configurations of the appraisal in the appraisal template. For example, to include a Competencies section in the appraisal, you create a competency assessment template and include it in the appraisal template. Otherwise, the appraisal contains no Competencies section.

Organizations that run Oracle Learning Management (formerly Oracle Training Administration) may want to include the Learning Path region in appraisals.

To include the Learning Path region, you can:

1. Personalize the following pages, enabling both to display the item TraActivitiesRN:
   - Overview page: mds/selfservice/appraisals/webui/OverviewPG.xml
   - Main Appraiser Final Ratings page: mds/selfservice/appraisals/webui/MAFinalRatingsPG.xml
2. Using the page layout tree in the personalization page for the pages listed in Step 1, personalize the region TraActivitiesRN to enable the item Training Courses and remove the item View Competency Gaps.
3. Personalize relevant pages to show the Learning Path review region.

The Add Courses Based on Competency Gaps button can appear in the Learning Path region of the Overview page only for self appraisals. For standard and 360-degree appraisals, Add Courses Based on Competency Gaps can appear only on the main appraiser Give Final Ratings page.

To personalize the Give Final Ratings page:

1. Click Save as Draft to save the appraisal.
2. Click Next, then Click Apply.
3. Click Give Final Ratings.
4. In the Final Ratings page, select Personalize Page.
5. Set Rendered to True for the following items:
   - Default Single Column: (TrainingActRN)
   - Submit Button: Add Courses Based on Competency Gaps
   - Header: Learning Path

If you use the Manage Appraisal Templates function to create appraisal templates, you can select Include Learning Path to include this region.

Changing the Initial Values of the Appraisal Sharing Options

When the main appraiser shares the appraisal with the appraisee, the main appraiser specifies which information the appraisee can view and whether the appraisee can update the appraisal. For example, to share competency ratings and comments, the main appraiser selects the Competency Ratings and Comments check box. By default, all options on the Share Appraisal Details with Appraisee page (except Main Appraiser Retains Ownership) are selected.

To change the initial selection setting of any of the sharing options, you personalize the Appraisal Setup Details page. To personalize any attribute other than the initial setting, you personalize the Share Appraisal Details with Appraisee page. For example, to remove the Participant Details checkbox, you personalize the Share Appraisal Details with Appraisee page. To make Participant Details deselected by default, you personalize the Appraisal Setup Details page.

> **Note:** Within a single appraisal, the application sets the default values once only, when you first access the Appraisal Setup Details page. If you change the default values while an appraisal is in progress, those changes are not apparent in the existing appraisal. The changes become apparent only when you start a new appraisal.

To change the initial values of the sharing options, you select Personalize Page from the Appraisal Setup Details page. Alternatively, you can use the Functional Administrator responsibility, select the Personalization tab, and enter the document path: /oracle/apps/per/selfservice/appraisals/webui/SetupDetailsPG. This approach enables you to change initial values without launching the appraisals process flow.

> **Note:** If you use the Manage Appraisal Templates function, you can configure these sharing options interactively for each appraisal template.

Identifying a Default Appraisal Template

To identify a default appraisal template for an appraisal type (for example, for a standard appraisal), you select Personalize Page from the Appraisal Setup Details page. You personalize the field Message Text Input: (ApprTemplateIdTxtInp) and enter the numeric identifier of the appraisal template.

Searching for Employees and Workers

In addition to displaying appraisals for current employees and workers, you can display appraisals for ex-employees.

To enable ex-employee support in the search, you change the value of the &pEnableTerms parameter value to Y for the following Appraisals function:

- View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS)

You can then add the custom function to a custom responsibility or the HR Professional responsibility.

See: Defining Functions for SSHR, page 3-10

Menu and Function Names

The following table describes the menu and function names.

Menu and Function Names

User Menu Name	Function Name
Employee Self-Service	Appraisals (HR_EMP_MY_APPR_SS)
Employee Self-Service	Talent Management (HR_EMP_TALMGMT_ HMPAGE_SS)
Contingent Worker Self-Service	Appraisals (HR_EMP_MY_APPR_SS)
Contingent Worker Self-Service	Talent Management (HR_EMP_TALMGMT_ HMPAGE_SS)
Manager Self-Service	Appraisals (HR_MGR_MN_APPR_SS)
Manager Self-Service	Talent Management (HR_MGR_TALMGMT_ HMPAGE_SS)
HR Professional	View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS)

Workflow

Workflow Process Display Name: Appraisal Details Process

Workflow triggers multiple events, usually notifications to participants. Completion of a standard or 360-Degree appraisal automatically updates the appraisee's competency profile (unless the system profile is disabled), creates or updates the appraisee's learning path, and creates a Performance Review event, which in turn can transfer the overall rating and other data to other modules such as Compensation Workbench.

If you define or configure new functions, you can enable or disable approvals by adding one of the following values to the parameter "pApprovalReqd":

- Y [approvals required]
- YD [approvals with Dynamic Approval support]
- N [no approvals required]

YD is the default value. You cannot enable approvals for self appraisals.

The table below lists the workflow notifications that are specific to appraisals.

Workflow Notifications

Message Source	Message Name	Subject	Body
SYSADMIN	HR_AP PRAISAL_ COMMAP PLERR_MSG	An application error has occurred in your process & PROCESS_DISPLAY_NAME performed on &CURRENT_ PERSON_DISPLAY_NAME	Your &PROCESS_DIS PLAY_NAME performed on &CURRENT_PERSON_ DISPLAY_NAME has encountered the following application error: &ERROR_ MESSAGE_TEXT Please click the link below to view the changes. The HR Rep/System Administrator has been notified. For further action on this failed transaction, please contact your HR Rep/ System Administrator &APPROVAL_HISTORY
SYSADMIN	HR_APPRA ISAL_COMM IT_APPERR_ MSG	An application error has occurred in your & PROCESS_DISPLAY_NAME process	Your process &PROCESS_ DISPLAY_NAME has encountered the following application error: &ERROR_ MESSAGE_TEXT This process has been cancelled without any changes being made. After correcting the issue, click Retry to complete the transaction.
Main Appraiser User Name	HR_APPRA ISAL_OTHER_ PARTIC_MSG	The appraisal of &REV IEWEE needs your attention as other participant	&FORWARDER has requested that you participate in the appraisal (dated &APPRAISAL_ DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRA ISAL_REV IEWER_MSG	The appraisal of &REV IEWEE needs your attention as reviewer	&FORWARDER has requested that you review the appriaisal (dated & APPRAISAL_DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRA ISER_MSG	The appraisal of &REV IEWEE needs your attention as appraiser	&FORWARDER has requested that you act as appraiser for the appraisal (dated &APPRAISAL_ DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
Main Appraiser User Name	HR_APPRAISAL_COM_APPRAISEE_MSG	Your appraisal has been completed	&FORWARDER has completed your appraisal. Please click &OBJECT_URL to view the appraisal details.
Main Appraiser User Name	HR_TRANSFER_TO_APPRAISEE_MSG	Your appraisal has been transferred to you	&FORWARDER has requested that you modify the details of your appraisal dated &APPRAISAL_DATE Comments : &WF_NOTE Please click &OBJECT_URL to view the appraisal details.
Main Appraiser User Name	HR_EMBED_SHARE_LATEST_MSG	View latest details of your appraisal	Links to appraisal details
SYSADMIN	HR_NTFY_MA_COMPLETE_MSG	&PROCESS_DISPLAY_NAME for &CURRENT_PERSON_DISPLAY_NAME has been approved	Final Approver: &FORWARD_TO_DISPLAY_NAME User Name: &FORWARD_TO_USERNAME Comment: &APPROVAL_COMMENT &PROCESS_DISPLAY_NAME changes for &CURRENT_PERSON_DISPLAY_NAME have been approved and completed. View the status below, and verify the successful completion of the appraisal. This notification requires no action.
Main Appraiser User Name	HR_MAIN_APPRAISER_MSG	The appraisal of &REVIEWEE needs your attention as main appraiser	The appraisal (dated &APPRAISAL_DATE) of &REVIEWEE requires your attention as the main appraiser. Comments : &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_PART_TO_MAIN_APPRAISER_MSG	&FORWARDER has completed their appraisal of &REVIEWEE	&FORWARDER has completed their appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_NEW_MAIN_APPRAISER_MSG	You have been selected as main appraiser for the appraisal of &REVIEWEE	&FORWARDER has requested that you take over for &MAIN_APPRAISER as the main appraiser in the appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
SYSTEM	HR_NTFY_MA_PENDAPPR_MSG	&PROCESS_DISPLAY_NAME for &CURRENT_PERSON_DISPLAY_NAME has been approved and is pending appraisee feedback	Final Approver: &FORWARD_TO_DISPLAY_NAME User Name: &FORWARD_TO_USERNAME Comment: &APPROVAL_COMMENT &PROCESS_DISPLAY_NAME changes for &CURRENT_PERSON_DISPLAY_NAME have been approved. The appraisal requires appraisee feedback. View the status below, and verify the successful completion of the appraisal &HR_APPRAISAL_COMMIT_LOG This notification required no action.
Participant	HR_EMBED_PART_TO_MA_MSG	Appraisee &CURRENT_PERSON_DISPLAY_NAME has provided feedback on &PROCESS_DISPLAY_NAME	&CURRENT_PERSON_DISPLAY_NAME has provided feedback on &PROCESS_DISPLAY_NAME This notification requires no action.
SYSTEM	HR_EMBED_APPRAISEE_FBCK_MSG	Your appraisal has been completed. Please review and provide feedback.	

Configuring Text

You can configure most text (including tips, instructions, and messages) on the Appraisals pages using the Personalize Page function.

Editing Page Titles

To change an Appraisals page title, you edit both the title message and either the Employee Appraisals menu or the Manager Appraisals menu.

To change the title message, you log in to HRMS using the Application Developer responsibility and navigate to the Messages window.

The title messages you can edit for the Create Appraisal pages are:

Appraisals Page	Message	Default Message Text
Setup Details	HR_INST_APPR_CREATE_SETUP_SS	Create &1: Setup Details
Overview	HR_INST_APPR_CREATE_OVIEW_SS	Create &1: Overview
Review	HR_INST_APPR_CREATE_REVIEW_SS	Create &1: Review

The title messages you can edit for the Update Appraisal pages are:

Appraisals Page	Message	Default Message Text
Setup Details	HR_INST_APPR_UPDATE_SETUP_SS	Update &1: Setup Details
Overview	HR_INST_APPR_UPDATE_OVIEW_SS	Update &1: Overview
Review	HR_INST_APPR_UPDATE_REVIEW_SS	Update &1: Review

The "&1" value in the default message text resolves to the appraisal type value (for example, "Standard Appraisal") from the Employee Appraisals menu or the Manager Appraisals menu, as appropriate. The menus and their default prompts are as follows:

User Menu Name	Menu	Default Prompts
Employee Appraisals	HR_EMPLOYEE_APPRAISALS_MENU	Self Appraisal Standard Appraisal 360-Degree Appraisal
Manager Appraisals	HR_MANAGER_APPRAISALS_MENU	Standard Appraisal 360-Degree Appraisal

To change the appraisal type value, navigate to the Menus window and modify the prompt in the relevant menu.

For example, to change the page title "Update Standard Appraisal: Setup Details" to "Modify Annual Appraisal Setup Information" for an employee, you:

- Change the message "Update &1: Setup Details" to "Modify &1 Setup Information".
- Change the prompt "Standard Appraisal" in HR_EMPLOYEE_APPRAISALS_MENU to "Annual Appraisal".

Configurable Flexfields

If the FND: Diagnostic profile option is enabled, you can click About this Page on any appraisal page to display a list of the flexfields on the page.

Profile Options

The following profile options affect the Appraisals function:

- *HR: Appraisee Can Add Participants* enables appraisees to add appraisers, reviewers, and other participants.
- *HR: Worker Appraisals Menu* and *HR: Manager Appraisals Menu* enable you to change the types of appraisals a worker and a manager can create.
- *Apply Assessment Competencies to Person*, if set to Yes, automatically updates the appraisee's competency profile with data from a completed appraisal.

- *Talent Management Source Type* enables you to select a default value from among the values you establish for the PROFICIENCY_SOURCE user lookup; the value appears in various places,such as learning paths.
- *HR: Save and Stay in Appraisals Page* controls what happens when the user clicks Save as Draft. If this option is set to Yes, the user stays in the current page. If this option is set to No, the Appraisals home page appears.

The following table describes the profile options.

Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Appraisee Can Add Participants	All	**Yes**, No	No
HR: Worker Appraisals Menu	All	**Employee Appraisals Menu**	Yes
HR: Manager Appraisals Menu	All	**Manager Appraisals Menu**	Yes
Apply Assessment Competencies to Person	Site	Yes, **No**	No
Talent Management Source Type	Site	[PROFICIENCY_SOURCE lookup value]	No
HR: Save and Stay in Appraisals Page	User, Site	**Yes**, No	No

Questionnaire Administration (Self-Service)

The Questionnaire Administration module helps to automate the creation of questionnaires for use in appraisals or surveys.

Users can generate the HTML content with any external HTML editor.

> **Note:** Text fields in questionnaires hold up to 2000 single-byte characters. If users enter or paste text containing multibyte characters, the field limit reduces accordingly. Text is truncated automatically to fit the 2000-byte limit.

Menu and Function Names

You can access the Questionnaire Administration module from the menus and functions in the table below.

Menu and Function Names

User Menu Name	Function Name
HR Professional	Questionnaire Administration (HR_QUEST_ADMIN_SS)
Questionnaire Functions Menu	HR_QUEST_ADMIN_SS (Questionnaire Administration) HR_QUEST_DEFINE_SS (Create Questionnaire) HR_QUEST_PREVIEW_SS (Preview Questionnaire) HR_QUEST_VIEW_SS (Preview Questionnaire) HR_QUEST_UPD_PREVIEW_SS (Preview Questionnaire) HR_QUEST_UPDATE_SS (Update Questionnaire)

Note: Questionnaire Functions Menu is a submenu of Questionnaire Administration. To include the Questionnaire Administration function in a custom menu, include HR_QUEST_ADMIN_SS with a prompt and Questionnaire Functions Menu as a submenu without a prompt. Do not include prompts for the functions in the submenu.

Workflow

Questionnaire Administration uses no configurable workflow processes.

Tips, Instructions, and Messages

You can configure all the following tips, instructions, and messages directly from the Questionnaire Administration pages, using the "Personalize..." links.

Tips and Instructions

Page	Region	Attribute Name	Message Name
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_DEFINE_INSTR_SS
QuestCreatePG	Required Field Description	longMessage	HR_QUEST_HTML_FIELD_INSTR
QuestPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW_INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_ADMIN_INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_SRCH_INSTR_SS
QuestOverviewPG	Results: Questionnaires	Instruction	HR_QUEST_RESULTS_INSTR_SS
QuestUpdatePG	Questionnaire Update Region	Instruction	HR_QUEST_UPDATE_INSTR_SS
QuestUpdatePG	Required Field Description	longMessage	HR_QUEST_HTML_FIELD_INSTR
QuestUpdPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW_INSTR_SS

Confirmation Messages

Message Name	Message Meaning
HR_SAVE_FOR_LATER_NO_CHANGE	No changes have been made in the Update Questionnaire Page
HR_QUESTIONNAIRE_UPDATE_CONF	Questionnaire create/update/publish/unpublish Confirmation

Instructions in Dialog Pages

Instruction Name	Instruction Meaning
HR_QUESTIONNAIRE_DELETE_WARN	Warning displayed for Delete Questionnaire

Flexfields

Questionnaire Administration uses no configurable flexfields.

Profile Options

Questionnaire Administration uses no unique configurable profile options.

Suitability Matching (Self-Service)

The Suitability Matching module provides a range of competency-based methods for finding the right person for a work opportunity or finding the right work opportunity for a person. Managers and HR professionals can compare employees, applicants, and contingent workers by role, job, and position, and employees can find work opportunities that fit their competencies.

Depending on their responsibility, the default Suitability Matching gateway page offers users from four to ten matching options.

The following table describes the options for suitability matching.

Suitability Matching Options

Category	Option	Access by Responsibility
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

Menu and Function Names

Suitability Matching is accessible through three menus and corresponding functions as described in the following table.

Menu and Function Names

User Menu Name	Function Name
Manager Self-Service (LINE_MANAGER_ACCESS_V4.0)	Suitability Matching Mgr (HR_SUITABILITY_MATCH_MGR_SS)
Employee Self-Service (EMPLOYEE_DIRECT_ACCESS_V4.0)	Suitability Matching (HR_SUITABILITY_MATCH_SS)
Contingent Worker Self-Service (HR_CWK_DIRECT_ACCESS)	Suitability Matching (HR_SUITABILITY_MATCH_SS)
HR Professional (HR_PROF_SELF_SERVICE_V4.0)	Suitability Matching Hr (HR_SUITABILITY_MATCH_HR_SS)

Workflow

Suitability Matching uses no configurable workflow processes.

Tips and Instructions

You can configure all the following tips and instructions directly from the Suitability Matching pages, using the "Personalize..." links.

The following table describes the tips and instructions.

Tips and Instructions

Region	Attribute Name	Message Name
AddCompetenciesPG	SelectCompInst	HR_INST_ADD_COMP_TO_LIST
CompGapsPG	SMCompGapsInst	HR_INST_COMP_GAPS_SS
ComparePeopleListPG	PersonListInst	HR_INST_PERSON_LIST
CompareSuccessorsListPG	PersonListInst	HR_INST_PERSON_LIST
CurrentAssignmentsPG	CurrentAssnInst	HR_INST_ASSIGNMENT_LIST
GraphByCompetencePG	GraphCompInst	HR_INST_GRAPH_COMP
GraphByPersonPG	GraphPersonInst	HR_INST_GRAPH_PERSON
GraphByWorkOppPG	GraphWorkOppInst	HR_INST_GRAPH_WORKOPP
PersonCompetenciesPG	PersonCompInst	HR_INST_PERSON_SELECT_COMP
PersonListPG	PersonListInst	HR_INST_PERSON_LIST
RefineSearchPG	RefineSearchInst	HR_INST_REFINE_SEARCH
SMManagerOptionsPG	ManagerOppInst	HR_INST_SUITMATCH_LMDA_OPTIONS
SMManagerOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPTIONS
SMManagerOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_OPTIONS
SMOptionsPG	HROptionsInst	HR_INST_SUITMATCH_LMDA_OPTIONS
SMOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPTIONS
SMOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_OPTIONS
SMPersonOptionsPG	PersonPageOppInst	HR_INST_SUITMATCH_EDA_OPTIONS
SMTrainingActivitiesPG	SMTrainActInst	HR_INST_TRAIN_ACT_SS

Region	Attribute Name	Message Name
SelectCompetenciesPG	SelectCompInst	HR_INST_SELECT_COMP
SelectMultiRolePG	SelectRoleInst	HR_INST_MULTI_SELECT_ ROLE
SelectRolePG	SelectRoleInst	HR_INST_SELECT_ROLE
SelectRolePG	CompareByRoleInst	HR_INST_COMPARE_PEO PLE_ROLE
SelectRolePG	SelectPositionInst	HR_INST_SELECT_POSITION
SelectRolePG	SelectVacancyInst	HR_INST_SELECT_ VACANCY
SuccessionOptionsPG	SuccOptionsInst	HR_INST_SUCCESSION_OPT IONS
SuitableWorkOppListPG	WorkOppListInst	HR_INST_SUITABLE_ WORKOPP_LIST
VacancyListPG	VacancyListInst	HR_INST_VACANCIES_LIST
WorkOppListPG	WorkOppListInst	HR_INST_WORKOPP_LIST
MultiJobLovPG	SearchInst	FND_LOV_GO
MultiOrganizationLovPG	SearchInst	FND_LOV_GO
MultiPositionLovPG	SearchInst	FND_LOV_GO
MultiVacancyLovPG	SearchInst	FND_LOV_GO

Configurable Flexfields

Suitability Matching uses no configurable flexfields.

Profile Options

The three profile options control the matching options available to each category of user: employee, manager, and HR professional. Each of the values is a menu name. If you want to change the options available to a given user (if you want to hide the succession options from everyone, for example), you can clone a menu and replace the profile value with the name of your new menu. Note that these menus differ in kind and structure from the user menus listed above.

The following table describes the profile options.

Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: SM Manager Find Work Opp Menu (HR_SM_PERSONAL_ACTIONS_MENU)	Responsibility	**HR_SM_PERSONAL_FUNCTIONS** (at Responsibility:HR Professional)**HR_SM_PERSONAL_FUNCTIONS** (at Responsibility:Manager Self-Service)	Yes
HR: SM Manager Find Person Menu (HR_SM_MANAGER_ACTIONS_MENU)	Responsibility	**HR_SM_MANAGER_FUNCTIONS** (at responsibility:HR Professional)**HR_SM_MANAGER_FUNCTIONS** (at responsibility: Manager Self-Service)	Yes
HR: SM Employee Find Work Opp Menu (HR_SM_EMP_PERSONAL_ACTIONS_MENU)	Responsibility	**HR_SM_EMP_PERSONAL_FUNCTIONS** (at responsibility: Employee Self-Service)	Yes

11

Compensation and Benefits Management

Compensation and Benefits Management Overview

SSHR provides self-service functions within the following areas of Compensation and Benefits Management:

- Leave and Absence Management
- Compensation and Awards Management (Benefits Enrollment, Compensation Workbench, Individual Compensation Distributions)

This chapter looks in detail at the self-service functions available within these areas and provides information on the functionality and configuration options for each function:

Self-Service Compensation and Benefits Functions

Can I use SSHR to enroll in a benefits program?

Yes. You can use the self-service benefits enrollments functions to enroll yourself in any benefits program for which you are eligible. If you are a manager, you can enroll your employees or contingent workers in a benefits program.

Self-Service Benefits supports a variety of enrollment types including open, unrestricted, and life event enrollments for one or more flex or non-flex programs.

When a user logs on to Self-Service Benefits, the application determines eligibility. If a user is able to change their benefits at this time, the Benefits Enrollment Overview page is displayed. If the user cannot change their benefits at this time, the Current Benefits Overview page is displayed.

Do I still create the benefits plans and programs using the Professional User Interface (PUI)?

Yes. You still use the Benefits functionality in the PUI to create benefits plans and programs. You can update benefit-related information, for example, dependent information and personal information, using the self-service interface and this information is stored in the Oracle Applications database tables using standard Application Programmable Interfaces (APIs).

So I can use the Self-Service Benefits functionality to add dependents?

Yes. You can add, delete, or update dependents and family members using the self-service functions.

Some benefit plans use care providers. How does this work in SSHR?

If applicable, you can configure Self-Service Benefits so that your user can search for a primary care provider (PCP) using a web-based search of a PCP database. Alternatively, you can set up a free-form text field for your users to enter a primary care provider.

Apart from Benefits Enrollment, what other functionality is available?

SSHR also includes a module called Individual Compensation Distributions which enables you to assign bonuses and awards to eligible employees. SSHR also supports Absence Management and your employees can use the Absence Management function to enter absence-related information using a self-service interface.

And I can also access the Compensation Workbench using SSHR?

Yes. The Compensation Workbench is available from the delivered Manager Self-Service menu. Managers can use the Compensation Workbench to determine and allocate compensation awards.

Who can use Self-Service Benefits What-if?

HR Professionals, Managers and Employees can use Self-Service Benefits What-if. As a manager, you can use Self-Service Benefits What-if to model electability for benefits of employees in your security group, based on proposed changes to the person's HR record. As an employee, you can use Self-Service Benefits What-if to model changes to your benefits based on your electable choices, plan or option enrollment rate.

What does Self-Service Benefits What-if enable me to do?

Self-Service Benefits What-if enables you to model electability for benefits based on proposed changes to a person's HR record, before you make the actual change. When you model electability, changes are not saved to the database, so you can view different electability scenarios without having to manually save data.

As a manager, you can use Self-Service Benefits What-if to model electability for benefits of employees in your security group, based on proposed changes to the person's HR record. As an employee, you can view changes to your benefits based on your electable choices, plan or option enrollment rate.

Absence Management

Absences

The Absences module enables employees or managers to enter absence-related information in SSHR. You can request multiple absences and view them in a summary format. You can also view a history of absences you have taken and display current leave accrual balances. You can submit a planned absence request (before the absence is taken) or a confirmed request (either after the absence is completed or when dates have been finalized before the absence begins).

You can update absence requests as a manager or employee, for example, to change the absence dates or confirm the absence. Planned, confirmed, and updated requests can be submitted for approval. You cannot update requests when they are pending approval.

You can view your accrual balances as an employee, or those of other employees as their manager.

See: Viewing Accrual Balances using SSHR, page 11-5.

For more information on Absence Management, see: Absence Management and PTO Accruals, *Oracle HRMS Compensation and Benefits Management Guide*

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Leave of Absence	Leave of Absence

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Leave of Absence

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Leave of Absence Summary Top Page

Region	Tip Type	Message Name
Absence Summary	Instruction	HR_INST_LOA_SUMMARY

Create Leave of Absence Page

Region	Tip Type	Message Name
Create Leave Of Absence Main	Instruction	HR_INST_LOA_CREATE
Absence Details	Instruction	HR_INST_LOA_CREATE_ DETAILS

Update Leave of Absence Page

Region	Tip Type	Message Name
Update Main	Instruction	HR_INST_LOA_UPDATE
Update Details	Instruction	HR_INST_LOA_UPDATE_ DETAILS

Confirm Dates Top Page

Region	Tip Type	Message Name
Confirm Dates Main	Instruction	HR_INST_LOA_RETURN
Confirm Dates Details	Instruction	HR_INST_LOA_RETURN_ DETAILS

See: Configuring Tips and Messages, page 5-25

Configurable FlexFields

Create Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

View Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

Update Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

Confirm Dates Top Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default Value
HR: Accrual Plan Element Set Displayed to User	All	All Element Sets	Null

Attach the required element set to the profile **HR: Accrual Plan Element Set Displayed to User** at the appropriate levels to display the accrual balances in the Leave of Absence page.

Viewing Accrual Balances in SSHR

Using SSHR, employees and managers can view their accrual balances or those of their group of employees. The Show Accrual Balances region in the Self-Service HR Leave of Absence page displays the accrual balances for a person as of the effective date.

Follow the steps below to enable SSHR to display the appropriate accrual balances in the Leave of Absence page.

1. Set up the accrual plans that suit the requirements of your organization.

   Determine the accrual balances and their corresponding accrual plans that you would like to display in the Leave of Absences page.

   See: Setting Up PTO Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide*.

2. Define an element set of type run set and include elements that correspond to these accrual plans.

   See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*.

3. Attach this element set to the profile HR: Accrual Plan Element Set Displayed to User at the appropriate levels.

   See: Defining Preferences with User Profile Options, *Oracle Applications Systems Administrator's Guide*.

4. You can now view the appropriate employee accrual balances using the SSHR Leave of Absence page.

   See: Absences, page 11-3.

Self-Service Benefits Enrollments

Self-Service Benefits Enrollments

Self-Service Benefits supports a variety of enrollment types, including open, unrestricted, and life event enrollments for one or more flex or non-flex programs.

The enrollment choices, price tags, and other information in Self-Service Benefits web pages are derived from Oracle Applications database tables using the rules of your plan design. Updated information is stored in the Oracle Applications database tables using standard Application Programmable Interfaces (APIs).

Self-Service Benefits supports enrollment for plans and options in a program. Use vertical plan types to enable plan level enrollments which can have multiple rates and horizontal plans types to enable enrollments in options inside a plan level with single rate. Use Oracle's professional forms interface or the self-service Individual Compensation Distribution web pages to enroll participants in all plans not in a program such as savings plans, Employee Stock Purchase Plans (ESPP), or 401(k) plans.

Self-Service Benefits Enrollment Functionality

Self-Service Benefits offers an employee the opportunity to:

- Review current, and future program benefits enrollments, and up to ten past enrollments, within the last two years
- Select benefits
- Distribute excess flex credits (Advanced Benefits)
- Add, update, or review family member information

  Note: Family member information entered through the self-service interface and personal contact data entered through the professional forms interface share the same table. Any data entered or updated in Self-Service HRMS or the professional forms interface is reflected in both interfaces.

- Add, update, or remove dependents

  Note: Self-Service requires dependents and beneficiaries to have the personal relationship check box checked on the Contacts window.

- Add, update, or remove beneficiaries

  Employees can select organizational beneficiaries provided that the administrator has entered the Beneficiary Organization using the professional forms interface, and selected the May Designate Organization as Beneficiary check box in the plan enrollment requirements.

- Search for and select primary care providers
- Print a temporary participant identification card
- Save or print an enrollment confirmation statement as a PDF document

Legal Disclaimer Page

During implementation, you can choose to display a predefined Legal Disclaimer page in Self-Service Benefits. Before self-service users can enroll in a benefit, they must read and accept the terms provided in the Legal Disclaimer page. If they do not accept these terms, the application will not enable the users to enroll.

You can enter the instruction text for the Legal Disclaimer page in the Self Service Instructor Text field in the Communication Types Usages window. This is a one-time process that you can complete when you set up Self-Service Benefits. You can also include HTML tags in the Disclaimer text for formatting effects, such as bold and indented text.

Enrollment Change Workflow Notifications

You can configure the Workflow Builder to send a notification to an HR professional whenever a participant updates a Self-Service Benefits Enrollment web page, excluding the Primary Care Provider page. The notification contains the following information and provides direct access to the Confirmation page for the participant, but is not linked to any Workflow approval process:

- Name of Employee
- Social Security Number or National Identifier
- Life Event Name
- Enrollment Period
- Selected Benefit Plans and Options
- List of Covered Dependents

Oracle Workflow sends a notification to a worklist or group that you maintain after the participant completes the enrollment update. If the participant closes the browser window prior to reaching the Confirmation page, Oracle Workflow sends a notification within one hour of the first enrollment change.

You can manually override the enrollment or contact the participant to correct and resubmit the election if necessary.

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

Hidden Fields in Self-Service Benefits

There are a number of fields that are delivered hidden by default on the self-service pages. You can choose to display them. They include:

- Coverage start and end dates for specific enrollments
- Cost 2 (after tax), 3 (taxable), and 4 (miscellaneous) columns for displaying multiple rates for a vertical display plan type
- Physician group and hospital, on the Primary Care Provider Search page
- Full name

See: Benefits Enrollments, page 11-14 for further details of these hidden fields and the regions where you can display them.

Displaying Descriptive Flexfields

The following descriptive flexfields can be entered in self-service Benefits:

- Additional Ben Prtt Enrt Rslt F Details (BEN_PRTT_ENRT_RSLT_F)

  You enter this flexfield data on the Benefits Information page, which appears after the Benefits Selection page if the flexfield has been set up and there are global segments, or segments defined for the selected plan type.

- Add'l Contact R'ship Det's (PER_CONTACTS)

  You enter this flexfield data in the Miscellaneous region of the Family Member Add page. You can also view or enter the flexfield data in the Personal Information module of SSHR.

- Further Person Information (Person Developer DF)

  You enter this flexfield data in the Name and Relationship region of the Family Member Add page.

If you have set up the Further Person Information or Additional Contact Relationship Details flexfields, you can choose to display some or all of the segments in self-service using the Personalization Framework. See: Configuring Flexfields, page 5-19

The Additional Ben Prtt Enrt Rslt F Details flexfield appears automatically if you define and freeze this flexfield. You must bounce the Apache server after freezing or unfreezing the flexfield to ensure that your changes are displayed.

Plan Type Context

You may want to display the Additional Ben Prtt Enrt Rslt F Details flexfield only for enrollment in specific compensation objects. For example, you may want to display prior years commission information to participants for a supplemental life insurance plan, while hiding commission information used to calculate group life insurance rates.

To display the flexfield differentially by compensation object, you must define a context for the flexfield based on BG_ID_PL_TYP_ID. On the Descriptive Flexfield Segments window, uncheck the Displayed check box for the context if you do not want to show the context poplist to the user. Notice that if you display this list, it will contain all the contexts for the flexfield (even those for other business groups) unless you restrict them by a value set defined for the context.

If there are frozen segments for the descriptive flexfield but no global segments defined and no segments defined for the selected plan type, the Benefits Information page appears in the enrollment chain but the region pertaining to this plan type does not display. Existing data set up in the flexfield is not affected by any new contexts you define for self-service.

Plan Design Considerations for Self-Service Benefits

Before eligible participants can enroll in self-service benefits using the self-service interface, you must design your benefit plan using Oracle's professional forms interface. The following topics look at the points you should consider when designing your plan for the self-service environment.

Legislative Configurations

Self-Service Benefits is delivered with US-style formatting for the following fields:

- Address
- Social Security Number
- Pre Tax Cost
- After Tax Cost

For non-US self-service implementations, you can edit field labels to fit your legislative requirements and you can also hide and unhide fields. For example, you may want to hide the list of States from the address fields.

> **Note:** The address style and country used by Self-Service Benefits is inherited from the primary benefits participant.

If your legislation or benefit plan design does not allow for after tax contributions, consider hiding the after tax columns on the tables contained in the following web pages:

- Benefits Enrollment Overview
- Current Benefits Overview
- Benefits Selection
- Confirmation

See: Setting Up Self-Service Benefits Web Pages, page 11-28

See: Benefits Enrollments, page 11-14 for a list of the configurable user interface elements in each delivered web page.

Integration with Authoria HR (US and UK)

The third party product Authoria HR provides a common knowledge repository to manage and communicate HR and benefits information.

After a self-service implementer defines a total compensation plan in the Oracle HRMS professional user interface, licensees of Authoria HR can configure links between Oracle HRMS and Authoria HR.

End users can click on links in the applicable self-service web pages to display context-sensitive Authoria HR documentation.

You can configure the following self-service enrollment windows for use with Authoria HR:

- Benefits Enrollment Overview page
- Current Benefits page
- Confirmation page
- Benefits Selection page

See Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Multiple Rates

You can display up to four standard rates for each compensation object to enable employees to see employee and employer paid premiums, and related costs such as fringe benefit taxes and administrative fees. Multiple rates are displayed on the Overview, Benefits Selection, Current Benefits, and Confirmation pages.

Only vertical display Plan Types are able to be custom formatted in self-service to display multiple rates for a single compensation object. Due to display and sizing constraints, horizontal display Plan Types cannot display multiple rates. You can only display one standard rate per column.

When you define standard rates for self-service, you can select any activity type and tax type. However, you must check the Display on Enrollment check box (Processing Information tab) and you must specify the Self Service Display Order number (1 to 4).

When you display multiple rates, the column headings in self-service are Cost 1, Cost 2, Cost 3, and Cost 4. Otherwise, a single rate displays as either Pretax or Aftertax. You can change the column headings using the Personalization Framework.

When defining your standard rate, consider the following:

- For Costs 2, 3, and 4 you can select the Display on Enrollment check box (Processing Information tab of Standard Rates window) or the Enter Value at Enrollment check box (Calculation Method tab). However, do not select the Enter Annual Value check box on the Calculation Method tab. Annual Value can only be entered in Cost 1, if applicable.
- Costs 2, 3, and 4 can be used to calculate additional amounts, either based on the coverage or the amount in Cost 1. For example, if you charge a 2% administration fee for a spending account, you would set up the rates as follows:

  Coverage-Check the Enter Value at Enrollment box

  Cost 1 = *Contribution* - Select Same as Coverage as the Calculation Method

  Cost 2 = *Administration Fee* - Select Multiple of Coverage as the Calculation Method (0.02 * coverage, in this example)

  Cost 3 = *Total Cost* - Select Multiple of Coverage as the Calculation Method (1.02 * coverage, in this example)

Benefits Pools (Advanced Benefits)

If you are displaying multiple rates, you may not want them all deducted from flex credits. Use the Application tab on the Benefits Pool window to determine which standard rate to deduct. All rates selected on this tab are included in the Flex Credit Used Total. Unused Flex Credits (rollovers) displayed are not impacted by the use of multiple rates.

Flexible Spending Accounts (US)

To ensure that your qualifying participants can enroll in Flexible Spending Account (FSA) plans using Self-Service Benefits, you must set up your plans using one of the following two methods:

The preferred method is to use the Plan Types window to define one plan type for each FSA plan. For example, you define one plan type for Dependent Care FSA plans and a second plan type for Health Care FSA plans. For each plan type, you define the coverage plan or plans into which participants and their dependents can enroll. You also define a **decline coverage** plan which is linked to each plan type.

Alternatively, you can set up one FSA plan type that covers both dependent care and health care plans. Within this plan type, you define plans for both dependent care and health care. Then, within these plans, you link **options** for both selecting and declining coverage.

Other items for consideration:

- When you define the activity rate for the FSA plan, check the Enter Value at Enrollment field in the Calculation Method region of the Standard Rates window.
- Select Set Annual Rate Equal to Coverage as the calculation method.
- In the Coverages window, define the minimum and maximum contribution amounts for the FSA plan. Indicate that values for this plan are entered at enrollment.

Flexible Benefits Programs (Advanced Benefits)

With Flexible Benefits Programs, you can offer flex credits to eligible participants to offset the cost of benefits. When you defining a benefit program in the Programs window, select the same periodicity for the activity reference period (the time period in which the system expresses activity rates) and the enrollment rate frequency (the activity rate that is communicated to participants). This ensures that the price tags for selecting benefits and the flex credits available to participants are expressed for the same time period.

Other items for consideration:

- Unless your flex credits are determined using the result of a calculation, you indicate the number of flex credits associated with a compensation object by entering the value in the Flat Amount field in the Calculation Method region of the Flex Credits window.
- You must set up a flex credits *placeholder plan* and link this plan to the flex program. This plan records the total flex credits for the program. Define a rate for this plan by entering zero in the Flat Amount field of the Calculation Method region of the Standard Rates window.
- Set the processing type of the corresponding element to Recurring.

Temporary Participant Identification Cards

A temporary identification card allows a participant to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider. Using Self-Service Benefits, a participant can print one card for each elected plan that allows for temporary identification cards. The participant can also print a card for each covered dependent.

The application generates a temporary ID card upon:

- Enrollment
- Re-enrollment
- Change in Enrollment
- Participant Request (due to loss)

The identification card includes information such as:

- Employee Name and Social Security Number
- Member Name and Social Security Number (for dependents)
- Employer Name
- Plan Name

You indicate that a plan allows for the printing of temporary ID cards by checking the Allow Temporary Identification field on the Plans window.

Declining Coverage

Depending on your plan design, you must set up either a decline coverage plan or option that allows a participant to waive an enrollment opportunity for which they are otherwise eligible.

If a plan type contains multiple plans, you create a *decline coverage plan* in the Plans window (in addition to the regular plans) and indicate that the plan is of the specified plan type. If a plan type has only one plan, you define a *decline coverage option* and link it to the plan. This ensures that participants can either select or decline benefit coverage.

> **Note:** If your plan design *requires* that a participant select at least one option from a group of options or at least one plan from a group of plans, do not define a decline coverage plan or option.

Self-Service Benefits What-if

Self-Service Benefits What-if enables you to model electability for benefits based on proposed changes to a person's HR record, before you make the actual change. When you model electability, the database does not save changes, so you can view different electability scenarios without having to manually save data.

The Self-Service Benefits What-if page is available from Manager and Employee Self-Service Responsibilities. To ensure that certain data is not visible to all users, as an administrator, you can define roles for Self-Service Benefits What-if. Managers can review changes to benefits for employees in their security group that would result from proposed changes to the employee's HR record. Employees can view changes to their benefits based on proposed data changes to their HR records. The comparison is in terms of their electable choices, plan or option enrollment rate.

As a manager or an employee, you can compare current benefits with the proposed benefits based on the electable choices, and a plan or option enrollment rate. For example, you can view the benefits impact of relocation or a change in weekly hours worked.

See: Modeling a Person's Benefits Eligibility (Advanced Benefits), *Oracle HRMS Compensation and Benefits Guide*

The system does not allow you to model electability if current life events are in progress. What-if electability depends only on the data changes you elect to model. Using the HRMS System Administrator responsibility, you need to enable the Benefits Compensation Objects Extra Information Type (EIT). This EIT enables you to add information about the type of compensation object such as program, plan type, compensation object name, and a flag indicating whether the compensation object is visible to the user.

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

You also define the What-if Label that displays to users who perform the what-if modeling, and the life events for compensation objects and link one or more person changes to each life event.

See: Setting Up What-if Modeling, *Oracle HRMS Compensation and Benefits Management Guide*

You can use the HRMS System Administrator responsibility to configure Self-Service Benefits What-if so that managers only view changes to benefits for employees in their security profile.

By default, the Self-Service Benefits pages do not display some fields. However, you can choose to display them using the Personalization Framework.

See: Benefits Enrollments, page 11-27

Benefits Enrollments

This topic provides reference information you need to configure your Self-Service Benefits web pages using the Personalization Framework.

For **instruction text**, the tables below list--by web page region--the communication short name and the valid communication usages that are required when you define a communication type to display instruction text for a particular program, plan type, plan, or life event.

See: Defining Self-Service Instruction Text, page 11-35

Hidden Fields: This topic also lists--by web page region--all fields the application delivers as hidden which you can display using the Personalization Framework.

For example, by default all person name fields in Self-Service Benefits display names in the format 'First Last Suffix' (without commas between the parts of the name.) You can add the Full Name field to a web page and remove the delivered Name field. In the US, the Full Name field uses the format 'Prefix Last, First Middle Suffix'.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Self-Service Benefits Enrollment - Employee
Employee Self-Service	Self-Service Benefits Enrollment - Federal

Configurable Pages and Shared Regions

The following definitions can be configured using the Personalization Framework:

Family Members and Others, and Family Members and Others Detail Page

The Family Members and Others page enables a participant to view a record of their family members and other persons enrolled as dependents or beneficiaries of their benefits. Benefits participants can add another person to the Family Members and Others table by choosing the Add Another Person button, which opens the Family Members and Others Details page.

This page only displays when a person has either:

- An enrollment opportunity
- Eligibility for an unrestricted program
- A detected or unprocessed potential life event as of the system date

If one of these conditions does not exist, the application opens the Current Benefits page.

The seeded life event reason of *Added During Enrollment* prevents a life event from occurring when you create a family member or update a family member's details. If you define a life event reason of the type Personal, that you make Selectable for Self Service, you can trigger a life event when a person enters or deletes a contact on the Self-Service Human Resources Contacts page and selects a relationship start or end reason.

> **Note:** It is recommended that you provide instruction text indicating that eligibility for benefits may be based on family members. However, you cannot use communication usages to restrict the display of instruction text to a compensation object or a life event for the Family Members page.

Hidden Field: Use the BEN_FAMILY_MBRS_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Family Members and Others

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Members Content	Instruction		FML.FAMILY_MBRS_CONTENT	Program, Life Event
Family Members Content	Help Tip			

Family Members and Others Detail Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Add or Update Family Members	Instruction		FML.FAM_ADD_CONTENT	Program, Life Event
Name and Relationship	Instruction		FML.FAM_ADD_NAME	Program, Life Event
Address	Instruction		FML.FAM_ADD_ADDRESS	Program, Life Event
Miscellaneous Information	Instruction		FML.FAM_ADD_OTHER	Program, Life Event
Second Medical Coverage	Instruction		FML.FAM_ADD_SECOND_MEDICAL	Program, Life Event
Address	Help Tip			
Name and Relationship	Hint (Suffix)	92638	—	—
Address	Hint (Postal Code)	92639	—	—
Miscellaneous Information	Hint (National Identifier)	92640	—	—
Miscellaneous Information	Hint (Date of Birth)	92637	—	—
	Message (Required Field Missing)	92601	—	—
	Message (Invalid Birth Date)	92598	—	—

Configurable FlexFields

Family Members and Others Page

Region	Flex Name	Flex Code
Add or Update Family Members	Further Person Information	hrpersondevdfflex
Miscellaneous Information	Additional Contact Relationship Details	Add Cont Details D Flexfield

See: Configuring Flexfields, page 5-19

Benefits Enrollment Overview Page

The Benefits Enrollment Overview web page enables a participant to view a record of their current benefits and to enroll into a new set of benefits.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_SELECTIONS_TABLE
- BEN_OVW_CVRD_DEPS_TABLE
- BEN_OVW_BENEF_TABLE
- BEN_OVW_PCP_TABLE

You can use the BEN_OVW_SELECTIONS_TABLE region to display a column for the taxable cost of a benefit. This column corresponds to a standard rate with an activity type of Self-Service Display, or--if you are displaying multiple rates for the compensation object--to the rate you have defined with 3 in the Self Service Display Order field. If you are displaying multiple rates, you can also display the Cost 2 (After Tax Cost) and Cost 4 (Miscellaneous) columns to show the rates you have defined with 2 and 4 in the Self Service Display Order field.

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Benefits Enrollment Overview Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Enrollment Overview Content	Instruction		BEO.ENRL_OVERVIEW_CONTENT	Program, Life Event
Flex Credits	Instruction		BEO.FLEX_CREDITS	Program, Life Event
Flex Credit Summary	Instruction		BEO.OVERVIEW_FC_SUMMARY	Program, Life Event
Flex Credit Rollovers	Instruction		BEO.FLEX_CREDIT_ROLLOVERS	Program, Life Event
Benefit Selections	Instruction		BEO.OVERVIEW_SELECTIONS	Program, Life Event
Covered Dependents	Instruction		BEO.OVERVIEW_CVRD_DEPS	Program, Life Event
Beneficiary Enrollment Overview	Instruction		BEO.ENRL_OVERVIEW_BENEF	Program, Life Event
Primary Care Providers Enrollment Overview	Instruction		BEO.ENRL_OVERVIEW_PCP	Program, Life Event
Enrollment Overview Content	Message (No Enrollment Opportunity, Brief Message)	92570	--	--
Enrollment Overview Content	Message (No Enrollment Opportunity, Detail Message)	92571	--	--

Current Benefits Overview Page

The Current Benefits Overview web page enables a participant to see a record of their current benefits.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_CVRD_DEPS_TABLE
- BEN_OVW_BENEF_TABLE
- BEN_OVW_PCP_TABLE

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Current Benefits Overview Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Current Benefits Overview Content	Instruction		CBO.CURRENT_ OVERVIEW_ CONTENT	Program
Flex Credits	Instruction		CBO.FLEX_CRED ITS	Program
Flex Credit Summary	Instruction		CBO.OVERV IEW_FC_ SUMMARY	Program
Flex Credit Rollovers	Instruction		CBO.FLEX_CRED IT_ROLLOVERS	Program
Benefit Selections	Instruction		CBO.OVERV IEW_SELECT IONS	Program
Covered Dependents	Instruction		CBO.OVERV IEW_CVRD_DE PS	Program
Beneficiary Overview	Instruction		CBO.OVERV IEW_BENEF	Program
Primary Care Providers Overview	Instruction		CBO.OVERV IEW_PCP	Program
Current Benefits Overview Content	Message (No Current Enrollment, Brief Message)	92572	—	—
Current Benefits Overview Content	Message (No Current Enrollment, Detail Message)	92573	—	—

Benefits Selection Page

The Benefits Selection page enables a participant to select one or more plans in which to enroll.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Enrollment Selection Content	Instruction		BNS.ENRT_SELECTION_CONTENT	Program, Life Event
Top Flex Credit Region	Instruction		BNS.ENRT_SELECTION_CR_TOP	Program, Life Event
Bottom Flex Credit Region	Instruction		BNS.ENRT_SELECTION_CR_BOTTOM	Program, Life Event
Selection Area	Instruction		BNS.ENRT_SELECTION_SELECT_AREA	Program, Plan Type, Life Event
Selection Area	Help Tip (Certification Legend)			
Selection Area	Help Tip (Enter Annual Rate Input Box, Long Tip)			
Selection Area	Help Tip (Enter Rate Input Box, Long Tip)			
Selection Area	Help Tip (Enter Benefit Amount Input Box, Long Tip)			
Selection Area	Message (Enter Annual Rate, Long Tip)	BEN_ENRT_ANN_RTVAL_TIP		
Selection Area	Message (Enter Rate, Long Tip)	BEN_ENRT_BNFTAMT_TIP		
Selection Area	Message (Enter Benefit Amount Tip)	BEN_ENRT_RTVAL_TIP		
Selection Area	Message (Tokens for above messages)	BEN_ENRT_SLECT_TIP_ANY_AMOUNT		
Selection Area	Message (Tokens for above messages)	BEN_ENRT_SLECT_TIP_ANY_VALUE		

Dependents Selection Page

The Dependents Selection page enables a participant to add their dependents to a plan.

> **Note:** For Advanced Benefits customers: if participant dependents are not displaying in this page, verify that you have linked the appropriate

life events to the program or plan enrollment requirements in the Dependent Change of Life Event window.

Hidden Field: Use the BEN_ENRL_DEPEN_SELECTION_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Dependents Selection Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Dependents Selection	Instruction		--	--
Dependents Selection	Instruction		DPS.ENRL_DEPENDENTS_CONTENT	Program, Life Event
Dependents Selection	Hint (Dependent Table)		DPS.ENRL_DEPENDENTS_CONTENT_PL	Program, Plan Type, Plan, Life Event
Dependents Selection	Message (Can't Designate)	92588	—	—

Beneficiary Selection Page

The Beneficiary Selection page enables a participant to add their beneficiaries to a plan.

Hidden Field: Use the BEN_BENEF_SELECTION_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Beneficiary Selection	Instruction (Page)		BFS.BENEFICIARY_CONTENT	Program, Life Event
Beneficiary Selection	Instruction (Plan Level Table)		BFS.BENEFICIARY_CONTENT_PLAN	Program, Plan Type, Plan, Life Event
Family Members and Others	Instruction		BFS.BENEFICIARY_CONTENT_FAMILY	Program, Plan Type, Plan, Life Event
Organizations	Instruction		BFS.BENEFICIARY_CONTENT_ORGS	Program, Plan Type, Plan, Life Event
Beneficiary Totals Table	Hint			
Beneficiary Selection	Message (Can't Designate)	92587	—	—

Primary Care Provider Page

The Primary Care Provider page enables a participant to select a care provider. If your enterprise partners with a third party supplier of primary care provider information, you can configure this page to allow web-based searches of a database of provider information.

See: Configuring the Primary Care Provider Search Facility, page 11-36

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Primary Care Provider Selection Content	Instruction	Instruction	PCP.PcpSelectContentPageLevel	Program, Life Event
Primary Care Provider Selection Content	Instruction	Instruction	PCP.PcpSelectContentPlanLevel	Program, Plan Type, Plan, Life Event
Primary Care Provider Selection Content	Hint		—	—
Primary Care Provider Selection Content	Message (Can't Designate)	92567	—	—

Primary Care Provider Summary and Search Pages

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_PCP_SEARCH_TABLE
- BEN_PCP_SELECT_TABLE

On the Primary Care Provider Search page, you can use the BEN_PCP_SEARCH_CR ITERIA region to add the hidden fields of Physician Group and Hospital. The hidden fields of Location, School, and Degree are reserved for future use.

For the Physician Group, Hospital, Language, and Specialty fields, you must load the available data as provided by your third party provider into the corresponding Lookup Codes--in the following order--using the Application Utilities Lookups window in the Professional User Interface.

- BEN_PCP_MED_GRP
- BEN_PCP_HOSPITAL
- BEN_PCP_LANGUAGE
- BEN_PCP_SPCLTY

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Primary Care Provider Search	Instruction		PCS.PCP_ SEARCH	Program, Plan Type, Plan, Life Event
Search	Instruction		PCS.PCP_ SEARCH_CR ITERIA	Program, Plan Type, Plan, Life Event
PCP Result Table	Instruction		PCS.PCP_ SEARCH_ RESULT	Program, Plan Type, Plan, Life Event
Ben PCP XML Request Params	Tip			
Ben PCP XML Request Params	Message (No PC Ps found)			

Confirmation Page

The Confirmation page enables a participant to see a summary of their choices and a warning of any oversights or miscalculations they may have made.

> **Note:** You can also use the Confirmation page to display a *signature region* for participants to print from their web browser. Use this region if you require a participant's signature as part of a benefits enrollment. Use the Personalization Framework to display the signature region for this page.

Benefits users can print a summary statement of their enrollment, along with their signature, to keep as a proof of their records or to submit to an HR Representative if required. They can also view, print, or save the summary as a PDF document instead. The statement page displays a summary of the participant's benefits enrollment along with any warning messages, oversights, or miscalculations the participant may have made during the enrollment. Depending on the participant's enrollment data and personalization on the page, the Confirmation Page displays the following:

- Flex credits summary
- Benefits selection
- Covered dependents
- Beneficiaries
- Primary care providers
- Signature region

To print a benefits confirmation statement, click Printable Page. The printable page prints only the relevant information, excluding navigation buttons, tip messages, instruction text, tabs, and other user interface components.

To open or save the statement as a PDF document, click Publish PDF. Choose Open or Save in the File Download dialog box. You can print the document once you open it.

If you want to change the layout of the PDF Confirmation page, you can configure a copy of the default RTF template that XML Publisher uses for this page, which is Benefits Enrollment Confirmation.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_BENEF_TABLE
- BEN_OVW_CVR_DEPS_TABLE
- BEN_OVW_PCP_TABLE

You can use the BEN_OVW_SELECTIONS_TABLE region to display a column for the taxable cost of a benefit. This column corresponds to a standard rate with an activity type of Self-Service Display, or--if you are displaying multiple rates for the compensation object--to the rate you have defined with 3 in the Self Service Display Order field. If you are displaying multiple rates, you can also display the Cost 2 (After Tax Cost) and Cost 4 (Miscellaneous) columns to show the rates you have defined with 2 and 4 in the Self Service Display Order field.

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Ben Enrollment Confirmation Content	Instruction		BEC.ENRL_ CONF_CONTENT	Program, Life Event
Flex Credits	Instruction		BEC.FLEX_CRED ITS	Program, Life Event
Flex Credit Summary	Instruction		BEC.OVERVIEW_ FC_SUMMARY	Program, Life Event
Flex Credit Rollovers	Instruction		BEC.FLEX_CRED IT_ROLLOVERS	Program, Life Event
Benefit Selections	Instruction		BEC.OVERVIEW_ SELECTIONS	Program, Life Event
Covered Dependents	Instruction		BEC.OVERVIEW_ CVRD_DEPS	Program, Life Event
Beneficiaries Enrollment Confirmation	Instruction		BEC.ENRL_ CONF_BENEF ICIARIES	Program, Life Event
Primary Care Providers Enrollment Confirmation	Instruction		BEC.ENRL_ CONF_PCP	Program, Life Event
BEN_ENRL_ CONF_WARN INGS	Message (Confirmation Success)	92605	—	—
BEN_ENRL_ CONF_WARN INGS	Message (Action Item Warning)	92606	—	—

Configurable FlexFields

Confirmation Page

Region	Flex Name	Flex Code
Benefit Selections	Additional Ben Prtt Enrt Rslt F Details	N/A

Unused Flex Credits Page

The Unused Flex Credits page provides a summary of the flex credits left unspent by a participant.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Unused Flex Credits Content	Instruction		FLX.UNUSED_FLEX_CREDIT_CONTENT	Program, Life Event
Unused Flex Credits Content	Instruction		FLX.UNUSED_FLEX_CREDIT_NONE	Program, Life Event
Unused Flex Credits Content	Message (No Unused Flex Credits)	92633	—	—
Unused Flex Credits Content	Message	92632	—	—

Change Session Date Page

The Change Session Date page lets you test future-dated elections. For example, you may want to perform system testing before the start of an open enrollment period. This page should be removed in your production environment so that benefits participants do not alter their enrollment date.

See: Setting the Effective Date of a Scheduled Enrollment in Self-Service Benefits, page 11-33

Region	Tip Type	Message Name
Session Date Content	Instruction	92604
Session Date Content	Tip (Effective Date)	92637

Temporary ID Card Page

The Temporary ID Card page lets a participant print an ID card which the participant can use to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Oracle Self-Service Human Resources Identification Card	Instruction		TMP.ENRL_TEMP_ID_PAGE	Program, Life Event
Ben Temporary ID Card Content	Instruction		TMP.ENRL_TEMP_ID_PLAN	Program, Plan Type, Plan, Life Event
Temporary ID Card	Instruction		TMP.ENRL_TEMP_ID_CARD	Program, Plan Type, Plan, Life Event

See: Configuring Web Pages, page 5-14

Self-Service Benefits What-if Pages

You can access Self-Service Benefits What-if from the following menus and functions:

Menu and Function Names

User Menu Name	Function Name
Manager Self-Service	Self-Service Benefits What-if Manager
Employee Self-Service	Self-Service Benefits What-if Employee

You can configure the following definitions using the Personalization Framework.

Configurable Tips and Instructions

Region	Tip Type	Message Name
Impact on Benefits Region	Header Text	BEN_93423_SS_WATIF_HDR_LABEL
Choose Winning Life Event Region	Message (Error)	BEN_93393_WATIF_CONFLICT_LER
Choose Winning Life Event Region	Instruction	BEN_93392_WATIF_CNFLT_LER_INS
Effective Date Region	Instruction	BEN_93389_WATIF_EFF_DATE_INS
Associated Data Changes Region	Instruction	BEN_93391_WATIF_DATA_CHG_INS
Impact on Benefits Region	Instruction	BEN_93394_WATIF_PG_INS_TEXT

You can personalize the following columns to display them:

Seeded Hidden Columns

Column Name	Displayed Detail
Reference Period	Activity Reference Period
Current Electable	Compensation objects currently electable
Current Coverage	Coverage information about currently electable compensation objects
Current Defined Amount	Defined Amount
What-If Electable	Compensation objects based on the what-if modeling
What-If Coverage	Coverage information about compensation object based on the what-if modeling
What-If Defined Amount	Defined Amount based on what-if modeling

Setting Up Self-Service Benefits Enrollments

You must complete your plan design in the professional forms interface before you can view a Self-Service Benefits enrollment web page. If you license Advanced Benefits, you can run the Participation Batch Process from the Concurrent Manager to create electable choices for eligible participants.

If you use Standard Benefits, or if you are an Advanced Benefits customers using the **unrestricted** enrollment method, you can begin to allow participant enrollments after you create your plan design. The application creates the self-service enrollment page when the person logs into Self-Service Benefits.

To set up self-service benefits enrollments:

1. Review the sample benefits web pages. You can configure the following elements using the Personalization Framework:
   - Section titles
   - Table Layout
   - Hints
   - Tips
   - Fields (you can choose to display fields that are hidden by default)
   - Field labels

   See: Configuring Web Pages, page 5-14
2. Choose whether to display a predefined Legal Disclaimer page that the user must accept before processing an election.

   Oracle Self-Service Benefits delivers the Legal Disclaimer page as hidden by default.

   See: Setting Up User Access to Self-Service Benefits, page 11-30
3. Define instruction text for each web page region. You do this by defining a communication type and associating the instruction text with a web page Region.

See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

You can include a link in your instruction text to another web site using HTML syntax. You could create a link to reference information contained in a summary plan description. For example:

See the Vision Medical web site for more information.

In this example, the application opens the web page in a new browser window.

4. Define when you want the instruction text displayed. You can vary the instruction displayed according to:

   - Program
   - Plan Type
   - Plan
   - Life Event (Advanced Benefits)

   See: Defining When to Use a Benefits Communication, *Oracle HRMS Compensation and Benefits Management Guide*

5. Create a hypertext link from a compensation object to a web page which describes that program, plan type in program, plan in program, plan, or option in plan. To create a hypertext link, use one or more of the following windows:

   - Programs (for a program)
   - Plan and Plan Type window (for a plan or a plan type in program)
   - Plans window (for a plan)
   - Maintain Plan Options window (for an option in a plan)

   The link appears in the Benefits Selection web page, or--for Programs--the Overview page.

   See: Defining a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

6. Review Messages and change any that do not meet your requirements.

7. Configure Action Item messages (Advanced Benefits) to meet your requirements.

   The application displays Action Item messages at the end of the enrollment process on the Confirmation page.

   See: Enrollment Action Types in Enrollment Requirements, *Oracle HRMS Compensation and Benefits Management Guide*

8. Set up any life event reasons that you want to trigger when a user adds, updates, or deletes a family member contact in Self-Service Benefits.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*

9. Configure whether benefits participants have the option to select a Primary Care Provider (PCP) for a benefits plan.

   See: Maintaining Primary Care Providers for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

10. Configure whether you want benefits participants to have access to the Primary Care Provider Search facility.

    See: Configuring the Primary Care Provider Search Facility, page 11-36

11. Configure the RTF template if you want to modify the default Confirmation page. Perform the following steps to configure your own Confirmation page:

    1. Copy the default template, Benefits Enrollment Confirmation, and ensure that your copy has a template code beginning with BENSSCNF.

    2. Make the default template inactive.

12. Test your implementation. A system administrator can debug Self-Service Benefits by generating a PYUPIP trace file for an individual user.

    See: Generating Self-Service Benefits Trace Files, page 11-39

Enabling Self-Service Benefits Enrollment Notifications

You can configure Self-Service Benefits Enrollments so that an enrollment update generates a notification to an HR professional.

To enable enrollment notifications, you update one of the seeded functions in the Form Functions window using the system administrator responsibility.

See: Enrollment Change Workflow Notifications, page 11-8

To enable Self-Service Benefits Enrollment Notifications:

1. Query the function that you want to update. Choose one of the following:

    - Employee Self-Service (BEN_SS_BNFT_ENRT)

    - Manager Self-Service (BEN_SS_MGR_ENRT)

2. Choose the Form tab.

3. In the Parameters field, verify that the following parameter appears:

    displayDate=N&allowEnrt=Y&sessionDate=&sendFYINotification=N&wf ProcessName=FYI_NOTIFICATION_PRC.

    > **Note:** If you do not see this string, you must manually enter the parameter.

4. To enable workflow notifications, replace sendFYINotification=N with sendFYINotification=Y.

5. Replace the wfProcessName=FYI_NOTIFICATION_PRC portion of the parameter with your custom process name.

6. Save your work.

Setting Up User Access to Self-Service Benefits

Self-Service Benefits functions are attached to the Benefits Self-Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

If you create a new submenu, you must update the AK regions which point to the submenou.

See: Configuring Tabbed Regions, page 5-21

To set up user access to self-service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self-Service Menu in the Menu field: HR_EMPLOYEE_DIRECT_ACCESS_WEB. The following Self-Service User Menu Name displays to users:
   - Employee Self-Service

   You can change the menu name if required.
4. Query the Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:
   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.
   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self-service web page.
5. Save your work and close the Menus window.
6. If you create a new submenu, you must update the AK regions which point to the submenu.

   Complete steps 2 to 7 to update the region items, or proceed to step 8 if you do not intend to create any new submenus.

   See:Configuring Tabbed Regions, page 5-21
7. Using an AK Developer responsibility, log on to the application.
8. Open the Regions window.
9. Query one of the following regions in the Region ID field:
   - BEN_BENEFICIARY_PAGE
   - BEN_CURR_OVW_PAGE
   - BEN_ENRL_CONF_PAGE
   - BEN_ENRL_DEPENDENTS_PAGE
   - BEN_ENRL_OVERVIEW_PAGE
   - BEN_ENRT_SELECTION_PAGE
   - BEN_FAMILY_MBRS_PAGE

- BEN_FAM_ADD_PAGE
- BEN_PCP_SEARCH_PAGE
- BEN_PCP_SELECT_PAGE
- BEN_UNUSED_FLEX_CREDIT_PAGE

10. Choose the Region Items button to open the Region Items window.
11. In the Attribute Name column, select the Application Menu entry.
12. Scroll to the Menu Name column and update the field with the new menu as entered in the Menu field of the Menus window.
13. Repeat for each region listed in step 9.
14. Save your work and close the Region Items window.
15. You can use the Form Functions window to customize the seeded functions--BEN_SS_BNFT_ENRT and BEN_SS_MNGR_ENRT.
16. Use the Form Functions window to create your own Self-Service Benefit functions from the sample functions supplied. The sample User Function Names are:
    - Self Service View Current Benefits
    - Self Service Benefits Enrollment

    The Function Names are:
    - BEN_SS_CURR_BNFT
    - BEN_SS_BNFT_ENRT

    If you update the seeded functions, you must update your custom function to use the seeded parameters and HTML Calls.

    > **Note:** It is a good practice to check the Readme for each Self-Service Benefits patch you apply to see if the parameters and HTML Calls for the seeded functions have changed.

17. Update the displayAgreement parameter value to Y to display a Legal Disclaimer page that the user must accept before continuing with an enrollment.
18. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:
    - HR: Security Profile

    > **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

19. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:
    - HR: Business Group
20. Define the people you would like to access Self-Service Benefits.

There are two ways to do this. You can follow the typical steps for defining a new user and assign each user a responsibility that enables access to Self-Service Benefits, one at a time.

Or, you can set up concurrent programs to automate this manual process.

See the White Paper titled: *Batch Creation of User Accounts,* available from MetaLink.

Setting the Effective Date of a Scheduled Enrollment in Self-Service Benefits

Self-Service Benefits provides different ways of controlling the date on which the application records a participant election:

- The Change Session Date web page (for testing environments in both Standard and Advanced Benefits)
- The Change Session Date menu parameter (Standard Benefits)
- Normal date processing based on the session date (Advanced Benefits)

The Change Session Date web page lets you test future-dated elections, such as for an upcoming open enrollment period.

Use the Change Session Date menu parameter if you use Oracle Standard Benefits and you want to record the life event occurred date of an enrollment for a date that is not equal to the system date.

For example, if you schedule your open enrollment period for the first two weeks in November, you can set the session date to record all enrollments as of January 1st of the following year.

> **Note:** You can use both features simultaneously, but the date the user enters in the Change Session Date web page overrides the session date parameter for the current session.

To set the session date in Self-Service Benefits:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. Choose from:
   - BEN_SS_BNFT_ENRT (Employee Self-Service Benefits)
   - BEN_SS_MGR_ENRT (Manager Self-Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to display the Change Session Date page or to set the effective date to a date you choose.

   > **Note:** If you do not set the session date, Self-Service Benefits processes dates based on the date codes you select in your plan design.

In the following example, setting *displayDate=Y* displays the Change Session Date web page. Setting *&sessionDate=12/31* sets the session date to December 31st for the BEN_SS_MGR_ENRT function.

displayDate=Y&sessionDate=12/31&pFromPersonSearch=Y&pFormFunction=BEN_SS_MGR_SRCH

You enter the session date in *mm/dd* format. Do not include the year.

> **Note:** You should remove this web page from your production environment by setting displayDate=N so that benefits participants cannot alter their enrollment date.

Deriving the Year of the Session Date

The application derives the year to use for the session date, so you should not include a year in the session date parameter.

If you enter a session day and month that is prior to or equal to the *system* day and month, the application uses the following year. If you enter a session date that is later than the system day and month, the application sets the session date to the current year.

Configuring Unrestricted Program Enrollment Processing

Whenever a participant accesses the Benefits function in Self-Service Benefits, the Participation Process evaluates the participant's eligibility for unrestricted program enrollments. During an annual open enrollment period, with many participants accessing the application at once, this can impede system performance.

To reduce system load, you can restrict when the application re-evaluates unrestricted programs for a participant.

Also, you can remove access to the Benefits Enrollment Overview web page during those periods when you do not want participants to enter or update benefits elections for any event. In these instances, participants can still view their past, current, and future elections using the Current Benefits Overview web page.

To configure unrestricted program enrollment processing:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to configure unrestricted enrollment processing. Select one of the following:
   - BEN_SS_BNFT_ENRT (Self-Service Benefits Enrollment - Employee)
   - BEN_SS_MGR_ENRT (Self-Service Benefits Enrollment - Internal Use)
4. Choose the Form tab to display the following parameter:

   displayDate=Y&allowEnrt=Y&sessionDate=&sendFYINotification=Y&wfProcessName=FYI_NOTIFICATION_PRC&ssProcessUnrestricted=Y
5. If you do not see the parameter, enter the parameter string as listed above.

6. To force the Participation Process to re-evaluate a participant for each access of the Benefits function, leave the seeded parameter ssProcessUnrestricted=Y. Use this setting during open enrollment.

7. To disallow unrestricted enrollments in Self-Service Benefits, update the seeded parameter by setting ssProcessUnrestricted=N. Use this setting outside of your Open Enrollment period to prevent Self-Service enrollments.

8. Set ssProcessUnrestricted=P to restrict Unrestricted enrollment evaluation during your Open Enrollment period to the following scenarios:

    - This is the first time the application has evaluated the unrestricted event for the person, and no unrestricted events exist for the person.

    - The Participation Process has not processed the unrestricted event for the current annual enrollment period, and the current session date is later than the existing unrestricted life event occurred on date.

    - The Life Event Occurred On Date for the unrestricted event equals the session date, and there is a person change made after the last unrestricted process run to one of the following tables.

        - Per_addresses
        - Per_all_assignments_f
        - Per_all_people_f
        - Per_contact_relationships
        - Per_pay_proposals
        - Per_periods_of_service
        - Per_qualifications
        - Ben_per_bnfts_bal_f
        - Per_absence_attendances
        - Per_person_type_usages_f

9. Save your work.

Defining Self-Service Instruction Text

Use the Communication Types window in the Professional User Interface to define regional instruction text for Self-Service Benefits Enrollments and Individual Compensation Distributions.

You can vary the instruction text that displays in a region based on different criteria, such as the presence of a life event or enrollment in a particular compensation object.

To define a communication type:

1. Enter a Name for the communication type you are defining.

2. Enter a Short Name for this communication type.

    > **Note:** Self-Service uses the short name to link the instruction text you write to a specific region in a Self-Service Benefits web page. You must enter the short name in the following

format: **BEN.REGIONNAME**. Exclude the **BEN** prefix from the regionname portion of the short name.

See: Benefits Enrollments, page 11-14 for a list of the required short names for each web page region.

3. Select a To Be Sent code of Not Applicable.
4. Select a Usage type of Self Service Instruction Text to indicate you are configuring a self-service web page.
5. Save your work.
6. Choose the Usages button.
7. Select a value for one or more of the following parameters to limit the conditions under which instruction text is displayed.
   - Life Event
   - Program
   - Plan
   - Plan Type
   - Enrollment Period
   - Action
8. Select a Usage Rule if your criteria for determining the conditions under which instruction text is generated cannot be fully accommodated by the usage criteria on this window.
9. Enter instruction text in the Self Service Instruction Text field that corresponds to the region of the self-service web page that you are configuring.
10. Click in the next **Or Combination of** field and enter the next set of instruction text in the Self Service Instructor Text box if you enable the Legal Disclaimer page.

    You cannot specify limitation parameters, such as life event or plan, when defining instruction text for the Legal Disclaimer page.

    > **Note:** The application displays the disclaimer text entered in each field as a separate paragraph on the Legal Disclaimer web page. You can enter a maximum of 2000 characters for each disclaimer text paragraph. Advanced Benefits users can check whether a person has accepted the legal disclaimer in the Person Communication window. When you query the name of the person in the window, the Type field displays Legal Disclaimer, indicting that the user has accepted the legal disclaimer with details of the life event name and date. Both Standard and Advanced Benefits users can create a system extract to report on this information.

11. Save your work.

Configuring the Primary Care Provider Search Facility

As part of a self-service enrollment, a benefits participant can select a primary care provider (PCP) for a benefit plan. As a system administrator, you can configure

Self-Service Benefits so that a participant can select a primary care provider through a web-based search of a PCP database.

Self-Service Benefits also supports free form text entry of primary care providers without validation when a repository of PCP data is not used.

Follow the instructions below based on the search type configured by your enterprise.

Setting up an XML-Enabled Primary Care Provider Search

If the search criteria entered by a benefits participant is formatted as an XML search request for use with a database of primary care providers (maintained by your enterprise or a third party), you use the Personalization Framework to configure information such as the URL of the information provider and the Document Type Definition (DTD) used by the search.

> **Note:** If you change your PCP Search Configuration, you must delete any Personalization changes and re-enter the PCP configuration data.

To set up an XML-enabled primary care provider search:

1. Navigate to the Primary Care Provider Search page from the Self-Service Benefits Enrollments menu.
2. Choose the Personalize Ben PCP XML Request Params link.
3. Select a Personalization Level.
4. Choose the Advanced Settings button.
5. Select the Ben PCP Provider Information item and enter the URL of the information provider in the New Column Name field.

   > **Note:** Enter the URL as you would in the Address or Location field of your web browser. Do not enclose the URL in quotations.

6. Select the Ben PCP XML DTD item and enter the URL of the XML Document Type Definition in the New Column Name field.
7. Select the Ben PCP Info Provider Client ID item and enter the Client ID given by the information provider in the New Column Name field.
8. If you use a proxy server to access an external web site, select the Ben PCP Server Proxy Set item and enter **true** in the New Column Name field.
   - If you do not use a proxy server, enter **false**.
9. If you use a proxy server, select the Ben PCP Server Proxy Port item and enter the port number (typically 80) in the New Column Name field.
10. If you use a proxy server, select the Ben PCP Proxy Host item and enter the URL of the proxy server in the New Column Name field.
11. Select the Ben PCP XML Version item and enter the version of XML you are using in the New Column Name field, such as 1.0
12. Select the Ben PCP Max Records item and enter the maximum number of records to be returned by the query in the New Column Name field.

    > **Note:** For best performance, it is recommended that the maximum number of records be set to 100 or less.

13. Select the Ben PCP Request Method item and enter the HTTP request method expected by the information provider (such as GET or POST) in the New Column Name field.
14. Select the Ben PCP Show Label item and enter a message to display in the Result Table if the search returns no provider.
15. Select the Ben PCP Direction item and enter the text to display in the Map Column of the Result Table.
16. Select the Ben PCP Table Bar Text item and enter the text to display in the Result Table Bar.

Setting Up a Primary Care Provider Search without XML

Customers who create a search page which does not format the PCP query in XML can follow these guidelines for a creating a PCP search that is compatible with Self-Service Benefits.

To set up a primary care provider search without XML:

1. Navigate to the Primary Care Providers page from the Self-Service Benefits Enrollments menu.
2. Choose the Personalize Primary Care Provider Selection Table link.
3. Select a Personalization Level.
4. Choose the Advanced Settings button.
5. Select the Search item and enter the URL in the URL field that is accessed when a participant clicks the Search button on your custom Search web page.
6. A system administrator or application developer creates a search page that performs the query and accepts the following page-context variables:
   - PcpPersonId = (Person ID of the person for whom you are searching for a primary care provider)
   - PcpPlId = (Plan ID defined for the plan in the database)
   - PcpPlTypId = (Plan Type ID defined in the database)

     Note: You do not need to use these variables if they are not required for your search or validations.

7. If the search is canceled without a selection of a PCP, the following URL must be used to return to the search page:
   - /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE&akRegionApplicationId=805&pcpSearchCancel=1.

     Note: Replace the directory OA_HTML with the base HTML directory of your installation.

8. If the search is successful, the URL accessed by the query must return the following information (properly formatted) with the following parameter names and data types:

Parameter Name	Data	Value	Example
ExtIdent	ID of the primary care provider per the plan.	Number	10154244 (id)
PcpName	Name of the primary care provider	String	Sue Jones, MD (doctorsName)
PcpSpecialty	Specialties of the primary care provider	String	Internal Medicine, Pediatrics (specialty)
PcpPlId	The plan ID that corresponds to the plan name	Number	905 (planId)
PcpPersonId	The person ID passed to the database as part of the query	Number	928374655 (personId)
PcpTypCd	The code of the first primary care provider specialty that is returned by the query	Number	23 (pcpTypCd)

The URL returned by the search should look like this:

- /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE&akRegionApplicationId=805&ExtIdent=id&PcpName=doctorsName&PcpSpecialty=specialty&PcpPlId=planId&PcpPersonId=personId&PcpTypCd=pcpTypCd

  Note: Replace the directory OA_HTML with the base HTML directory of your installation and replace the variables in the URL with the actual values.

Generating Self-Service Benefits Trace Files

If you experience enrollment problems during system testing, or while in production, you can generate a trace file of a PL/SQL procedure to track the source of the problem for an individual user. The hr_utility.set_location function generates output that lets you examine the flow of code execution for key APIs and business processes.

Set the profile option OAB: Enable Self-Service Benefits Trace to select the module that you want to trace.

Note: You should set the profile option for only one user at a time.

Using a system administrator responsibility, open the Find System Profiles Value window to set the profile option for a user.

To generate a Self-Service Benefits trace file:

1. Deselect the Site check box.
2. Select the User check box.
3. Select the person for whom you are running the trace from the User list.

4. Select the OAB: Enable Self-Service Benefits profile option in the Profile field.
5. Click Find.
6. In the System Profile Values window, select a User value for the profile option.
   - **BENACTBR (Activity Base Rate)**: This user value traces the rates computation process.
   - **BENDISRT (Distribute Rates)**: This user value traces a user-entered rate change that calculates other dependent rates, such as parent/child rates or annual-to-communicated rates.
   - **BENELINF (Election Information)**: This user value traces the enrollment process when the user changes elections on the Benefits Selections Page and clicks Next.
   - **BENOLLET (On-Line Life Event)**: This user value traces the Participation Process for a single user. For example, when the user clicks Next on the Dependents and Beneficiaries page.
7. Save your work.
8. Close the System Profile Values window.
9. Run your test case in Self-Service Benefits based on the profile option you selected.

   Note: The browser window stops responding while the page waits for the trace pipe to open for the user.

10. To view the results of the trace, enter the following command on a server where you can access the application database. The example below shows the command for the BENELINF value of the profile option.

```
$PAY_TOP/bin/PYUPIP <apps userid>/<apps pwd>@<dbname> BENELINF >
PYUPIP.txt
```

11. Read the PYUPIP.txt file to analyze the results of the trace.

    Note: You can upload the trace file to Oracle Support for analysis as part of a Technical Assistance Request.

12. Close your test browser session.
13. After you complete the trace, navigate to the System Profile Values window and clear any value from the OAB: Enable Self-Service Benefits profile option.

    Warning: If you do not return the profile option value to null, the Self-Service application stops responding while the page waits for the trace pipe to open for the user the next time they access Self-Service Benefits.

Self-Service Benefits Enrollments - US Federal

US Federal Self Service Benefits

US Federal employees can use self-service to enroll and manage their Federal Employee Health Benefits and Thrift Savings Plans elections. Employees can review their current elections using self-service benefits. They can also review their current, past, and future benefit elections from their My Information self-service page, as well as other employment-related information.

See: Information Overview , page 9-86

Federal Employee Health Benefits

Federal government employees can elect, change, or cancel Federal Employee Health Benefits (FEHB). You can enroll employees when you process an Appointment, Conversion to Appointment, or Extension RPA. Employees enroll and manage their FEHB benefits using self-service. As an HR specialist, you can also enroll and administer benefits for employees using the professional user interface.

See: Federal Employee Health Benefits Overview, *Oracle HRMS Compensation and Benefits Management Guide*

Thrift Savings Plans

Federal government employees covered by the Federal Employee's Retirement System (FERS) and the Civil Service Retirement System (CSRS) can participate in Thrift Savings Plans (TSP) and, where eligible, contribute to Thrift Savings Catch-up plans.

You can enroll employees when you process an Appointment, conversion to Appointment, or Extension RPA. Employees enroll and manage their TSP benefits using Oracle Self-Service Human Resources (SSHR). As an HR specialist, you can also enroll and administer benefits for employees using the professional user interface.

See: Thrift Savings Plan Overview, *Oracle HRMS Compensation and Benefits Management Guide*

Appointment, Conversion, and Extension Enrolments

When you process an Appointment or Conversion to Appointment RPA action, you can enter employee benefits, and upon update to HR, the application establishes the Health Benefits elements, Federal Employee Group Life Insurance, and Thrift Savings Plan (TSP) elements. Similarly, for Extension actions, you can enter new employee benefits and change existing health benefits. (OPM does not authorize changes to these benefits for Extension actions.)

When you update the RPA action, the application initiates appropriate potential life events, such as an Initial Opportunity. The employee can then modify the choices during the life event period using self-service, or you can enter the elections for the employee using the professional user interface.

Appointment, Conversion, and Extension Enrolments, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up User Access to Self-Service Benefits

Self-Service Benefits functions are attached to the Benefits Self-Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

See: Configuring Tabbed Regions, page 5-21

See: User's Menu *(Oracle Applications System Administrator's Guide)* for more information on configuring menus.

To set up user access to self-service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self-Service Menu in the Menu field: GHR_EMPLOYEE_DIRECT_ACCESS. The following Self-Service User Menu Name displays to users:
   - Federal Employee Self-Service

   You can change the menu name if required.
4. Query the global Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:
   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.
   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self-service web page.
5. Save your work.
6. Add a new row for the US Federal benefits function.
7. Enter a sequence number.
8. Enter a prompt, such as US Federal HR Benefits.
9. Choose the Self-Service Benefits Enrollment - Federal function, (GHR_SS_BNFT_ENRT).
10. Save your work and close the Menus window.
11. You can use the Form Functions window to customize the predefined functions--GHR_SS_BNFT_ENRT.
12. Use the Form Functions window to create your own Self-Service Benefit functions from the sample functions supplied. The sample User Function Names are:
    - Self Service View Current Benefits
    - Self Service Benefits Enrollment

    The Function Names are:

- BEN_SS_CURR_BNFT
- GHR_SS_BNFT_ENRT

If you update the predefined functions, you must update your custom function to use the predefined parameters and HTML Calls.

> **Note:** It is a good practice to check the Readme for each Self-Service Benefits patch you apply to see if the parameters and HTML Calls for the predefined functions have changed.

See: Form Functions Window *(Oracle Applications System Administrator's Guide)*

13. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:

    - HR: Security Profile

    > **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

    See: User Profiles (*Oracle Applications User's Guide* and *Oracle Applications System Administrator's Guide*)

14. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:

    - HR: Business Group

15. Define the people you would like to access Self-Service Benefits.

    There are two ways to do this. You can follow the typical steps for defining a new user and assign each user a responsibility that enables access to Self-Service Benefits, one at a time.

    See: Users Window *(Oracle Applications System Administrator's Guide)*.

    Or, you can set up concurrent programs to automate this manual process.

    See the White Paper titled: *Batch Creation of User Accounts,* available from MetaLink.

Enabling US Federal Benefits Notifications

As a general practice, most federal personnel offices approve a participant's benefits elections, such as health benefit and TSP selections. If your agency's policies include this review or approval process, you can have Oracle workflow send a notification to the POI groupbox when employees enroll or update their benefit elections. The notification contains a link to the employee's confirmation page. After reviewing the elections, you can contact the participant to correct and resubmit the elections or manually override the changes in the professional user interface.

When you want to change the predefined function, you copy and rename the original process. By leaving the original process intact, you can refer to it and also use it as a basis for future upgrade. After you copy the process, use the Function window and the system administrator responsibility to change the notification setting and attach the function to your menu Federal Employee Self Service Benefits.

See: Defining SSHR Functions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

To have Oracle Workflow send the POI groupbox a benefit notification:

1. Click the Forms tab.
2. Query the function GHR_SS_BNFT_ENRT
3. Navigate to the Parameters field and change the send Notification parameter from N to Y. The entire parameter should read:

   displayDate=N&allowEnrt=Y&ssProcessUnrestricted=Y&sessionDate=&
   sendFYINotification=Y&wfProcessName=GHR_FYI_NOTIFICATION_PRC&
   displayAgreement=N
4. Save the form function.

Compensation Workbench

Compensation Workbench Overview

Compensation Workbench is a flexible tool enabling line managers to publish compensation budgets, and allocate compensation awards and salary increases to their teams. Using Compensation Workbench for Administrators, compensation administrators can also monitor the progress of compensation cycles and perform overrides and exception processing, as required.

This topic provides an overview of what you can do using Compensation Workbench.

Line Managers

Your compensation administrator gives you access to a set of tasks for each compensation cycle, such as budgeting, allocating compensation, entering performance ratings, entering job changes, and approving the work of subordinate managers. For determining budgets and allocating compensation, you can enter values directly on a worksheet that enables you to see all your employees in a single view. Alternatively you can download information to a spreadsheet and work there, or you can use the Allocation Wizard to help you determine budgets and allocations according to the rules and criteria you choose.

If your manager or compensation administrator gives you a budget, you can choose to hold the entire budget yourself, or allocate it to your direct reports only, or to all your subordinate managers. If you use the Allocation Wizard to determine the budget, you can provide budget targets for each employee so your managers understand the criteria you used for creating their budgets.

See: Budgeting in Compensation Workbench, page 11-55

See: Promotions and Rating in Compensation Workbench, page 11-56

You can save your work at any stage, and submit it for approval when you are ready.

See: Hierarchies for Award Allocations and Approvals, page 11-86

You can use the online reports to view:

- Summary information for one or more compensation plans
- Compensation history for each employee
- Stock option history, including estimated walk-away values
- Changes made to an employee record by other managers in Compensation Workbench (Audit History)

See: Reports in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

There are some additional features that your compensation administrator may give you access to:

- Overriding an employee's eligibility or ineligibility for an award
- Reassigning an employee to another manager, for the purposes of award allocation only
- Switching to subordinate managers to enter allocations on their behalf
- Generating a compensation statement for employees to communicate their award

See: Access Levels in Compensation Workbench, page 11-87

See: Eligibility, Award Limits and Targets, page 11-88

See: Configure Worksheet and Budget Sheets, page 11-90

See: Switch Manager, *Oracle HRMS Compensation and Benefits Management Guide*

Compensation Administrators

You can use Compensation Workbench to perform all the tasks available to line managers, either for the whole workforce (if you decide not to delegate the task to line managers), or in place of individual managers, for example to cover absences. You have access to plan information for every employee within your security profile, including information about the progress each manager is making in distributing budgets and allocating awards. You can reprocess a single employee or change their eligibility, salary, or assignment information.

See: Key Decision Areas in Compensation Workbench, page 11-46

See: Plan Design for Compensation Workbench, page 11-52

You can use the Plan Administration page to override certain plan setup information for the current compensation cycle, such as period dates, budget information, tasks available to managers, and rates.

See: Maintain Compensation Workbench Plan Mid-cycle, page 11-112

See: Steps to Administer a Compensation Workbench Plan, *Oracle HRMS Compensation and Benefits Management Guide*

You can use reports to monitor the progress of the compensation cycle, and to gather manager feedback.

Key Decision Areas in Compensation Workbench

You must first design your plans and how you want the self-service pages to look, then you can begin to set them up. There are four main types of decision you must make, summarized in the table below and explored in more detail in subsequent topics.

Decision Area	Questions to Ask Yourself	Setup Tools	Additional Information
Compensation Plan Design	Which awards do you handle together within the same compensation cycle? Which awards do you allocate from the same budget? Do you want to promote, change jobs, and give ratings at same time as allocating awards, or separately?	Plans, Plan Enrollment Requirements, and Standard Rates windows. Plan Administration page	See: Compensation Plan Design, page 11-52 See: Promotion and Rating in Compensation Workbench, page 11-56

Decision Area	Questions to Ask Yourself	Setup Tools	Additional Information
Controlling Access, Eligibility, and Award Amounts	Do you make all allocations centrally or delegate to line managers? Do you allocate each manager a budget centrally or give high-level managers a budget and let them decide how to roll it down? Do you control who can receive awards with eligibility criteria? Do you let managers override the criteria? What management hierarchy do you use for allocations, roll-down budgeting and approvals? Do you want to restrict which managers have access to plans? Which items do you give managers access to on their task list and what level of access do you give them?	Plans, Plan Enrollment Requirements, and Standard Rates windows. Plan Administration Page AME or FastFormula to define the rules for passing budgets down and approvals up the management hierarchy (unless you use standard supervisor or position hierarchies)	See: Budgeting in Compensation Workbench, page 11-55 See: Hierarchies for Award Allocations and Approvals, page 11-86 See: Access Levels in Compensation Workbench, page 11-87 See: Approval Modes, page 11-88 See: Eligibility, Award Limits and Targets, page 11-88

Decision Area	Questions to Ask Yourself	Setup Tools	Additional Information
Worksheet and Budget Sheet Configuration	Which rates do you display? Do you validate Jobs, Grades, and Positions? Which flexfields do you include? Which custom and dynamic columns do you configure? Which columns do you want to display and what should the column headings be? Do you enable upload/ download using WebADI?	Self-service personalization to hide or display items, rename or reorder columns, or make them read-only. You can use personalization by plan to vary the worksheet layout between plans.	See: Configure Worksheet and Budget Sheets, page 11-90
Reports and Notifications	Will you use the Employee Statements? Do you need to personalize any of the reports or notifications? Which plan do you want to use as context for the Salary Statistics and Employee Compensation History Reports?	Reporting from the self-service interface Plan Administration Page	See: Reports in Compensation Workbench, page 11-102 See: Notifications in Compensation Workbench, page 11-104

Compensation Workbench (SSHR Components)

For a full functional description of the Compensation Workbench, see: Compensation Workbench, page 11-45.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self-Service	Compensation Workbench
HR Professional	Compensation Workbench for Administrators

Workflow

Compensation Workbench uses the following workflows:

Internal Name	Display Name
RECALL_PROC	Worksheet Recalled Process
ACCESS_NTF_SUB_PROCESS	Customizable Access Notification Sub Process
ACCESS_PROC	Access Process
BDGT_ISS_NTF_SUB_PROCESS	Customizable Issued Budget Notification Sub Process
BUDGET_ISSUED_PROC	Issued Budget Process
CWB_EMP_ELIG	CWB Employee Eligibility Main Process
CWB_NTF_FINAL_HOOK	CWB Notification Finalize Hook
CWB_NTF_INIT_HOOK	CWB Notification Initialize Hook
CWBFYINTF	Comp Workbench Notifications
HR_APPROVAL	HR Approval
RSGNNTFP	Employee Reassignment Notifications
RSGNP	Employee Reassignment Process
WS_REJ_NTF_SUB_PROCESS	Customizable Worksheet Rejected Notification Sub Process
WS_REJECTED_PROC	Worksheet Rejected Process
WS_SUB_NTF_SUB_PROCESS	Customizable Worksheet Submitted Notification Sub Process
WS_SUBMITTED_PROC	Worksheet Submitted Process

Configurable Tips and Instructions

Region	Tip Type	Message Name
Employee Reassignment: Employee Selection Page	Instruction Text	BEN_93088_CWB_RSGN_EMP_MSG
Allocation Budgets	Instruction Text	BEN_94021_CWB_SET_PREF_CURR
Allocation Budgets	Tip	BEN_92974_NO_EXCHANGE_RATE
Currency Switcher	Short Tip	BEN_94021_CWB_SET_PREF_CURR
Currency Switcher	Tip	BEN_92974_NO_EXCHANGE_RATE
Allocation Wizard - Component Selection Content	Instruction Text	BEN_93304_CWB_WIZ_OPTION_INSTR
Manager Selection	Instruction Text	BEN_92824_WIZ_MGR_SEL_HDR

Region	Tip Type	Message Name
Allocation Wizard Distribution Method Content	Instruction Text	BEN_92826_WIZ_DIST_MTHD_HDR
Allocation Wizard Distribution Method Content	Long Message	BEN_93136_WIZ_DIST_MATRIX_INFO
Allocation Wizard Distribution Method Content	Long Message	BEN_92862_WIZ_DIST_EQPCT_INFO
Allocation Wizard Distribution Method Content	Long Message	BEN_92838_WIZ_DIST_PRAMT_INFO
Allocation Wizard Distribution Method Content	Long Message	BEN_92839_WIZ_DIST_RCAMT_INFO
Distribution Method	Instruction Text	BEN_92826_WIZ_DIST_MTHD_HDR
Distribution Method	Long Message	BEN_93136_WIZ_DIST_MATRIX_INFO
Distribution Method	Long Message	BEN_92862_WIZ_DIST_EQPCT_INFO
Distribution Method	Long Message	BEN_92838_WIZ_DIST_PRAMT_INFO
Distribution Method	Long Message	BEN_92839_WIZ_DIST_RCAMT_INFO
Matrix - Content	Long Message	BEN_94000_CWB_WIZ_POP_TRG_AMTS
Matrix - Content	Long Message	BEN_93999_CWB_WIZ_BASIS_CALC
Details	Long Message	BEN_93999_CWB_WIZ_BASIS_CALC
Details	Long Message	BEN_94000_CWB_WIZ_POP_TRG_AMTS

Configurable FlexFields

Descriptive Flexfields display on their own flexfield worksheet group subtab within the worksheet.

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Compensation Workbench provides the following configurable profile options:

Profile	Configurable Levels	Values	Default
BEN: CWB Download Expire Seconds	All Levels	Positive Integer	60

Profile	Configurable Levels	Values	Default
BEN: CWB Encrypt/ Decrypt Key	All Levels	String. (If you change this value, you cannot upload spreadsheets you have already downloaded. You must download the spreadsheets again with the new key.)	
BEN:CWB History Type Display	All Levels	Basic Stock Option History/Extended Stock Option History	
BEN: CWB Home Plans Displayed	All Levels	Positive Integer	
BEN: CWB Layout Lock Time	All Levels	Positive Integer	10
BEN: CWB Maximum Number of Layouts	All Levels	Positive Integer	10
BEN:CWB Reporting Plan Context	Site Level	Plan or Period	
BEN: CWB Wizard Compratio Range	All Levels	Positive Integer	5
BEN: CWB Wizard Years Worked Range	All Levels	Positive Integer	1
BEN:CWB Display Currency Type	All Levels	Employees' Local currency Corporate currency Preferred currency	Corporate currency
BEN:CWB Summary Level	All Levels	All Employees Direct Employees	
BEN:CWB Table Population	All Levels	All Employees Direct Employees	
BEN: CWB History Type Display	All Levels	Basic Stock Option History Extended Stock Option History	Basic Stock Option History
BEN: CWB Estimated Market Price	All Levels	Any numeric value	
HR:FTE Factor	All Levels	Budget Full Time Equivalent Budget Percent of Full Time No Conversion Based on Working Hours	No Conversion

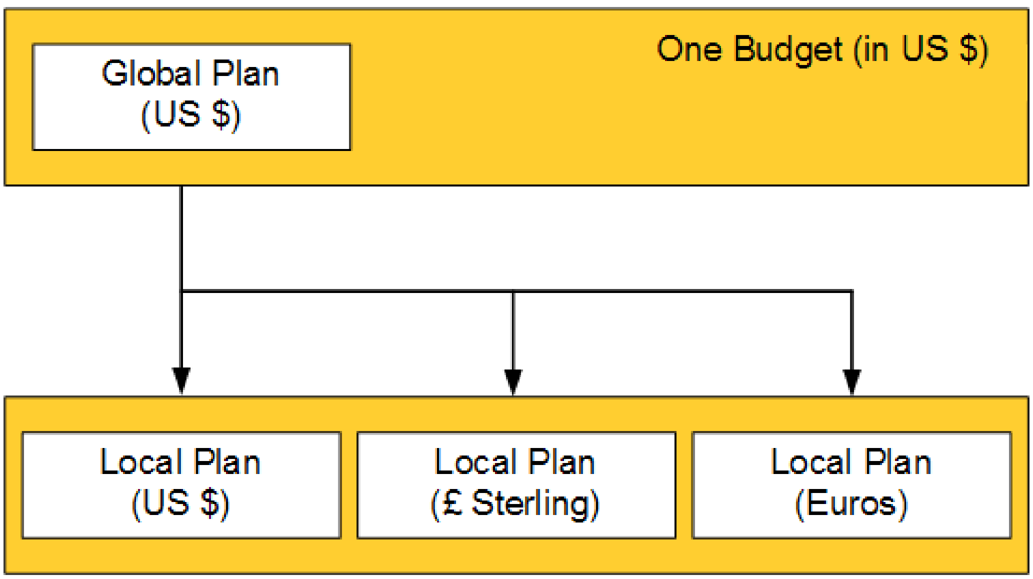
Compensation Plan Design

Plan Design for Compensation Workbench

Which Awards Do You Want to Budget for and Allocate Together?

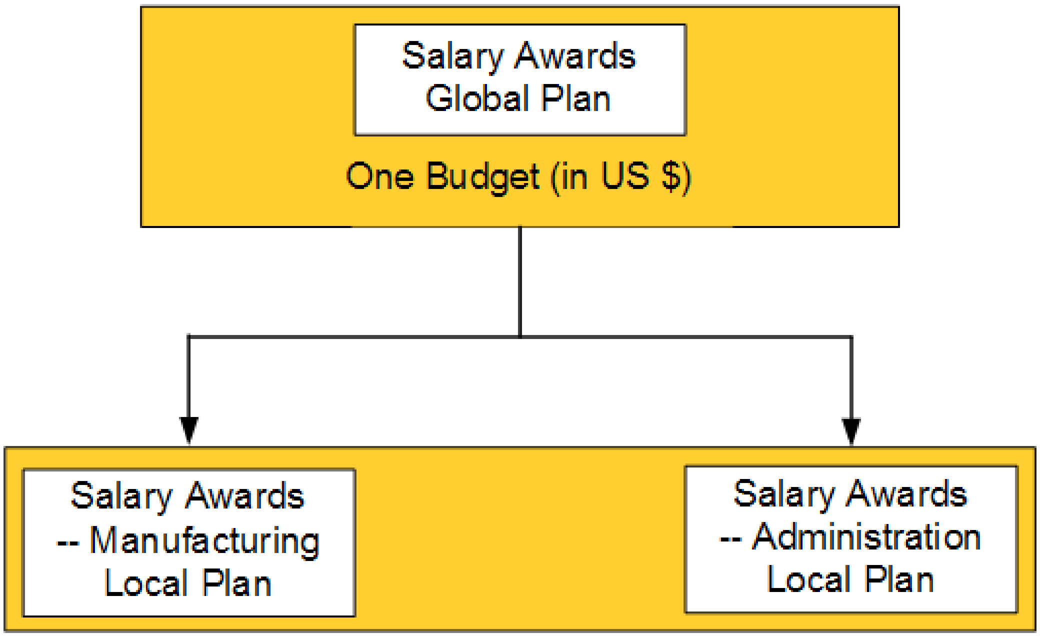
Your primary design decision is how many compensation plans to create. If you want to handle awards together on a single worksheet or allocate them from a single budget, you must set them up within the same plan or group of plans. You group plans by associating them with one global plan, even if the plans are defined in different business groups and using different currencies.

For example, if you want to allocate compensation across currencies or business groups, create a local plan for each business group and associate all the local plans with the same global plan, which uses your corporate currency. You create a single budget for the global plan, which you can distribute across the local plans in their local currencies. This is called a global basic plan structure.



If you are allocating in one business group, you can create a single standalone plan that acts as its own global plan. However, if you have several plans of the same plan type in your business group and you want to allocate money across the plans from one budget, you can group them under a single global plan using the global basic plan structure.

See: Setting Up a Basic Plan, page 11-62

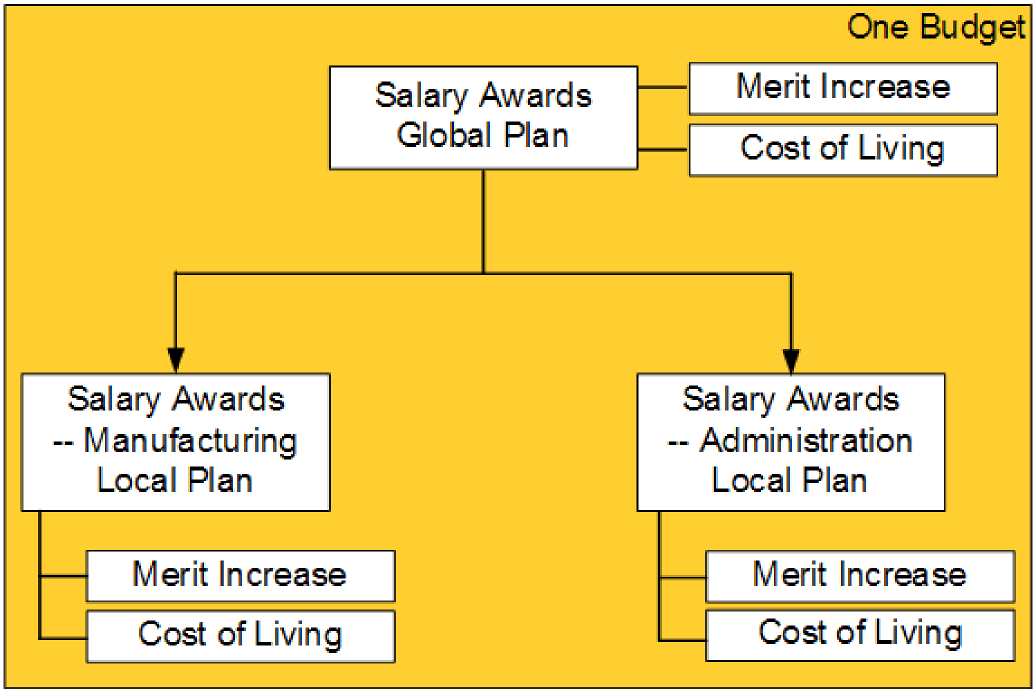


Note: Local plans do not have budgets. You always budget at the global plan level.

For all global and local plans, you can define up to four options.

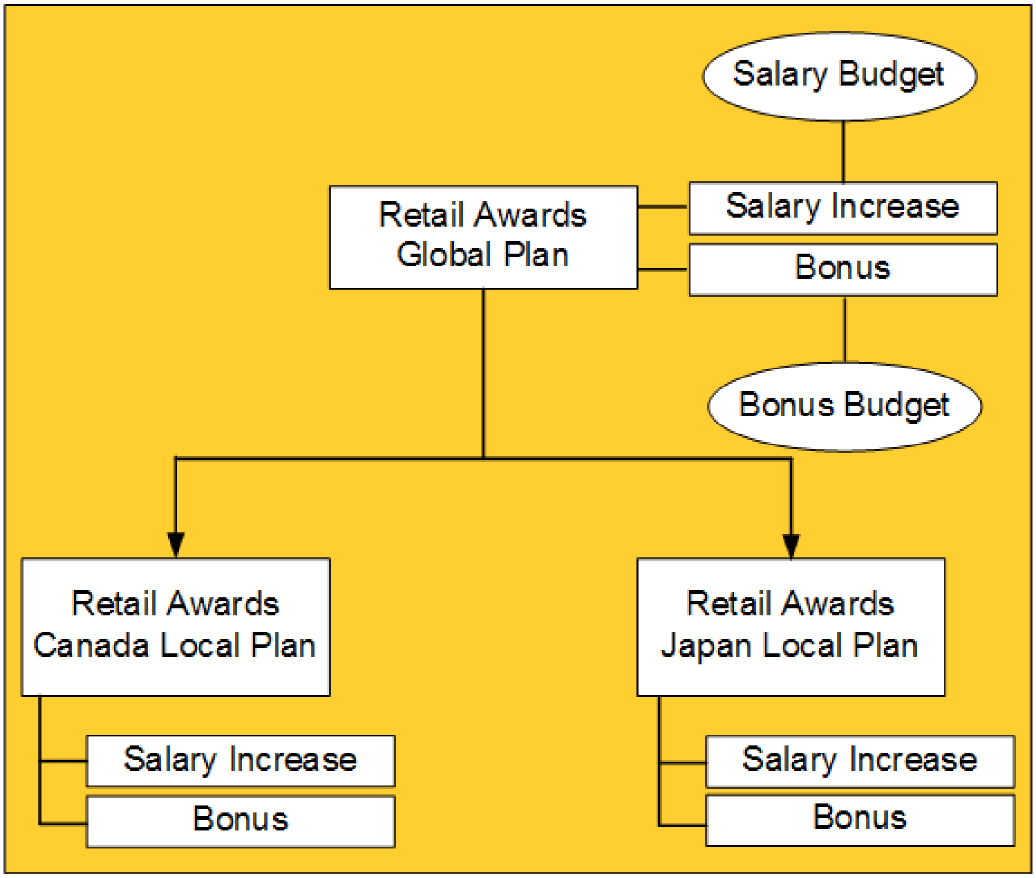
If you want to break down allocations into components such as cost of living increase and merit awards, select the same plan type, such as Salary Increase, for all the options (and the plans). These plans are called component plans. You can set up rates based on your business requirements. Decide whether you store your budgets as a percentage of eligible salaries or as amounts. For example, you can set up option level budgets for a component plan with 5% for merit, 2% for cost of living, and 3% for company performance or set up a plan for 10% to budget or allocate between salary increases and bonuses.

See: Setting Up a Component Plan, page 11-66



If you want to allocate different types of compensation (such as salary increases and bonuses) on the same worksheet, select different plan types for the options, and select Combination Plan as the plan type for the plan. You can publish a separate budget for each option in the global plan.

See: Setting Up a Combination Plan, page 11-70



Combination plans do not total options so you can create options with different units of measurement.

Budgeting in Compensation Workbench

Compensation Workbench provides two general styles of budgeting:

- **Automatic Budgeting:** use this type of budget if you predetermine budgets prior to giving managers access. For example, you enter a budget of 7.5% for all managers in the west, and 10% for all managers in the east. Auto-issuing budgets gives the compensation professional control over the amount a manager can allocate to reporting employees and creates a uniform compensation distribution across the enterprise. You can set up variable rate profiles to vary the flat percentage or amount based on a variety of eligibility criteria such as location.
- **Roll-Down Budgeting:** use this type of budget if you predetermine the initial budget only, and line managers complete the budgeting task. As a compensation administrator, you publish the initial budget with the highest-level manager, or with multiple lower managers. Managers roll the budgets down the hierarchy by distributing the budget. Managers decide the level to which they want the budget to trickle down by selecting the budgeting method on the Budget Task.

You include the budgeting task in the plan design only if you want to use roll-down budgeting. You can define budgets as monetary amounts or as a percentage of eligible salary in the Plan Enrollment Requirements window. You can also define the budget in non-monetary units such as Shares or Stock Options.

To configure the number of decimal places to display for budget and worksheet amounts that are expressed as a percentage of eligible salary, you must set the following profile options:

- BEN: CWB Budget as Percent of Eligible Salary Decimals – set this profile option to Yes to display budgets as percent of eligible salary
- BEN: CWB Allocation as Percent of Eligible Salary Decimals – set this profile option to Yes to display decimals for percent of eligible salary based on allocated amounts

You can decide how you store your budgets - either as a percentage of eligible salary or as an amount. You can also choose to maintain fixed amounts or to recalculate the budget based on a percentage.

If you have a combination plan, you must budget for at least one component, but you are not required to budget for each component of the plan.

Promotion and Rating in Compensation Workbench

Do You Want To Enter Promotions and Performance Ratings At the Same Time as Awards?

You can enter employee ratings and assignment changes during a compensation award cycle, or enter them separately, depending on how your business operates. You can:

- Create a plan that includes tasks for managers to enter performance ratings, job changes or promotions, and compensation awards at the same time.

  This plan design speeds up the annual review process because managers can submit, review, and approve all changes that affect a person's compensation at once. Doing these tasks together helps managers award compensation to employees in the position, job, or grade equitably, and reduces the amount of plan design setup required.

- Create a plan that only allows managers to process job changes and promotions.

  This plan design enables you to schedule a compensation period to only process job changes and promotions, before you process compensation awards. This is helpful when you base compensation limits or recommendations on an employee's assignment information.

Performance ratings and assignment changes can cross global plans. If you want the values your managers enter in one plan to show in another plan, you enter the same effective date for ratings and assignment changes for each plan on the Timing tab of the Plan Enrollment Requirements window.

Standard Rates for Compensation Workbench

You can define standard rates to meet a variety of business needs for a Compensation Workbench plan. Most rates display fixed or enterable amounts that appear as columns in the self-service interface. You can also base a rate on a multiple of compensation that uses a derived compensation factor you have defined.

The **activity type** you select when you define a standard rate determines how Compensation Workbench uses the rate.

When you define Compensation Workbench standard rates for certain global plan structures, you must alkso define a **compensation category**. You can choose from Salary Change, Bonus, Stock Option, Other, Combination Plan, and Option Level Component. You must define this because the worksheet, history page, and the Compensation Workbench Post Process use the compensation category to determine the type of compensation that you award under the plan. For example, if the application does not automatically calculate the new salary on the worksheet, then it is probably because you have not defined the compensation category.

For *Basic Plans*, when you define Standard Rates with the Activity Type of CWB Worksheet Amount or an Additional History Element, you must provide a Compensation Category of Salary Change, Bonus, Stock Option, or Other.

For *Component Plans*, the plan level CWB Worksheet Amount Standard Rate must have a Compensation Category of Salary Change, Bonus, Stock Option, or Other. You must define Option Level Component as the option level CWB Worksheet Amount Standard Rate.

For *Combination Plans*, you do not define a plan level CWB Worksheet Amount Standard Rate. The option level CWB Worksheet Amount Standard Rates compensation category must be either Salary Change, Bonus, Stock Option, or Other.

Rate Types

CWB Worksheet Amount

This rate stores an employee's award amount.

If you attach an element and input value to the rate, then the Post Process Batch job will create an element entry in Oracle HRMS and pass the allocation as the entry value. Use this rate if you define a plan that allocates compensation of any type, for example Stock Options or Bonus. For salary plans or salary options, do not attach an element to this rate. You do not require this rate if the plan is non compensation plan, such as a Performance Appraisal Plan.

You can associate a minimum and maximum rule for rates with this activity type to set a range that managers can allocate to employees. If you select a Min Max Value Rule in the Standard Rates window, then when you run the participation process, the application automatically calculates the minimum and maximum values that managers can allocate to employees. If the Minimum, Maximum, or Default values vary based on Criteria, then attach the rate to a Variable Rate Profile.

You can use the Default value as an initial amount that appears on the worksheet. You can use this with a Calculation method of Multiple of Compensation. You can use a Calculation Method of Rule to default to the worksheet amount based on any fast formula. Use rules to supply the worksheet amount.

The Rounding Code is multi-functional, and rounds off the amount you enter. It also controls if the amounts display with decimals. To change the number of decimal places to which the application rounds all amounts, you configure the precision (number of decimal places) for a currency using the Define Currency window in Oracle GL. Rounding codes larger or equal to Round to the nearest One suppress the decimal amounts to display the amount as a whole number. You must ensure that the Increment and Rounding Codes are consistent. Use the Currency Precision field on the

Plan Administration page to designate the number of decimal places to display when rounding salary amounts when converting the amount from pay frequency to plan frequency.

Compensation Category determines how rates display in history, as well as apply special processing logic required for Salary Plans such as calculation of the New Salary column on the worksheet.

CWB Distribution Budget

This activity type stores the budget amount or percent of eligible salaries issued by a high-level manager to another manager.

If you auto-issue budgets, define the Distribution Budget rate so that it is equal to the Worksheet Budget rate. Leave the Enter Value at Enrollment and Enter Annual Value fields unchecked. Enter the auto-issue percent or amount in the Flat Amount field.

Use the Preserve Budget Column field on the Plan Enrollment Requirements window to set whether the application stores budgets as amounts or percents.

Required?	Required if budgeting
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear (Selected for auto-issued budgets)
Override Recommendation	Selected
Unit of Measure Recommendation	Shares or Blank if monetary
Attach elements?	No

CWB Worksheet Budget

The total monetary or share amount available to a manager to distribute to employees.

If you auto-issue budgets, define the Worksheet Budget rate equal to the Distribution Budget rate. Leave the Enter Value at Enrollment and Enter Annual Value fields unchecked. Enter the auto-issue percent or amount in the Flat Amount field.

Required?	Required if budgeting
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Selected (Clear for auto-issued budgets)
Override Recommendation	Selected
Unit of Measure Recommendation	Shares or Blank if monetary
Attach elements?	No

CWB Reserve

A reserve enables a manager to retain a certain amount of money or shares in a budget for distribution at a later time.

If you define distribution rates for components (options in plan), you must define reserve rates at the same level. If you auto-issue budgets, you should not define a reserve rate since managers will not have access to the Budget sheet to reserve any portion of their budget.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Selected
Override Recommendation	Selected
Unit of Measure Recommendation	Blank or Shares
Attach elements?	No

CWB Eligible Salary

This activity type is required if you distribute budgets by percentage, and recommended for bonus and salary plans if you budget by amount.

If you define Worksheet Amount rates for components (options in plan), you must define Eligible Salary rates at the same level.

The Eligible Salary rate uses a derived compensation factor to determine an employee's eligible salary. You can prorate an employee's salary based on length of service using a FastFormula rule to determine their eligible salary.

Required?	Required if distributing budgets by percentage
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Clear
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Stated Salary

Use for salaries that can be converted to a different frequency than the one set in a person's pay basis. The stated salary is stated as of a specific date and is usually a multiple of a compensation factor. Use stated salary if you want an amount other than eligible salary. Unlike eligible salary, you cannot prorate stated salary.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Clear
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Other Salary

Used when eligible and stated salary are not sufficient to display the result of a calculated derived factor in Compensation Workbench.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Clear
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Misc Rate 1, 2, and 3

You can define miscellaneous standard rates to use for storing any numeric value in Compensation Workbench, for example, vacation hours, performance ratings, or length of service. Miscellaneous rates often require a FastFormula rule to derive a value. You can rename these columns in the self-service interface.

Required?	Never required
Maximum Defined Per Plan or Option	One of each
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Clear
Unit of Measure Recommendation	Blank if monetary, or use any value--this has no impact on processing
Attach elements?	No

CWB Recommended Amount/Target Amount

Displays minimum and maximum recommended compensation increases or awards on the worksheet. Often, recommended rates use variable rate profiles--based on a percentage of a multiple of compensation--to derive the recommend increase based on an employee's compensation.

You can associate a minimum and maximum rule for rates with this activity type to set a range that managers can allocate to employees. If you select a Min Max Value Rule in the Standard Rates window, then when you run the participation process, the application automatically calculates the minimum and maximum values that managers can allocate to employees. For example, if your calculation method is Multiple of Compensation, the Operator is Multiply By, select Default as the Target, and enter .01 as the minimum and maximum values, then the application calculates the target as 10% of compensation.

If you define Worksheet Amount rates for components (options in plan), then you must define Recommended Amount rates at the same level.

A manager can distribute a recommended amount using the Allocation Wizard.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Selected
Unit of Measure Recommendation	Blank or Shares
Attach elements?	No

CWB Total Compensation

The total of a person's compensation stated as a monetary amount. You must define a derived factor that provides the total through a balance or a FastFormula rule. Attach this derived factor to the rate that uses this activity type.

Required?	Never required
Maximum Defined Per Plan	One
Assign on Enrollment Recommendation	Clear
Enter Value at Enrollment Recommendation	Clear
Override Recommendation	Selected
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Additional Element History

Displays element entry history for compensation elements. The Compensation Category you define determines the history group in which the details display, for example, bonus, stock option or other compensation history.

Use this to display element entries that are not already linked to a Standard Rate. To do this, you must define a plan type called CWB History Plan Type, and a plan called CWB History Plan, and link the plan to the CWB History Plan Type. For each element entry, you want to display in history, define a standard rate with an activity type of CWB Additional History Elements. Ensure you define an element entry and an input value, and use a calculation method of No Standard Value Used. Define the Compensation Category as Bonus, Stock Option, or Other Compensation to determine the appropriate history grouping

Setting Up a Basic Plan

This topic is a worked example of the steps for setting up a global basic plan structure across three business groups. Use this type of plan setup to allocate compensation across currencies or business groups for a single compensation award using a single budget. For example, you can award a single salary increase amount, a single bonus amount, or a single stock option amount to eligible employees.

This sample setup creates plans in US, UK, and Canadian business groups. You can replace these with business groups relevant to your enterprise. This sample setup is an example of how you can use three different business groups to create a global plan. In this example, the US business group is the master business group in which you define the global plan.

> **Note:** Ensure you use the business group in which you define the global plan to complete administrative processing.

> **Note:** You should have defined your business groups and set up conversion rates before you complete your plan design.

Business Rules

Use this sample setup if your business requirements are as follows:

- Each country has a country-specific currency
- You publish budgets in a single currency - in this example, we use US dollars
- You publish budgets as a percentage of eligible salary
- You administer bonuses annually.
- Your target bonus amount for eligible employees is a percentage of their eligible salary - in this example, we use 5% of eligible salary
- You limit access to plans for line managers for a specific period - in this example, they have access to the plan from January 1, 2006 until December 31, 2006
- You disallow updates to the plan beyond a particular date - in this example, this date is November 30, 2006
- You display all person-related information as of a specific date - in this example, we display all person related information as of January 1, 2006
- You use the Supervisor Hierarchy for Approvals
- You enable managers to submit worksheets for approval at any time.

1. Define Plan Years as follows:
    - 01-JAN-2005 - 31-DEC-2005
    - 01-JAN-2006 - 31-DEC-2006

- 01-JAN-2007 - 31-DEC-2007
- 01-JAN-2008 - 31-DEC-2008

See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

2. Define a Life Event called Global Basic Bonus with Compensation as the Type.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*

3. Define another Life Event called US Basic Bonus with Compensation as the Type.

4. Define a Derived Factor called Stated Salary, where US dollar is the currency, Stated Compensation is the source, Annually is the Stated Compensation Periodicity, select the No Minimum and No Maximum check boxes, and As of Event Date as the Determination Code.

   See: Defining Derived Factors: Compensation Level, *Oracle HRMS Compensation and Benefits Management Guide*

5. Define a Plan Type called Bonus Award, where Compensation Workbench is the Option Type and Comp-Bonus is the Compensation Category. Select the No Minimum and No Maximum check boxes.

   See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

6. Define a Plan called Global Basic Bonus Plan with Bonus Award as the Plan Type, May Not be in a Program is the Usage, US dollar is the Currency, and Annually is the Activity Reference Period.

   Add all the plan periods you defined to your plan, and add the following tasks:

Task Type	Self-Service Task Name	Access
Set Budgets	Set Budgets	Full Access
Allocate Compensation	Award Bonuses	Full Access
Manage Approvals	Approve Awards	Full Access
Review and Submit	Review & Submit	Full Access

7. Define a Plan called US Basic Bonus Plan with the same parameters as the Global Basic Plan.

   Note: For this plan you must also select the Restrictions tab and select Global Basic Bonus Plan as the Global Plan Name.

   See: Defining a Compensation Workbench Plan, *Oracle HRMS Compensation and Benefits Management Guide*

8. Define Plan Enrollment Requirements for the Global Basic Plan as follows:

   - Select Explicit as the Method in the Enrollment alternate region.
   - On the Scheduled tab, select Compensation as the Enrollment Type.
   - In the General alternate region, enter 01-JAN-2006 as the Start and 31-DEC-2006 as the End as the Enrollment or Availability Period.

- Enter 01-JAN-2006 as the Assigned Life Event Date.
- Select Global Basic Bonus as the Life Event.
- Select Processing End Date as the Close Enrollment Date to Use.
- Select 01-JAN-2005 to 31-DEC-2005 as the Year Period.
- In the Coverage alternate region, select Event as the Enrollment Coverage Start Date. Select 1 Day Before Event as the Enrollment Coverage End Date.
- Select the Rates alternate region and select Elections as the Rate Start Date. Select 1 Day Before Event as the Rate End Date
- In the Budget alternate region, select the Uses Budget check box if you use budgets. Select Store Budgets as Percentages in the Preserve Budget Column.
- In the Miscellaneous alternate region, select Supervisor Hierarchy as the Hierarchy to Use. Select At Any Time as the Approval Mode of Submission. Enter 01-JAN-2006 and 30-NOV-2006 as the Self Service Worksheet Update Period Start and End dates. Select Full Access as the Default Worksheet Access and enter 01-JAN-2006 as the Freeze Date.

See: Defining an Enrollment Method for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

9. Define Plan Enrollment Requirements for the US Basic Plan with the same parameters as the Global Basic Plan.

   Note: For the US Basic Bonus Plan, select US Basic Bonus as the Life Event instead of Global Basic Bonus.

10. Define Standard Rates for the Global Basic Plan as follows:

For Distribution Budgets

- Create a new rate called Global Basic Bonus Plan - DB
- Select Plan as the Level.
- Select Global Basic Bonus Plan as the Compensation Object.
- Select Not Applicable as the Tax Type.
- Select CWB Distribution Budget as the Activity Type.
- Clear the Element and Input Value Required check box.
- On the Calculation Method tab, select Flat Amount as the Method, select the Enter Value at Enrollment and the Calculate for Enrollment check boxes. Enter 0 as the Minimum, 1000000000 as the Maximum, 1 as the Increment Amount, and 0 as the Default. Select Round to Nearest One as the Rounding Code.

For Budget Reserves

- Create a new rate called Global Basic Bonus Plan - BR with the same parameters as you define for the Distribution Budget.

  Note: For this rate, select CWB Reserve as the Activity Type.

For Worksheet Budgets

- Create a new rate called Global Basic Bonus Plan - WB with the same parameters as you define for the Distribution Budget.

> **Note:** For this rate, select CWB Worksheet Budget as the Activity Type.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

See: Standard Rates for Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

11. Define Standard Rates for the US Basic Bonus Plan as follows:

    Worksheet Amounts

    - Create a new rate called US Basic Bonus Plan - WA with the same parameters as you defined for the Distribution Budget except the following:
      - Select US Global Basic Bonus Plan as the Compensation Object.
      - Select Taxable as the Tax Type.
      - Select CWB Worksheet Amount as the Activity Type.
      - Select the appropriate Element and Input Value.
      - On the Processing Information tab, select Bonus as the Compensation Category.

    Recommended Amount

    - Create a new rate called US Global Basic Bonus Plan - RA with the same parameters as you defined for Worksheet Amounts except the following:
      - Select CWB Recommended Amount as the Activity Type.
      - Select Not Applicable as the Tax Type.
      - Clear the Element and Input Value Required check box.
      - On the Calculation Method tab, select Multiple of Compensation as the Method.
      - Enter .05 as the Multiplier and select Multiply by as the Operator.
      - Select Stated Salary as the Compensation Factor.

    Eligible Salary

    - Create a new rate called US Global Basic Bonus Plan - ES with the same parameters as you defined for Worksheet Amounts except the following:
      - Select CWB Eligible Salary as the Activity Type.
      - Select Not Applicable as the Tax Type.
      - Ensure to select the Calculate for Enrollment check box.
      - On the Calculation Method tab, select Multiple of Compensation as the Method.
      - Select the Enter Value at Enrollment check box.
      - Enter 1 as the Multiplier and select Multiply by as the Operator.
      - Select Stated Salary as the Compensation Factor.

12. Repeat the steps (3, page 11-63, 7, page 11-63, 9, page 11-64, and 11, page 11-65) you used to create the US Basic Bonus Plan to set up your CA and UK plans.

Setting Up a Component Plan

This topic is a worked example of the steps for setting up a component plan structure across three business groups. Use this type of plan setup to budget and award compensation based on different components or reasons. You can create up to four components of the same plan type for a single award. For example, you can budget and allocate a salary increase based on a merit component, cost of living component, and a company performance component. Although the award is based on different components, employees receive a single compensation award.

This sample setup creates plans in US, UK, and Canadian business groups. You can replace these with business groups relevant to your enterprise. This sample setup is an example of how you can set up a global component plan to award salary increases based on the following components: merit, cost of living, and company performance. In this example, the US business group is the master business group in which you define the global plan.

> **Note:** Ensure you use the business group in which you define the global plan to complete administrative processing.

> **Note:** You should have defined your business groups and set up conversion rates before you complete your plan design.

Use this sample setup if your business requirements are as follows:

- Each country has a country-specific currency
- You publish budgets in a single currency - in this example, we use US dollars
- You publish budgets as a percentage of eligible salary
- You enable line managers to update rankings and rate employee performance
- You enable line managers to view and update employee assignment information
- You administer salary increases annually
- You limit access to plans for line managers for a specific period - in this example, they have access to the plan from January 1, 2006 until December 31, 2006
- You disallow updates to the plan beyond a particular date - in this example, this date is November 30, 2006
- You display all person-related information as of a specific date - in this example, we display all person related information as of January 1, 2006
- You use the Supervisor Hierarchy for Approvals
- You enable managers to submit worksheets for approval at any time.

1. Define Plan Years as follows:
   - 01-JAN-2005 - 31-DEC-2005
   - 01-JAN-2006 - 31-DEC-2006
   - 01-JAN-2007 - 31-DEC-2007
   - 01-JAN-2008 - 31-DEC-2008

   See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

2. Define a Life Event called Global Component with Compensation as the Type.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*

3. Define another Life Event called US Global Component with Compensation as the Type.

4. Define a Derived Factor called Stated Salary, where US dollar is the currency, Stated Compensation is the source, Annually is the Stated Compensation Periodicity, select the No Minimum and No Maximum check boxes, and As of Event Date as the Determination Code.

   See: Defining Derived Factors: Compensation Level, *Oracle HRMS Compensation and Benefits Management Guide*

5. Define a Plan Type called Component Plan, where Compensation Workbench is the Option Type and Comp - Salary Change is the Compensation Category.

   See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

6. Define an Option called Global Merit, where Component Plan is the Plan Type. The application automatically updates the Group Option field and the Group Option check box when you save your work.

7. Define two new Options called Global Company Performance and Global Cost of Living.

8. Define local options for US Merit, US Company Performance, and US Cost of Living. For each local option, in the Group Option field, select the corresponding global option name.

   See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*

9. Define a Plan called Global Component Plan with Component Plan as the Plan Type, May Not be in a Program as the Usage, US dollar as the Currency, and Annually as the Activity Reference Period.

   Add all the plan periods you defined to your plan, and add the following tasks:

Task Type	Self-Service Task Name	Access
Set Budgets	Set Budgets	Full Access
Job Changes/Promotions	Update Assignment Information	Full Access
Performance Ratings	Rate Employee Performance	Full Access
Allocate Compensation	Award Bonuses	Full Access
Manage Approvals	Approve Awards	Full Access
Review and Submit	Review & Submit	Full Access

   Attach the Global Merit, Global Company Performance, and Global Cost of Living options to the plan. Set the status to Active.

10. Define a Plan called US Component Plan with the same parameters as the Global Basic Plan.

Note: For this plan you must also select the Restrictions tab and select Global Component Plan as the Global Plan Name.

Attach the US Merit, US Company Performance, and US Cost of Living options to this plan.

See: Defining a Compensation Workbench Plan, *Oracle HRMS Compensation and Benefits Management Guide*

11. Define Plan Enrollment Requirements for the Global Component Plan as follows:
    - Select Explicit as the Method in the Enrollment alternate region.
    - On the Scheduled tab, select Compensation as the Enrollment Type.
    - In the General alternate region, enter 01-JAN-2006 as the Start and 31-DEC-2006 as the End as the Enrollment or Availability Period.
    - Enter 01-JAN-2006 as the Assigned Life Event Date.
    - Select Global Component as the Life Event.
    - Select Processing End Date as the Close Enrollment Date to Use.
    - Select 01-JAN-2005 to 31-DEC-2005 as the Year Period.
    - In the Coverage alternate region, select Event as the Enrollment Coverage Start Date. Select 1 Day Before Event as the Enrollment Coverage End Date.
    - Select the Rates alternate region and select Elections as the Rate Start Date. Select 1 Day Before Event as the Rate End Date
    - In the Budget alternate region, select the Uses Budget check box if you use budgets. Select Store Budgets as Percentages in the Preserve Budget Column.
    - In the Miscellaneous alternate region, select Supervisor Hierarchy as the Hierarchy to Use.
    - In the Performance alternate region, enter 01-Dec-2006 as the New Ratings Become Effective date.
    - In the Miscellaneous alternate region, enter 01-JAN-2006 and 30-NOV-2006 as the Self Service Worksheet Update Period Start and End dates. Select Full Access as the Default Worksheet Access and enter 01-JAN-2006 as the Freeze Date. Select Promotion as the Salary Change Reason.

    See: Defining an Enrollment Method for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

12. Define Plan Enrollment Requirements for the US Component Plan with the same parameters as the Global Component Plan.

    Note: For the US Component Plan, select US Component as the Life Event instead of Global Component.

13. Define Standard Rates for the global component plan as follows:

    For Distribution Budgets

    - Create a new rate called Global Component Plan DB - Merit.
    - Select Plan as the Level.

- Select Global Component Plan – Global Merit as the Compensation Object.
- Select Not Applicable as the Tax Type.
- Select CWB Distribution Budget as the Activity Type.
- Clear the Element and Input Value Required check box.
- On the Calculation Method tab, select Flat Amount as the Method, select the Enter Value at Enrollment and the Calculate for Enrollment check boxes. Enter 0 as the Minimum, 1000000000 as the Maximum, 1 as the Increment Amount, and 0 as the Default. Select Round to Nearest One as the Rounding Code.

For Budget Reserves

- Create a new rate called Global Component Plan RB - Merit with the same parameters as you define for the Distribution Budget.

  Note: For this rate, select CWB Reserve as the Activity Type.

For Worksheet Budgets

- Create a new rate called Global Component Plan WB - Merit with the same parameters as you define for the Distribution Budget.

  Note: For this rate, select CWB Worksheet Budget as the Activity Type.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

See: Standard Rates for Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

14. Define Standard Rates for the US Component Plan as follows:

Worksheet Amounts

- Create a new rate called US Component Plan WA - Merit with the same parameters as you defined for the Distribution Budget except the following:
  - Select US Component Plan – US Merit as the Compensation Object.
  - Select CWB Worksheet Amount as the Activity Type.
  - Clear the Element and Input Value Required check box.
  - Select the Enter Value at Enrollment and Calculate for Enrollment check boxes in the Calculation Method tab.
  - On the Processing Information tab, select Option Level Component as the Compensation Category.

Eligible Salary

- Create a new rate called Global Component Plan ES - Merit with the same parameters as you defined for Worksheet Amounts except the following:
  - Select CWB Eligible Salary as the Activity Type.
  - Select Not Applicable as the Tax Type.
  - Clear the Element and Input Value Required check box.
  - Ensure to select the Calculate for Enrollment check box.

- On the Calculation Method tab, select Multiple of Compensation as the Method.
- Select the Calculate for Enrollment check box.
- Clear the Enter Value at Enrollment check box.
- Enter 1 as the Multiplier and select Multiply by as the Operator.
- Select Stated Salary as the Compensation Factor.

15. Follow the same steps to set up rates for Global Component Plan – Global Cost of Living and Global Component Plan – Global Company Performance.
16. To create the setup for the UK and CA plans, follow the steps you completed to define Plan Years, page 11-66, Derived Factors, page 11-67, and Life Events, page 11-67. Use Plan Design Copy to copy the rest of the setup.

 Note: Ensure you copy the US Component Plan and all its child records into your UK and CA business groups one at a time. Do not copy the global plan.

 To copy the US Component Plan, you must do the following:

 1. On the Plan Design Copy page, select the link to copy and enter UK Component as the Plan Name.
 2. Enter 01-Jan-1990 as the Effective Date.
 3. Select your US Component Plan.
 4. Select the Target Category as Different Business Group.
 5. Select your UK business group as the Target Business Group.
 6. Enter 01-Jan-1990 as the Effective Date to Copy.
 7. Select Reuse existing objects if current name exists in target as the Reuse Method.
 8. Enter a Prefix of UK.

 Note: Ensure that the Global Component Plan is the Global Plan and verify that the copied compensation objects names are updated to UK or CA as required. Also, ensure you change the currency for these local component plans as required.

 Note: Optionally, update the rate names as well.

 See: Copying a Program or Plan, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up a Combination Plan

This topic is a worked example of the steps for setting up a combination plan structure across three business groups. Use this type of plan setup to use a single budget amount to allocate awards across different types of compensation. For example, you can allocate salary increases, bonuses, and stock option awards from the same budget, also on the same worksheet.

This sample setup creates plans in US, UK, and Canadian business groups. You can replace these with business groups relevant to your enterprise. This sample setup is an example of how you can set up a global combination plan to award salary increases and bonuses. In this example, the US business group is the master business group in which you define the global plan.

Note: Ensure you use the business group in which you define the global plan to complete administrative processing.

Note: You should have defined your business groups and set up conversion rates before you complete your plan design.

The Total column in the Compensation Summary table within the Allocate Compensation task does not provide a real total for each row of data. This is because you define budgets at the plan level in this sample setup. You can hide the option level columns (global merit and global bonus) using Personalization, so that managers will not be confused. The table displays an example of the data provided in the Compensation Summary table based on this sample setup.

Compensation Summary	Total	Global Merit	Global Bonus
Eligible Employees	100	100	100
Employees Receiving	95	95	95
% Receiving	95	95	95
Total Eligible Salaries	1,500,000 USD	1,500,000 USD	1,500,000 USD
Budget	150,000 USD	150,000 USD	150,000 USD
Budget as % of Total Eligible Salaries	10%	10%	10%
Total Allocated	145,000 USD	90,000 USD	90,000 USD
Unused Budget	5,000 USD		
Average Allocated as % of Eligible Salaries	9.67%	6%	3.67%

Use this sample setup if your business requirements are as follows:

- Each country has a country-specific currency
- You publish budgets in a single currency - in this example, we use US dollars
- You publish budgets as a percentage of eligible salary
- You enable line managers to update rankings and rate employee performance.
- You enable line managers to view and update employee assignment information
- You administer salary increases annually
- You limit access to plans for line managers for a specific period - in this example, they have access to the plan from January 1, 2006 until December 31, 2006

- You disallow updates to the plan beyond a particular date - in this example, this date is November 30, 2006
- You display all person-related information as of a specific date - in this example, we display all person related information as of January 1, 2006
- You use the Supervisor Hierarchy for Approvals
- You enable managers to submit worksheets for approval at any time.

1. Define Plan Years as follows:
   - 01-JAN-2005 - 31-DEC-2005
   - 01-JAN-2006 - 31-DEC-2006
   - 01-JAN-2007 - 31-DEC-2007
   - 01-JAN-2008 - 31-DEC-2008

   See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*
2. Define a Life Event called Global Combination with Compensation as the Type.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*
3. Define another Life Event called US Combination with Compensation as the Type.
4. Define a Derived Factor called Stated Salary, where US dollar is the currency, Stated Compensation is the source, Annually is the Stated Compensation Periodicity, select the No Minimum and No Maximum check boxes, and As of Event Date as the Determination Code.

   See: Defining Derived Factors: Compensation Level, *Oracle HRMS Compensation and Benefits Management Guide*
5. Define a Plan Type called Combination Plan, where Compensation Workbench is the Option Type and Combination Plan is the Compensation Category.

   See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*
6. Define an Option called Global Salary Increase, where Combination Plan is the Plan Type. The application automatically updates the Group Option field and the Group Option check box when you save your work.
7. Define another Option called Global Bonus.
8. Define local options for US Salary Increase and US Bonus. For each local option, in the Group Option field, select the corresponding global option name.

   See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*
9. Define a Plan called Global Combination Plan with Combination Plan as the Plan Type, May Not be in a Program as the Usage, US dollar as the Currency, and Annually as the Activity Reference Period.

   Add all the plan periods you defined to your plan, and add the following tasks:

Task Type	Self-Service Task Name	Access
Set Budgets	Set Budgets	Full Access
Job Changes/Promotions	Update Assignment Information	Full Access
Performance Ratings	Rate Employee Performance	Full Access
Allocate Compensation	Award Bonuses	Full Access
Manage Approvals	Approve Awards	Full Access
Review and Submit	Review & Submit	Full Access

Attach the Global Salary and Global Bonus options to the plan. Set the status to Active.

10. Define a Plan called US Combination Plan with the same parameters as the Global Combination Plan.

    Note: For this plan you must also select the Restrictions tab and select Global Combination Plan as the Global Plan Name.

    Attach the US Salary and US Bonus options to this plan.

    See: Defining a Compensation Workbench Plan, *Oracle HRMS Compensation and Benefits Management Guide*

11. Define Plan Enrollment Requirements for the Global Combination Plan as follows:
    - Select Explicit as the Method in the Enrollment alternate region.
    - On the Scheduled tab, select Compensation as the Enrollment Type.
    - In the General alternate region, enter 01-JAN-2006 as the Start and 31-DEC-2006 as the End as the Enrollment or Availability Period.
    - Enter 01-JAN-2006 as the Assigned Life Event Date.
    - Select Global Combination as the Life Event.
    - Select When Elections Are Made as the Close Enrollment Date to Use.
    - Select 01-JAN-2005 to 31-DEC-2005 as the Year Period.
    - In the Coverage alternate region, select Event as the Enrollment Coverage Start Date. Select 1 Day Before Event as the Enrollment Coverage End Date.
    - Select the Rates alternate region and select Elections as the Rate Start Date. Select 1 Day Before Event as the Rate End Date
    - In the Budget alternate region, select the Uses Budget check box if you use budgets. Select Store Budgets as Percentages in the Preserve Budget Column.
    - In the Miscellaneous alternate region, select Supervisor Hierarchy as the Hierarchy to Use and select At Any Time as the Approval Mode of Submission.
    - In the Performance alternate region, enter 01-Dec-2006 as the New Ratings Become Effective date.

- In the Miscellaneous alternate region, enter 01-JAN-2006 and 30-NOV-2006 as the Self Service Worksheet Update Period Start and End dates. Select Full Access as the Default Worksheet Access and enter 01-JAN-2006 as the Freeze Date. Select Periodic Review as the Salary Change Reason.

See: Defining an Enrollment Method for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

12. Define Plan Enrollment Requirements for the US Combination Plan with the same parameters as the Global Combination Plan.

    Note: For the US Basic Bonus Plan, select US Combination as the Life Event instead of Global Combination.

13. Define Standard Rates as follows:

For Distribution Budgets

- Create a new rate called Global Combo Plan – DB.
- Select Plan as the Level.
- Select Global Combination Plan as the Compensation Object.
- Select Not Applicable as the Tax Type.
- Select CWB Distribution Budget as the Activity Type.
- Clear the Element and Input Value Required check box.
- On the Calculation Method tab, select Flat Amount as the Method, select the Enter Value at Enrollment and the Calculate for Enrollment check boxes. Enter 0 as the Minimum, 1000000000 as the Maximum, 1 as the Increment Amount, and 0 as the Default. Select Round to Nearest One as the Rounding Code.

For Budget Reserves

- Create a new rate called Global Combo Plan - RB with the same parameters as you define for the Distribution Budget.

    Note: For this rate, select CWB Reserve as the Activity Type.

For Worksheet Budgets

- Create a new rate called Global Combo Plan - WB with the same parameters as you define for the Distribution Budget.

    Note: For this rate, select CWB Worksheet Budget as the Activity Type.

Worksheet Amounts

- Create a new rate called Global Combo Plan - WA with the same parameters as you defined for the Distribution Budget except the following:
    - Select Global Combination Plan as the Compensation Object.
    - Select CWB Worksheet Amount as the Activity Type.
    - Clear the Element and Input Value Required check box.
    - Select the Enter Value at Enrollment and Calculate for Enrollment check boxes in the Calculation Method tab.

- On the Processing Information tab, select Combination Plan as the Compensation Category.

Eligible Salary

- Create a new rate called Global Combo Plan – ES with the same parameters as you defined for Worksheet Amounts except the following:
  - Select CWB Eligible Salary as the Activity Type.
  - Select Not Applicable as the Tax Type.
  - Clear the Element and Input Value Required check box.
  - Ensure to select the Calculate for Enrollment check box.
  - On the Calculation Method tab, select Multiple of Compensation as the Method.
  - Select the Calculate for Enrollment check box.
  - Clear the Enter Value at Enrollment check box.
  - Enter 1 as the Multiplier and select Multiply by as the Operator.
  - Select Stated Salary as the Compensation Factor.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

See: Standard Rates for Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

14. Follow the same steps, page 11-74 to set up rates for US Combination Plan, US Combination Plan – Salary, and US Combination Plan – Bonus.
15. To create the setup for the UK and CA plans, follow the steps you completed to define Plan Years, page 11-72, Derived Factors, page 11-72, and Life Events, page 11-72. Use Plan Design Copy to copy the rest of the setup.

    Note: Ensure you copy the US Combination Plan and all its child records into your UK and CA business groups one at a time. Do not copy the global plan.

To copy the US Combination Plan, you must do the following:

1. On the Plan Design Copy page, select the link to copy and enter UK Combo as the Plan Name.
2. Enter 01-Jan-1990 as the Effective Date.
3. Select your US Combination Plan.
4. Select the Target Category as Different Business Group.
5. Select your UK business group as the Target Business Group.
6. Enter 01-Jan-1990 as the Effective Date to Copy.
7. Select Reuse existing objects if current name exists in target as the Reuse Method.
8. Enter a Prefix of UK.

    Note: Ensure that the Global Combination Plan is the Global Plan and verify that the copied compensation objects names are updated to UK or CA as required. Also, ensure you change the currency for these local combination plans as required.

Note: Optionally, update the rate names as well.

See: Copying a Program or Plan, *Oracle HRMS Compensation and Benefits Management Guide*

16.

Setting Up Compensation Workbench Plans

You set up Compensation Workbench plans using the Total Compensation data model. The windows you use to define a Compensation Workbench plan are a subset of those windows that you use to implement and administer Standard and Advanced Benefits.

Follow this process to set up plans for Compensation Workbench. Refer to the cross-references for further details.

For information about administering Compensation Workbench plans that you have defined, see: Compensation Workbench Processing, page 11-113

To set up a Compensation Workbench plan:

1. Define one life event reason for each plan.
2. Define plan years for the Compensation Workbench plan.
3. Define a plan type, selecting a compensation category.
4. Optional: define participant eligibility profiles to limit the employees who are eligible for a Compensation Workbench plan.
5. Define the Compensation Workbench plan.
6. Link the plans and eligibility.
7. Optional: define a derived compensation factor if compensation awards are based on a stored or system calculated value, such as eligible or stated salary.
8. Optional: define options.
9. Optional: define elements if you want to transfer activity rates to Oracle Payroll or to third party applications. Link the elements.
10. Optional: define variable rate profiles if an activity rate can vary according to one or more factors.
11. Define standard activity rates.
12. Optional: define or load the GL Daily Rates if you enable managers to view amounts in different currencies.

Compensation Life Event:

Set up a life event reason.

- Enter a life event Name that corresponds to your plan. Provide a life event name that identifies the compensation type, and--if you operate globally--the legislation of the plan. A naming convention helps you to identify the life event.
- Select a life event Type of Compensation.

  Compensation Workbench life events require no additional set up.

See: Defining General Characteristics of Life Events, *Oracle HRMS Compensation and Benefits Management Guide*

Plan Years:

You use the Program/Plan Years window to set up plan years that define the year--or period within a year--during which an employee earned their compensation. You can use this amount, if, for example, you award a bonus based on a percentage of compensation earned during the period.

> **Note:** The application requires year periods for life event processing.

- Enter the plan year start and end dates. This is the year in which the employee earned the compensation.
- For compensation types that you award more than once per year (such as quarterly bonus plans)--or for which the employee earning period is less than a full year--enter a **Within Year Period** that represents that period.

  Select the Unit of Measure that best represents your period. For example, select Semi-Year for compensation plans administered twice yearly.

Compensation Plan Types:

Your plan requires a compensation plan type.

Select Compensation Workbench as the Option Type.

Select a Compensation Category from the list:

See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

Compensation Workbench Plans:

You define a Compensation Workbench plan for a group of tasks that are a single collection, available to managers at the same time, processed at same time, and use the same hierarchy and approval chain.

Typical compensation plans include salary increases linked to a yearly focal review period, scheduled bonuses, and stock option grants.

You can also define plans for promotions/job changes and performance ratings.

See: Defining a Compensation Workbench Plan, page 11-80

See: Setting Up a Basic Plan, page 11-62

See: Setting Up a Component Plan, page 11-66

See: Setting Up a Combination Plan, page 11-70

Compensation Components:

If you itemize your compensation plan, you can define components to represent each item (Cost of Living or Merit, for example). You should attach two or more components to an itemized compensation plan.

You define components as Total Compensation options. For each option, select a plan type you defined with an Option Type of Compensation Workbench.

You can link a salary increase component to a salary administration component. Run the Compensation Workbench Post Process to update salary component values for an employee who received an award or compensation increase.

You can attach the options to a global or a local plan. A group option belongs to a group plan and you can use it for global component or global combination plans. You maintain budgets at the group option level. Options you define for a group plan display on the same worksheet within Compensation Workbench. A local option belongs to a group option or to a local plan. You can define all rates, except budget rates, at the local option level. You can also define eligibility at the local option level.

See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*

Plan Enrollment Requirements:

Set up plan enrollment requirements to determine the availability period of Compensation Workbench in Self-Service for a plan.

You also use plan enrollment requirements to enter items such as the:

- Assigned life event date
- Plan year or within year period for the compensation plan
- Close enrollment date
- Enrollment coverage and activity rate start and end dates
- Budget and worksheet characteristics and availability periods
- Supervisor or position hierarchy to use for budgets
- Dates on which performance ratings or job changes become effective

See: Defining Enrollment Requirements for Compensation Workbench Plans, page 11-82

Elements:

Use elements to transfer activity rates to Oracle Payroll or to third party applications. Elements record items such as the compensation that a line manager distributes to an employee.

> **Note:** You do not need to define elements for salary plans, only for bonus and stock option plans. The application automatically updates the employee's salary basis on the Salary Administration window.

If you have previously defined an element that you now want to use for a Compensation Workbench plan, you can use that element without defining a new one.

For Compensation Workbench, a typical element setup includes:

- A Primary Classification of Supplemental Earnings, for bonuses
- A Processing Type of Non-Recurring

- An Input Value of Pay Value in Units of Money
- For Stock Option plans with a unit of measure of Shares, select an element type of Information

See: Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

Element Links:

You set up element links for Compensation Workbench plans as you would for Standard and Advanced Benefits.

See: Defining an Element Link, *Oracle HRMS Compensation and Benefits Management Guide*

Variable Rate Profiles:

Variable rate profiles are optional for Compensation Workbench plans.

You can use a variable rate profile, for example, if you provide an initial *recommended amount* for a compensation distribution. You could vary this amount based on a manager's demographics. A line manager can override the recommended amount within the guidelines of a minimum and maximum compensation range that you define.

Variable rate profiles are also useful if you auto-issue a fixed budget to all managers and you want to vary the issued amount based on a manager's demographics.

See: Defining General Information for a Variable Rate Profile, *Oracle HRMS Compensation and Benefits Management Guide*

Standard Rates:

You set up standard activity rates to record a variety of compensation amounts, such as:

- Distribution budgets
- Worksheet budgets
- Budget reserves
- Eligible or Stated Salary

You can use rules to configure the minimum and maximum values for standard rates. The Participation Process uses these rules to dynamically calculate the minimum and maximum values. You can also use a rounding code for any Compensation Workbench standard rate.

> **Important:** You can specify rule only for rates with an Activity Type of CWB Worksheet Amount or CWB Recommended Amount.

Each standard rate uses an *activity type* to control many of the columns that display in Compensation Workbench. You set up different activity rates--with different activity types--depending on the kinds of values you want to record in Compensation Workbench.

If you budget or allocate for a component, you must set up activity rates for the option in plan rather than for the plan. If you have multiple components, and you check the Uses Budget check box on the Plan Enrollment Requirements window, you must budget for at least one component.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

See: Standard Rates for Compensation Workbench, page 11-56

GL Daily Rates:

Setting up GL Daily Rates enables your managers to use Compensation Workbench to enter and view budget and worksheet distributions in a currency that differs from the currency set for the profile option BEN: Benefits Preferred Currency, or, if you do not set this profile option, for the currency defined for the business group.

Line managers can select their preferred currency--you should only enable those currencies for which you have conversion rates.

- You must use a GL Daily Rate Conversion Type of **Corporate** for each currency you want to use with Compensation Workbench.

  > **Note:** Conversions are for display purposes only and do not affect actual paid amounts.

See: Entering Daily Rates, *Oracle General Ledger Users' Guide*

Defining a Compensation Workbench Plan

Use the Plans window to define a Compensation Workbench plan.

> **Note:** You can also use the Plans window to define employee benefits plans. Compensation plans use only a subset of the features available on the Plans window.

1. Enter the plan Name.

   > **Note:** By using a generic plan name (one that does not include a particular year period), you can reuse the plan over multiple award periods.

2. Select a Status of Active.

   Change the status to inactive to make the plan unavailable in Compensation Workbench.

3. Select the Plan Type you created for this plan.
4. In the Plan Usage field, select May not be in Program.
5. Choose the Eligibility Rates tab.
6. Select the Track Ineligible Person check box to track ineligibility without having to rerun the Participation Process: Compensation Workbench to determine eligibility or rates.
7. Select the Participation Eligibility Override Allowed check box to enable managers to override eligibility requirements for the plan.
8. Select the Restrictions tab.

   By default, the Global Plan Name is the plan name you defined, and the Global Plan check box is selected. To link a different global plan to the plan you are defining, deselect the Global Plan check box, and select a different Global Plan Name.

9. Choose the Not in Program tab.

10. Enter the Sequence number of this plan if you want compensation plans to display in a particular order in Self-Service.
11. Select the Currency of your plan.

    You must create a separate plan for each plan with a unique currency.
12. Leave the Enrollment Rate/Frequency field blank.
13. Select an Activity Reference Period that matches your most common pay basis.

    This determines the period for which the base salary is displayed, and the amount in which salary increases are entered.

    Note: If you select Hourly as the Activity Reference Period, ensure you have defined a value for the BEN:BEN HOURLY ANNUALIZATION FACTOR user profile option. This defaults to 2080, meaning that there are assumed to be 2080 hours in a year (8 hours * 5 days * 52 weeks).
14. Choose the Details button to open the Maintain Plan Related Details window.
15. Choose the Plan Periods tab.
16. Attach the plan years you defined to the plan.
17. Select the Compensation Workbench tab, and enter a sequence number for the first Task Type to add. You can attach any combination of the same or different tasks.

    Note: If you do not attach any tasks, then Self-Service defaults to show the Compensation Worksheet Group. Existing Compensation Plans do not require modification.
18. Select a Task Type from the list, enter a Self Service Task Name, and select the Site Level Access. The task name you specify appears on the Self-Service interface, and the access level you select determines the level of access managers have to the task.
19. Close the Maintain Plan Related Details window.
20. Choose the Plan Eligibility button if you want to link a participant eligibility profile to the plan.
21. Choose the Eligibility button.
22. Attach any applicable participant eligibility profiles that you created.
23. Close both the Eligibility window and the Maintain Plan Eligibility window.
24. Choose the Options button if you itemize this compensation plan.
25. Enter the sequence number of the first component.
26. Select the component in the Option field.
27. Select a Status of Active.
28. Check the Hidden check box if you want to hide this component from a manager's budget and worksheet.
29. Choose the Eligibility tab.
30. Attach any applicable participant eligibility profiles that you created.

31. Check the Track Ineligible Person field to enable eligibility overrides without having to rerun the Participation Process: Compensation Workbench.
32. Repeat steps 25, page 11-81 to 31, page 11-82 for each component in the plan.
33. Save your work.

Defining Enrollment Requirements for Compensation Workbench Plans

Use the Plan Enrollment Requirements window to define the scheduled availability period for a Compensation Workbench plan and to establish certain budget and worksheet properties.

> **Note:** You can also use the Plan Enrollment Requirements window to define electability requirements for employee benefits plans. Compensation Workbench plans use only a subset of the features available on this window.

1. Query the plan for which you are defining enrollment requirements in the Plan field.
2. With the General tab and the Plan tab selected, select the Enrollment region.
3. Select Explicit as the enrollment Method.
4. Select Current, Can Keep or Choose; New, Can Choose as the Enrollment Code.
5. Select the Coverage region.

   > **Note:** By setting coverage and activity rate start and end dates at the plan level you will not have to update these codes for each availability period.

6. In most instances, select Elections as the Enrollment Coverage Start Date.

   This starts the employee's coverage as of the effective date of the Compensation Workbench Post Process.
7. Required: select 1 Prior or Event as the Enrollment Coverage End Date.

   This ends the employee's coverage one day prior to the start of any subsequent coverage.
8. Select the Rates region.
9. In most instances, select Elections as the Rate Start Date.

   This starts the employee's rate--and element entry--as of the effective date of the Compensation Workbench Post Process.
10. Required: select 1 Prior or Event as the Rate End Date.
11. Choose the Timing tab and then the Scheduled tab.
12. Select Compensation as the Enrollment Type.

    You can only select this Enrollment Type if the option type of the plan type you attached to this plan is Compensation Workbench.
13. In the Enrollment or Availability Period Start and End fields, enter the date range for which Compensation Workbench is available in Self-Service for this plan.

    Availability periods for the same plan cannot overlap.

Note: Once you run the Participation Process: Compensation Workbench, you cannot change the availability period unless you back out the life event. Subsequent runs of the process must be *after* the previous life event has been closed for all individuals and the previous availability period has ended.

14. Enter the effective date of the compensation life event in the Assigned Life Event Date field.

    The assigned life event date sets the date on which the Participation Process: Compensation Workbench evaluates your plan design to determine eligibility, activity rates, and each employee's worksheet manager.

15. Select a previously defined compensation life event reason for this plan in the Life Event field.

    Note: You can only have one life event per plan.

16. In the No further processing is allowed after field, enter the last date on which you can make changes in the professional user interface to this compensation plan.

17. Enter a Close Enrollment Date to use code that determines the date when the life event status is changed from started to processed:

    - Processing End Date (Closed by the Close Compensation Enrollments Process on the No further processing date)
    - When Elections Are Made (**Recommended**--Closed by the Compensation Workbench Post Process on the effective date of the process)
    - When Enrollment Period Ends (Closed by the Close Compensation Enrollments Process as of the Availability Period end date)

18. Select the Year Period of this plan.

19. Select a Within Year Period if this plan uses a period of less than a year to determine available compensation.

20. **Budget Characteristics**

    Note: Because Budgets are not used for Promotion and Performance Plans, you must leave the budget tabbed region blank. For promotion and performance plans, skip to step 25., page 11-84

    Select the Budget region.

21. Select the Uses Budget check box to enable higher level managers to issue budgets to lower level managers.

    You must select this field to enable the use of budgets at any level in the application.

22. Optionally, select the Automatically Allocate Defined Budgets check box to update the allocation worksheet for all managers with a predefined budget amount after you run the Compensation Pre-Process.

23. Select whether to store budgets as percents or amounts in the Preserve Budget Column field.

If you select percent (recommended), then the application automatically recalculates a manager's distribution budget and worksheet budget if an employee becomes eligible or ineligible or is reassigned from one manager's worksheet to another's.

24. **Worksheet and Budget Sheet Characteristics**
25. Select the Miscellaneous region.
26. Enter the date range for which a manager can access and update worksheets in the Self Service Update Period block.

    You can change the date range for the worksheet at any time without having to re-run Participation Process: Compensation Workbench for the change to take effect.
27. Select the Default Access to Tasks:
    - Full Access
    - Hidden
    - No Access
    - Read Only

      Note: You can override the default worksheet access for lower level managers within your hierarchy using the Plan Administration page.
28. Select the Freeze Date (Omit for Most Recent Data) to freeze and display person data as of this date. When you run the Compensation Workbench Refresh process, it displays data as of this date, if you do not specify an effective date when running the process, even if a person's data changes.
29. Enter an Assignment Changes Become Effective date to display assignment data as of this date.

    Note: To share performance ratings and assignment changes (job, position, grade, and group) across group plans, provide the same value for the New Ratings Become Effective field (to share performance ratings) and the Assignment Changes Become Effective field (to share proposed job, proposed position, proposed grade, or proposed group) for all plans between which data should be shared. Ranking values are automatically shared across plans.
30. Select a Salary Change Reason from the list to define a common salary change reason that the application uses in the Salary Proposal Page when you run the Compensation Workbench Post Process.
31. **Hierarchy and Performance Ratings**

    Select the Hierarchy region.
32. Select the Hierarchy Type to determine how you administer this plan.

    You can choose from:
    - AME Transaction

      If you select this hierarchy type, then application tests each employee against your AME definition and uses the Next Approver as the worksheet manager for the employee. When you create your AME definition, ensure there is only one Next Approver.

- Position Hierarchy

  If you select this hierarchy type, then the application checks for a manager's supervisor if it cannot find a position in the hierarchy above the manager's current level. This supervisor can be in a different business group.

  If you use position hierarchies--and you want an employee to report to a supervisor in a different business group for budget purposes--create a *placeholder* position above that employee in the hierarchy and do not assign a person to the position.

- Rule

  If you select this hierarchy type, then application returns the PERSON_ID of the worksheet manager for each employee. You must ensure that the formula builds a hierarchy that has no breaks, no one managing themselves, and no recursive relationships (where A reports to B, and B reports to A).

  > **Note:** If you define a formula with a recursive relationship, then the Participation Process: Compensation Workbench processes the rest of the organization unaffected by the recursive hierarchy and creates an error log that displays the employees within the recursive hierarchy so you can fix it.

- Supervisor Hierarchy

  If you select this hierarchy type, then you must select an approval mode. You can choose from:

  - Submission at any time
  - Submission only after approved

33. Select the Performance region.

34. If you maintain employee performance ratings in Oracle HRMS, and you want to display those rating in Compensation Workbench, select the Performance Rating Type to use for this plan.

    You can only display one performance rating type at a time for a compensation plan in Compensation Workbench.

    Enter the date in the New Ratings Become Effective field.

35. Save your work.

Controlling Access, Eligibility, and Award Amounts

Hierarchies for Award Allocations and Approvals

As you set up Compensation Workbench, you can choose which managers can use the tool, which plans they have access to, and which tasks are available to them for each plan.

Who Enters and Approves Awards?

For a manager to use Compensation Workbench, they must have:

- Access to a Manager Self-Service responsibility
- Employees reporting to them who are eligible for an active plan with a current availability period.

You define the employees reporting to them for each plan by selecting a hierarchy type for that plan.

Hierarchy Types

The hierarchy determines:

- The employees and subordinate managers that managers see on their worksheets
- The managers to whom they can roll down a budget
- The approval chain when managers submit their worksheets: high level managers approve the worksheets of direct reporting managers. The high level manager's worksheet is a consolidation of the entries of lower level managers.

You select the hierarchy type for a plan on the Miscellaneous tab of the Plan Enrollment Requirements window. You can choose from the following types:

- Position hierarchy
- Supervisor hierarchy
- Hierarchy defined by a FastFormula of type Manager Hierarchy
- AME Transaction

Using FastFormula: During processing, the application returns the PERSON_ID of the worksheet manager for each employee. You must ensure that the formula builds a hierarchy that has no breaks, no one managing themselves, and no recursive relationships (where A reports to B, and B reports to A).

For a formula example see: Oracle FastFormula Reference Guide for Standard and Advanced Benefits Metalink Note ID 218059.1

Using AME: During processing, the application tests each employee against your AME definition and uses the Next Approver as the worksheet manager for the employee. When you create your AME definition, ensure there is only one Next Approver.

See: Approval Process, *Oracle Approvals Management User Guide*

Allocating Awards Centrally

If you don't want line managers to have access to Compensation Workbench at all, you can define a hierarchy rule (using FastFormula) or AME transaction to create a hierarchy where all employees report to HR managers. Another approach is to use a hierarchy that involves line managers, but also define security profiles for HR managers that control which employees' records they can see. HR managers can then use the Switch Manager feature to perform allocations and other tasks for the managers within their security profile.

Access Levels in Compensation Workbench

Who Can Access Plans and Tasks?

Access to Plans

You set default (site) access for plans by setting a status code on the Plan Administration page:

- Active
- Inactive – only administrators can see the plan
- Closed – neither administrators nor managers can see the plan in Compensation Workbench
- Pending – neither administrators nor managers can see the plan in Compensation Workbench

For active plans, you can give managers No Access, Read Only Access or Full Access on the Employee Administration page. But managers can override the access level for their lower level managers if you make the Change Access link available to them.

Access to Tasks

You can use the Plan form or the Plan Administration page to define default access to each task for the plan, and you can vary the access level for individual managers using the Employee Administration page. You can set the access levels for tasks to:

- Hidden – managers cannot see the task on the Home Page
- No access – managers can see the task on the Home Page but cannot access it
- Read only – managers can view the task but cannot make any changes
- Full access – managers can view and update the task

You can change these access labels using the BEN_WS_ACC lookup type.

> **Note:** Managers cannot override task access.

Switch Manager

Managers can enter allocations and assignment changes for any employee who reports directly or indirectly to them, according to the selected hierarchy. If you make the Switch Manager feature available to them, they can view and edit the budgetsheets and worksheets of any manager within their security view (defined by the security profile attached to their responsibility). Switch Manager enables you to act as another manager or as a super-user and do everything that the manager can do except view their notifications. You can search for and select another manager to switch to even if you don't know the exact name, employee number or email address of the manager you want to switch to.

Compensation Workbench is delivered with Switch Manager enabled for the HR Professional and Manager Self-Service responsibilities. A system administrator can disable Switch Manager using the Form Functions window.

- Query Compensation Workbench Home for Administrators in the User Function Name field.
- Choose the Web HTML tab to display the following HTML Call:

OA.jsp?akRegionCode=BEN_CWB_HOME_PAGE&akRegionApplicationId=805&displayDate=N&displaySwitchManager=Y

Approval Modes

Approval modes enable you to control when managers submit their worksheets to the next level for approval.

You can choose between two approval modes:

- Submission at any time – Managers can submit their worksheets at any time provided they have full access to the task and none of the worksheets of their direct reports has a Rejected status.
- Submission only after approved – In addition to the above limitations, managers must approve the worksheets of all lower managers before submitting their own. Additionally, managers may not approve a lower manager's worksheet until the lower manager submits it.

You configure the approval mode on the Plan Enrollment Requirements form > Timing tab > Miscellaneous region. You can also change the approval mode using the Plan Administration form.

Eligibility, Award Limits and Targets

Who Receives Awards, Ratings, or Assignment Changes?

When you set up your Compensation Workbench plan, you can define participant eligibility profiles to determine if an employee is eligible to receive an award, a promotion, or even a performance evaluation. You can set different eligibility criteria for each option and for each local plan.

Compensation administrators can override eligibility results. You can give managers the ability to request a change in eligibility results too, and make these override requests subject to an approval process.

> **Note:** Contingent workers cannot receive awards, ratings, or assignment changes through Compensation Workbench though they can participate as managers.

Controlling the Value of Awards

When you define the rates to display on the Allocations worksheet, you can set company targets and impose minimum and maximum award amounts.

Notice that the application does not enforce budget limits. However, managers can reject worksheets when managers have allocated awards in excess of their budgets.

Compensation administrators can monitor allocations throughout the compensation cycle, and can override any awards that are outside of company policy.

Worksheet and Budget Sheet Configuration

Configure Worksheet and Budget Sheets

You can configure the worksheet and the budget sheet to determine which columns to display and how the column headings read. You can configure these sheets and other pages in Compensation Workbench to also hide or display links to other features such as reassigning employees, and Switch Manager.

Which Columns Do You Want to Display?

The worksheet displays a variety of information about an employee that helps managers determine allocations. For example, you can display rank, rating, number of years employed, and historical compensation information for the employee.

You configure the worksheet using Personalization and select the columns that managers can view and update. You can make the following columns available for update:

- Assignment Change Reason (the reason that a promotion or job change has occurred) – You can restrict the change reasons available on the worksheet by creating codes containing “CWB” in the EMP_ASSIGN_REASON lookup type. Otherwise, all codes are available on the worksheet.
- Proposed Job
- Proposed Position
- Proposed Grade

You can make the following columns available for managers to view while promoting or changing assignment information:

- Employee Name
- Employee Full Name
- Job
- Position
- Grade

You can also rename column headings to suit your enterprise requirements.

See: Personalize By Plan, page 11-94

Which Rates Do You Want to Display?

You can define rates to display amounts that appear as columns on the worksheet or budget sheet. Rates can be:

- Fixed
- Enterable
- Calculated as a multiple of compensation using a derived factor

For enterable rates you can display default values and specify minimum and maximum values so that Compensation Workbench displays an error if managers enter a value outside the range. You can include the minimum and maximum amounts as columns on the worksheet using Personalization.

The activity type you select when you define a standard rate determines how Compensation Workbench uses the rate. For example, you can display columns for the award amount, budget amount, eligible salary, stated salary, vacation hours, performance ratings, length of service, and so on.

See: Standard Rates for Compensation Workbench, page 11-56.

Rounding Codes

For each rate you can specify a rounding code, which applies to the amount, and not the percentage, of the award. For example, if you specify a rounding code for a salary award that is defined as a percentage of eligible salary, the application calculates the award using the percentage the manager enters, applies the rounding code, and then adjusts the percentage and new salary using the rounded amount. If you do not define a rounding code for a rate, the application uses the rounding rules defined for the plan currency, which you enter using a General Ledger responsibility.

> **Note:** The Currency Precision field on the Plan Administration page defines the number of decimal places the application displays for salary amounts it converts from pay frequency to plan frequency.

Which Flexfields Do You Want to Display?

You can set up the Additional CWB Person Information flexfield to add up to 30 columns to the worksheet for managers to enter values. There are certain limitations to using flexfields:

- You cannot download Compensation Workbench flexfields to a spreadsheet.
- You can use only Compensation Workbench flexfields 1-6 as grouping criteria on the Allocation Matrix, Summary by Directs report, and the Stock Option History report.
- You cannot assign a default value for flexfields.
- You must not use multiple contexts when defining flexfield. Use only the Global context for the flexfield definition and disable all others. Hide the context and do not make any mandatory.

You store flexfield values in the BEN_CWB_PERSON_INFO table.

See: Configuring Descriptive Flexfields Within Compensation Workbench, page 11-96

Which Custom Columns Do You Want to Configure?

You can use PL/SQL to create custom columns that you add to the worksheet using Personalization. These columns are read-only, and you can use them to group data or for reporting.

Some of the restrictions of custom columns are:

- You can retrieve values only using a batch process (Participation Process: Compensation Workbench or the Compensation Workbench Refresh Process.
- The values in custom columns are fixed and display only in Compensation Workbench. Line Managers cannot enter or update the values in these custom columns. To enable managers to enter or update values, use the Descriptive Flexfields in Compensation Workbench. You can change custom column values using the Employee Administration page.

- There are ten alphanumeric custom columns (Custom1-10) and ten numeric columns (Custom 11-20).
- Numeric columns are not formatted or subject to currency conversion when they display in Compensation Workbench. You can use Miscellaneous Rates for currency conversions.
- You cannot display numeric custom columns on the Budget Page. You can use Miscellaneous Rates to do this.
- You cannot use the same custom column for different items across plans because not all tables allow Personalization By Plan.

You store custom column values in BEN_CWB_PERSON_INFO table.

See: Configuring Custom Columns Within Compensation Workbench, page 11-98

Which Dynamic Columns Do You Want to Configure?

You can add up to ten numeric and ten non-numeric columns that:

- Either display values calculated from other columns
- Or display fixed values depending on conditions you define with respect to the values in other columns.

For example, you could define a numerical column to show the percentage change from last year's bonus, or you could define a Yes/No column to show whether this year's bonus is greater than last year's. You do not have to display the columns on which you base the calculations or conditions (last year's bonus, in the example).

See: Configuring Dynamic Columns Within Compensation Workbench, page 11-96

Which Other Features Do You Want to Make Available?

By choosing which links you display on each page, you can control which features you make available to managers. You can choose to enable:

- Reassignment, so managers can transfer employees between worksheets
- Upload/Download to Spreadsheet, so managers can manipulate budget figures and allocations in a spreadsheet
- Switch Manager, so managers can operate as other managers within their security profile
- Audit History
- Flexible Summary
- Allocation Wizard
- Validation of Jobs, Grades, and Positions in Compensation Workbench
- Configure targets

Employee Reassignment

Employee Reassignment enables managers to award compensation to employees who do not report to them, but who have performed some task for them that warrants compensation. The employee reassignment is valid for the selected compensation plan and enrollment period, and does not affect the current supervisor relationship.

You can require that reassignments gain approval. There are three delivered approvals, which use Workflow and AME:

- Approval 1: Party 1 – The manager whose worksheet is losing the employee must approve the reassignment.
- Approval 2: Party 2 – The manager whose worksheet is gaining the employee must approve the reassignment.
- Approval 3: Party 3 -- No approver is necessary

Both managers receive notifications if the request is approved or approval is not required. Only the requester (who may be a third party) receives notification if the request is rejected.

Configuring the Home Page

You can configure the home page in the following ways:

- In the Plans window, select which tasks appear in the Task list. If you select the Employee Statements task, you must perform some additional setup.

  See: Configuring Employee Statements For Use by Managers Within Compensation Workbench, page 11-98
- Using Personalization, add a status column to the Task list, and choose whether to display status using an icon (the default) or text.
- Using the user profile option BEN: CWB Home Plans Displayed, you can limit the number of plans displayed on the home page
- Using Personalization, select which links to display to give access to additional features such as Switch Manager, and reports.

Displaying Corporate Standard Format Names

If you are a global enterprise and you store employee names in a corporate standard format to avoid problems with displaying names using different character sets, you can display the corporate standard name in Compensation Workbench. You must add code to the custom column hook and set the system profile HR: Display Person Name at the site level to Custom Name.

For details about the package you need to configure, see: Global Employee Names in Compensation Workbench Family Pack J Enhancements and Clarifications, Metalink Note ID: 303198.1 [https://metalink.oracle.com/metalink/plsql/ml2_documents.showDocument?p_database_id=NOT&p_id=303198.1]

Validating Jobs, Grades, and Positions in Compensation Workbench

You can configure whether Compensation Workbench validates a proposed grade, job, or position based on the job or position an employee currently holds. This ensures that managers propose new jobs, grades, and positions for employees for which the employees are eligible. You can configure the worksheet to do the following.

- Display only valid grades – when a line manager proposes a new grade for an employee, the application displays only those grades for which the employee is eligible.
- Default the proposed grade based on proposed job or position

- Disallow a manager from proposing a new position if a proposed job exists for jobs and positions that are directly correlated
- Enable managers to select only from currently active and valid proposed jobs, grades, and positions based on the job, grade, position combination. The application displays these jobs, grades, and positions as a List of Values
- Make the proposed job, grade, and positions columns read-only if managers cannot change them. Alternatively, hide the job, grade, and position from the list of values

To validate grades, jobs, and positions in Compensation Workbench, you must set the following profile options:

- BEN: CWB Valid Grade Filtering – set this profile option to Yes to indicate that the application must display valid grades for a proposed job/position within the business group.
- BEN: CWB Validate Performance/Assignment Changes Online – set this profile option to Yes to validate assignment changes online.

Configuring Targets

Worksheets display company target amounts. Managers can select the displayed minimum, maximum, or target values to populate the worksheet amount column with the amount selected.

When you select company targets from the list, it refreshes the page to display a table the employees you select, and the amount and percent of their target minimum, actual target, and maximum. The worksheet also displays the worksheet amount and percentage of eligible salary column that you can modify. The target percentage columns display only if you define a Standard Rate for eligible salary and the corresponding target amount.

The application uses the following icons to indicate the target status for the worksheet amount:

- Circle – On target
- Green arrow pointing upwards – Above target
- Green arrow pointing downwards – Below target
- Red arrow pointing upwards – Above target maximum
- Red arrow pointing downwards – Below target minimum

Use the quick fill feature to select individual values and display them in the worksheet amount column. You can also do a mass selection for all eligible employees using links. These links are only visible of the respective target minimum, target, or target maximum are you define for the plan. The mass selection feature only applies target amounts to employees filtered and displayed in the target view.

Personalize By Plan

Plan-level personalization allows you as a professional user to configure the worksheet groups and the information that managers are able to view and update. This enables you to use personalization to have multiple and different views of the same information.

For instance, you can configure worksheets so managers can:

- View compensation history
- View job information
- View previous employee performance ratings
- Perform employee evaluations
- Award allocations

You can use personalization to move columns into a more meaningful arrangement, choose to display or not display items, render columns read-only, and rename columns to match your business terminology. Use Plan Design Copy to copy plan personalization for custom and dynamic columns.

You enable self-service personalization through the System Profiles window using the System Administrator responsibility.

1. Navigate to Profile > System.
2. In the System Profile Values window, select either the Site or the Responsibility check box to enable personalization at the appropriate level.
3. In the Find field, search for the Personalize Self Service Definition Profile.
4. Select Yes for either Site- or Responsibility-level, as appropriate.

   Important: Your system administrator must bounce the Apache server before personalization is enabled in Self-Service.

   Note: Use Oracle SSHR to complete the following steps:

5. Log into the Manager Self-Service responsibility, and select Compensation Workbench.
6. On the Home page, select the plan, the allocate compensation task or the set the budgets task, and then the view you want to personalize.
7. Click the Personalize This Region for Benefits Plan Design link.

   Note: The left side displays all Available Columns you can choose to display in the view for the selected plan; the right side lists the Columns Displayed in the view for the selected plan.

8. Select items to add or remove by highlighting them in either column and using the appropriate left or right arrow on the slider. Additionally, you can reorder the sequence of columns displayed by using the up and down arrows on the slider.
9. To change the name of a column, click Rename. Select the item you want to rename and change the name.
10. Save your work.
11. Click Apply to save your changes to the view, or click Delete to cancel your changes.

    Note: Click Delete Customization to return to the original design of the view after changes have been applied.

Configuring Descriptive Flexfields Within Compensation Workbench

You can configure thirty descriptive flexfields for use on the Worksheet Detail Table. System Administrators can define these descriptive flexfields also known as CPI flexfields. These flexfields enable managers to enter values within Compensation Workbench.

You cannot download data stored on Compensation Workbench flexfields to Microsoft Excel and this data is not a part of the grouping criteria on the Allocation page, Summary by Directs report, and the Stock Option History report. To create a default value for the flexfields, you must use the Custom Columns. The values of these flexfields are stored in the BEN_CWB_PERSON_INFO table.

You define the Descriptive Flexfields from the Access Descriptive Flexfield Segment window.

Define the flexfield, and the table query to add a Poplist or a List of Values. Avoid using multiple contexts when you define a flexfield - use only the Global context for the flexfield definition, and disable all others. Hide the context, and do not make any context mandatory. Include and Rename the Columns on the Compensation Detail report using Personalization by Plan. Configure the Downloads to have proper column heading names, and configure the view name for use in the Allocation Wizard, Summary By Directs Report, and the Stock Option History Report. To do this, access the Lookup Type BEN_CWB_MATRIX_ROW_CRITERIA, and BEN_CWB_MATRIX_COLUMN_CRITERIA, and rename the Descriptive Flexfield or the Custom Column and disable any Descriptive Flexfields or Custom Columns you do not use.

To personalize your views in the CWB user interface:

Important: Ensure that personalization links are turned on and that you have run the Participation Process: Compensation Workbench.

1. Select the Plan from the homepage and continue to the Worksheet
2. Click the Personalize Page link.
3. Choose a personalization level, and ensure that PelFlex is a displayed column.
4. Define the Flex Settings and apply.

    Note: In the Flex Segment List, you must enter the Segment Information using the following structure:

    ContextName|SegmentName1|SegmentName2|"ContextName2"|SegmentName3|SegmentName4

    Example: Global Data Element|Compensation Month|Misc Use

    Important: Spelling must match exactly as defined in the Flexfield.

Configuring Dynamic Columns Within Compensation Workbench

Using dynamic columns, you can configure unique worksheet columns to display calculated values, or fixed values based on defined conditions. You can use dynamic columns to define calculations and conditions for 20 custom columns. Use custom attributes 1-10 for non-numeric values and 11-20 for numeric values. You use custom columns to display the results of calculations or conditions you define in dynamic columns.

For details about custom columns see Configuring Custom Columns Within Compensation Workbench, page 11-98

Configure dynamic columns to do the following:

Calculation - to display a fixed value based on other numeric columns that use basic math operations such as addition, subtraction, multiplication, and division. For example, New Salary + Bonus = Total Compensation Amount or Last Year Bonus/Bonus Amount * 100 = Percentage Change from Last Year's Bonus

Condition - to display a fixed value based on values of other columns that the application determines based on your choice of multiple relational operators such as ends with, is between, is greater than, is less than.

To configure dynamic columns:

1. On the Compensation Workbench Home page, select the plan to personalize. Select the Allocations task.
2. Click Personalize Dynamic Columns.
3. On the Dynamic Columns page, select the column to personalize and click the Define Column icon.
4. On the Define Dynamic Column page, select the type of dynamic column. You can choose Calculation or Condition.
5. Enter a value in the Execution Sequence field. The application uses the calculations or conditions in this sequence starting with the lowest number in the sequence.

   If you select Calculation as the type of dynamic column in Step 4, page 11-97**, then complete Steps 6 to 9.**, page 11-97
6. Select a Column, for example New Salary.
7. Enter a Fixed Value, for example 6.
8. Select an Operator, for example, Divided By.
9. Click Add Another Row and follow Steps 6 to 9, page 11-97 to enter more rows for the calculation. Click Apply to save and calculate.
10. **If you select Condition as the type of dynamic column in Step 4**, page 11-97**, then complete Steps 11 to 19**, page 11-97.
11. Enter a Column Result, for example 100.
12. Click the Conditions icon to display the Define Conditions page.
13. Enter a Sequence number. This is the order in which the application evaluates conditions.
14. Select a Column for example, Eligible Salary.
15. Select an Operator, for example, Is Between.
16. Enter a Value, for example 0. Ensure this value is the same as the value on the worksheet.
17. Enter a Value, for example 100.

Note: You need to enter this value if you select Is Between as an operator.

18. Optionally, select a value from the And/Or list.
19. Click Add Another Row and follow Steps 11 to 19, page 11-97 to enter more rows for the condition. Click Apply to save your work.

Configuring Custom Columns Within Compensation Workbench

You can use custom columns to group data for view on worksheets or for reporting purposes.

To configure custom columns:

1. Write your PL/SQL code to retrieve the values for a custom column and add this code to a custom column hook. This procedure is predefined blank and is called ben_cwb_custom_person_pkg. There are twenty separate functions in this for each corresponding custom column. These are called get_custom_segment1, get_custom_segment2, and so on.
2. Compile the package on the database. The application executes this logic when you run the Participation Process: Compensation Workbench or the Compensation Workbench Refresh process.
3. Configure the worksheet through Personalization to rename the column heading appropriately and include the column on any worksheet.
4. Optionally, configure the Compensation Detail report columns to include the custom column.
5. Configure the Downloads to have provide valid column heading names.

   See: Downloading to Excel using WebADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.
6. Configure the correct grouping name for use in the Allocation Wizard Matrix, Summary By Directs Report, and the Stock Option History Report. To do this, access Lookup Type BEN_CWB_MATRIX_ROW_CRITERIA and BEN_CWB_MATRIX_COLUMN_CRITERIA and rename the Custom Column.

Configuring Employee Statements For Use by Managers Within Compensation Workbench

You can configure and use Employee Statements to communicate with employees. Use this to inform employees about promotions, raises and any other information. Compensation Workbench uses Document Management and XML publisher to create an Adobe Portable Document Format (PDF) file of these employee statements, which you can generate and print.

To configure employee statements:

1. Create an Employee Statement template in Microsoft Word or WordPad.
2. Format the statement including any text and data tags based on your requirements. Data tags are placeholders for employee specific data that the

application merges into the individual statement for each employee. You can use any text for the tag name. Ensure you format the tag <?tagname?> , for example, <?NEW_SAL?>

3. To display your company logo, paste a .jpg file in the template.
4. To display text conditionally, use the <?if: and <?endif?> tags. The application displays any data you enter between these tags if the condition is met.

   See: Metalink Note ID 311702.1 for more information on available tags.
5. Save the template as a .rtf file.
6. Log into Oracle HRMS using a Super HRMS Manager responsibility that has the Document Management menu item associated with it.
7. Navigate to the Document Management page.
8. Click Create Group to create a group to contain the document you created.
9. In the Define Group page, enter a Group Name and a Short Name.
10. Click Apply.
11. In the Map Documents to Group page, click Create Document.
12. In the Define Document page, enter a Document Name.
13. Select Compensation Workbench as the Document Category.
14. Enter a Short Name for the document.
15. Select an effective date for the document.
16. Select Upload a new file, and browse to select the .rtf template you created.
17. Click Continue.
18. In the Define Document: Attribute Mapping page, map all the tags you defined to the appropriate data attribute.
19. Click Finish.
20. In the Map Documents to Group page, search for, select your document and click Go.
21. In the Define Document Properties page, click Finish.
22. Navigate to the Plans window.
23. Query the plan for which you created the statement template, and click Details.
24. Select the Compensation Workbench tab.
25. Add Employee Statement as a new Task Type.
26. Use the HR Professional responsibility and navigate to the Compensation Workbench Home page.
27. Click Plan Administration.
28. Select the plan for which you created the employee statement and click Continue.
29. In the Plan Hierarchy page, click the Details icon for the group plan.
30. Select the group that you defined for your template from the Employee Statement Template list.
31. Click Apply Updates.

32. Run the Participation Process: Compensation Workbench. Line managers will see a new task Employee Statement for the group plan to which you added the employee statement. They can select one or more employees and click Generate Statements. They can click Open to view the employee statement, and print or email it.

Related Topics

Document Management,

Capturing Grant Price With a Stock Option Element Entry

You can capture grant information of any type (Grant Price, Vesting Schedule, Expire Date, Lot Number, etc.) in the same element entry as a separate input value.

To set up extra stock option input values for use in Compensation Workbench, do the following:

Define a formula:

1. Navigate to the Formula window.
2. Enter a Name for the formula.
3. Select Extra Input as the formula type.
4. Click Edit.
5. In the Edit Formula window, enter the formula values as shown in the example that follows:

```
GRANT_PRICE = 24.13
GRANT_DATE = "01-MAR-2005"
VEST_SCHED = "YEARLY = 4 YR"
LOT_NAME = "A45B19"
EXPIRE_DATE = "01-MAr-2015"
GRANT_TYPE = "ISO"
GRANT_TICKER = "ORCL"
```

6. Click Verify.

Define an element and input values:

1. Navigate to the Element window.
2. Enter the Name for the element.
3. Select Supplemental Earnings as the Primary Classification.
4. Click Input Values.
5. In the Input Values window, create input values that represent the amounts to display in Compensation Workbench. Ensure you include input values for the values you defined in the formula.
6. Save your work.

Link the element and formula to the CWB Amount Standard Rate:

1. Navigate to the Standard Rates window.

2. Query the CWB Worksheet Amount Standard Rate.
3. Select the Element and Input Required check box.
4. Select the Element you defined for the stock option plan.
5. Select the Input Value to display in Compensation Workbench, for example, Shares.
6. Select the formula you defined in the Extra Input Rule list.
7. Click Extra Inputs.
8. In the Extra Input Values window, map the remaining input values to the appropriate formula return variables you defined.
9. Run the Compensation Workbench Participation Process.

Reports and Notifications

Reports in Compensation Workbench

Compensation Workbench includes the following reports:

Report Name	Use	Further Information
Compensation Detail	Managers use this report to view details of a compensation plan in a single report. The report displays a summary of employees receiving compensation under the plan, details about their award, and assignment information.	You can download data using Web ADI for this report. See: Compensation Detail Report, page 11-105
Combined Plan View	Managers and administrators use this to compare results of different compensation plans in one report	See: Combined Plan View Report, page 11-105
Employee Stock Option History Report	Managers and administrators use this report to view stock option history for current employees, including an estimated walk-away value at a summary and employee level.	• Load the BEN_CWB_ STOCK_OPTN_DTLS table • Set the system profile BEN: CWB History Type Display to Extended Stock Option History to display this report See: Employee Stock Option History Report, page 11-106
Flexible Summary	Managers use this to view summarized compensation information for each direct report. Use this to view allocations you made for example, allocations for a country, or a job.	You can download data using Web ADI for this report. See: Flexible Summary Report, page 11-106
Administration Progress Report	Administrators use this report to obtain a progress report for any global plan after running the Participation Process: Compensation Workbench , during the allocation period, or after running the compensation post process.	See: Administration Progress Report, page 11-107
Employee Compensation History Report	Managers use this to view the compensation history for an employee irrespective of the current compensation period.	See: Employee Compensation History Report, page 11-107

Report Name	Use	Further Information
Audit History Report	Administrators use this report to track changes managers make to records in CWB. The report tracks changes such as Update Stated Salary and Update Performance Rating.	See: Audit History Report, page 11-108
Manager Feedback Report	Administrators use this report to view consolidated manager feedback about the Compensation Workbench system. The report provides a summary region that provides the count of managers who rated Compensation Workbench.	Configure the ratings using the BEN_CWB_SUBMIT_ FEEDBACK lookup type. See: Manager Feedback Report, page 11-108
Salary Statistics Report	High-level managers and HR Professionals use this report to get an insight into the details of the enterprise's salary expenses. The report provides details of the total salaries, mean and median salaries, growth of salaries over time. The report also displays how salaries line up against defined measures such as grade ranges or market data.	Use the BEN: CWB Plan Context for Stock Option Reporting profile to configure the group or local plan for which you want to view salary statistics. See: Salary Statistics Report, page 11-109
Post Process Run Reports	Compensation administrators use this report to view details of the Compensation Workbench: Post Process, including the following additional reports: • Post Process Audit Report - displays all successes and failures on the post process, showing local and corporate currency amounts. • Post Process Summary Report - displays a summary of data proposed in CWB versus the actual data posted to Oracle HRMS.	You can download data using Web ADI from the Post Process Audit report. See: Post Process Run Reports, page 11-110

If you need to see additional reporting information, you can create other reports using Discoverer (which requires an HR Intelligence license). All Compensation Workbench tables are available to System Extract and the Discoverer end-user layer.

Web ADI

You can download several of the reports, the Budget worksheet, and the Allocation worksheet to an .xls file using Oracle Web Applications Desktop Integrator (Web ADI) a Self-Service application accessed using a browser. Managers do not need to install

Web ADI on their own computer. Processing takes place on the server rather than on the individual's machine.

When you select a report, Web ADI generates an .xls document on your desktop and downloads the data from the report. You can edit and modify the document if necessary, and upload from Web ADI into Compensation Workbench. You can download and upload CPI flexfield attributes, amounts, ranking, and rating data using Web ADI.

For information on how to configure Web ADI see Configuration of Data Download and Upload Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See also: Data Download Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Data Upload Using Web ADI, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Notifications in Compensation Workbench

The following events trigger notifications within Compensation Workbench:

Notification	Use
Publishing a Budget	The application sends this FYI notification to lower managers receiving a budget
Submitting for Approval	The application sends this FYI notification to the manager one level up
Recalling Your Worksheet	The application sends this FYI notification to the approving manager
Rejecting the Worksheet	The application sends this FYI notification to the manager whose worksheet you reject
Manager's Change of Access	The application sends this FYI notification to the manager whose access levels you change
Request for Reassignment	The application sends this action-required notification (AME defined) to the manager one level up from the initiating manager. Alternatively, you can configure this notification so it is approved automatically.
Request for Eligibility Change	The application sends this action-required notification (AME defined) to the manager one level up from the initiating manager.

None of the transactions performed within the Administration pages trigger notifications.

See: Creating Mass Notifications for Compensation Workbench, page 11-121

Final Notification From Highest Level Approver

To receive a notification when all approvals are complete, define an HR role using Transaction Maintenance, choosing a role type of Compensation Administrator, and selecting the appropriate person in the User field.

Compensation Detail Report

You can configure the Compensation Detail report to determine which columns to display within the report, such as:

- List of group plans to which you have Read Only or Full Access
- The manager to whom employees report
- The employees to include - direct or all
- Date range of transactions - pending transactions or historical transactions
- Amount range - you can choose from converted currency, local currency, base salary, eligible salary, new salary, or percentage of eligible salary, or a range of amount
- Other - you can choose to display only whole values for currency and each supervisor's hierarchy in rows.

Several columns are hidden by default, including:

- Employee Full Name
- Person Flex
- Today's Employment Status
- Job Segment 1
- Job Segment 2
- Job Segment 3
- Worksheet Manager Full Name
- Level 2 Manager Full Name
- Level 2 Manager
- Level 2 Manager Full Name

The hidden columns indicate the full range of available reporting attributes.

You can download the Compensation Details report to a spreadsheet using Oracle Web ADI.

Combined Plan View Report

Managers and administrators use this to compare results of different compensation plans in one report.

You can configure this report to view up to six compensation plans in a single report. You can only select those plans for which you have Read-Only or Full Access, and which contain rates.

Before using this report, the administrator must set the BEN: CWB Plan Context for Reporting profile option to the name of the group or local plan for which you want to view this report.

See: BEN: CWB Plan Context for Reporting, *Oracle HRMS Configuring, Reporting, and System*

You can personalize the following columns:

- Employee Country
- Employee Job
- Latest Performance Rating
- Latest Ranking
- Eligible Salary
- Amount as a percentage of the eligible salary
- Allocation Amount
- Currency
- Base Salary
- New Salary

Employee Stock Option History Report

You can use this report only if you upload the BEN_CWB_STOCK_OPTN_DTLS table, and set the system profile BEN:CWB History Type Display to Extended Stock Option History. Additional profile options that affect the display of the report are:

- **BEN: CWB Estimated Market Price** - Configure this profile at the site level to store the estimate market price to calculate the walk-away value of stock option grants.
- **BEN: CWB Plan Context for Reporting** - Use this profile to configure the plan and period to use to obtain employee related information for summarizing such as Job or Performance Rating.

The report contains the following tabs:

- Employee Information: displays data for direct employees only, all employees, or all employees of a direct reporting manager.
- Summary Information: displays data for a group of employees, who meet the selection criteria for the parameters you select.

You can view the walk-away value which is the value the employee would forfeit if they were to leave today. The walk-away value is the Estimated Market Value Grant Price multiplied by the number of unvested shares.

Flexible Summary Report

Use this report to display summarized compensation information for each manager’s direct reports. You access this report from the Compensation Allocations worksheet.

Managers can change the context of the report to further break down results by country, grade, job, or performance rating for example. This report enables managers to verify that allocations have been distributed in a fair manner across all direct reports.

The report displays the following tabs:

- General Summary - provides a summary of amounts budgeted and allocated, the number of eligible employees and the number of employees who actually received compensation.

- Advanced Statistics - provides statistical information such as the mean and median of amounts allocated as well as the standard deviation of the highest and lowest amount allocated for the plan.
- Grade Statistics - if you use grades and grade ranges, then this tab displays the number of employees in each quartile based on their new compensation and the compensation immediately before the current award. It also displays the number of employees above or below their range, and median comparatio.

Administration Progress Report

As an administrator, you use this report to obtain a progress report for any global plan. You can access this report from the Administration Page for any plan after you run the Participation Process: Compensation Workbench, during the allocation period, or after running the compensation post-process. The report displays data dynamically based on real-time data, and contains the following sections and information:

Section	Information
Manager Status	Provides a summary of all tasks for all managers and displays how many are complete, in progress or not started; number of worksheets submitted or not submitted; number or worksheets approved, pending approval, rejected, processed; summary of manager access levels.
Employee Event Status	Displays group and local plan names, life event names, and number of life events started, processed, and backed-out.
Employee Eligibility Status	Displays local plan and option names and number of employees eligible and not eligible.
Worksheet Rate Summary	Displays a list of all eligible employees, local plan and option names, and a total of all worksheet amounts, number of employees with compensation, total eligible salaries, total compensation, and so on.
Budget Rate Summary	Displays information about all local plans and options, eligible employee count, manager count, total worksheet budget, currency or units of awards.
Performance Rating Summary	Displays a list of employee count and percentage of total of each rating type.
Assignment Change Summary	Displays the employee count and percentage of total of each assignment change reason.
Post Process Results	Displays a summary of all posted element entries, posted salary or pay, and posted assignment change or performances.

Employee Compensation History Report

This report displays the full compensation history for an employee irrespective of the current compensation period, and enables managers to view all compensation, supported by compensation history, such as Pay Rate, Bonus, Overtime, Commissions, and Other. The report displays the pay value of the element entry associated with the CWB Worksheet Amount Standard Rate and the Compensation Category specified on the rate in each pay period.

The report enables managers to:

- View compensation history for multiple employees at one time, in a corporate currency, the employee's local currency, or their preferred currency for consistency and ease of comparison
- View details of compensation for previous years
- View all employees in their team, directs only, or a subset of employees
- Isolate employees from the search results to display compensation history only for those employees
- Compare compensation history of up to five employees in a single line graph.
- Use annualize amounts converted to a common currency

Audit History Report

Since multiple managers can make changes to the same compensation plan in Compensation Workbench, use Audit History to review those changes. You can view these changes based on audit types for a specific plan and plan period or a specific employee.

You enable audit types in the BEN_CWB_AUDIT_TYPE lookup type to define the changes the report tracks.

You can view updates to the following:

- Compensation Amounts
- Eligible Salary
- Stated Salary
- Recommended Amount
- Eligibility Status
- Budget Amount
- Performance Rating

Manager Feedback Report

Administrators use this report to view consolidated manager feedback for Compensation Workbench. When managers submit their work for approval, a notification prompts them to supply feedback. Administrators use this feedback to improve future compensation cycles and to make the entire process more effective and user friendly.

You access this report from the Compensation Workbench Administration Home page. You can run this report for any group plan to see how managers fared using Compensation Workbench. The report displays a summary region that provides:

- The count of managers who rated Compensation Workbench. The rating options are Excellent, Good, Poor and two configurable ratings that you configure using the BEN_CWB_SUBMIT_FEEDBACK lookup type
- The percentage of managers who gave those ratings

The report also displays this information in graphical format.

In the details section of the report, you can view manager feedback by rating type or for all ratings. The report provides the following details for the manager giving the feedback:

- Date
- Time
- Manager name
- Business group
- Rating
- Comments

You can also view employee number and email address of the managers if you enable these using Self-Service Personalization. By default, these are hidden. You can also choose to view only feedback that includes comments.

Salary Statistics Report

As a high-level manager or as an HR Professional, you can use the Salary Statistics Report to get an insight into the details of your enterprise's salary expenses. You can view the total salaries, mean and median salaries for your enterprise, and even growth of salaries over time. The report displays how salaries line up against defined measures such as grade ranges or market data. The report enables you to group salary data, so you can compare data against different grouping criteria.

Before using this report, the administrator must set the BEN: CWB Plan Context for Reporting profile option to the name of the group or local plan for which you want to view salary statistics. Note that the Combined Plan View Report also uses this profile option.

See: BEN: CWB Plan Context for Reporting, *Oracle HRMS Configuring, Reporting, and System*

If you use annualized values, then the administrator must set the HR: FTE Factor profile option.

See: HR: FTE Factor, *Oracle HRMS Configuring, Reporting, and System*

When you run the report, you can set three parameters – country, type of employees to include, and the currency to view amounts. These parameters apply to all regions of the report and do not change when navigating from one region to another in the report.

This report displays:

- Analytics such as total salary, mean salary and median salary
- Salaries against grade rates and market data when available.
- Data in tables and graphs

- Data by groups of employees such as hourly and salaried, hourly only, or salaried employees only who receive compensation for the plan. For global plans, the report also displays data by country and currency for global plans.

The report organizes data into the following regions that display dynamically based on the information available. These are:

- **Statistics** – this region displays the total pay, low, median and high pay a well as the standard deviation for the selected plan. It enables you to group data by certain criteria such as country, job, grade, etc. You can choose to use full-time equivalents and display annualized values.
- **Grade Ranges** – if you use grades, then this region provides a list of all grades held by the employees receiving compensation in the plan. It provides grade data as well as statistics for employees in each of those grades.
- **Quartiles** – if you use grades and have defined grade rates, then this region displays the number and percent of employees in each quartile. You can also view counts by quintiles and deciles
- **Comparatios** – this region displays comparatios by 5, 10 and 15% increments. This region enables you to group data by criteria such as country, job, or grade.
- **Pay Growth Rate** - if you award employees compensation in this plan in prior periods, then this region displays the change in total pay over time. You can view the change over 1, 3 and 5 years.

Post Process Run Reports

Compensation administrators use this report to view an online list of the Compensation Post Process runs and access the Summary, Audit Log, and Error Reports generated by the post process. You use this information to correct any errors that might occur during the compensation cycle.

You can view the following reports:

- **Audit Log Report** - this displays all successes and failures on the post process, showing local and corporate currency amounts for employees. This also displays any employees that the application did not process because they were part of a recursive hierarchy. You can access the report only if you have security access to see the data. This report
  - Provides a full and accurate picture of all amounts and assignment changes proposed in CWB as well as those posted in the HR system.
  - Organizes data into tabs, which display processing statuses, allocations at the plan or option level, assignment, and performance rating changes.
  - Provides additional parameters to filter the report – the selection you make on the Audit Log Report page apply to all the tabs for the report
  - For global plans that use multiple currencies, displays amounts in local and corporate currencies
- **Summary Report** - this displays the parameters executed by the process, and a summary of the employees evaluated, compensation life events open and closed, as well as the number of employees whom the process did not process. This report:
  - Provides a full and accurate picture of all amounts and assignment changes proposed in CWB as well as those posted in the HR system.

- Organizes data into tabs, which display processing statuses, allocations at the plan or option level, assignment, and performance rating changes, assignment changes, and error summary.
- Provides additional parameters to filter the report – the selection you make on the Summary Report page apply to all the tabs for the report
- For global plans that use multiple currencies, displays amounts in local and corporate currencies

- **Error Report** - this lists any persons evaluated by the process that erred or warned and the accompanying error message.

Plan Administration

Maintain Compensation Workbench Plans Mid-Cycle

Use Plan Administration to administer your Compensation Workbench plans after you define them in Oracle HRMS using the Total Compensation data model.

Use the Plan Administration page to make updates to plans for the specific compensation period. To make permanent changes, you must update the original plan definition.

> **Note:** The changes you make using the Plan Administration page are not carried over to other plan periods and are lost when you run the Compensation Workbench Back-out Life Events Process.

You can select any group plan to update. If you select a plan containing options, then the plan hierarchy displays all the options separately. The application does not display a hierarchy for Global Basic or Global Stand Alone plans.

You can make the following changes:

- Plan and Option names
- Plan status (Active, Inactive, Closed)
- Task types, names, sequences, and access levels
- Self-Service availability period
- Effective date of performance ratings or assignment changes
- Standard rate details
- Currency exchange rates
- Hide Options/Components
- Rounding/Formatting Codes

  > **Note:** To configure the number of decimal places to display for budget and worksheet amounts that are expressed as a percentage of eligible salary, you must set the following profile options:
  >
  > - BEN: CWB Budget as Percent of Eligible Salary Decimals – set this profile option to Yes if the application displays budgets as percent of eligible salary
  > - BEN: CWB Allocation as Percent of Eligible Salary Decimals – set this profile option to Yes if the application displays decimals for percent of eligible salary based on allocated amounts.

- Add new rows to refresh exchange rates for those currencies

  > **Note:** You must always run the Refresh Summary Batch process after you change exchange rates.

You cannot do the following:

- Add a new rate
- Update rate calculation definitions

- Update eligibility definitions
- Add a New Local Plan
- Add a New Option
- Add a New Task
- Change the Hierarchy Type Definition

  Note: You can use this page to update details only after you run the Participation Process: Compensation Workbench. All changes affect only the specific period and do not affect the original plan definition. Plan changes made here act as temporary overrides. The changes you make here are lost and overridden during subsequent runs of the Participation Process: Compensation Workbench for the same plan and period.

You can also use the Plan Administration page to:

- View the entire hierarchy above an employee
- View an employee's extended job information
- Update performance information and ranking
- Update promotion and assignment change information
- Update Compensation Workbench Flexfield information
- Refresh person data from Oracle HRMS at any time
- Update an employee's Base Salary
- Run the Participation Process for a single person
- See a complete audit trail of all changes made in Compensation Workbench
- Include new custom attributes
- View pending eligibility changes made in (Self-Service) Compensation Workbench. Force approve pending changes
- View pending worksheet manager changes made in (Self-Service) Compensation Workbench. Force approve pending changes
- View when a manager was processed only as a placeholder in the Single Person Participation Process.
- Personalize Administration pages

Steps to Administer Compensation Workbench Plans

Use the following process to administer your Compensation Workbench plans after you define them in Oracle HRMS using the Total Compensation data model.

For information about implementing compensation plans, see: Setting Up a Compensation Plan, page 11-76

1. Run the Participation Process: Compensation Workbench.

   Run this process prior to the availability period of Compensation Workbench to prepare the Self-Service interface for data entry by your line managers.

The process assigns the compensation life event to a person and determines eligibility and rates.

If you auto-issue budgets, the process updates the allocation worksheet for all managers with a predefined budget amount that cannot be updated.

See: Opening a Compensation Workbench Award Cycle, page 11-115

2. If you do not auto-issue budgets, use roll-down budgeting to publish the initial budget with the highest-level manager, or with multiple lower managers.

   The highest level manager can then use Compensation Workbench to issue budgets to lower level managers.

   You include the budgeting task in the plan design if you do not auto-issue budgets. You can define budgets as monetary amounts or as a percentage of eligible salary in the Plan Enrollment Requirements window. You can also define the budget in non-monetary units such as Shares or Stock Options.

   See: Budgeting in Compensation Workbench, page 11-55

3. Run the Compensation Workbench Back-out Life Events process to remove the results of the Participation Process: Compensation Workbench for a compensation life event in the case of errors or changes in plan design. If you need to back-out a compensation life event, you run this process before you run the Compensation Workbench Post Process. You can, however, run the process any time before a payroll run has processed your results.

   See: Backing out a Compensation Workbench Plan, *Oracle HRMS Compensation and Benefits Management Guide*

4. If you need to run the participation process for employees not previously selected for processing, new or terminated employees, or employees who had a status of life event started, or for managers who are now eligible for awards, then run the participation process for an individual even after you run the Participation Process: Compensation Workbench for a plan. The Single Person Participation process determines a person's eligibility for the plan and rates, and places the person in the correct position in the hierarchy.

   You run the Single Person Participation process for a single participant using the Submit Requests window, or the Compensation Workbench Administration Home page.

   See: Adding an Individual into a Started Compensation Workbench Cycle, page 11-118

5. Line managers use Compensation Workbench to enter compensation awards.

6. Run the Progress Report to monitor the progress of the compensation cycle for a specific availability period and plan. You can run the report at any time after you run the Participation Process: Compensation Workbench, during the allocation period, or after running the Compensation Workbench Post Process. The report results differ depending on when you run it during the compensation cycle. You can run this report using the Submit Requests window or from Compensation Workbench Administrators Home page.

   See: Administration Progress Report, *Oracle HRMS Compensation and Benefits Management Guide*

7. To update plan information mid-cycle, use the Plan Administration page.

See: Maintain Compensation Workbench Plans Mid-Cycle, page 11-112

8. Run the Compensation Workbench Refresh Process to refresh employee or plan design data in Compensation Workbench.

   See: Refreshing Compensation Workbench Data, page 11-120

9. Run the Compensation Workbench Mass Notification Process to generate approval notice and other notifications.

   See: Creating Mass Notifications for Compensation Workbench, page 11-121

10. Run the Compensation Workbench Post Process.

    Run this process *after* all worksheet allocations have been approved to write the distribution totals to enrollment results. This also posts assignment changes, performance ratings and rankings.

    See: Writing Allocated Amounts from the Compensation Workbench Cycle, page 11-119

11. Optionally, perform enrollment overrides.

    If necessary, use the Enrollment Override window to override an amount for a person after you run the Compensation Workbench Post Process.

    > **Note:** Values you enter in this window update element entries for bonus and stock option plans. However, for salary plans, overrides you enter on this window do not update the Salary Administration window.
    >
    > See: Overriding Enrollment Results for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

12. Run the Close Compensation Enrollments Process.

    Typically, you run this process for a bonus plan if you set the Close Enrollment Date code to Processing End Date. This process *closes* the compensation life event for one or more persons as selected by the batch process parameters.

    You can run the Compensation Workbench Post Process to close the compensation life event if you set up the processing end date as 'When elections are made.' Typically, you run the Post Process for salary and stock option plans.

    You do not need to run the Close process if you set up the Compensation Workbench Post Process to close the compensation life event.

    However, future-dated enrollments always require you to run the Close Compensation Enrollments Process.

    See: Closing a Compensation Workbench Award Cycle, page 11-122

Opening a Compensation Workbench Award Cycle

You run the Participation Process: Compensation Workbench *before* the availability period of a compensation plan. The process determines eligibility, calculates rates, and assigns the compensation life event to each eligible person.

If you auto-issue budgets, then the process updates the allocation worksheet with a predefined budget amount for all managers.

If you do not auto-issue budgets, you use roll-down budgeting to publish the initial budget with the highest-level manager, or with multiple lower managers. The highest level manager can then use Compensation Workbench to issue budgets to lower level managers. You include the budgeting task in the plan design if you do not auto-issue budgets. You can define budgets as monetary amounts or as a percentage of eligible salary in the Plan Enrollment Requirements window. You can also define the budget in non-monetary units such as Shares or Stock Options.

Publish the budget for a plan so that managers can access the budget task.

You run this process from the Submit Requests window.

To run the Participation Process: Compensation Workbench:

1. Select Participation Process: Compensation Workbench in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Set the effective date of the process to a date on or after the assigned life event date.
4. Select Commit - Database will be updated or Rollback - Database will not be updated in the Validate field.

   Select Rollback to check your results before committing them to the database. It is easier to correct errors before you commit results.
5. Select the compensation plan in the Group Plan Name field.
6. Select a year Period.
7. Select a Person Selection Rule to run the process for persons who match the criteria of your rule.
8. Select a Benefits Group to limit the search to a benefits group.
9. Select Yes in the Audit Log to create a file that lists the eligibility results for each person evaluated by the process.

   > **Note:** If the Participation Process: Compensation Workbench detects a recursive hierarchy exists, then it processes the rest of the organization unaffected by the recursive hierarchy and creates an error log that displays the Person IDs in the order Employee A, Employee B, Employee C, Employee A in the format ~A~B~C~A to identify the location of the error. You fix the error using Employee Reassignment.

   If you select Yes, you should periodically run the Participation Audit Activity Purge process to purge the audit log tables.
10. Click OK, and click Submit to complete the batch process request.

Publishing a Budget

Publishing the budget enables managers to access their budget tasks. Until you publish the budget for a plan, the budget task is disabled and managers may not access the task. You typically publish the budget with the highest-level manager, although you can publish the budget at any level in the hierarchy. You can also publish more than 1 budget for a plan with multiple managers.

Use the Employee Administration link on the Compensation Administrators Home Page to publish budgets.

To publish a budget:

1. On the Compensation Administrators Home Page, click Employee Administration.
2. Search for and select the manager for whom you want to publish the budget.
3. Click the Details icon for the plan for which you want to publish the budget.
4. Select the Manager Information tab.
5. Enter either the Total Budget Amount (Published) or the Total Budget as % of Eligible Salaries (Published), and the Budget Published Date in the Budget Summary region.
6. Click Update to publish the budget.

Backing out a Compensation Workbench Plan

You run this process to remove the results of the Participation Process: Compensation Workbench for a compensation life event in the case of errors or changes in plan design.

If you need to back-out a compensation life event, you run this process *before* you run the Compensation Workbench Post Process. You can, however, run the process any time before a payroll run has processed your results.

> **Note:** Use caution if you run this process. Persons selected by the process lose all rates assigned during the selected period--including amounts they entered on a budget or worksheet, or an award distributed to the person by another manager.

If you run the Compensation Workbench Back-out Life Events Process after running the Compensation Workbench Post Process, then the application backs out salary proposals but does not back out the performance ratings and assignment changes.

As an alternative to backing-out the compensation life event, use the Enrollment Override window to override an activity rate result for a person, or use the Plan Administration page.

You run processes from the Submit Requests window.

To run the Compensation Workbench Back-out Life Events Process:

1. Select Compensation Workbench Back-out Life Events Process in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date of the process.

   Typically, this is the same as the To Occurred Date in step 6.
4. Select Commit - Database will be updated or Rollback - Database will not be updated in the Validate field.

   Select Rollback to check your results before committing them to the database.
5. Select the compensation Life Event to back out.
6. Enter the date range for which you want to back out results in the From Occurred Date and To Occurred Date fields.

7. To further limit the persons evaluated by the process, select one or more of the following parameters.
    - Organization
    - Location
    - Person Benefit Group
    - Legal Entity
    - Person Selection Rule
8. Choose the OK button.
9. Complete the batch process request and choose Submit.

Adding an Individual into a Started Compensation Workbench Cycle

Run the participation process for an individual even after you run the Participation Process: Compensation Workbench for a plan. The Single Person Participation process determines a person's eligibility for the plan and rates, and places the person in the correct position in the hierarchy. Run this process from the Administrator's page in Oracle Self-Service Human Resources. The application processes the individual based on one of the following Detected Processing Methods:

- **Normal Processing** - processes participants who were not selected for the run previously
- **Special Processing** - processes participants who were not current employees as of the plan design freeze date or the life event occurred date, for example, new employees or terminated employees. You must select a valid override date that the application uses to calculate eligibility and for employee data.
- **Reprocess** - processes participants whom Compensation Workbench has already processed with a started life event status. This process backs out and reprocesses the person. The application reevaluates eligibility and recalculates rates.

    Note: When you run this process, you lose any progress made within Compensation Workbench for this person.

- **Placeholder to Normal** - processes managers who are now eligible for the award. For example, as a manager, the person was not eligible for compensation, but at least one of their lower employees was eligible. The application creates a placeholder record for the manager to enable the manager to log into Compensation Workbench and perform duties as a manager. This process converts the placeholder to an eligible employee. This person now appears on another manager's worksheet for compensation activities to begin.

    Note: This process may result in loss of budget amounts previously issued to the manager within Compensation Workbench.

    The application creates a placeholder record for managers who are not eligible to receive compensation under the plan, but who have employees under them who are eligible.

To run the single person participation process:

1. Click Employee Administration on the Compensation Workbench Home page.
2. On the Employee Search page, enter the parameters to search for an employee.
3. Select an employee from the search result, and click Continue.
4. On the Plan Overview page, click Run Participation Process to run the participation process for the selected employee.

Writing Allocated Amounts from the Compensation Workbench Cycle

You run the Compensation Workbench Post Process *after* line managers have approved all budget and worksheet entries.

The process updates the database and writes the allocated amounts to an employee's salary proposal record or to an element entry--for salary changes--or to element entries for other activity rates (such as bonuses) if you attach an element to the applicable rate when you define the rate.

You run processes from the Submit Requests window, or from the Compensation Workbench Administration Home page.

To run the Compensation Workbench Post Process:

1. Click Run Post Process on the Compensation Workbench Administration Home page.
2. On the Run Post Process: Select Group Plan and Period for Processing page that displays, select the plan to run the post process.

   Note: You select the group plan here.

3. Select the Period to run the post process and click Next.
4. On the Run Post Process: Select Local Plans for Processing page that displays, select the local plans to run the post process.
5. On the Run Post Process: Compensation Element Types and Effective Date Overrides page, enter the effective date.

   Note: For Non-Salary plans, you can override the Element Type and Input Value. For salary plans, the application automatically updated the element entries associated with an employee's pay basis. You can override the dates that the Compensation becomes effective. For Salary Plans, this is the Salary Change Date, for Element Entries, this is the Effective Start Date.

6. On the Run Post Process: Assignment and Performance Effective Date Overrides page, enter the Assignment Effective Date and the Performance Rating/Ranking Effective Date.

   Note: If your setup does not allow assignment changes within Compensation Workbench, then leave that column blank. If your setup does not allow performance ratings or rankings within Compensation Workbench, then leave that column blank.

7. On the Submit Request: Parameters page, enter the following details:
    1. Select Commit - Database will be updated or Rollback - Database will not be updated in the Validate field.

        Note: Select Rollback to check your results before committing them to the database. It is easier to correct errors before you commit results.

    2. Select Yes in the Audit Log to create a file that lists the results for each person evaluated by the process.

        Note: If you select Yes, you should periodically run the Participation Audit Activity Purge process to purge the audit log tables.

    3. If you select Yes in the Audit Log field, then select a Debug Level from the list.
    4. Select the name of a specific person in the Specific Employee Only list to run the process for one person, or to test the process.
    5. Select a manager's name from the Process Employees Under Manager list to run the process for all employees in that manager's hierarchy.
    6. Select a business group from the list of Employees in a Business Group to run the process for all employees in that business group.
8. Click Submit.

Refreshing Compensation Workbench Data

Use the Compensation Workbench Refresh Process to refresh employee or plan design data in Compensation Workbench. Administrators can also run this process to recalculate summary data and to consolidate summary totals into a single row. You run the Compensation Workbench Refresh Process from the Submit Requests window to refresh employee or plan details. You can also run these processes from the Compensation Workbench Administration Home Page as follows:

- Use the Employee Administration page to refresh employee details for a selected employee
- Use the Plan Administration page to refresh plan design details for a selected plan

To run the Compensation Workbench Refresh Process:

1. Select Compensation Workbench Refresh Process in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select the Group Plan to refresh data for the plan.
4. Select the Period to refresh data for that period.
5. Enter the effective date of the process. If you do not set an effective date, then the process uses the Freeze Date you specified in the Plan Enrollment Requirements window.
6. Select Yes in the Refresh Summary list to run this process to recalculate summary data. The summary data that is stored in BEN_CWB_SUMMARY table is the same

data that appears at the top of the budget sheet and worksheet pages. If summary data is out of synch due to manual changes in the database, then you can run this process to correct the data. By default, this is set to No.

7. Select Yes in the Refresh Person Info list to refresh Compensation Workbench BEN_CWB_PERSON_INFO table with the latest Base Salary or Current Job information details. By default, this is set to No.
8. Select Yes in the Refresh Plan Design list to refresh plan design data in the BEN_CWB_PL_DSGN table. By default, this is set to No.

   Note: If you want to make plan design changes after running the Participation Process: Compensation Workbench, then you should use the Plan Administration pages and make the updates manually.

9. Select Yes in the Consolidate Summary list to consolidates all summary totals into a single row. A single summary amount may consist of multiple records due to simultaneous updates in the system. You do not need to run this process in conjunction with the recalculation process, as both processes consolidate automatically.
10. Select Yes in the Initialize Rankings list to delete current ranking records in CWB.
11. Select Yes in the Refresh Exchange Rates list to refresh the exchange rates for the plan.
12. Click OK in the Parameters window.
13. Click Submit in the Submit Request window.

Restrictions

The Compensation Workbench Refresh process only overwrites previously stored person and assignment data from Oracle HRMS into Compensation Workbench. The process does not:

- Retain changes that you made using the Plan or Employee Administration pages
- Reevaluate eligibility
- Change the number of people processed by the Participation Process: Compensation Workbench

Creating Mass Notifications for Compensation Workbench

Use this process to generate approval notice and other notifications as follows:

- All Approvals are obtained - to managers
- Compensation Period Commences - to managers
- Compensation Period is Ending - to managers
- Period Has Ended - to managers
- Mass Eligible Employee Notifications - to employees

Use the Compensation Workbench Administration Home page to run Mass Notifications.

To run the Compensation Workbench Mass Notification Process:

1. Click Run Mass Notification on the Compensation Workbench Administration Home page.
2. On the Schedule Request: Parameters page, select the Group Plan Name and the Period.
3. Enter a Message Title. This is the title of the notification you send.
4. Select a Message Name and the Target Population.
5. Select an access level from the Managers with Access Level list to send the notification to managers who have the selected access.
6. Select a Target Population Selection Rule from the list to send the notification to select people based on the criteria specified in the rule.
7. Select Yes to Include Link to Compensation Workbench. By default, this is set to No.
8. Select Yes to Resend If Previously Sent. By default, this is set to No.
9. Select a name from the Send a Notification to Username list to send a test mail.
10. By default, the Withold Notification (Report Only) list displays Yes, and the application does not send the notification to the population that is to receive the notification. This is useful to test the notification before you actually send it.
11. Click OK in the Parameters window.
12. Click Submit to run the process.

Closing a Compensation Workbench Award Cycle

This process closes the compensation life event for the selected persons when the following conditions exist:

- The availability period for the compensation plan is passed
- The final processing date for the plan is passed

You must run this process for each local plan that you define. You cannot run this process for a group plan.

You must run this process only when the Close Enrollment Code for your plan is Processing End Date as is used for bonus or stock option plans.

If you set the Close Enrollment Date code for a plan to When Elections are Made (such as for a salary or stock option plan), you do not need to run this process. Run the Compensation Workbench Post Process to close the life event.

You run processes from the Submit Requests window.

To run the Compensation Workbench Close Enrollment Process:

1. Select Compensation Workbench Close Enrollment Process in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date of the process.
4. Select the Program Name from the list.
5. Select the compensation plan in the Plan Name list.

6. Select a Location to close the compensation life event for persons who work in a specific location.
7. Select the compensation Life Event to close.
8. Select an Assigned Life Event Date to close a life event that was assigned on a particular date.
9. Select the name of a specific person from the Person Name list to run the process for one person.
10. Select a Person Selection Rule to run the process for persons who match the criteria of your rule.
11. Select Commit - Database will be updated or Rollback - Database will not be updated in the Validate field.

    Select Rollback to check your results before committing them to the database.
12. Select Yes in the Audit Log to create a file that lists the results for each person evaluated by the process.

    If you select Yes, you must periodically run the Participation Audit Activity Purge process to purge the audit log tables.
13. Select a Close Mode.
    - **Force Close** always closes the life event.
    - **Normal Close** closes the life event based on the close enrollment date.
    - **Preserve Pending Transaction Close**closes life events only for participants with no pending approvals. This process does not close life events for participants with pending approvals. You can view the process log to identify the list of these participants by the status Life Event is not closed due to pending approvals.
14. Choose the OK button.
15. Complete the batch process request and choose Submit.

Individual Compensation Distribution

Self-Service Individual Compensation Distribution

Managers and other employees responsible for distributing compensation use Self-Service ICD to assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and company cars. Employees use Self-Service ICD to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

Using Oracle HRMS, you can give managers throughout your enterprise the authority and ability to assign one-time or recurring awards, bonuses, and allowances to qualified employees and other individuals using Oracle Self-Service Human Resources.

Components

Compensation Managers use the Oracle HRMS professional user interface to define components of the award or allowance. They also configure employee self-service ICD for use by non-manager employees. The manager or the employee uses Oracle SSHR to assign the award. Compensation Managers set up the following:

- Plan Design - plan types, plans and options
- Enrollment Requirements for the Plan - coverage/rates start and end dates, action items and certifications
- Activity Rates and Coverage Calculations for the Plan

You can also configure *employee self-service* ICD for use by non-manager employees. For example, if your enterprise offers a charitable contribution plan or a savings bond plan to which employees contribute at their own discretion, you can enable the contribution through the self-service interface.

Using elements, you can process the distributions through Oracle Payroll. For recurring distributions, you can define the distribution end date, or, using FastFormula, enforce the total maximum distribution you allow in a period.

Security Features

Security features in Oracle HRMS ensure that managers can assign a distribution only to employees and contractors within their security group.

Participant eligibility profiles offer a further way to limit distributions to eligible employees based on a range of criteria, such as assignment data.

Workflow Approval

Oracle SSHR seeds a workflow approval process that automatically sends a notification to the supervisor of the manager, or the manager of the employee who assigned the distribution. The supervisor or manager can either approve or reject the distribution.

Individual Compensation Distributions (SSHR Components)

The Individual Compensation Distributions (ICD) module enables managers to assign compensation distributions to employees. Use ICD for both one-time and recurring awards, such as bonuses or allowances to employees.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

The Benefits or Compensation administrator needs to define the individual compensation distribution plans using Oracle Advanced Benefits or Oracle Standard Benefits.

See: Self-Service Individual Compensation Distributions, page 11-126

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Individual Compensation Distributions

See: Defining User Access and Menus, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Compensation Distribution

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Comp Plan Selection	Benefits Communication Type	CPS.PLAN_SELECTION_ CONTENT
Compensation Update Mode Selection Content	Long Message	BEN_92737_COMP_UPD_ MD_INSTR
Compensation Details Content	Benefits Communication Type	CPD. COMP_DETAILS_ CONTENT
Compensation Review Content	Benefits Communication Type	(Review Page): CPC.COM P_CONFIRM_CONTENT (Confirmation Page): CPR. COMP_REVIEW_CONTENT

See: Adding Instructions to Web Pages, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Setting Up Individual Compensation Distributions for Employees and iRecruitment Applicants

As a compensation manager, you set up individual compensation distribution (ICD) plans to define the components of an award or allowance. The line manager uses the self-service interface to assign the award - setting the start and end date of the distribution - while the back-office maintains control of the plan's administration. You can set up compensation plans so that hiring or line managers assign benefits components to applicants when they create or update offers in iRecruitment.

Follow these process steps to set up a variety of plans for ICD and iRecruitment offers, such as:

- Periodic or spot bonuses
- Sponsored allowances
- Resettlement compensation
- Severance Payments
- Relocation
- Sign-on bonus
- New hire stock
- Other periodic or recurring awards

As a compensation and benefits administrator, you define plans for individual compensation distribution and iRecruitment using the features of Oracle Standard Benefits or Oracle Advanced Benefits following the guidelines in these sections.

- Define Plans, page 11-126
- Define Enrollment Requirements for the Plan, page 11-129
- Set Up Activity Rates and Coverages for the Plan, page 11-131
- Configure Web Pages, page 11-133
- Enter People for Test Purposes, page 11-133
- Set Up Employee Self-Service Access to ICD, page 11-134

Define Plans:

You set up plans for individual compensation distribution and iRecruitment by defining the characteristics of the plan and any electable options in the plan. If necessary, you can define participant eligibility profiles to limit the participants who are eligible for the plan or option.

To set up plans for self-service individual compensation distribution and iRecruitment

1. Define the Plan Year start and end dates for the compensation plan. Set up several plan years to account for future plan years.

See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

2. Optional: define a participant eligibility profile to control eligibility for the compensation plan.

   If you do not define a participant eligibility profile:

   - ICD finds all employees and contractors reporting to the manager eligible for the distribution.
   - iRecruitment finds all applicants eligible for the compensation plans defined for applicant offers.

     Note: Set the participant eligibility profile status to active if you define a profile.

   See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

3. Set up one or more Plan Types to group the compensation plans you administer.

   - Required: select an Option Type of Individual Compensation Distribution to enable a manager to distribute the award or assign benefits to applicants. When you define Plan Types for iRecruitment, select Enterable Amount or Select List as the option for Self Service Display format. Currently the other self-service options do not apply for iRecruitment plans.
   - Optional for ICD: select a Compensation Category of Compensation for reporting purposes or for system extracts.

   You can choose to set up a single plan type for all your compensation plans, or you can define multiple plan types for groupings of plans (Bonus, Allowance, Severance, and others).

     Note: You should base the number of plan types you define on your reporting requirements.

   See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

4. Required for iRecruitment: Define reporting groups to group the compensation plans for iRecruitment. Select the purpose as iRecruitment to display the plans on the Compensation page of iRecruitment.

   See: Defining a Reporting Group, *Oracle HRMS Compensation and Benefits Management Guide*

5. Optional: define the options in the compensation plan.

   - Enter a user friendly option name to display in the self service web page.
   - Select the corresponding plan type of each option.

     Note: Use options when there is a logical grouping of choices within a plan, such as a car allowance plan with options of BMW, Honda, and Ford. For bonus plans, severances, and allowances, set up each compensation type as a separate plan.

See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*

6. Define compensation plans for ICD and iRecruitment
   - Enter a user friendly plan name to display in the self service web page.
   - Select the plan type of the plan.
   - Set the plan status to active. You can update the status to inactive if you need to temporarily disable the plan.
   - Select a Plan Usage code of May Not Be In a Program.

   In the Not in Program tabbed region:

   - Enter a sequence number that indicates the order in which the plan displays in the self service web page relative to other plans in the plan type.
   - Select the currency of the plan for monetary distributions. You do not enter a currency for non monetary allowances, such as cars.
   - Select the Activity Reference Period of the plan. For recurring awards, the activity reference period is the period the manager sees when distributing the award, for example, $100 per period.

   For non recurring awards, you can select any activity reference period.

   > **Note:** For an iRecruitment plan, ensure that you select frequency specific values such as Per Month or Per Year as the Enrollment rate/frequency. As applicants are not assigned any payrolls, if you select values such as Per Pay Period no plans will be displayed to hiring managers when they create or update offers.

   See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

7. Link the Plan Years to the plan that you defined in Step 1.

   See: Maintaining Plan Related Details, *Oracle HRMS Compensation and Benefits Management Guide*

8. If you defined options in Step 5, link the options to the plan.
   - Set the status for each option to active. You can update the status to inactive if you need to temporarily disable an option.

   See: Associating Options with a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

9. Link a participant eligibility profile to the plan if you limit eligibility for the plan.
10. For iRecruitment: Define a single life event reason with the iRecruitment type. Oracle iRecruitment uses this life event type to process compensation plans for applicants.

    See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*

Define Enrollment Requirements:

You use the Plan Enrollment Requirements window to control the enrollment method.

ICD only: You can also set up required certifications that the individual must provide before Oracle Payroll distributes the award.

To define enrollment requirements for ICD and iRecruitment plans

1. Define enrollment requirements for the plan.

   - Query the plan you defined in step 6 above.
   - Select an enrollment method of Explicit.
   - Check the Allows Unrestricted Enrollment check box.
   - Select Current, Can Keep or Choose; New, Can Choose as the Enrollment code.

   For ICD Plans

   - If you define coverages, select a Coverage Start Date code of Enterable if you want to let the manager enter the coverage start date. The application distributes the award to Payroll following the date. If you do not want the manager to enter the start date, select any other coverage state date code.
   - Select a Coverage Start Date code of Event to set the start date to the system date when the manager enters the self service web page. Use this code for non-recurring awards. The application distributes the award to Payroll in the following payroll period.
   - Required: select a Coverage End Date code that corresponds to your Coverage Start Date code.
   - Activity Rate Start and End Date codes function similarly to coverage codes. Choose Enterable for recurring allowances; for non-recurring allowances, choose Event.

   For iRecruitment Plans

   You must define enrollment requirements by specifying coverage and rates start and end codes.

   General Tab

   1. With the General tab and the Plan tab selected, select the Coverage tabbed region.
   2. Enter the enrollment coverage start and end dates to specify when the coverage begins and ends for participants in the plan. For example, select Event as the start date and 1 Day Before Event as the end date code.
   3. Select the Rates tabbed region.
   4. Enter the rates start and end date codes to specify when the activity rates start and end for participants in this plan. For example, select Event as the start date and 1 Day Before Event as the end date code.

   When you set up compensation plans for iRecruitment offers, you must associate the plans with the iRecruitment life event. When a hiring manager completes the basic details of an offer and clicks Continue on the Basic Details page, the application detects that the iRecruitment life event has occurred for the applicant assignment and runs the Participation process. The Participation process evaluates the eligibility for the applicant and displays the appropriate benefit plans in the Compensation page.

Timing Tab

Define the following iRecruitment Life Event in the Life Event region of the Timing tab to allow users to make or change elections.

- Select Enrollment Type as the life event.
- Select iRecruitment Life Event as the life event.
- Select a Coverage Start Date code of Event and select the corresponding code 1 Day Before Event as the end date code.
- Select Event as the Rate Start Date and select the corresponding code 1 Day Before Event as the end date code.
- Select As of Event Date as the Enrollment Period Start date code and select a Enrollment Period end date that corresponds to the Period start date such as Thirty Days After Event Date or Sixty Days After Event.

For information on compatible start and end codes, see the white paper, *Oracle Applications HRMS Compatible Start & End Date Codes, Metalink* Note ID: 247317.1

See: Defining Enrollment Requirements for Not in Program Plans, *Oracle HRMS Compensation and Benefits Management Guide*

2. Optional for an ICD plan: for Advanced Benefits users, link one or more certifications to the plan if you request or require certification from the participant before you make the distribution.

   Oracle HRMS supplies the certification types available with the application.

   > **Note:** If you require a certification, the application suspends the payroll distribution of the award until the participant returns the certification. A message displays to the issuing manager indicating that the distribution is suspended.

   See: Defining Certifications for Enrollment in a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

   See: Defining an Action Item Due Date (Advanced Benefits), *Oracle HRMS Compensation and Benefits Management Guide*

3. Optional for ICD: for Advanced Benefits, you can define communication types that the application generates to inform the participant of a suspended distribution.

   You set up a system extract to write the applicable information from the communication type to a text file. You can then merge the data from the text file into the body of the participant communication.

   See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

Set Up Activity Rates and Coverages for the Plan:

You set up activity rates to define:

- The amount of a distribution (for fixed rate distributions) or to indicate that the manager enters the distribution amount when the award is assigned in the self-service web page.

Note: You can set up multiple activity rates for an ICD plan; however, you can choose only one rate to display on enrollment to the self-service user.

- The amount ranges that hiring managers can assign when they create or update offers for applicants in iRecruitment

To set up activity rates for a plan

1. Optional: set up an activity rate for an ICD/iRecruitment plan or option in the following cases:

   - You do not use coverages.
   - You offer a monetary award and you want to distribute the amount of the award to payroll.
   - You create element entries for the award.
   - You award a non monetary gift (defined as a coverage) and you need to keep records of the taxable benefit.
   - You want to control the maximum amount that can be distributed for a recurring element.

     Note: In order to control the maximum distribution amount, you must configure Oracle Payroll using FastFormula.

   Follow these guidelines when setting up the activity rate:

   - Set the activity rate status to active.
   - Indicate if the activity rate applies to a plan or to an option in a plan.
   - Select any Activity Type code.
   - Select a Usage code of Standard Contribution/Distribution.
   - Select a Unit of Measure if the award is non monetary.

     Note: If the Unit of Measure is monetary, do not select any unit of measure.

   - For ICD only: Select a rate certification type if you want to suspend the rate until the appropriate certification is received and approved.

   Define the calculation method for the activity rate.

   - If the award is a flat amount, enter the value of the award.
   - If the award is not a flat amount, check the Enter Value at Enrollment check box. For recurring awards, the value the manager enters at enrollment is per the activity reference period defined for the plan.
   - Check the Assign on Enrollment and Display on Enrollment check boxes.

   See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

   Note: Steps 2 - 3 do not apply to iRecruitment plans.

2. Optional for ICD: define a variable rate profile if the activity rate varies according to one or more factors, such as the assignment of the person to whom the manager distributes the award.

   You can also use variable rate profiles to define minimum and maximum distributions, increments, and default rates.

   See: Defining General Information for a Variable Rate Profile, *Oracle HRMS Compensation and Benefits Management Guide*

3. Optional for ICD: create a taxable benefit rate for use with non monetary coverages.

   You set up a taxable benefit rate for non monetary coverages like you define a standard activity rate, with the following exceptions:

   - Leave the Unit of Measure field blank.
   - Select a Calculation Method of Multiple of Coverage.
   - Uncheck the Enter Value at Enrollment field.
   - Define a multiplier where the number represents the value of one non monetary award.
   - Select a Coverage Operator of Multiply by.
   - Select a Rounding Code of Round to Nearest Hundredth.
   - Uncheck the Display on Enrollment check box.

     Note: You may have to define your coverage first before saving this rate.

4. Optional for ICD and iRecruitment: create a Maximum Distribution Rate to accompany the standard rate.

   You set up a Maximum Distribution Rate like you define a standard activity rate, with the following exceptions:

   - Select an Activity Type of Total Distribution Limit.
   - Leave the Unit of Measure field blank.
   - Leave the Recurring field blank.

5. Optional for ICD: define coverages for the plan if:

   - The award is non monetary and you do not want element entries created for the non monetary award.
   - The award is a non monetary gift (which is defined as a coverage) and you need to keep records of the taxable benefit.
   - You do not define standard activity rates.

   See: Defining a Coverage Calculation, *Oracle HRMS Compensation and Benefits Management Guide*

   Follow these guidelines when you set up a coverage definition:

   - Enter a name for the coverage.
   - Select a coverage type.

- Select a Unit of Measure if the Type is not Coverage.
- On the Calculation Method Tab, select a Calculation Method of Flat Amount.

  Note: If you want the user to enter the value during the enrollment check the Enter Value at Enrollment check box. Otherwise, enter the amount.

- For recurring distributions, the coverage amount is per the activity reference period defined in the plan.

  Note: You should set up no more than one coverage per compensation plan or option.

Configure Web Pages:

To configure ICD web pages, use the Application Dictionary to configure the field labels, hints, tips, and messages that display in an ICD web page. You can also configure menu names, function names, and certain workflow attributes, see: Individual Compensation Distributions (ICD), page 11-124

To configure iRecruitment offers pages, including the Compensation page, see: Setting Up Offers, *Oracle iRecruitment Implementation Guide*

Enter People for Test Purposes:

You can enter sample people into the Oracle HRMS database to test your Individual Compensation Distribution plan.

Define a Manager

Using the People window, define a manager with a date of birth, social security number, and address.

1. Enter an Assignment for the manager.
2. Check the Manager check box located in the Miscellaneous tabbed region.
3. Select the manager's GRE in the GRE tabbed region.

Define an Employee

Using the People window, define an employee with a date of birth, social security number, and address.

Note: If you use eligibility profiles, make sure the test employee meets your eligibility requirements.

1. Enter an Assignment for the employee.
2. Select the test manager you created as the employee's supervisor on the Supervisor tabbed region.
3. Select the employee's GRE in the GRE tabbed region.

Create a User Name and Password for the Test Manager

As a system administrator, open the User Types window to define a user name and password for the manager you created.

1. Link the Manager Self Service responsibility to the user name.

2. Save your work and close the window.

Assign an Individual Compensation Distribution to the Employee

1. Using the manager's user name and password, log on to Oracle Self Service HR.
2. Choose the Individual Compensation menu item.
3. Find the Employee you created.
4. Assign the individual an award.

Set Up Employee Self-Service Access to ICD:

You can configure ICD for employee self-service access. Use this feature if your enterprise administers charitable contribution plans, savings bond plans, or service recognition plans where you allow the employee to select from one or more awards.

> **Note:** You set up employee self-service plans as you would other plans, using the professional user interface. However, you should include employee self-service plans in their own plan type, so that participants cannot view plans only available to managers.

To set up employee self-service access to ICD

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Enter a new function name--without spaces--in the Function field.
4. Enter a User Function Name for this function.
5. Select SSWA JSP Function as the function Type.
6. Optional: enter a Description of the function.
7. Choose the Form tab.
8. Enter the following parameter, substituting the function name you entered in Step 3 and your plan type IDs where indicated:
   - pProcessName=HR_INDIVIDUAL_COMP_PRC&pItemType=HRSSA&pCalledFrom=<your new function code>&PLANTYPE=<your plan type IDs separated by commas>
9. Choose the Web HTML tab.
10. Enter the following string in the HTML Call field:
    - OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800
11. Save your work.
12. Close the Form Functions window and open the Menus window.
13. Add the function you just created to the Employee Self-Service Menu.
14. Save your work.

    See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

See: Defining When a Communication is Used, *Oracle HRMS Compensation and Benefits Management Guide*

Compensation History

Compensation History

Compensation History refers to groups of historical data. You can view groups such as Salary History, Bonus History, Stock Option History, Other Compensation History, Ranking History, Performance Rating History, and Job History. The compensation category you define for standard rates in Individual Compensation History and Compensation Workbench determine the history group to which the elements belong.

HR Professionals and Managers use Compensation History to view employee information from a single page in Compensation Workbench (CWB) and Individual Compensation Distribution (ICD).

Employees use Compensation History to view their information from a single page in ICD.

Based on the responsibility used to log in to Self-Service Human Resources, certain sub-tabs are visible to HR Professionals and Managers, and not to Employees.

HR Professionals and Managers can view information about all compensation awarded and transactions made to an employees record - historical, current and pending from all assignments. You can view information such as salary changes, bonuses, basic or extended stock options, monetary compensation grouped by year, ranking assigned to the employees based on number of employees ranked and rank quartile, jobs, and details of other non-monetary compensations given to an employee. You can also view performance information, such as rating types and actual ratings, for the employees in their security group. In addition, managers can also view in-progress transactions.

Employees can view information such as salary changes, bonuses, basic or extended stock options, monetary compensation for a single year period, their job details such as name, date of the job change, position, grade, people group, and reason for the job change, and details of other non-monetary compensations received.

See: Compensation History Views, page 11-137

You can configure any of the history groups to show or hide them.

> **Note:** You can personalize the views at the Function, Localization, Site, Organization, and Responsibility level. The Responsibility level personalization enables you to configure manager and employee views to display different sub-tabs and columns.

See: Personalizing Sub-tabs for Compensation History, page 11-143

See: Seeded Hidden Columns, page 11-141

Compensation History Setup

During implementation, Compensation Administrators use the Oracle HRMS professional user interface to define an additional standard rate so that Compensation History is available for ICD.

In addition, they set up a Plan Type, a Plan, and a Standard Rate with activity type of Additional History Element. They associate the element and input value to the Additional History Element standard rate to ensure that Compensation History displays details of those elements entered from the Element Entries window.

Compensation Administrators set up the following to view Compensation History from ICD:

- Standard Rate with activity type Additional History Element, and status Inactive

Compensation Administrators also set up the following to ensure that details of elements entered from the Elements window display in Compensation History:

- Plan Type
- Plan with a status Inactive – used only to display history of element entries created outside ICD or CWB.
- Standard Rate with activity type of Additional History Element.

See: Setting Up Compensation History, page 11-141

Also See: Compensation History Menu and Function Names, page 11-140

Security Features

Security features in Oracle HRMS ensure that managers view ranking assigned only by those managers within their security profile. In addition, while managers can view ranking, and in-progress transactions, employees do not have access to view this information.

Compensation History Views

When you use the HR Professional or Manager responsibility to log into CWB or ICD, you can view the compensation and ranking information for employees on a single page.

If an employee has only one open assignment, you can view details for that assignment. However, if the employee has multiple open assignments, select the assignment from the list to view history details for the selected assignment. If you do not select an assignment, the system displays the details of the primary assignment.

The views that you see may differ because the system displays some information (but not all) by default. You can personalize other information to display.

See: Seeded Hidden Columns, page 11-141

You can view compensation history for employees based on:

- **Salary:** In this sub-tab, you can view details of all compensations that belong to either the Salary Proposal in the Salary Administration window or the CWB Worksheet Amount Standard Rate. The system displays each change in salary in a single row. If there is a change in the components of the salary, you can view the sum total of each component. The amounts are based on the employee's pay basis.

The following table describes some important details you can view as part of the Salary sub-tab:

Label	Displayed Detail for Status - In Progress	Displayed Detail for Status - Process/Approved
Date	In Progress	Effective date of salary change
Change Amount	Change Amount (in pay basis)	Change Amount (in pay basis)
Change Percent		Change amount as a % of starting salary
New Salary		Starting salary plus change amount
Frequency	Pay Basis	Pay Basis
Currency	Plan currency	Element input value currency code

- **Bonus Sub-tab:** In this sub-tab, you can view compensation details for plans with a plan type Compensation Category of Comp - Bonus. The system displays each bonus in a single row. If you itemize a bonus, you can view all components of the bonus.

The following table describes some important details in the Bonus sub-tab:

Label	Displayed Detail for Status - In Progress	Displayed Detail for Status - Processed
Date	In Progress	Non-recurring - effective end date of element Recurring - effective start date of element - effective end date, or Ongoing
Description	Element reporting name or element name	Element reporting name or element name
Frequency	Activity Reference Period of plan	Per Pay Period
Currency	Element input value currency code	Element input value currency code

- **Stock Option Sub-tab:** This sub-tab displays compensation details for plans with a plan type Compensation Category of Comp - Stock. Based on how you configure the application, a manager can view either the Basic Stock Option History or the Extended Stock Option History.

  Note: When you configure the application to show Extended Stock Option History, the data that is displayed is from an outside party, it is not tied to a Comp - Stock category plan.

  In the Basic Stock Option view, you can view details such as the date, description, number of shares, grant price enrollment rate amount , grant value, and currency.

  In the Extended Stock Option view, you can view details such as grant name, number, type, shares, and price; value at grant; current outstanding shares; market value; gain; vested market value; exercisable shares, market value, gain; exercised gain; cancelled shares; reason code; and class. You can also view details based on the estimated market price per stock that you enter.

- **Compensation by Year Sub-tab:** This sub-tab displays details - organized by the year - about salary changes, bonuses, stock options, and other monetary forms of compensation.

  Note: This sub-tab does not include details of in progress transactions, recurring entries or non-monetary forms of compensation.

- **Ranking Sub-tab:** This sub-tab displays only when you log in using the manager responsibility. It displays ranking details by managers within your security group. Rankings are correlated with salary, bonus, and stock option plans, and CWB plans that belong to the category Comp - Other.
- **Performance Sub-tab:** This sub-tab displays only when you log in using the manager responsibility. It displays the rating type, the rating, and the date of the rating for the selected employee. Performance ratings may be related to salary, bonus or stock option plans, and plans that belong to the category Comp – Other.
- **Job Change Sub-tab:** This sub-tab displays details of job changes for the selected employee. You can view the date of the change, the job, the grade, the people group, and the change reason.
- **Other Sub-tab:** In this sub-tab, you can view all monetary and non-monetary awards that do not belong to the Salary, Bonus, and Stock Options sub-tabs. This sub-tab displays compensation details for plans with a plan type Compensation Category of either of the following - Comp - Allowance; Comp - Gift/Service Award; Comp - Other; or Comp - Company Car.

The following table describes important details you can view in the Others sub-tab:

Label	Displayed Detail
Date	Non-recurring - effective end date of element Recurring - effective start date of element - effective end date, or Ongoing
Description	Element name
Amount	Distribution amount
Frequency	Non-recurring - Once Recurring - Plan's activity reference period
Units	Monetary - Element input value currency code Non-monetary - Non-monetary UOM of associated rate

When you use the employee responsibility to log into ICD, you can view all the details that you can view when you log in using the manager responsibility with the following exceptions:

- Ranking sub-tab
- Performance sub-tab
- In-progress transactions

Compensation History Menu and Function Names

Compensation History enables managers to view compensation and ranking information of employees in their security group from Compensation Workbench and Individual Compensation Distribution.

Compensation History also enables employees to view their compensation information from Individual Compensation Distribution.

See: Compensation History, page 11-136

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self-Service	Individual Compensation Distribution
Manager Self-Service	Compensation Workbench
Employee Self-Service	Individual Compensation Distribution

Configurable Tips and Instructions

Region	Column Name	Message Name
HistoryContent	Instructions	BEN_93424_COMP_HISTORY_INSTR
BenHistoryComp-ByYearRN	TipComp	BEN_93436_HSTRY_COMP_BY_YR_TIP
BenHistoryExtend-edStockRN	Tip	BEN_93430_HSTRY_EXT_STK_TIP

Seeded Hidden Columns

Column Name	Displayed Detail
Salary Sub-tab	
Annualized Starting Salary	Starting Salary (in annual basis)
Annualized Change Amount	Change Amount (in annual basis)
Annualized New Salary	New Salary (in annual basis)
Bonus Sub-tab:	
Plan Name	Name of Plan corresponding to Bonus
Basic Stock Option Sub-tab:	
Plan Name	Name of Plan corresponding to Stock Option
Extended Stock Option Sub-tab:	
Grant Date	Date of grant
Current Option Price	Current price of the option
Vested Shares	Total number of vested shares
Unvested Shares	Total number of shares not vested
Unvested Market Value	Value of the unvested shares multiplied by the market price
Unvested Gain	Unvested shares multiplied by the Grant Price minus the unvested market value
Trading Symbol	Trading Symbol used by the organization
Expiration Date	Date of expiry of the unvested shares

See: The Personalization Framework, page 5-3

Setting Up Compensation History

As a Compensation Administrator, you need to configure some additional details so that processed ICD transactions are visible in Compensation History.

You need to create an additional Standard Rate for the ICD Plan whose history you want displayed. This ensures that all occurrences of these element entries are visible in the history.

In addition, you need to set up a Plan Type, a Plan, and an additional Standard Rate to ensure that entries created from the Element Entries window, are visible in the Compensation History.

See the following topics for more information on how to set up Compensation History:

1. Setting Up Compensation History for ICD Plans, page 11-142

2. Setting Up Compensation History for Entries Created from Element Entries, page 11-142

Setting Up Compensation History for ICD Plans

As the Compensation Administrator, you set up Compensation History for ICD Plans. To ensure that processed ICD transactions are visible in compensation history, you need to configure an additional standard rate for the ICD plan whose history you want to display. This ensures that all occurrences of these element entries are visible in history.

To set up an additional standard rate:

1. Select Inactive as the Status.
2. Select Additional History Element as the Activity Type.
3. If you selected an Element for the ICD rate, select the same Element here.
4. If you selected an Input Value for the ICD rate, select the same Input Value here.
5. Choose the Calculation Method tab, and select No Standard Value Used as the Calculation Method.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up Compensation History for Entries Created from Element Entries

As the Compensation Administrator, you can set up Compensation History to display information for entries created from the Element Entries window. For example, you can view information about commissions and automobile allocations in the Others sub-tab. To do this, you must set up a Plan Type, a Plan, and an additional Standard Rate.

> **Note:** The system uses the following Plan Type and Plan to process the entries.

To configure this, use the following guidelines:

To create a Plan Type:

1. Enter a Name for the Plan Type. For example, History Bonus, History Stock, or History Others.
2. Select Compensation Workbench or Individual Compensation Distribution as the Option Type.

   > **Note:** You require to select either of these to ensure that the system processes these entries.

3. Select the most appropriate Compensation Category. This determines the sub-tab on which the compensation history will appear.

See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

To create a Plan:

1. Enter a Name for the Plan. For example, History Bonus, History Stock, or History Other.
2. Select Inactive as the Status.
3. Select the Plan Type you defined earlier.

See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

> **Note:** Ensure that you also set up Plan Enrollment Requirements and a Standard Rate before you proceed further.

See: Defining Plan Enrollment Requirements, page 11-129

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

To create an Additional Standard Rate:

1. Enter a Name for the Rate. For example, History Bonus, History Stock, or History Other.
2. Select Plan as the Level.
3. Select the Plan you defined earlier as the Compensation Object.
4. Select Additional History Elements as the Activity Type.
5. Select the Element you want displayed on the history page.
6. Select the Input Value you want displayed on the history page.

> **Note:** You can add multiple rates under the same plan if you have multiple element types.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

Personalizing Sub-tabs for Compensation History

You can personalize Compensation History to configure multiple and different views for managers and employees. You can hide or rename sub-tabs, and the columns within these sub-tabs. You can also use Personalization to restrict visibility of data on the Stock, Bonus and Other tab. For instance, you can restrict managers from viewing employee savings plan contributions, retirement plans, or the charitable contributions, and restrict employees from viewing certain awards. You can configure the plans that are available to display to a user to do this.

To hide or rename sub-tabs in Compensation History:

1. Navigate to the Compensation History page.
2. Click Personalize Region in the top right corner of the page.
3. Select the Personalization Level and click Next.
4. In the Create/Update Personalization page, select the Name of the personalization level and click Next.

5. In the Create View page, expand the BEN_COMP_HISTORY_PAGE or the Worksheet History Page list.
6. Click the arrow next to the BenHistorySubTabs link to show the list.
7. Select the sub-tab you want to hide or rename, and click the arrow to show the link.
8. In the General Properties region, enter a name in New Label to rename the sub-tab. Alternatively, to hide the sub-tab, delete the contents in New Label.
9. Click Apply to apply the personalization.

To restore a hidden sub-tab in Compensation History:

1. Follow steps 1 – 6.
2. Click the arrow next to the sub-tab you want to restore.
3. Click Delete in the Create View page.

> **Note:** If the personalization page contains a hidden sub-tab, the sub-tab's text link on the tree displays the technical name of the subgroup. For instance, if you hid the Bonus sub-tab, the link will appear as BenHistoryBonusRN.

To restrict access to plans for employees or managers:

1. Follow steps 1 – 6.
2. Click the arrow next to the sub-tab you want to display.
3. Click BenHistorySubtabNameDetailsTblRN
4. In the Search Query to Filter Data in Table region, specify the conditions required for the tab to display the data. If you do not define any conditions, then all information on the sub-tab will be visible to both managers and employees.

Total Compensation Statement

Total Compensation Statement Overview

You can create Total Compensation Statements to communicate compensations, rewards, and benefits to your employees and contingent workers. They can use this statement to view their total compensation for a specified period, often one year, through an easy-to-use self-service interface.

This topic provides an overview of what you can do using Total Compensation Statement.

Since compensation and benefits packages differ from enterprise to enterprise, you can configure statements based on your enterprise requirements. You can display employer and employee costs or contributions for different types of compensation including earnings, bonuses, taxes, stock options, benefits, savings and retirement, perquisites, time-off, and so on. You can display information from various sources, including Oracle Payroll, third party payrolls, element entries, and rules (formulas).

See: Key Decision Areas in Total Compensation Statement, page 11-146

You can design different statements for different groups of employees and generate statements as often as you require. You can create variations of statements by duplicating and modifying a statement setup. Your statements evolve as your compensation packages evolve. You can add new items or categories to existing statement setups so that the next time you generate statements, the new compensation offerings display.

See: Setting Up Total Compensation Statement, page 11-148

See: Processing and Reporting for Total Compensation Statements, page 11-151

As a compensation administrator, or an HR professional, you can view employee statements before you make the statements available to employees. By previewing statements, you can ensure that the information effectively communicates the compensation, rewards and benefits you provide.

Presentation is key, and Total Compensation Statement enables you to add graphs and links to additional information. Using a rich text editor, you can compose a welcome message that greets employees when they view their statements. Employees can print a PDF of the statement and view it at their convenience.

Prerequisites

There are certain prerequisites to using Total Compensation Statement:

- You should have implemented Salary Administration - this is essential to ensure that your employees' rate of pay displays on the Total Compensation Overview Page.
- If you map compensation items to recurring element entries, then you must assign each employee to a payroll.
- The payroll to which you assign employees must have valid pay periods if your total compensation statement includes recurring element entries.

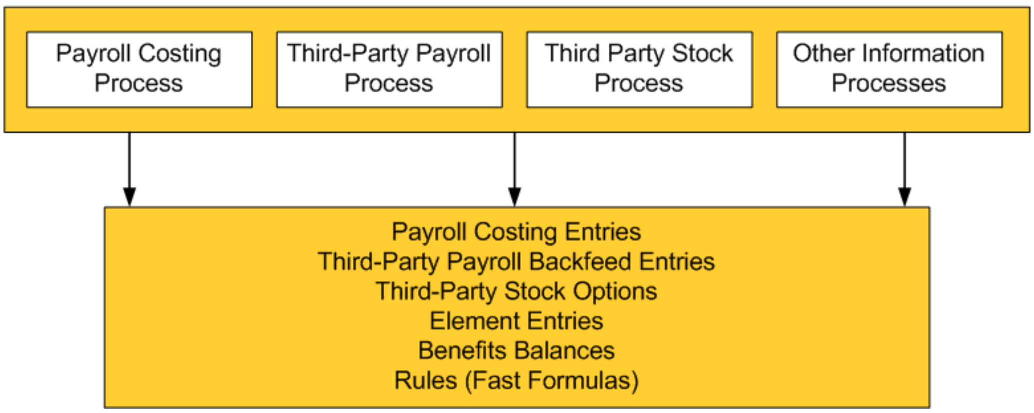
Key Decision Areas in Total Compensation Statement

Before you set up Total Compensation Statement for your enterprise, you need to make some key decisions to establish an outline of the statement you want to present to your employees. This topic gives you an insight into the key decision areas. This topic also explains the key concepts you will use to set up Total Compensation Statement for your enterprise.

Key Concepts in Total Compensation Statement

Statement Period - The period of time for which Total Compensation Statements display compensation. Statements display compensation distributed from the period start day through the period end day.

Compensation Source - The source from which Total Compensation Statement obtains a particular compensation detail, such as element entries or benefits balances. The following diagram illustrates the sources available:



You create compensation items to map to these compensation sources.

For more information on Third Party Payroll Backfeed, see:

Oracle Generic Third Party Payroll Backfeed, *Oracle HRMS Implementation Guide*

For information on Rules for Total Compensation Statement, see: Oracle FastFormula Reference Guide for Standard and Advanced Benefits Metalink Note ID 218059.1

Compensation Item - A one-time or recurring instance of a compensation source, such as a specific element, balance, or formula rule

Compensation Category - A group of compensation items. You can define subcategories within a compensation category, for example, a cash compensation category with subcategories bonus and salary.

Key Decision Areas in Total Compensation Statement

- How do you intend to organize the statement? Decide on the structure of the statement and the items you want to display to different groups of employees. You can also decide on the statement period, graphical representation of statements, and links to supplemental information you want to provide. In addition to web-based statements, you can create a pdf statement. You can decide to use the default template for generating pdfs or customize the template to suit your business requirements. You use XML Publisher to generate PDFs viewable via Self-Service.

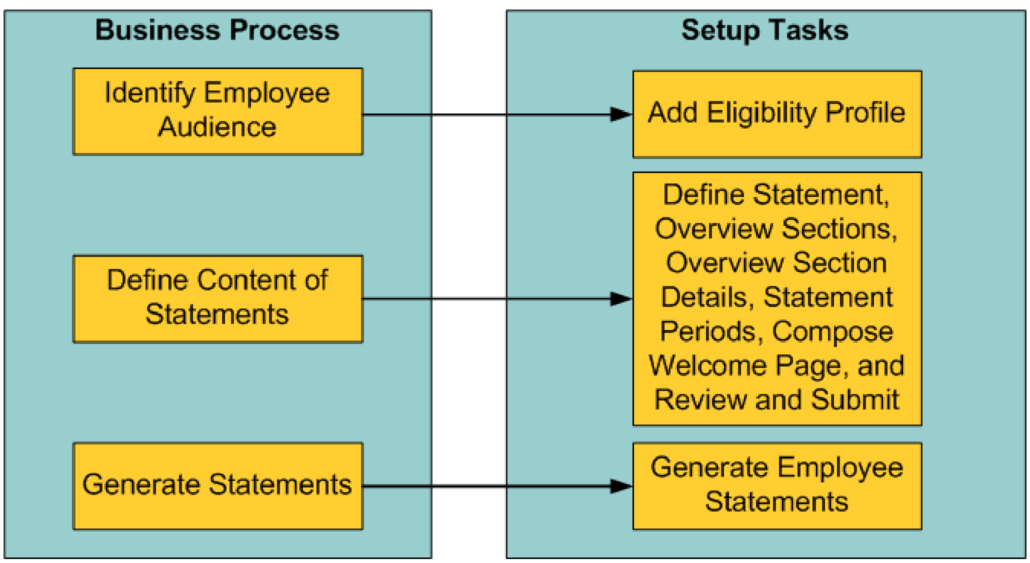
> **Note:** On the predefined BENTCSRPT.rtf template, you can only update the header and footer information, alter the order in which you display the fields, and make changes to the font color, font size, and background.

For information on customizing the template, see: Viewing and Updating a Template in the Oracle XML Publisher User's Guide.

- Which compensation items do you want to display on the statement? Decide on compensation items you want to map to the sources of information. You need not recreate compensation items for each different statement you set up. You can reuse the compensation items you create across different statements.
- How do you want to group compensation items into categories and subcategories? Decide on the main categories and subcategories to display on the statement. You need not recreate compensation categories and subcategories for each different statement you set up. You can reuse the compensation categories and subcategories you create in more than one statement.
- What do you want to display on the Overview page that you present to your employees? Decide on the information you want to display to employees - for example, monetary, non-monetary, and time-off information. You can also decide on the text that displays to employees when they use Oracle Self-Service to view their compensation statements.

The following diagram depicts the three main steps in the business process and how they map onto the specific setup steps, which are outlined in a separate topic.

See: Setting Up Total Compensation Statements, page 11-148



Total Compensation Statement (SSHR Components)

This topic provides you details of items you must configure for Total compensation Statement and items you can personalize for display in Oracle Self-Service HR. For a full functional description of Total Compensation Statement, see Total Compensation Statement Overview, page 11-145

Menu and Function Names

You can access Total Compensation Statement from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Total Compensation Statement Welcome Page
HR Professional	Total Compensation Statement Employee Search Page

See: Defining Menus for SSHR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Configurable Profile Options

Total Compensation Statement provides the following configurable profile options:

Profile	Configurable Levels	Values
Ben: TCS Maximum Number of Statement Periods	All Levels	Positive Integer
HR: FTE factor	All Levels	• Budget Full Time Equivalent • Budget Percent of Full Time • No Conversion • Based on Working Hours

Setting Up Total Compensation Statement

To set up Total Compensation Statements, you need to follow the steps outlined in this topic. The steps depict a typical setup. However, you can modify the examples based on your business needs. All steps are mandatory, except the defining eligibility profiles and composing the welcome page steps. You must complete all the mandatory steps before you generate statements for employees to view.

Before you set up Total Compensation Statements, you should have:

- Decided upon the information you plan to include in the statements for example, salary, bonuses, medical benefits, dental benefits, stock options and so on.
- Identified the source of data for the information. For example, a Payroll Costing entry associated with a particular element-input value, an element-input value, a Compensation Item Rule formula that you create, a benefits balance, a third party payroll entry associated with a particular element-input value and so on.
- Decided how to group the information. These groups of information are the compensation categories. Ensure you group similar items into categories - for example, monetary and non-monetary.
- Decided if you want to further group information into sub-groups. These are the sub-categories. Employees can view details of these sub-categories on the statement.

1. Define the statement name to identify the statement for future use. For example, Benefits for Salaried Workers. This name does not appear on the statement

that employees view. You must define a statement before you can perform any of the other steps.

2. Define the Overview Sections, such as Cash Compensation, Benefits, and Savings and Retirements. This task governs the sections that display on the Overview page that employees view. Choose from Monetary, Non-Monetary, and Time-Off as the compensation types for these sections. You can create as many sections as you require for your statement. You must complete this step before you can add details for the Overview sections.

   Note: Employee statements display table totals and charts only for monetary sections.

3. Define the details for the Overview sections. Add the compensation items and compensation categories you want to display here. For example, define Payroll Costing as a compensation item and cash compensation as a category with bonus and salary as subcategories. When you add compensation categories to the section, by default, all subcategories for the category are also associated with the section. When you add compensation categories and compensation items to an Overview section, you must ensure that they are of the same compensation type. For example, you cannot add a monetary compensation category or compensation item to a Non-Monetary section.

   Note: You cannot add categories to time off sections.

   Note: You can choose to create compensation items and compensation categories before defining any of the other steps. For example, you can create compensation items, compensation categories, and then create the statement. You can reuse compensation items and categories across different statements.

4. Define statement periods to define the period for which Total Compensation displays the statement. For example, 01-Jan-2005 to 31-Dec-2005. You can choose to display the statement period to employees. You can also select the date the application uses to calculate the exchange currency rates.

   Enter the Available to Employees date to indicate the date when statements covering a period are available to your employees. If you do not specify this date, then the statements is not be accessible to your employees.

   Note: The statement displays amounts in a single currency. This could be the employee's preferred currency, their pay basis currency, or the business group currency. The application obtains exchange rates from the GL Daily Rates table. If you do not specify an exchange rate date, then the application uses the exchange rate in effect on the Interim Statement End Date or on the Statement Period End Date.

5. Optionally, select the Eligibility Profile to limit the statement to a select group of employees. For example, select Full Time to limit your statement to salaried full time employees only. You can also create or update eligibility profiles.

6. Optionally, compose a welcome page using the rich text editor. Employees see this page when they access their statements. You can insert substitution fields to personalize your welcome message.

   Note: As an HR Professional or a Compensation Administrator, you can also search for and review statements for employees using the Total Compensation for Administrators page.

7. Review and complete your statement set up.

8. **Updating Statements**

   The following table summarizes the changes you can make to a statement after generating it.

Task		
Define Statement	Update all details	
Define Overview Sections	**Add:** • New sections **Update:** • Section names that appear on the employee statements • Display of subcategories for employee contributions • Chart and chart measures that appear in the monetary sections • The order in which sections display on the statement overview page	• Change the compensation type if you added categories or items to the section • Delete the section for employee statements that include the section.
Define Overview Section Details	**Add:** • Categories and compensation items **Update:** • The order of section contents • Display names • Delete any categories and compensation items you added after generating the statement	

Task		
Define Statement Periods	**Add:** • Add statement periods **Update:** • Display names • The date when statements are available to employees • A statement period to make it unavailable to employees • The exchange rate date	• Change the statement period start and end dates • Delete the statement period
Compose Welcome Page	• Always display the welcome page to employees • Enable employees to hide the welcome page • Hide the welcome page • Change the salutation and the welcome page text	

Processing and Reporting for Total Compensation Statements

Once you have set up Total Compensation Statements for your enterprise, you can run the following processes:

- **Generate Employee Statements Process** Use this process to generate Total Compensation Statements using a statement setup and period you defined.

  See: Generating Employee Statements, page 11-152

- **Purge Employee Statements Process** Use this process to purge Total Compensation Statements for the statement and period you select, if statements for the statement setup and period you select already exist.

  See: Purging Employee Statements, page 11-152

- **Reopen Welcome Page Process** Use this process to reset the welcome page. If you configured your setup to enable employees to hide the welcome page, then this process clears employee' selections to hide the welcome page.

  See: Reopening Welcome Pages, page 11-153

- **Batch Process Run Reports** Use this report to view details of all batch processes you run.

See: Running the Batch Process Run Reports, page 11-154

1.

Generating Employee Statements

Use the Generate Employee Statements process to create total compensation statements using a statement setup and period you defined. If statements for a period already exist, then the process purges and recreates them irrespective of whether the statement is an interim or complete statement. If you attached an eligibility profile to the setup and entered an Interim Statement End Date, then the process uses the eligibility profile if it is active on the Interim Statement End Date.

To generate an employee statement:

1. Select a Statement Name on the Generate Employee Statements: Select Statement and Period page.

   Note: The list displays only those statements that are complete.

2. Select a Statement Period. This is the period for which you generate the statement.
3. Optionally, enter an Interim Statement End Date. Use this date to create a statement that covers a part of the statement period. For example, if your statement period is 01-Jan-2006 to 31-Dec-2006 and you enter an interim statement of 31 April 2006, then the generate employee statement process creates a statement until 31-April-2006. If you do not select an interim statement end date, then the application creates a statement for the statement period.
4. Click Continue
5. On the Generate Employee Statements: Select Parameters and Submit page, select the Run Mode:
   - Rollback - Database will not be updated
   - Commit - Database will be updated

   By default, the process runs in the Rollback mode.
6. Select Yes or No from the Audit Log list. This parameter indicates if the application should create an audit log when running the process. By default, the process does not create an audit log.
7. Select Yes or No in the All Business Groups list. This parameter indicates if the process should generate the statement for all business groups.
8. Select a specific person to run the process for an individual employee.

   Note: If you select Yes in the All Business Groups list, then you cannot run this process for an individual employee.

9. Click Submit to generate the employee statement.

Purging Employee Statements

Use the Purge Employee Statements process to purge total compensation statements for the statement and period you select.

To purge an employee statement:

1. Select an employee statement on the Purge Employee Statements: Select Statement and Period page.
2. Select a Statement Period. This is the period for which you purge the statement.
3. Click Continue
4. On the Purge Employee Statements: Select Parameters and Submit page, select the Run Mode:
   - Rollback - Database will not be updated
   - Commit - Database will be updated

   By default, the process runs in the Rollback mode.
5. Select Yes or No from the Audit Log list. This parameter indicates if the application should create an audit log when running the process. By default, the process does not create an audit log
6. Select Yes or No in the All Business Groups list. This parameter indicates if the process should purge the statement for all business groups.
7. Select a specific person to run the process for an individual employee.

   Note: If you select Yes in the All Business Groups list, then you cannot run this process for an individual employee.
8. Click Submit.

Reopening Welcome Pages

Use the Reopen Welcome Page process to reset the Total Compensation Statement welcome page. If you configured your setup to enable employees to hide the welcome page, then this process clears employee' selections to hide the welcome page.

To run the reopen welcome pages process:

1. Select a statement name on the Reopen Welcome Page: Select Statement and Period page.
2. Select a Statement Period. This is the period for which you reopen the welcome page for the statement.

   Note: If multiple statements are available to employees, and if you generated statements using different statement setups, then the welcome message that displays is that of the statement with the most recent end date, start date, and available date.
3. Click Continue
4. On the Reopen Welcome Page: Select Parameters and Submit page, select the Run Mode.
   - Rollback - Database will not be updated
   - Commit - Database will be updated

   By default, the process runs in the Rollback mode.

5. Select Yes or No from the Audit Log list. This parameter indicates if the application should create an audit log when running the process. By default, the process does not create an audit log
6. Select Yes or No in the All Business Groups list. This parameter indicates if the process should reopen the welcome page for the statement for all business groups.
7. Select a specific person to run the process for an individual employee.

   Note: If you select Yes in the All Business Groups list, then you cannot run this process for an individual employee.

8. Click Submit.

Total Compensation Statements Batch Process Run Reports

Use this report to view details of the batch processes you run.

To view the batch process run reports:

1. On the Total Compensation Setup Wizard page, select Total Compensation Statement as the Business Area Selection to display the Launchpad page.
2. Click Batch Process Run Reports on the Launchpad page.
3. The Requests page displays. You can view details of your requests including the status and the mode in which you ran the process.
4. Click the Summary Report icon to view the summary report for the selected request, including:
   - The business group for which you ran the process
   - The eligibility profile for which you ran the process
   - The setup evaluation for the process
   - The number of eligible persons for the process
   - The number of persons processed
   - The number of persons that processed with errors
   - The number of persons without reportable compensation
5. Click the Audit Log icon to view the Audit Report. You can view the request details and other details that include:
   - Total Eligible Persons
   - Total Persons with Statements Created
   - Total Persons with Errors
   - Total Persons without Reportable Compensation
   - Total Assignments Evaluated
   - Total Statements Created
   - Total Assignments With Errors
   - Total Assignments Held
   - Total Assignments Without Reportable Compensation

> **Note:** If the application encounters errors while processing a person's assignment, then the application will not process the person's other assignments. The Total Assignments Held field displays the number of assignments the application did not process.

In addition to total counts, this report also displays details of all eligible people processed and whether or not the process was successful for each of these persons.

6. Click the Error Report icon to view the error report for the process. The details you can view on the Error Report page are:

   - The request details
   - Total Persons With Errors
   - Total Assignments With Errors

7. Click the View Log icon to view the log for the process.

Vehicle and Mileage Processing

Vehicle Repository

In the vehicle repository, you can store details of company vehicles and private vehicles used for business purposes. This information is datetracked so that you can record changes to the vehicle - such as its status (active or inactive) - over time. Storing this data in a repository removes the need for repetitive and error-prone data entry.

Use Oracle SSHR to record vehicle repository information in the Vehicle Repository Page. The vehicle repository information includes:

- Registration number
- Make and model
- Registration date
- Engine capacity
- List price and value of optional accessories fitted initially and added later
- Fiscal rating
- Status, and reason for Inactive status
- Whether the vehicle can be allocated to multiple users
- **For Russian users only:**Vehicle Category, mileage/fuel limits, usage schedule, and lease details.
- **For Russian users only:**Extra information about vehicle insurance details

  Note: You can enter multiple insurance details for the same vehicle.

- **For Polish users only:** Vehicle-card identification number, engine number, inspection dates, and additional, user-defined technical information about the vehicle

You can import company vehicle information from a car fleet management system, storing a fleet identifier and date transferred on each vehicle record.

Vehicle Allocation

Use Oracle SSHR to allocate vehicles to your employees so they can be used in employee mileage claims (UK and Poland) or Benefit in Kind processing (Ireland). You can allocate two types of vehicles : company and private.

- You can allocate one primary company vehicle to each employee, and as many additional company vehicles as your business rules allow.
- You can allocate as many private vehicles as your business rules allow. You mark one vehicle as the default.

Business rules are held in the PQP_CONFIGURATION_VALUES table. See: Configuration Settings for Vehicle Repository and Mileage Claims, page 11-157

When you allocate a vehicle, you can override some of the configuration settings for your business group.

You can record a vehicle against a single assignment, or against all of an employee's assignments.

You can allocate vehicles from the Vehicle Repository page.

Vehicle Repository Menu and Function Names

The Vehicle and Mileage Processing module enables managers to add vehicles to the repository in Oracle SSHR. You can add details of company and private cars, and allocate vehicles to employees.

UK users can use this module to enter their mileage claims in Oracle SSHR.

Menu and Function Names

You can access this module from the following menus and functions:

User Menu Name	Function Name
Vehicle Repository	Vehicle Repository
Vehicle Mileage Claims	Vehicle Mileage Claims

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Private Vehicle Allocation

Configurable Workflow Attributes:

Not applicable

Workflow Process Display Name:

Vehicle Mileage Expense

Configurable Workflow Attributes:

Not applicable

Configuration Settings for Vehicle Repository and Mileage Claims

Global and localized configuration settings provide the appropriate defaults for your business groups. You can add this information using the Configuration Values Page. Select the Vehicle Mileage module and the Configuration Type Vehicle Mileage Generic Information to view, update or delete data for your business group.

Global and Localization Settings

Localization settings are currently provided for the UK only.

Column	Segment	Meaning	Global	UK	Ireland
LEGISLATION_CODE	Legislation Code	-	--	GB	IE

Column	Segment	Meaning	Global	UK	Ireland
PCV_ INFORMAT ION_ CATEGORY	Vehicle and Mileage Settings	-	PQP_VEH ICLE_M ILEAGE	PQP_VEH ICLE_M ILEAGE	PQP_VEH ICLE_M ILEAGE
PCV_ INFORMAT ION1	Calculation Method	Proration or Exhaustive--determines how you apply mileage band limits across payroll periods. You can override this default when you allocate vehicles or enter claims.	--	Exhaustive	Null
PCV_ INFORMAT ION2	Maximum Company Vehicles Allowed	Limit on the number of company vehicles that can be allocated to an assignment	--	2	Null
PCV_ INFORMAT ION3	Maximum Private Vehicles Allowed	Limit on the number of private vehicles that can be allocated to an assignment	--	--	Null
PCV_ INFORMAT ION4	Share Company Vehicle	Yes means that the vehicle can be shared by several employees. No means the vehicle cannot be shared.	Y	N	Y
PCV_ INFORMAT ION5	Share Private Vehicle	Yes means that the vehicle can be shared by several employees. No means the vehicle cannot be shared.	Y	Y	Y

Column	Segment	Meaning	Global	UK	Ireland
PCV_ INFORMATION6	Previous Tax Year Claim Valid Until	All claims for previous tax year must be submitted before the date entered. The year in the date is ignored.	--	5 July	Null
PCV_ INFORMATION7	Allow Both Company and Private Vehicles Claims	No means that you cannot allocate both company and private vehicles to an employee at the same time, nor submit mixed claims.	Y	N	N
PCV_ INFORMATION8	Search Criteria for Rates Table	The default (%) means that the Rates Table list of values displays all user defined tables. To restrict the list, use a naming convention for mileage rate tables. For example, include the word "car" in all names and enter %car% in this field.	%	%	%
PCV_ INFORMATION9	Validate Private Vehicle Claims in Repository	Yes means that you can only enter claims against a vehicle already assigned to the employee in the repository. No means that you can enter a claim against a vehicle that is not in the repository.	Y	N	N

Column	Segment	Meaning	Global	UK	Ireland
PCV_ INFORMAT ION10	Vehicle Claims Correction Period in Days	An input of 30 would mean that only those claims that have a claim date within the last 30 days could be corrected.	--	--	Null
PCV_ INFORMAT ION11	Use Sliding Rates	Yes means you use the sliding rates table for additional passengers. No means you use the rates table instead of the sliding rates table.	--	PQP_VEH ICLE_M ILEAGE	--
PCV_ INFORMAT ION12	Combine Taxable and NonTaxable Claims	Yes means you combine taxable and non-taxable balances to calculate rates. No means you do not combine taxable and non-taxable balances to calculate rates.	--	PQP_VEH ICLE_M ILEAGE	--

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Payroll Process Management

Payroll Overview

SSHR provides self-service functions within the following areas of Payroll Process Management:

- Payroll Payment and Distributions
  - Online Payslips
- Payroll Statutory Deductions and Reporting
  - Tax reports

This chapter looks in detail at the self-service functions available within these areas and provides information on the functionality and configuration options for each function:

Using SSHR with Payroll Functions

Can SSHR users access payroll information online?

Yes. The self-service Online Payslip function enables users to display their own payslip using the self-service interface.

Are these payslips configurable?

Yes. Administrators can use the Personalization Framework functionality to configure the payslip to suit their requirements. Payslips are also available for some localizations.

Can users use the self-service functionality to specify how their salary should be paid?

Yes. You can use the Payment Methods function to specify whether your salary is paid using a check, or a direct deposit, for example.

Can managers see the payslips for their employees?

Sometimes. The Online Payslip function is intended to be an employee-only function and is available from the Employee Self Service menu, however, the Online Payslip function is also available from the Payroll Professional menu which enables a third-party to access the payslip.

Can users view any other payroll information using SSHR?

This depends on your localization. Some users, for example, users in the US, can view tax withholdings information using SSHR. This tax information can be updated and maintained as required and then submitted to the tax authority. Alternatively, the tax information form enables users to display tax statements for information purposes.

Payroll

Payment Methods

The Payroll Payments module enables self-service users to specify how they wish their salary to be paid by dividing their net pay into one or more payments. Each payment is of a particular type (cash, check, deposit) and has an associated amount and a priority. The payments are made in order of priority. SSHR always uses the lowest priority payment to pay any net pay remaining after all the other payments have been made. It is also possible that low priority payments may not receive all (or any) or their allotted funds because of the amounts used to process higher priority payments.

A typical use of this function occurs if a user wants to split their net pay so that $100 is paid into a savings account and the rest is paid into a current account. The user can subsequently change the amount paid into the savings account if required.

You can apply configuration options to determine:

- whether users can use the module for multiple payments
- whether payment information is for viewing only
- which types of payments the user can select (cash, check, deposit, or a combination)
- how the payment amounts are defined (percentage of net pay or a monetary amount)
- the maximum number of payments a user can set up
- which organization payment methods are used

If you configure Payment Methods so that users can edit their payments, they can carry out the following steps:

- create new payments
- update existing payments
- delete payments
- change the priorities for payments

> **Note:** You must ensure that the required payment methods are available for the employee assignment. For information on enabling payment methods, see: Entering Payment Methods for an Employee Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Manage Payroll Payments

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Payroll Payments

Note: The Process Payroll Payments module does not support approvals.

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Process Payroll Payments	Manage Payroll Payments	View Only
Process Payroll Payments	Manage Payroll Payments	Permitted Payment Types
Process Payroll Payments	Manage Payroll Payments	Maximum Payment Methods
Process Payroll Payments	Manage Payroll Payments	Permitted Amount Types
Process Payroll Payments	Manage Payroll Payments	Deposit Payments List
Process Payroll Payments	Manage Payroll Payments	Cash Payments List
Process Payroll Payments	Manage Payroll Payments	Cash Payments List

View Only

Specifies whether the user can edit the payments information. The default value enables editing.

Permitted Payment Types

Specifies which types of payment methods a user can create. The available payment types are cash, check, and deposit. The default value allows the user to create any of the three payment types.

Maximum Payment Methods

Specifies the maximum number of payments that a user can create (up to 10). The default value is 5.

Permitted Amount Types

Specifies the amount types for payments. The payment amount can be a monetary amount or a percentage of net pay. The default value enables both amount types.

Deposit Payments List

This attribute is only used if you have enabled deposit payments. This attribute stores a list of Organizational Payment Method (OPM) names that can be used to create a deposit payment. The OPM names are separated by a vertical bar (|). The module uses the first match to a deposit OPM name (for the worker's payroll) when new deposit payments are created. For example, East_Coast_NACHA|West_Coast_NACHA.

Cash Payments List

This is used in the same way as the Deposit Payments Checklist but for cash payments.

Check Payments List

This is used in the same way as the Deposit Payments Checklist but for check payments.

> **Note:** The administrator must set at least one of Deposit Payments List, Cash Payments List, or Check Payments List.

See: Configuring Workflow Attribute Values, page 4-8

Configurable Definitions for the Personalization Framework:

The following definitions can be configured in the Personalization Framework:

Regions

Summary and Edit Pages

Region Code	Region Name
PAY_PAYMENTS_TOP_SS	Payroll Payments Top
PAY_PAYMENTS_EDIT_SS	Payroll Payments Edit
PAY_PAYMENTS_SUMMARY_SS	Payroll Payments Summary
PAY_PAYMENTS_LABELS_SS	Payroll Payments Labels

Review Page

Region Code	Region Name
PAY_PAYMENTS_REVIEW_SS	Payroll Payments Review

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 1		PAY_PSSV4_ ADD_CASH_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 2		PAY_PSSV4_ ADD_CHECK_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 3		PAY_PSSV4_ ADD_CHEQUE_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 4		PAY_PSSV4_ ADD_DEPOSIT_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 5		PAY_PSSV4_ ADD_REMAIN ING_PAY

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 1		PAY_PSSV4_UPDATE_CASH_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 2		PAY_PSSV4_UPDATE_CHECK_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 3		PAY_PSSV4_ UPDATE_ CHEQUE_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 4		PAY_PSSV4_UPDATE_DEPOSIT_OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 5		PAY_PSS_REMAINING_PAY
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 1		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 2		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 3		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 4		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 5		PAY_PSS_REMAINING_PAY
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 1		PAY_PSSV4_ SUMMARY_EDIT_OVERVIEW
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 2		PAY_PSS_ EDIT_DFLT_ MANDATORY_ PAY
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 3		PAY_PSS_EDIT_ DFLT_CASH
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 4		PAY_PSS_EDIT_ DFLT_CHECK

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 5		PAY_PSS_EDIT_ DFLT_CHEQUE
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 1		PAY_PSSV4_ SUMMARY_V IEW_OVERVIEW
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 2		PAY_PSS_ MANDATORY_ PAY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 3		PAY_PSS_CASH_ SALARY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 4		PAY_PSS_ CHECK_ SALARY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 5		PAY_PSS_ CHEQUE_ SALARY

See: Adding Instructions to Web Pages, page 5-25

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
PAY_PAYMENTS_EM PLOYEE_TABLE_SS	Payroll Payments Employee Table	PAY_BANK_KEY_ FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_ED IT_DETAILS_SS	Payroll Payments Edit Details	PAY_BANK_KEY_ FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_ REVIEW_SS	Payroll Payments Review	PAY_BANK_KEY_ FLEX	BANK Bank Details Key Flexfield

See: Configuring Flexfields, page 5-19

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Payroll Payments Self-Service Enable Multiple Assignments	Site	Yes/No	No

HR:Payroll Payments Self-Service Enable Multiple Assignments

Specifies whether the user can use the function to define payments for multiple assignments. The default value only permits payments for the primary assignment.

Online Payslip

The Payslip module enables self-service users to view their electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user sees an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

Viewing Online Payslips as a Payroll Professional

Using the Payroll Professional responsibility you can select the Payslip Details link and search for a person. When you select a person from the list, their payslip will be displayed. You can also save a person in My List for future access, so you do not need to search for that person again.

In addition to displaying payslips for current employees, you can also display online payslips for ex-employees. To search for ex-employees, you use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

For more information on the function parameter used to enable the Ex-Employee Search, see: Menu Function Parameter Descriptions, page 3-23.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service V5.1	Payslip V5.1
Payroll Professional	Employee Search (with Ex-Employee Search enabled)

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

HR: Mask Characters - South Africa only

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

Configuration Options

To set up a payslip for your employees to view online.

See: Setting Up Payslip Information and Generating Payslips, *Oracle HRMS Payroll Processing Management Guide*

To view an employee's statement of earnings.

See:Viewing Statement of Earnings, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (UK)

The Online Payslip for the UK is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 12-8.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip V4.0

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.
   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Payroll Processing Management Guide*
   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Payroll Processing Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Generation Self-Service process to enable SSHR users to view their payslip.

   See: Generating the Payslip, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (US)

The Online Payslip for the US is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 12-8.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Information additional organization information. You can display elements, messages, and balances.

   See: Entering Payslip Information, *Oracle HRMS Payroll Processing Management Guide*

2. Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Person Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Check Writer process).

5. Run the Payroll Archive process to enable SSHR users to view their payslip.

   See: Managing the Payroll Archive Process, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (Canada)

The Online Payslip for Canada is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 12-8.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Balances, Elements, and Message types in the Payslip Information additional organization information. If you are entering a message, you can either specify the message text or the message name. If you specify the message name, the Canadian Payroll Archiver subsequently retrieves the message from fnd_new_messages and archives it. If you enter the message text, the Canadian Payroll Archiver archives the message text entered at the organization or business group level.

   See: Entering Payslip Information, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

   See: Person Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Canadian Payroll Archiver process to enable SSHR users to view their payslip.

   See: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (Australia, Hong Kong, Korea, Singapore, New Zealand, India, Kuwait)

The Online Payslips for the above localizations are localized versions of the generic payslip and have been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 12-8.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

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

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.

   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Archive process for the appropriate legislation to enable SSHR users to view their payslip.

Online Payslip (South Africa)

The Payslip module enables self-service users to view an electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user will see an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

HR:Mask Characters

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the ZA Payslip Balances and ZA Payslip Elements additional organization information types.

   - ZA Payslip Balances

     See: Business Groups: Entering ZA Payslip Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

   - ZA Payslip Elements

     See: Business Groups: Entering ZA Payslip Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Pay Advice Generation - Self Service (South Africa) process to enable SSHR users to view their payslip.

   See: Running the Pay Advice Generation - Self Service (South Africa), *Oracle HRMS Payroll Processing Management Guide*

Tax Withholdings Form (W-4) (US)

The Tax Withholdings Form module enables self-service users to make changes to their tax information. When a user makes changes to the Federal information, all the states that follow the Federal information are also updated, unless the filing status, number of allowances, or exempt status are different. After you make an update to the Federal information, you see the data in PDF format when you review the changes.

The following states will default to follow the Federal information: Colorado, Idaho, Kansas, Nebraska, New Mexico, North Dakota, Rhode Island, and Utah.

If a user claims a tax exemption or allowances exceeding 10, the HR/Payroll representative receives a notification and can review the data and update if necessary.

See: Handling Claims for More Than 10 Allowances, *Oracle HRMS Payroll Processing Management Guide*

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Online Tax Forms

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change W4 Information JSP PRC

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
W4 Overview Header	Instruction	PAY_W4_OVERVIEW_MSG
W4 Update Filing Detail	Instruction	PAYSSW4_UPDATE_ HEADER_INFO
W4 Update Exempt	Instruction	PAY_US_OTF_W4_EXEM PTSTAT_TXT
W4 Update Agreement	Instruction	PAYSSW4_UPDATE_ AGREEMENT_INFO
W4 Update Filing Detail	Long Message	PAY_US_OTF_W4_ ALLOWANCES_TXT
W4 Update Filing Detail	Long Message	PAY_US_OTF_W4_ ADDLAMOUNT_TXT

See: Adding Instructions to a Web Page, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR: Online Tax Forms Update Method	Site	All, None, Primary	Primary
HR: HR/Payroll Representative Source	Site	Custom PL/SQL, GRE Contact Information, Further Payroll Information	Further Payroll Information

HR: Online Tax Forms Update Method

This profile option determines which assignments can be updated. For example, if the profile value is Primary, only the tax information for the primary assignment is updated when a user changes tax information using the Online Tax Form.

HR: HR/Payroll Representative Source

If a user makes a change to their tax information using the online tax form, a notification is sent to a designated contact person informing them of the change. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.
- GRE Contact Information: You must enter a payroll representative in the Contact Information additional organization information window.
- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

Tax Information Form (W-2) (US)

The Tax Information Form enables workers to view and print their Form W-2 Wage and Tax Statement on the web. Form W-2 Wage and Tax Statement for the year 2001 and onward will be available for viewing online and printing. A consent form from the worker is not required to place this W-2 information online because the employer must still issue a paper copy of Form W-2 (see publication 15-A for further details - available at www.irs.gov).

To view or print a Form W-2 Wage and Tax Statement for your own records, use the latest version of Adobe Acrobat Reader on your local machine.

When a user selects the Employee W-2 function, the most recent Form W-2 Wage and Tax Statement displays as a PDF file in the web page. If there is no W-2 information or if you have not configured the self-service preferences to enable online access, a message appears. You can view the Form W-2 only after the Year End Pre-Process runs successfully. If the Year End Pre-Process ended with an error status, then no online Form W-2 is available for any assignment in the GRE. If the Year End Pre-Process finishes successfully but some assignments are in error, only the successfully archived assignments is available for online viewing and printing.

Workers can request a reprint of the Form W-2 Wage and Tax Statement on paper. In this case, the payroll contact receives a notification of the reprint request. You define the payroll contact using the HR: HR/Payroll Representative Source profile option.

Viewing Tax Information as a Payroll Professional

Using the Payroll Professional responsibility you can select the Employee W-2 link and search for a person. When you select a person from the list, their tax information appears. You can also save a person in My List for future access, so you do not need to search for that person again.

In addition to displaying tax information for current employees, you can also display tax information for ex-employees. To search for ex-employees, use the Person Type field in the Advanced Search page and select the person type Ex-Employee.

> **Note:** The Ex-Employee Search is enabled for the following function:
>
> - PAY_MGR_W2_EMP_SEARCH (Employee Search for W-2)
>
> If you choose to use this functionality, you should add this function to your responsibility.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Employee W-2
Payroll Professional	Employee W-2
Payroll Professional	Employee Search for W-2

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Pay Employee W2 Process

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

See: Configuring Web Pages , page 5-14

Region Name	Tip Type	Message Name
Pay W2 Details	Instruction	PAY_W2_PRINT_WARNING_ MESG
	Instruction	PAY_NO_W2_TO_VIEW_WEB
	Instruction	PAY_NO_SS_PREF_W2_WEB

See: Adding Instructions to a Web Page, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR: HR/Payroll Representative Source	Site, Payroll	Further Payroll Information, GRE Contact Information, Custom PL/SQL	Further Payroll Information

HR: HR/Payroll Representative Source

If a user requests a reprint of the paper Form W-2, a notification is sent to a designated contact person informing them of the request. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.
- GRE Contact Information: You must enter a payroll representative in the Contact Information additional organization information window.
- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

Additional Configuration Steps:

Set the document viewing and printing preferences using Self Service Preferences. You can define this information at the HR organization or business group level using additional organization information, or alternatively, at the person or location level using an extra information type.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide* (for HR organization or business group level)

See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Management Guide* (*Managing Your Workforce Using Oracle HRMS*) (for person level)

See: Location Extra Information Types , *Oracle HRMS Enterprise and Workforce Management Guide* (for location level)

P11D Reports (UK)

The P11D report for the UK provides information on expenses and benefits paid by an employer to an employee or worker. UK employers must submit P11D information for employees on paper, or using Electronic Data Interchange (EDI) or magnetic tape.

See: P11D: Flat File Contents and Required Input Values, *Oracle HRMS Payroll Processing Management Guide*

The online P11D functionality in SSHR enables employees, workers, and Payroll Professional users to view their P11D information using a self-service interface. The user can select components to include in the report and select whether to display the P11D Expenses and Benefits report or the P11D Summary report.

If required, the user can print out the information.

Menu and Function Names

The P11D report is not attached to any self-service menu when delivered. However, you can add the function to self-service menus if required.

See: Viewing P11Ds Online, *Oracle HRMS Payroll Processing Management Guide*

Workflow

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Additional Configuration Steps

If you are a Payroll Professional and choose to view the P11D reports for leavers, you must create an assignment set and run the P11D Reports process for that assignment set.

See: Viewing P11Ds Online, *Oracle HRMS Payroll Processing Management Guide*

Voluntary Deductions

Using the Total Compensation data model, a compensation or benefits administrator can enable voluntary deductions for employees by setting up Individual Compensation Distribution plans, such as charitable contributions or savings bond plans.

ICD enables managers to assign one-time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

See: Individual Compensation Distributions (ICD), page 11-124

Commutation Allowance (Japan)

The Commutation Allowance form enables you to enter, view and print information about a worker's commutation or travel allowance information.

Employees in Japan are entitled to allowances for transportation or commuting methods to and from work. The Commutation Allowance form provides allowance information about public transportation, and traffic tools - which encompass other methods of traveling to and from work.

From this form, users can add, update, delete and view future actions for each allowance.

Withholding ITAX (Japan)

The Withholding ITAX Report for Employee form enables you to enter and view information about a worker's withholding ITAX information.

Employees in Japan are requried to submit their Certificate of Withholding Income Tax to the National Tax Agency (NTA) at the end of the financial year. From this form, users can add, update, delete and view ITAX information.

The Withholding ITAX Report for Payroll Manager form enables payroll managers to enter, view and update infomration about a worker's withholding ITAX information. From this form, the payroll manager can define the open and close dates for which changes can be made, view results, and update a worker's information.

Function Names

This module can be accessed from the following function:

- JP Tax Withheld Report: Payroll Manager

See: Defining Menus for SSHR, *Oracle HRMS Deploying SSHR Capability*

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Life Insurance Notification (Japan)

The Life Insurance Notification module enables you to view and update information about a worker's life insurance details.

From this form, users can add, update and view a worker's life insurance information. This includes LINC and group insurance related information.

Menu and Function Names

This module can be accessed from the following functions:

- JP Ins and SP Deduct Form for Sal Earner - Emp Processes
- JP Ins and Sp Deduct Form for Sal Earner - Self Service
- JP Ins and SP Deduct Form for Sal Earner - Pay Processes

See: Defining Menus for SSHR, *Oracle HRMS Deploying SSHR Capability*

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Tax Declaration (India)

Employees in India must declare their income and investments at the beginning of the financial year. The Tax declaration module enables self-service users to make their tax declarations. Employees can update their declaration at any time, other than the freeze period.

During the freeze period, employees submit physical proofs of his earnings and investments to the employer. The reviewer checks the proofs and updates the tax declaration of the employee. Reviewers can check and update tax declaration from the self-service module. Reviewers can also download multiple tax declarations as an Microsoft Excel file, and later upload it after reviewing.

> **Note:** New employees can create a new tax declaration using SSHR during the window period, within a few days of joining the enterprise. This window can occur even during the freeze periods.

You can configure freeze period details and new employee's window period in the Tax Declaration Information window.

See: Entering Tax Declaration Information, *Oracle HRMS Enterprise and Workforce Management Guide*

Menu and Function Names

Access this module from the following menus and functions:

User Menu Name	Function Name
India Employee Self Service	Tax Declaration
India Professional User Self Service	Search Tax Declarations

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not Applicable

Configurable Workflow Attributes:

Not applicable

Configurable Definitions for the Personalization Framework

Regions

Page Name	Region Code	Region Name
Tax Declaration	InformationDetails	Information Details
Deductions under Chapter VI A	Chapter6aLimits	Chapter VI A Maximum Exemption
Rebates under Section 88	RebateLimits	Rebates Maximum Exemption
Tax Declaration Review	ReviewProofs	Proof required

Configurable Tips and Instructions

Region	Tip Type	Message Name
RentDetails	Long Message	PER_IN_CITY_TYPE
Chapter6aDetails	Long Message	PER_IN_SECTION_8GG
Chapter6aDetails	Long Message	PER_IN_MEDICAL_ INSURANCE
Chapter6aDetails	Long Message	PER_IN_SPECIFIED_D ISEASES
MedicalDetailsTable	Long Message	PER_IN_DISABILITY_ CATEGORY
PremiumTable	Long Message	PER_IN_PREMIUM_PAID
OtherIncome	Instruction	PER_IN_HOUSE_PROPERTY

See: Adding Instructions to a Web Page, page 5-25

Configurable FlexFields

Not applicable

Configurable Profile Options

Not Applicable

Self Printed Payment Summary Report (AU)

Employers who submit their Payment Summary data to the ATO electronically can print these reports on paper. The online Payment Summary Report functionality in SSHR enables employees to view the payment summary information using a self-service interface.

> **Note:** You cannot, however, print a payment summary report submitted before the financial year 2005-2006.

For information on the generic payment summary functionality, see Self Printed Payment Summary Archive.

Menu and Function Names

You can access the Payment Summary Report using the self-service menu AU Self Printed Report.

User Menu Name	Function Name
AU Self Printed Report	AU View Payment Summary

See: Defining Menus for SSHR, page 3-8

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not Applicable

Configurable Workflow Attributes:

Not Applicable

Configurable Tips and Instructions

Not Applicable

Configurable Flexfields

Not Applicable

Configurable Profile Options

Not Applicable

Additional Configuration Steps

To view Payment Summary report using Self Service interface, the process "Self Printed Payment Summary Archive" should have been completed for employee.

You can enable the Self Service interface for an employee by setting the Self Service Preferences at Business group, Organization, Location or Person Level.

The Self Service Preference is defined at four levels:

- Person
- Location
- HR Organization
- Business Group

For Person and Location level, the statutory document printing option is delivered as an Extra Information Type (EIT) called 'Self Service Preference for Person' and 'Self Service Preference for Location' respectively. This EIT must be added to your user-defined responsibility to access the statutory document printing option.

For Organization and Business Group, the self-service preference for statutory document printing is delivered through an Org Developer DF. A segment called 'Self Service Preference' is added to the Descriptive Flexfield for HR Organization and Business Group.

Navigation: Work Structures > Organization > Description > Find the applicable Business Group or HR Organization > click Others and select Self Service Preference.

For more information, see : Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

Glossary

360-Degree Appraisal

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

Absence

A period of time in which an employee performs no work for the assigned organization.

Absence Types

Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual

The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Period

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Plan

See: *PTO Accrual Plan*, page Glossary-25

Accrual Term

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Active Employee

DBI for HRMS counts an employee, page Glossary-13 as active if they have a current period of service, page Glossary-10 at the effective date, page Glossary-12

If an employee is suspended, DBI for HRMS still counts them as active.

DBI for HRMS also uses the term Incumbent to refer to an active employee.

Active Contingent Worker

DBI for HRMS counts a contingent worker, page Glossary-9 as active if they have a current period of placement , page Glossary-10 at the effective date, page Glossary-12.

If a contingent worker is suspended, DBI for HRMS still counts them as active. DBI for HRMS also uses the term Incumbent to refer to an active contingent worker.

Activity Rate

The monetary amount or percentage associated with an activity, such as $12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Agency

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

Agency Candidate

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

Agency User

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

Align

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

An applicant is a person who submits an application for employment to an organization.

Applicability

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-4.

Appraisee

The person who is the subject of an appraisal.

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-9

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-3.

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of $10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-26

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balance Adjustment

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds

These are the input values of matching units of measure of any elements defined to feed the balance.

Balances

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-24

Bargaining Unit

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Benefit

Any part of an employee's remuneration package that is not pay. Vacation time, employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-12

Block

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-27, *Field*, page Glossary-14

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

Budget Value

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group

The business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

Business Number (BN)

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Business Rule

See Configurable Business Rules, page Glossary-8

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-14

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Calendars

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

Candidate Offers

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-28

Cascade

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

Cash Analysis

A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

Ceiling

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Certification

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Chief HR Officer

In DBI for HRMS the Chief HR Officer is the chief executive of the enterprise who can view the HR data at an enterprise-level.

Child/Family Support Payments

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Collective Agreement Grade

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

Communications

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-12

Compensation Object

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

Competency

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-33

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-21

Competency Evaluation

A method used to measure an employees ability to do a defined job.

Competency Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

Competency Requirements

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-8, *Core Competencies*, page Glossary-9

Competency Type

A group of related competencies.

Configurable Business Rule

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

Configurable Forms

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

Consolidation Set

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

Contract

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution

An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competency*, page Glossary-8

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-3

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

Current Period of Service

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

> **Note:** In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

Current Period of Placement

A contingent worker's period of placement, page Glossary-23 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-11, *Effective Date*, page Glossary-12

DateTrack

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-12

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Department

In DBI for HRMS, the term Department has the same meaning as Organization.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment Factors

See: *Work Choices*, page Glossary-34

Derived Factor

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield* , page Glossary-17

Developer Descriptive Flexfield

A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country.

See also: *Extra Information Types*, page Glossary-14

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Effective Date

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-11

EIT

See: *Extra Information Type*, page Glossary-14

Electability

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

Element Classifications

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-27, *Nonrecurring Elements*, page Glossary-20

Element Link

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-31

Elements

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Set

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

Eligibility

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

End Placement Date

DBI for HRMS uses this term to specifically refer to the contingent worker's most recent placement end date prior to the effective date.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-11

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-5, *Region*, page Glossary-27

Flex Credit

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-5, *Region*, page Glossary-27, *Field*, page Glossary-14

Format Mask

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

Format Type

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Global Value

A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type

A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

Grade Rate

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-22

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-15

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

HR Staff

In DBI for HRMS the HR Staff are people who work in the Human Resources role. Chief HR Officers can track the ratio of HR professionals to the number of workers in their enterprise.

DBI for HRMS uses the HRI_MAP_JOB_JOB_ROLE formula to categorize workers into HR staff and non-HR staff.

Headcount Activity

DBI for HRMS uses this term to mean all the gains and losses occurring in a manager's hierarchy during a reporting period.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

High Availability

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

Hire Date

In DBI for HRMS Hire Date is the employee's most recent hire date.

Imputed Income

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Incumbent

See also: *Active Employee*, page Glossary-1

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, Metalink and Learning Management.

Initiator

In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions

An SSHR user assistance component displayed on a web page to describe page functionality.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-11

Key Performance Indicator (KPI)

Target values that you set for the performance of your enterprise. This value comes from the corresponding KPI Portlet/Report. You can configure the Performance Management Framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the Performance Management Framework to send you a notification when workforce variance is greater than 10 percent, or when training success is below 50 percent.

Key Performance Indicator (KPI) Portlet/Report

Displays the executive summary of key measures such as total headcount and total salary.

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle's enterprise learning management system that administers online and offline educational content.

Leave Loading

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

Leaver's Statement

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Legal Employer

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

Legal Entity

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer.

Life Event

A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

Life Event Collision

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linked PIWs

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

Linking Interval

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

LMSS

Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

DBI for HRMS counts a person as a manager if they supervise assignments (directly or through subordinates) for which the total headcount value is greater than zero at the effective date.

Manager-Employee Appraisal

Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

Maternity Pay Period

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

NACHA

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

National Occupational Classification (NOC) code

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-27

North American Industrial Classification (NAIC) code

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan

A benefit plan that you define outside of a program.

Objective Assessment Template

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-8

Objectives Library

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

Off-Boarding

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

OLM

Oracle Learning Management.

On-Boarding

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

Organization

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

Organization Manager Hierarchy

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules, such as the Daily Business Intelligence Workforce Budget Management dashboard, to include only managers who own organizations.

OSSWA

Oracle Self Service Web Applications.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-15

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-17

Payment Type

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Framework (PMF)

A business intelligence tool used to alert users to exceptional circumstances, as defined by KPIs. When a particular factor measured by HRMSi goes beyond a threshold chosen by the user, the system sends the user a workflow notification.

Performance Management Plan

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

Personal Public Service Number (PPS)

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Person Search

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personal Scorecard

A collection of objectives for a single worker arising from a single Performance Management Plan.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

Plan Design

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Placement Start Date

In DBI for HRMS Placement Date is the contingent worker's most recent start date prior to the effective date.

Position

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Process Rule

See Configurable Business Rules, page Glossary-8

Professional Information

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

Progression Point

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-22

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

Provincial/Territorial Employment Standards Acts

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

Qualification Type

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-8

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-30

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

An SSHR function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-4

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

Rates

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

Record of Employment (ROE)

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-20, *Standard Link*, page Glossary-31

Referenced Rule

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-8

Region

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-5, *Field*, page Glossary-14

Registered Pension Plan (RPP)

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP)

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

Report Parameters

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set

A group of reports and concurrent processes that you specify to run together.

Requisition

The statement of a requirement for a vacancy or group of vacancies.

Request Groups

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-28

Residual

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-6

Responsibility

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-29, *User Profile Options*, page Glossary-33, *Request Groups*, page Glossary-28, *Security Groups*, page Glossary-28

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

Search by Date

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Security Group

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-28, *Security Profile*, page Glossary-29, *User Profile Options*, page Glossary-33

Security Groups Enabled

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

Security Profile

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-28

Self Appraisal

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Separation Categoary

See also: *termination category*, page Glossary-32

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-31

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-31

SSP Qualifying Pattern

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Standard Link

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-12, *Recurring Elements*, page Glossary-27

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Student Employee

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

Succession Planning

An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

Supporting Objective

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

Tabbed Regions

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Terminating Employees

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Category

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

DBI for HRMS uses a formula to determine which category each termination belongs to, based on the associated leaving reason.

HRMSi elsewhere refers to Termination Category as Separation Category.

Termination Date

DBI for HRMS uses this term to specifically refer to the employee's most recent termination date prior to the effective date.

Termination Rule

Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips

An SSHR user assistance component that provides information about a field.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competency

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-5

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-28, *Security Profile*, page Glossary-29

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

Viewer (SSHR)

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

Waiting Days

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

WCB Account Number

In Canada, this is the account number of the provincially administered Worker's Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Work Choices

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker

An employee, page Glossary-13 or a contingent worker, page Glossary-9

In DBI for HRMS workers are employees and contingent workers who report to the selected manager.

Worker's Compensation Board

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker's Compensation Board premiums are paid entirely by the employer.

Workflow

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Workforce Performance Management

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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