Fusion HCM User Manual – Core HR

Version 1.0

Issue / Amendment Record

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Contents

1 Manage Workforce Lifecycle Overview

- The Manage Workforce Lifecycle business process covers all stages of a worker's association with the enterprise.
- HR Specialists and Line Managers perform the following business activities of this process as shown:

  - **Add Person**

    HR specialists and line managers create new person records for employees, contingent workers, nonworkers, and pending workers. The Add Person tasks include creating the new person's first work relationship with the enterprise.

  - **Manage Employment Information**

    HR specialists create and manage work relationships and assignments for the workers to whom they have security access.

  - **Change Employment**

    Line managers edit work location, working hours, and manager details for their direct and indirect reports.

  - **Promote Worker**

    HR specialists promote workers to whom they have security access. Line managers promote their direct and indirect reports.

  - **Transfer Worker**

    HR specialists permanently transfer or create temporary assignments for workers to whom they have security access. Line managers permanently transfer their direct and indirect reports. Permanent transfers and temporary assignments can be within the worker's current legal employer or to a different legal employer.

  - **Terminate Worker**

    HR specialists terminate the work relationships of workers to whom they have security access. Line managers terminate the work relationships of their direct and indirect reports.

- **Manage Personal Information**

  HR specialists manage information, such as addresses, national IDs, emergency contacts, disability details, and document records for the workers to whom they have security access.

- HR specialists access Add Person tasks from the New Person work area. They access all other Manage Workforce Lifecycle tasks from the Person Management work area.
- Line manager tasks are accessible from the Directory and My Team pages.

2 HR Manager Tasks

2.1 Add Person

2.1.1 Person Names: Explained

This topic describes name styles, name formats, and person-name languages.

2.1.1.1 Name Styles

The structure of a person's name can vary among countries. Therefore, a predefined name style exists for many countries for capturing relevant components of a person's name. The name style determines:

- Which name components appear when you create a person record.

  For example, one country may display first name, last name, and title while another displays first name, middle name, and last name.

- The order in which the name components appear.
- Which name components are required and which are optional.

  For example, in one country you may be required to enter a title while in another, the title may be optional.

When you create a person record you select a legal employer, which sets the legislative context for the record. For example, if the legal employer is a Indian legal entity, the legislative context is India and the Indian name style is used.

2.1.1.2 Global and Local Name Formats

Global names use one name format; therefore, users in multinational enterprises can see person names presented consistently, regardless of their countries of origin.

Users who view or manage person records in a single country may prefer to see local names. For example, users who view or manage person records only in Canada may prefer to see Canadian rather than global formats of person names.

2.1.1.3 Person-Name Languages

Each enterprise identifies a global-name language. Person names appear in this language by default. When you create a person record, you can enter a local name in a different language from the global-name language. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the local-name language.

For example:

- The global-name language for the enterprise is American English.
- You set the local-name language in a person record to Japanese. Hence, users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese.
- All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English.

Note: If you enter no local name in a person record, the local name is the same as the global name by default.

2.1.2 Managing Person Work Email: Explained

A person can have only one work email. You can enter a work email when you create a person record. Thereafter, you must maintain it in the Security Console.

When you create a person record, you have the option of not entering a work email.

Note the following:

- If you enter a work email, it's sent to Oracle Fusion Identity Store.
- If you enter a work email in the Security Console, it's returned to Oracle Fusion HCM.

If you enter a person's work email, you can't edit or delete the email on the person information pages. You must edit the work email in the Security Console or contact your administrator. Updates made to the work email in the Security Console also appear on the person information pages.

2.1.2.1 Secondary Work Email

To enter a secondary work email, you must add a lookup value to the EMAIL_TYPE lookup type. You maintain the secondary work email on the person information pages and not in the Security Console.

2.1.3 Managing Person Work Phones: Explained

A person can have one primary phone. A virtual private database (VPD) policy controls the display of phone numbers. It ensures that nonwork phone numbers are displayed only to people with the appropriate privileges. This policy is delivered by Oracle and cannot be modified.

2.1.3.1 Work Phones Types

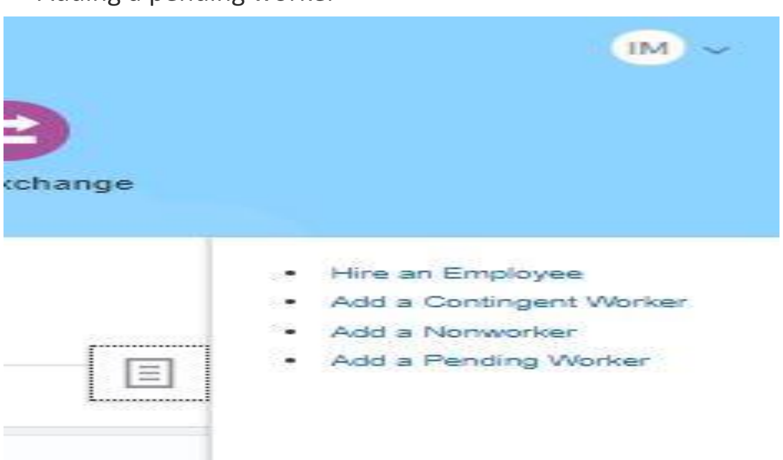
The following table lists the predefined phone types that begin with W codes and their meaning.

Lookup Code	Meaning
W1	Work Phone
W2	Second Work Phone
W3	Third Work Phone
WF	Work Fax
WM	Work Mobile Phone

2.1.4 Creating Person Records: Examples

You create a person record by doing the following:

- Hiring an employee
- Adding a contingent worker
- Adding a nonworker
- Adding a pending worker



Person records are global, independent of legal employers, and created once only for any person.

Note the following:

- If the person leaves the enterprise, you terminate the person's work relationships.
- If the person later rejoins the enterprise, you create a new work relationship.
- The person record continues to exist, even when the person has no current work relationships in the enterprise and no current contact relationships with other workers.
- When adding a person, if you click any of the fields in the Managers section, you must specify a value for the required fields. Otherwise, you won't be able to proceed with the transaction.

Adding a Person

The following scenarios illustrate when you create a person record and when you create a work relationship. In all cases, if you try to create a person record when one already exists, and the application finds the existing record, you continue by creating a work relationship for the existing person.

Action	Scenario
Adding a Person	Rahul Singh is starting a contingent worker placement with a legal employer in the enterprise. Rahul has never: • Been an employee, contingent worker, or nonworker in any legal employer in the enterprise • Been an emergency contact, dependent, or beneficiary of another employee, contingent worker, or nonworker anywhere in the enterprise Therefore, Rahul doesn't have a person record. To create both his person record and his first work relationship, you add him as a contingent worker.
Rehiring an Employee	Sonia Jalla starts her employment with the enterprise in India next month. Note the following: • Because Sonia was employed by the enterprise before, she already has a person record. • When you attempt to hire Sonia, the application finds her existing person record. • When you confirm that the existing person record is Sonia's, you continue the rehire process by creating an employee work relationship with Sonia's new legal employer in India.

Hiring a Nonworker	Anjali has a nonworker work relationship with a legal employer: • Anjali has been a volunteer mentor for young workers for several months. • Anjali recently applied for employment with the same legal employer and was successful. • Anjali will continue as a volunteer for this legal employer even after he has been hired. • When you attempt to hire Anjali, the application finds his person record. When you confirm that the person record is Anjali's, you continue the hiring process by creating an employee work relationship with the legal employer. Anjali will then have both nonworker and employee work relationships with the same legal employer.
Hiring a Contact	Bhawna starts her employment with the enterprise tomorrow. • Bhawna has never been an employee, contingent worker, or nonworker in any legal employer in the enterprise. • Bhawna is married to Ankur, who is a contingent worker elsewhere in the enterprise. • Ankur has identified Bhawna as an emergency contact; therefore, Bhawna already has a person record. When you attempt to hire Bhawna, if there is enough information in her contact record to identify her, the application finds her existing person record. You continue the hiring process by creating an employee work relationship with her new legal employer. Otherwise, the hiring process creates both a person record and a work relationship for Bhawna.

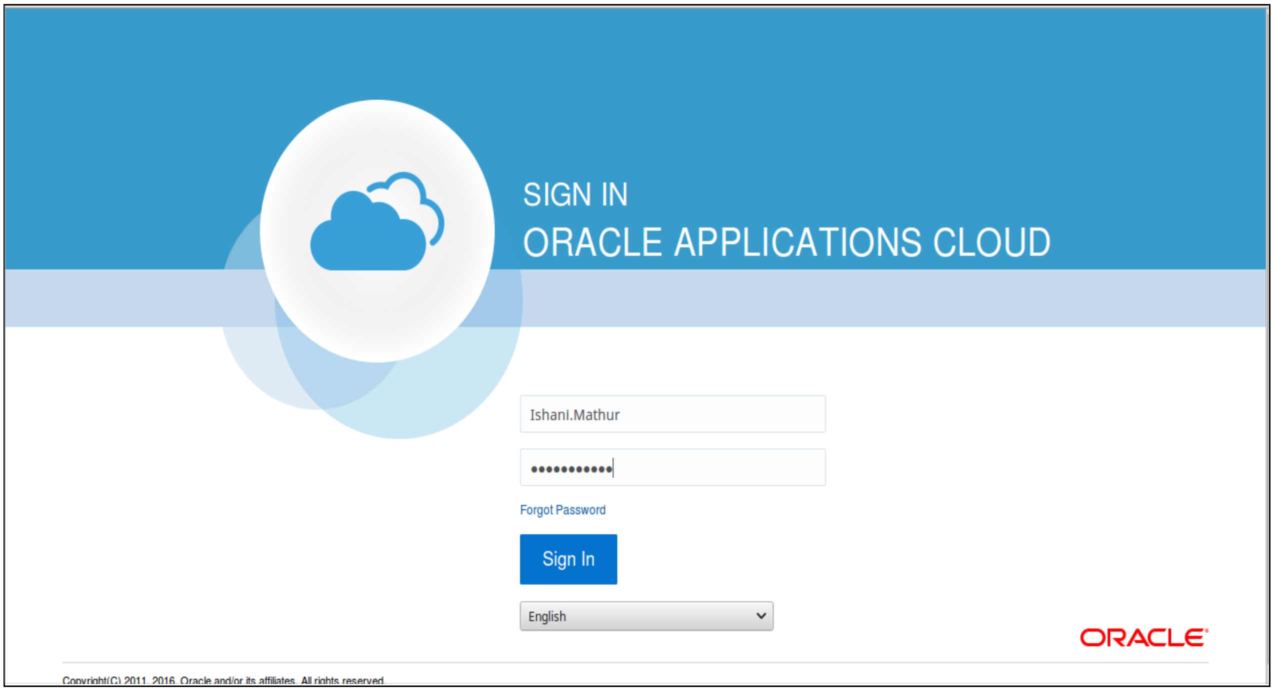
2.1.5 Hiring an Employee

Worked Example

You create a person record and a work relationship in Oracle HCM Cloud when you hire an employee. In this example, you will hire an employee, Rishika Singh to the Apollo LogiSolutions Legal Entity.

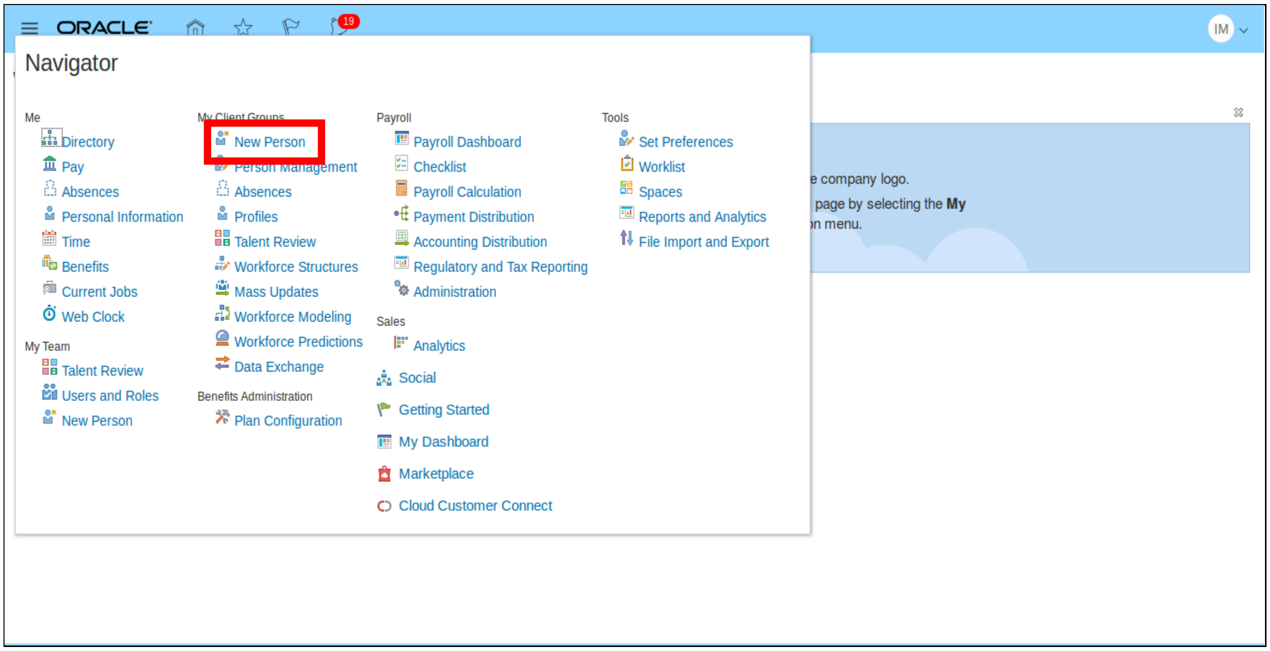
Perform the following tasks to create Rishika's person record:

Login with HR Manager User



2.1.5.1 Specify Basic Details

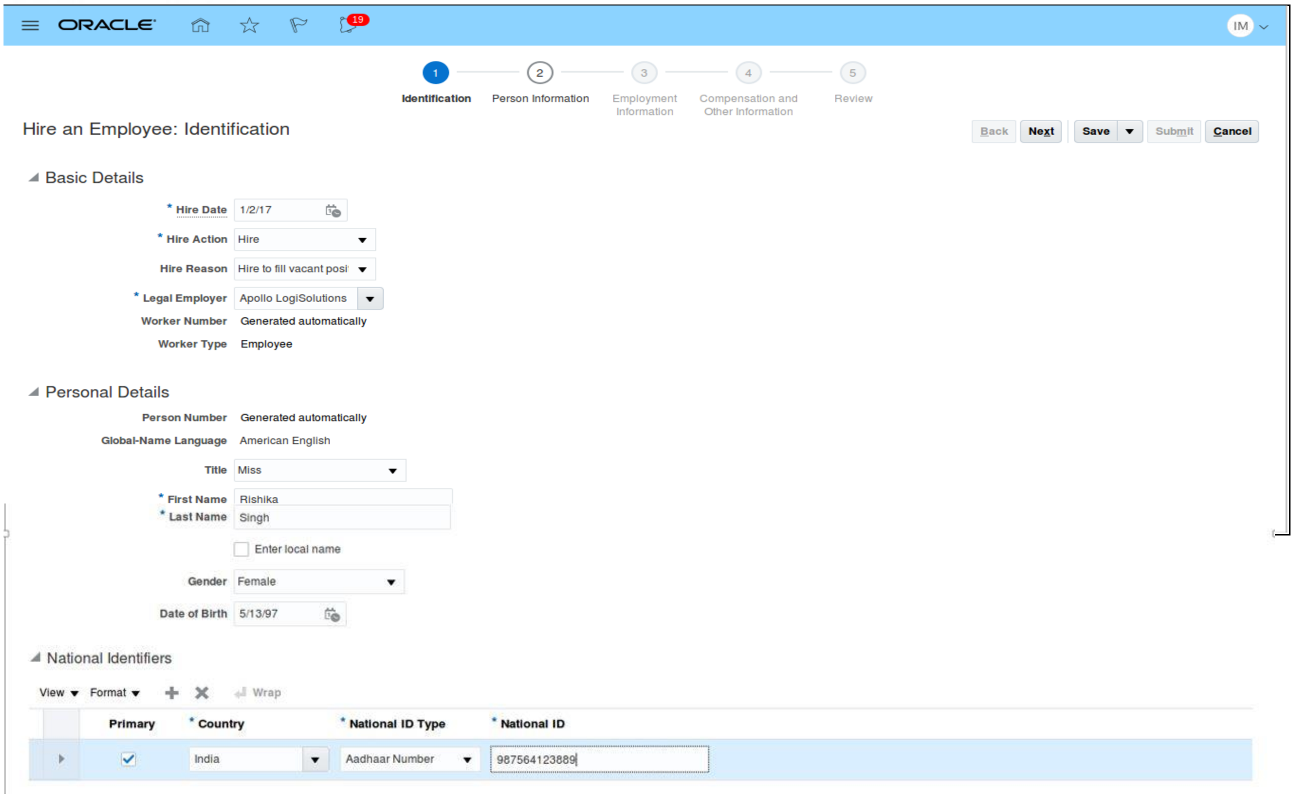
1. In the New Person work area, click the **Hire an Employee** task.



Field	Value
Hire Date	1/2/17
Hire Reason	Hire to fill vacant position
Legal Employer	Apollo LogiSolutions
Last Name	Singh
First Name	Rishika
Gender	Female
Date of Birth	5/13/97

2. On the Hire an Employee: Basic Details page, complete the fields as shown in this table.
3. Click the **Add Row** icon in the National Identifiers section.
4. Complete the fields as shown in this table.

Field	Value
National ID Type	Aadhaar Number
National ID	98765432123889



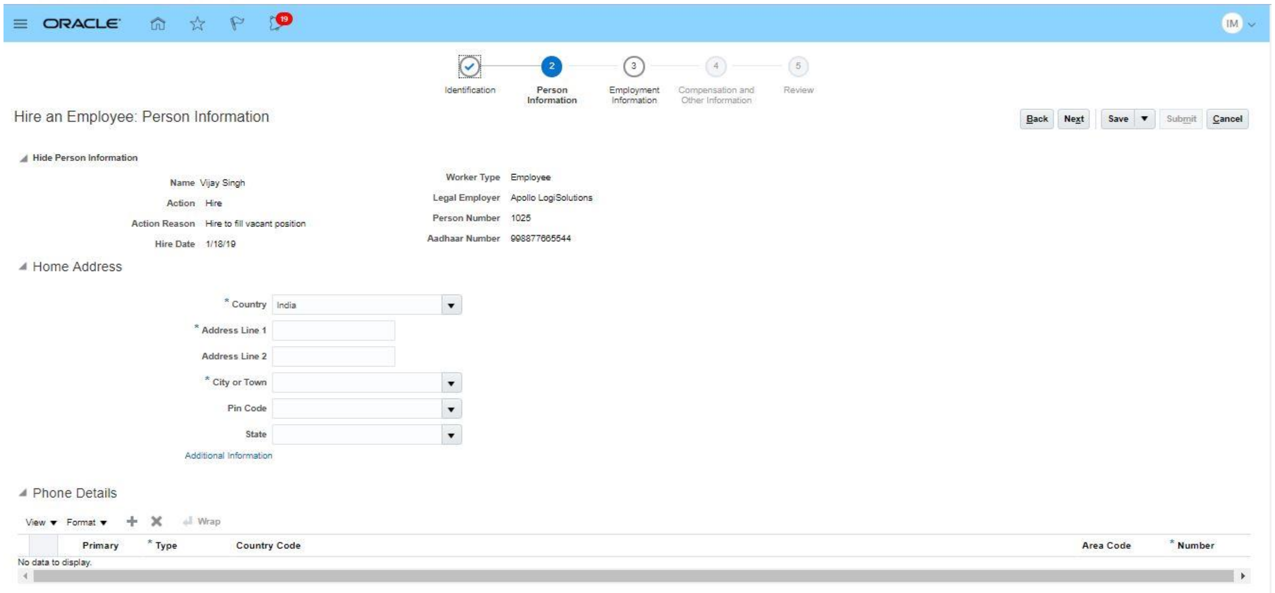
5. Click **Next** to access the Hire an Employee: Personal Details page.

2.1.5.2 Provide Personal Details

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

Field	Value
Address Line 1	4304
City or Town	CENTRAL DELHI
State	Delhi
PIN Code	110004
Country	India

2. If you enter the PIN code, the application automatically populates the city and state. If there is more than one valid address, all the addresses that are valid for the selected PIN code are displayed.



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

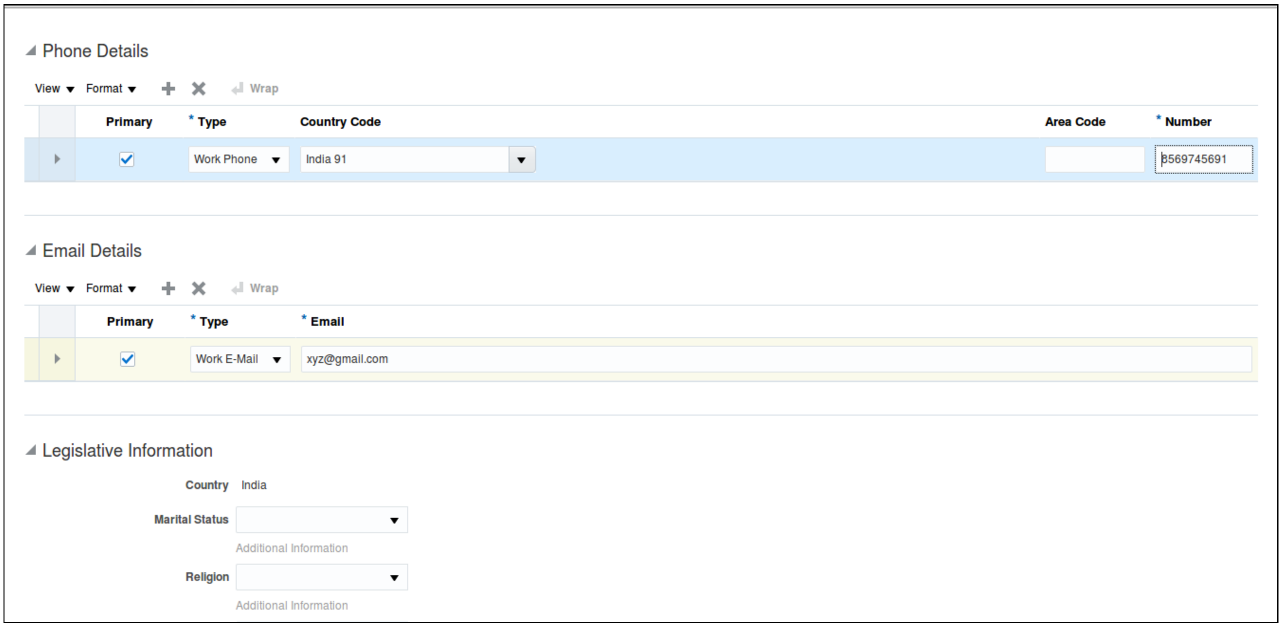
Field	Value
Type	Work Phone
Country Code	India 91
Number	9233445566

5. Click the **Add Row** icon in the Email Details section.
6. Complete the fields as shown in this table.

Field	Value
Type	Work E-Mail
Email	xyz@gmail.com

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

Field	Value
Marital Status	Single
Religion	Hindu

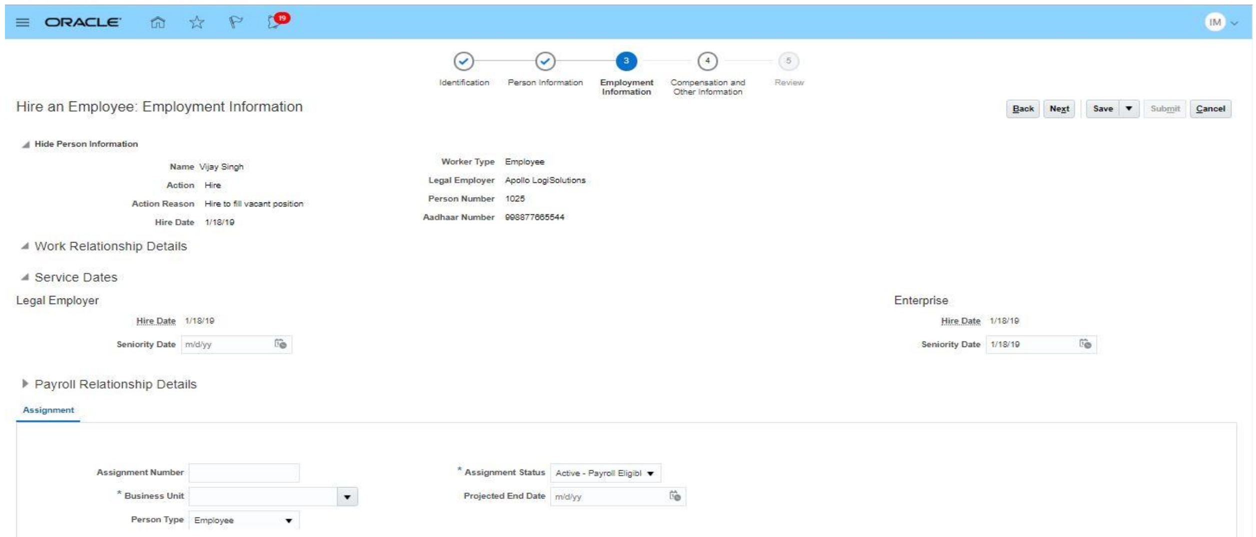


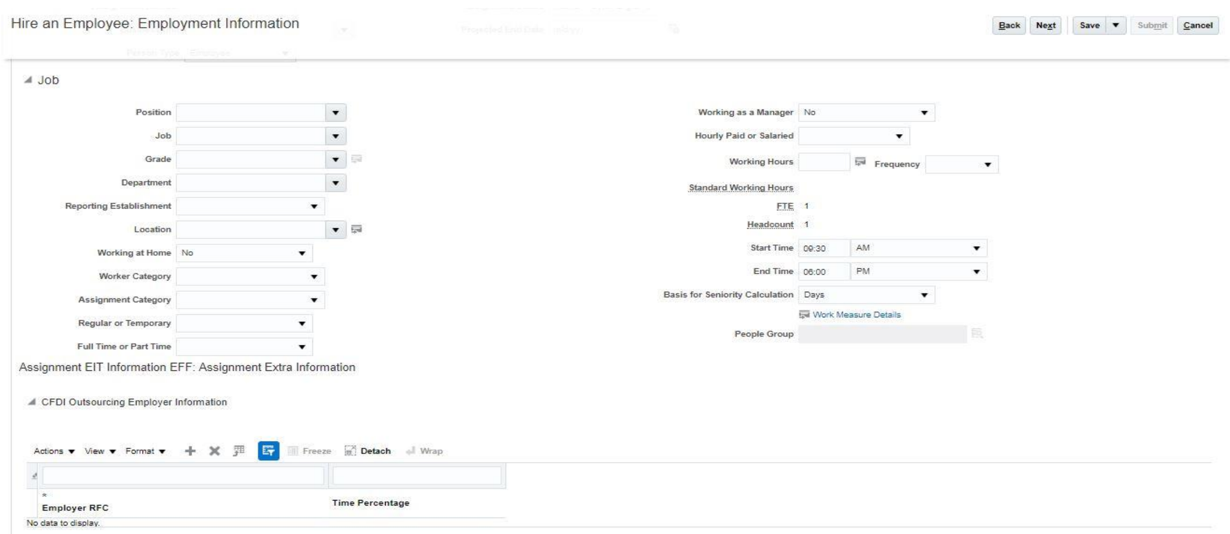
8. Click **Next** to access the Hire an Employee: Employment Information page.

2.1.5.3 Specify Employment Information

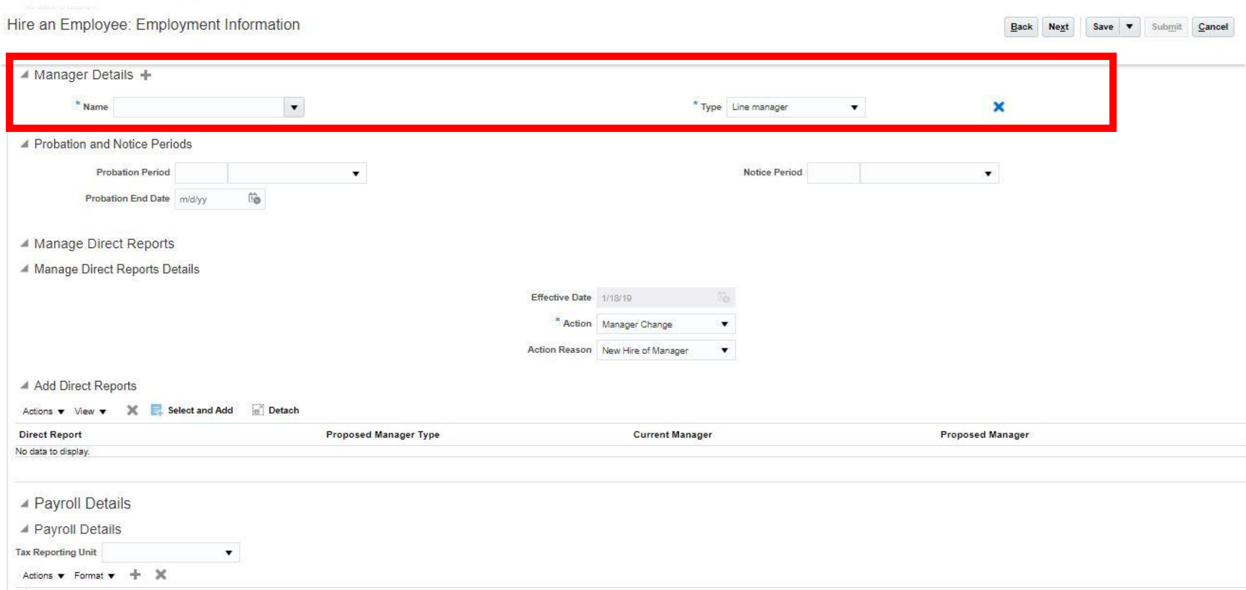
1. On the Assignment tab, complete the fields as shown in this table or you can fill the **Position** after filling the **Business Unit** information and rest of the fields will be automatically filled.

Field	Value
Business Unit	ALS Corporate Centre
Person Type	Employee
Assignment Status	Active- Payroll Eligible
Position	General Manager
Job	General Manager
Grade	ALS MD
Department	Corporate Sales HO COC ALS
Location	Gurgaon (HO)
Working at Home	No
Working as a Manager	Yes
Worker Category	Permanent
Assignment Category	Full time regular
Hourly Paid or Salaried	Salaried





2. In the Manager Details section, select **Mathur, Ishani** from the **Name** list.



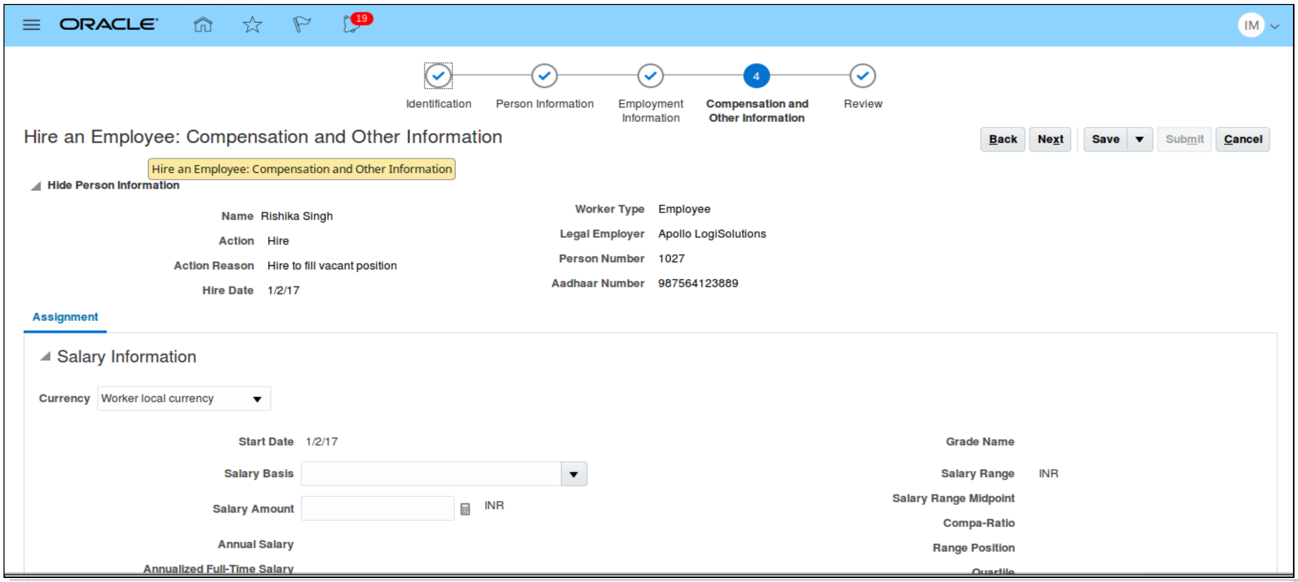
3. Click **Next** to access the Hire an Employee: Compensation and Other Information page.

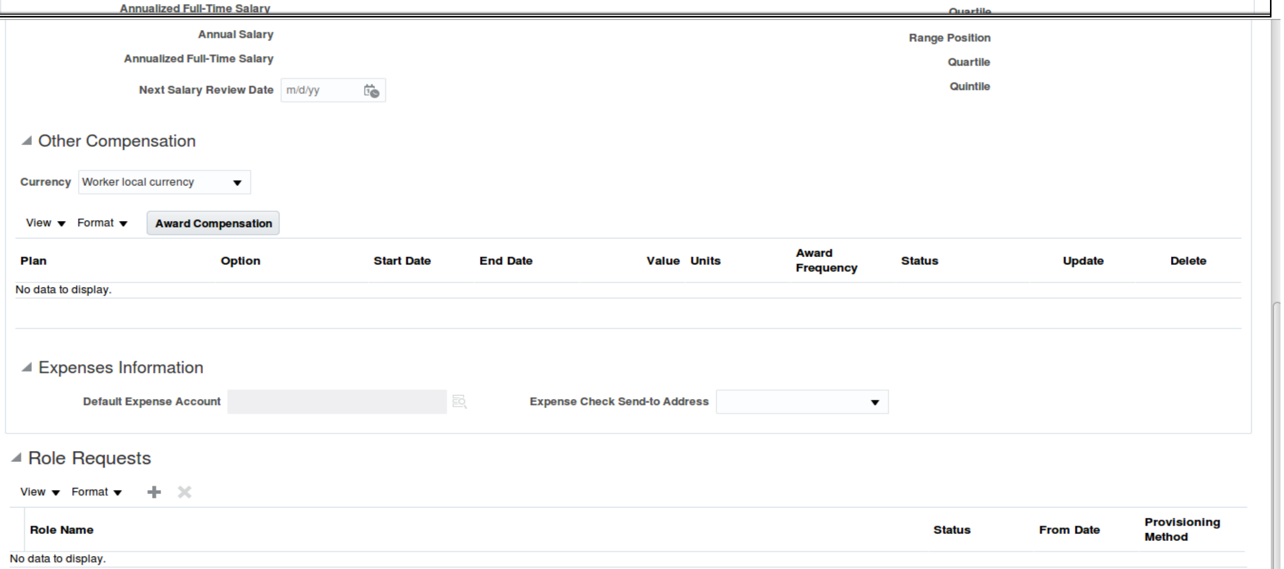
2.1.5.4 Add Compensation and Other Information

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

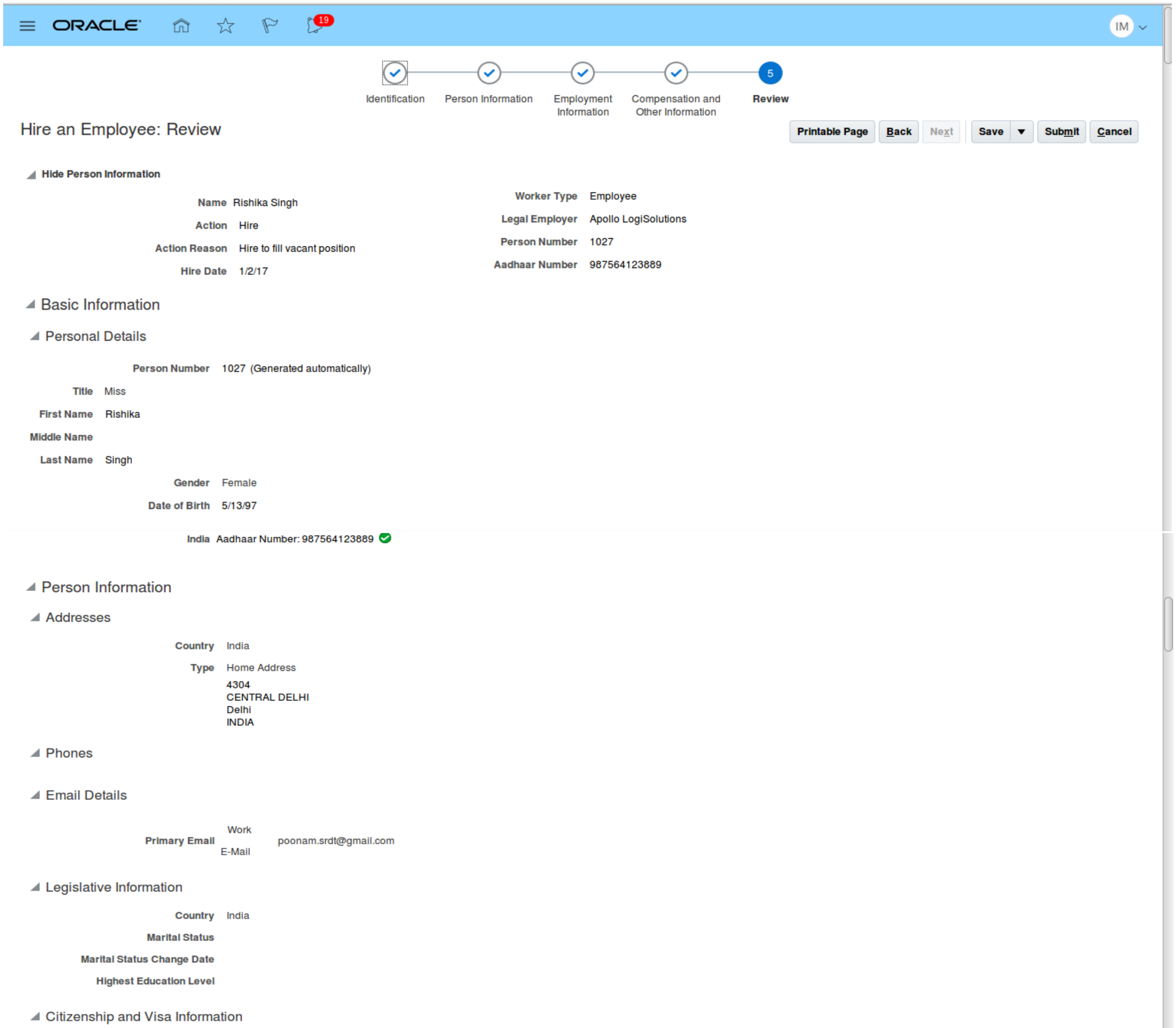
Field	Value
Salary Basis	ALS Monthly Salary Basis
Salary Amount	48000

2. When you enter the salary, the salary range and compensation ratio are automatically displayed based on the selected grade, if this information is defined when creating the grade.
3. By default, the employee role is assigned to the user.

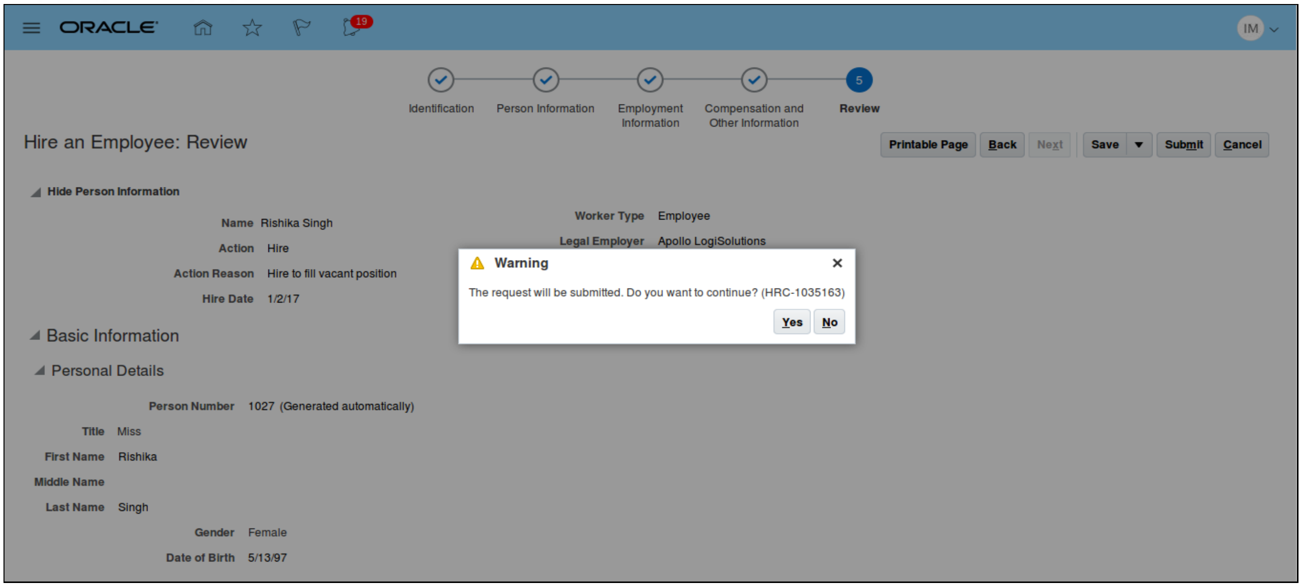




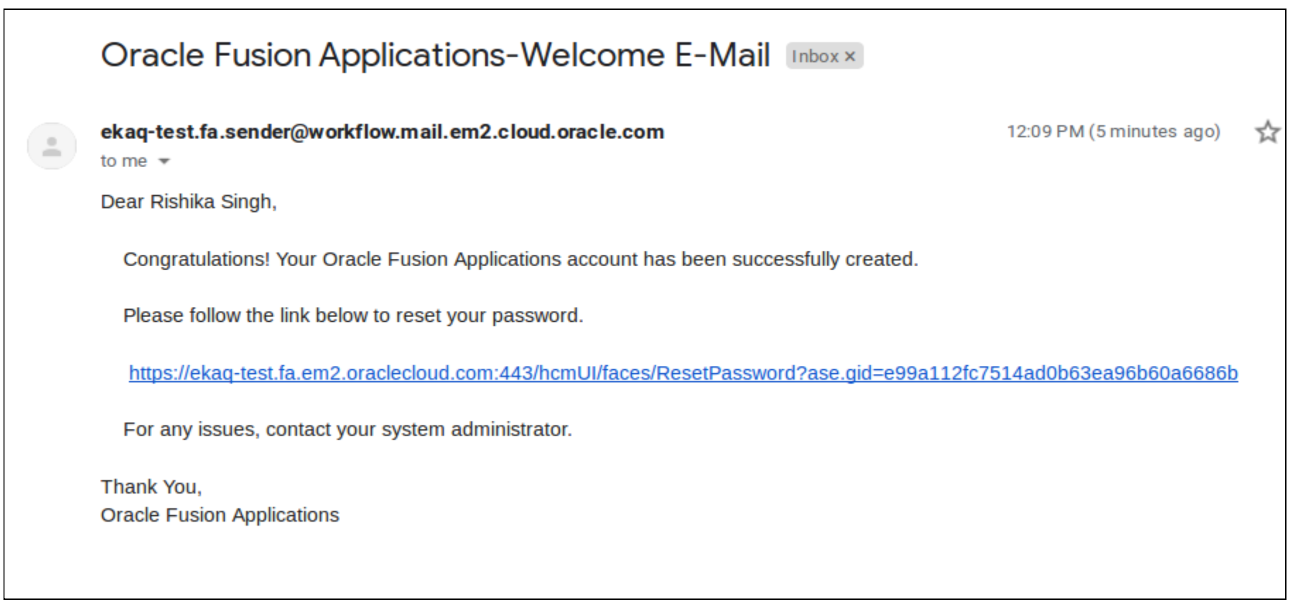
4. Click **Next** to access the Hire an Employee: Review page.
5. On the Hire an Employee: Review page, review the new hire information and approvers for Anshul's person record, and click **Submit**. Rishika's person record will created when all required approvals are received.



6. In the Warning dialog, click **Yes**.
7. In the Confirmation dialog, click **OK**.



8. A mail will be sent to the Employee's Email ID to reset his/her user account password.



Oracle Fusion Applications-Welcome E-Mail Inbox ×

ekaq-test.fa.sender@workflow.mail.em2.cloud.oracle.com 12:09 PM (5 minutes ago)

to me

Dear Rishika Singh,

Congratulations! Your Oracle Fusion Applications account has been successfully created.

Please follow the link below to reset your password.

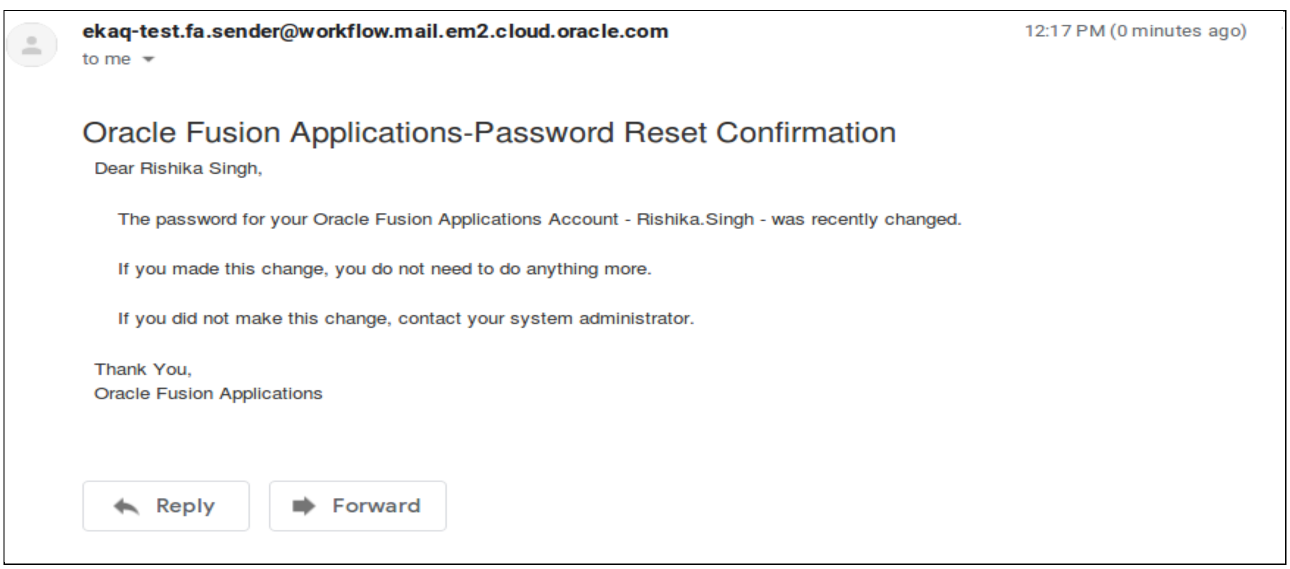
https://ekaq-test.fa.em2.oraclecloud.com:443/hcmUI/faces/ResetPassword?ase.gid=e99a112fc7514ad0b63ea96b60a6686b

For any issues, contact your system administrator.

Thank You,
Oracle Fusion Applications

9. Employee will click on link provided and reset his/her password.

10. After submitting the password a mail will be sent by Oracle Fusion Application for Password Reset Confirmation and Employee will receive his/her Username. Now employee can login from his/her account and access the Oracle Fusion Applications.



2.1.6 Converting a Pending Worker: Explained

You convert a pending worker to an employee or a contingent worker using the Convert Pending Worker page in the New Person work area.

During conversion, the application populates the hire record for the pending worker based on details from the pending worker record. You can:

- Review and edit the details
- Add additional details during conversion

However, you can't change the proposed worker type (employee or contingent worker), and the legal employer.

The default start date of the worker work relationship is the date on which the transaction is submitted for approval. However, you can change the proposed start date to the date the pending worker record was created or later.

If you save the hire record of the pending worker for later or cancel the conversion process before completion, the pending worker record remains as is. You must resume the transaction from your Worklist notification to convert the pending worker to the proposed worker type..

2.1.6.1 Quick Conversion

The Quick Convert option (available only to human resource (HR) specialists as a menu option under the Actions menu) converts the pending worker to the proposed worker type directly without populating the pending worker details.

All the hire records created through the quick conversion process don't require any approvals. However, the other hire records created thought the regular pending worker conversion process require an approval by default. If the transaction is rejected, the pending worker record remains as is.

2.1.6.2 Automatic Conversion

You can automatically convert multiple pending workers to the proposed worker type using the Convert Pending Workers Automatically scheduled process. The automatic conversion process quickly converts all pending worker records that match the criteria.

You can't edit the pending workers' details as a part of the process nor can the records be submitted for approval

From the Actions menu on the New Workers to Process page in the New Person work area, select:

- Include in Automatic Conversion - To set the Include in Automatic Conversion indicator to Yes for the pending worker record. All records marked with a Yes for this indicator are converted using the automatic conversion process. You can convert pending worker records belonging to specific legal employers only. For example, to automatically convert all pending workers belonging to the United States, enter Yes in the Include for Automatic Conversion field only for this legal employer, and N for all other pending worker records.
- Exclude from Automatic Conversion - To set the Include in Automatic Conversion indicator to No for the pending worker record. To exclude pending worker records belonging to specific legal employers, specify the value as No for the Include for Automatic Conversion field.

You can also include or exclude a pending worker from automatic conversion when you add or edit the pending worker record, or edit the pending worker's work relationship.

For candidates imported from Oracle Taleo Recruiting Cloud Service, if the pending worker record was created successfully but there were issues during import, the specific candidate is excluded from automatic conversion

2.1.7 Running the Convert Pending Workers Automatically Process

To automatically convert pending workers to employees or contingent workers, run the Convert Pending Workers Automatically process. You can specify the criteria for conversion, for example, convert workers belonging to specific legal entities, business units, countries or locations. You can schedule the process to run whenever required or to run daily.

Use the Schedule New Process page in the Scheduled Processes work area to run the Convert Pending Workers Automatically process.

2.1.7.1 Process Parameters

The following table lists the parameters for automatic conversion process.

Name	Description
Conversion Date	You can indicate the conversion date as same as the proposed start date of the pending worker or number of days before or after this date. For example, you can select Before proposed start date in the Conversion Date field, and enter 30 in the Number of Days field.
Proposed Worker Type	Contingent worker or employee.
Country	Country for which you want to automatically convert the pending workers

Legal Employer	Legal employer for which you want to automatically convert the pending workers.
Business Unit	Business unit for which you want to automatically convert the pending workers.
Department	Department for which you want to automatically convert the pending workers.
Location	Location for which you want to automatically convert the pending workers.

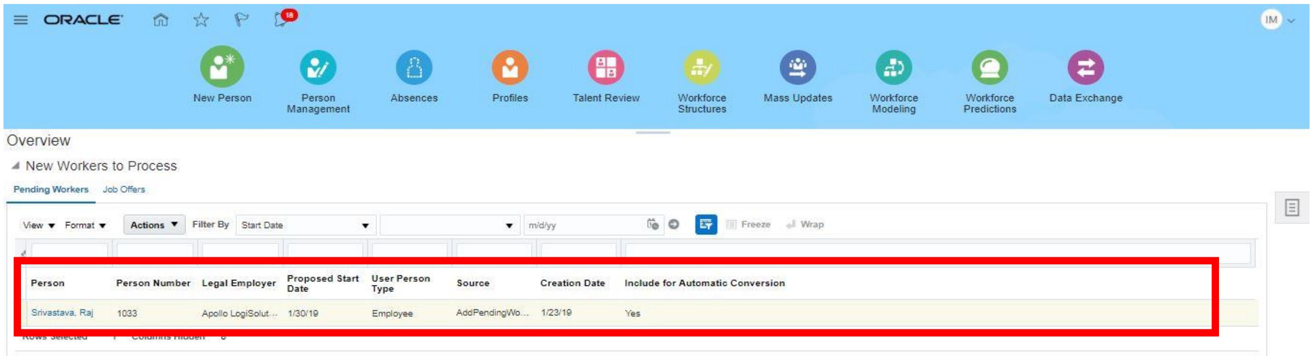
Select the criteria for conversion otherwise all the parameter values are selected by default.

2.1.7.2 Automatic Conversion of Pending Workers: Examples

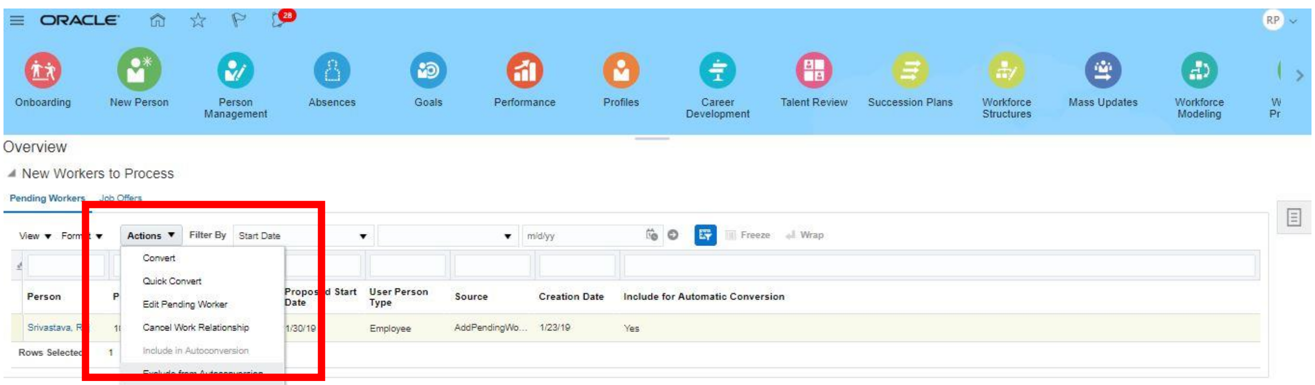
The following scenarios illustrate how you can use the conversion criteria in the Convert Pending Workers Automatically process.

Scenario	Action
Apollo enterprise has pending workers spread across legal employers in different time zones. The pending workers must be converted at the beginning of the proposed start date.	Schedule the process separately for each legal employer that is in a different time zone.
Apollo has many pending workers of the type Employee and rarely pending workers of the type Contingent Worker.	Schedule two instances of the process, one for the employee worker type, and the other for the contingent worker type.
Apollo has many pending workers in some locations, business units, or legal employers, and very few in others.	Schedule two instances of the process: one that runs daily for the selected location, business unit and legal employer with many pending worker; another that runs on a periodic basis for the selected location, business unit, and legal employer with few pending workers.

Pending Workers List Page



Actions for converting a pending worker



2.1.8 Worker Types: Explained

You select a worker type when you create a new person record or work relationship. Because a person can have multiple work relationships of multiple types simultaneously, a person can have multiple worker types at once. You create a new person in the New Person work area. You manage work relationships in the Person Management work area.

Which worker types apply at any time depends on the legal employer context. For example, consider this summary of a single person's work relationships with the enterprise: as shown in the table.

Work Relationship Type	Legal Employer	Start Date	End Date
Contingent worker	Legal Entity A	13 March, 2010	None
Employee	Legal Entity B	11 June, 2010	20 February, 2011
Nonworker	Legal Entity C	10 July, 2010	None
Employee	Legal Entity D	21 February, 2011	None
Contingent worker	Legal Entity D	21 February, 2010	31 December, 2010

On 1st March, 2011 this person is:

- A contingent worker in Corporation A
- An ex-employee in Corporation B
- A nonworker in Corporation C
- An employee and an ex-contingent worker in Corporation D

2.1.8.1 Identifying a Single Worker Type

When a single worker type is needed for a person, the worker type from the person's primary work relationship applies.

2.1.9 Matching Person Records: How They Are Identified

When you create a new person record, the application searches automatically for matching person records which may be duplicates of the new record.

If you are a human resource (HR) specialist, the application compares the following fields in the new record with those in existing person records to identify matching person records:

- First name
- Last name
- Date of birth
- National IDs

Note: If you are a line manager, the application doesn't display national IDs. How matching records are identified for line managers is described at the end of this topic.

2.1.9.1 How Matching Records Are Identified

If you are an HR specialist, the application identifies an existing person record as a match for a new person record when at least one national ID value is the same in both records.

Person records in which the national IDs do not match may still appear as matching records if they satisfy the following sets of criteria:

- The last name, the first character of the first name, and the date of birth are the same.

If one of the criteria is missing when the other two criteria produce a match, the application identifies the record as a matching record.

2.2 Manage Personal Information

2.2.1 Person Records: Explained

All workers, nonworkers, and contacts have a single person record in the enterprise identified by a person number.

You can't create the person record in isolation because it requires one of the following:

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

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

You create the person record either

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

2.2.1.1 Person Records Compared with Work Relationships

The following table compares Person Records and Work Relationship Records.

Information Type	Particulars
Person Records	Holds personal information such as: • Name • Date of birth • Disability information May also apply to more than one work relationship such as National ID.
Work Relationships	Holds employment information such as: • Job • Payroll • Working Hours This can vary among work relationships and be specific to a legal employer.

2.2.1.2 Local Information in Person Records

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

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

2.2.2 Person-Record Keyword Searches: Explained

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

This topic describes:

- Access to restricted information
- Keyword indexing
- Searches using name and keywords
- Searches using date-effective keywords

2.2.2.1 Access to Restricted Information

Access to information about a person's competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations is restricted to a person's line managers. For example, if a line manager searches for a language skill and a match is found in the language-skills information of the manager's direct or indirect reports, that information appears in the search results. Restricted information is only included in search results when the searcher is not a line manager. However, if the match is found in public information, such as areas of expertise, it appears in the search results for any user.

2.2.2.2 Searches Using Name and Keywords

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

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

2.2.2.3 Searches Using Date-Effective Keywords

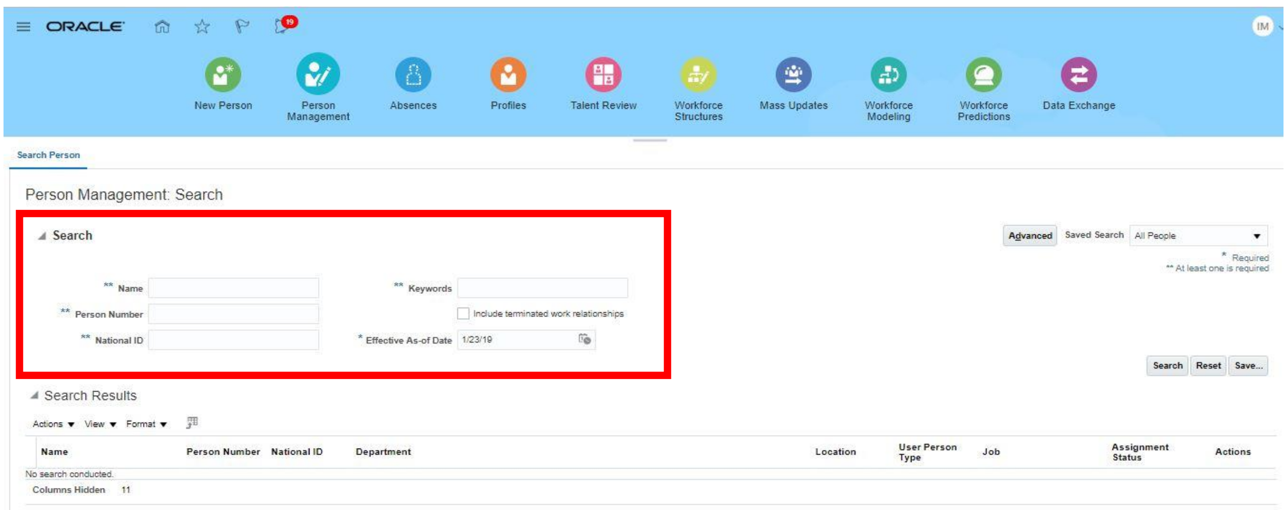
In the person search UI, you can enter an effective as-of date. When date-effective values, such as work location, are copied to the keywords table, their history isn't copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of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

For example:

- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.

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

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



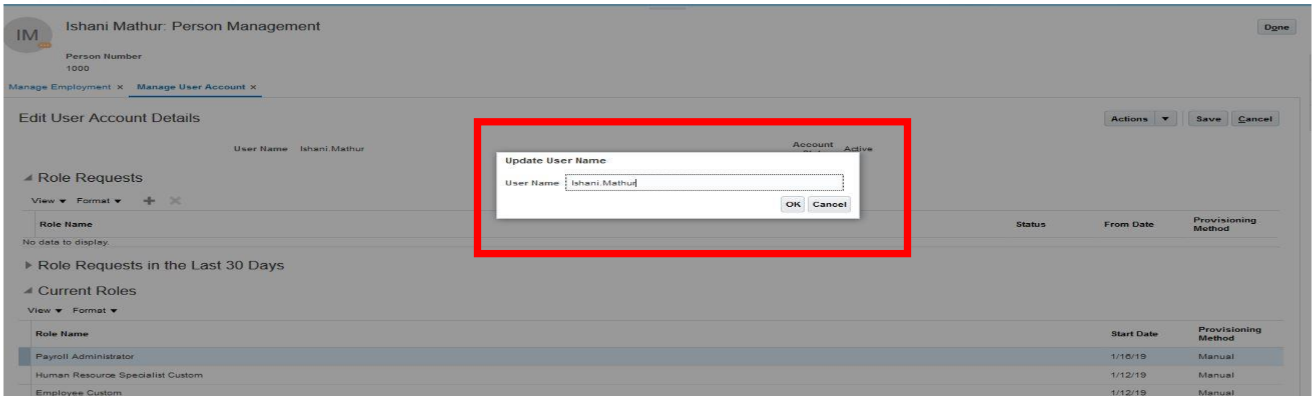
2.2.2.4 Existing User Names

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

To change a worker's user name:

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

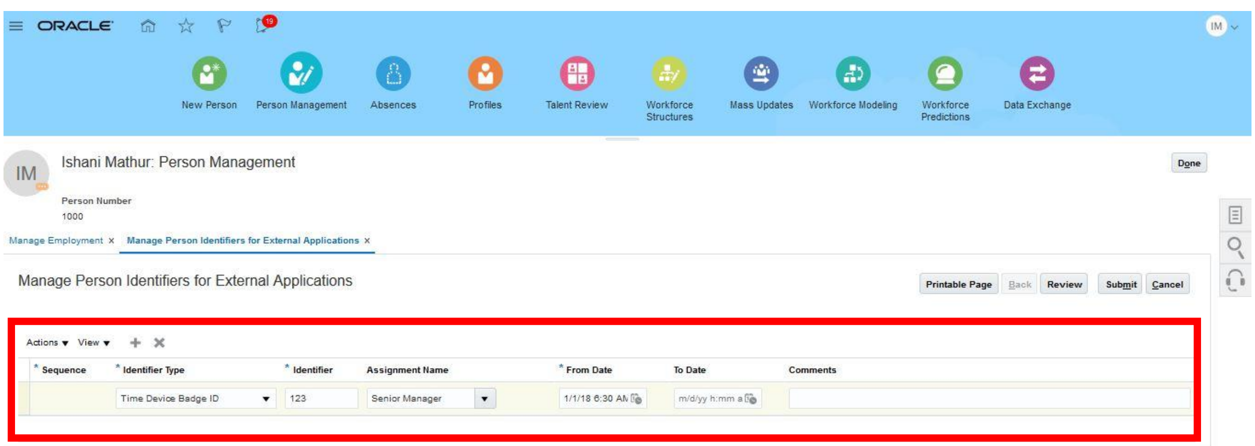
The updated name, which can be in any format, is sent automatically to your LDAP directory server. The maximum length of the user name is 80 characters.



2.2.3 Person Identifiers for External Applications: Explained

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

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



2.3 Manage Employment Information

2.3.1 Work Relationships: Explained

A work relationship is a relationship between a person and a legal employer. It provides the context in which a person's assignments exist and enterprise and legal employer service is calculated. All work relationships must contain at least one assignment. You create and manage work relationships for a person in the Person Management work area.

Aspects of work relationships explained here include:

- Work relationship types
- Work relationships for nonworkers
- Primary and nonprimary work relationships
- Terminating the primary work relationship
- Creating multiple work relationships for a person
- Worker types
- Worker numbers

2.3.1.1 Work Relationship Types

Work relationships are of the following types:

- Employee
- Contingent worker
- Nonworker
- Pending worker

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

2.3.1.2 Work Relationships for Nonworkers

To be classified as a nonworker, a person must have a nonworker work relationship with a legal employer. Having a work relationship doesn't mean that a person is working for a legal employer. It means only that there is an association between the person and the legal employer that's defined by the work relationship and assignment.

2.3.1.3 Work Relationships for Pending Workers

If you end a person's work relationship, the person record remains in the application with an inactive work relationship. If you rehire this person later by entering the same person data, the application identifies the person as a duplicate. You can select the existing person record and create a pending work relationship for the person.

2.3.1.4 Primary and Nonprimary Work Relationships

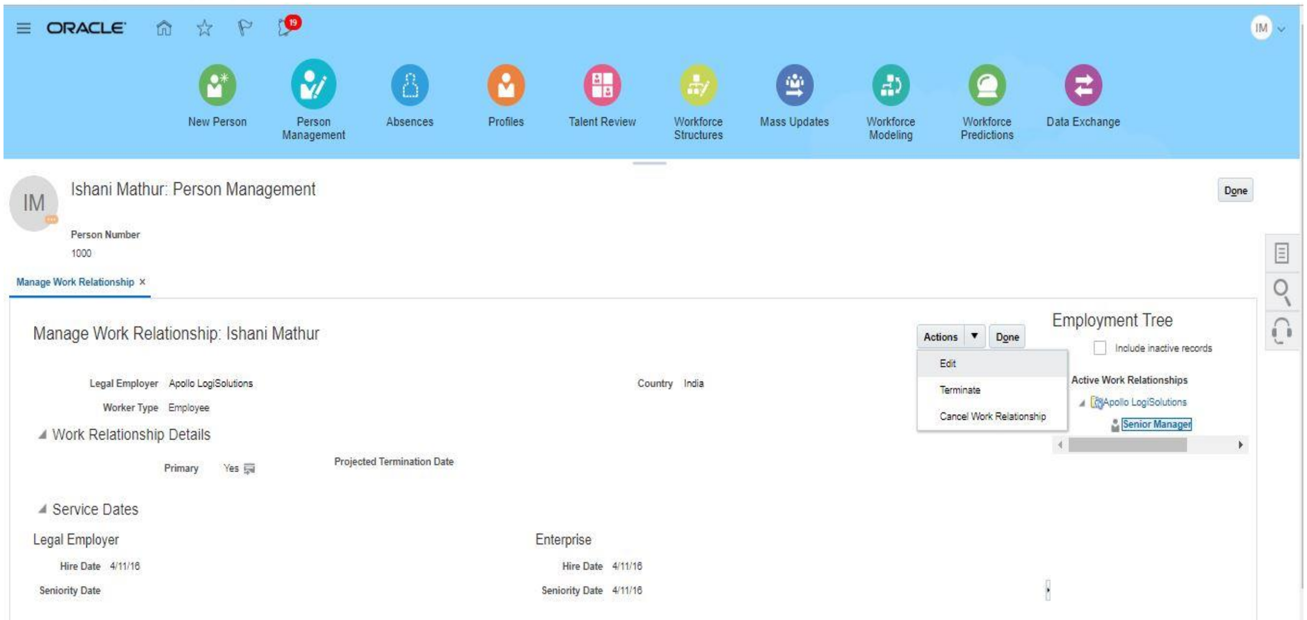
A worker or nonworker must have one, and only one, primary work relationship. All other work relationships are nonprimary. A person's first work relationship is the primary relationship, by default.

A person's overall primary assignment belongs to the person's primary work relationship. Regardless of how many work relationships and assignments a person has, you may need information about a person from a single assignment. For example, some government reports are based on one assignment only. In these cases, the person's primary assignment is used. In general, a person's primary work relationship and assignment are those that are of most significance, in terms of status, pay, benefits, and working hours, to the person.

2.3.1.5 Terminating the Primary Work Relationship

You terminate work relationships, not workers or nonworkers.

When a person has multiple current work relationships, you can't terminate the primary work relationship without first selecting a different primary relationship. This restriction exists because a current worker or nonworker can't be without a primary work relationship for any period of time.



2.3.2 Assignments: Explained

An assignment is a set of information about a person's role in a legal employer. It includes the person's job, position, pay, compensation, managers, working hours, and location. You manage assignments using the Manage Employment task in the Person Management work area.

This topic describes the following aspects of assignments:

- Assignments and work relationships
- Primary assignments
- Assignment numbers
- Assignment names
- Assignment statuses
- Contracts and collective agreements
- Inheritance of values in assignments

2.3.2.1 Assignments and Work Relationships

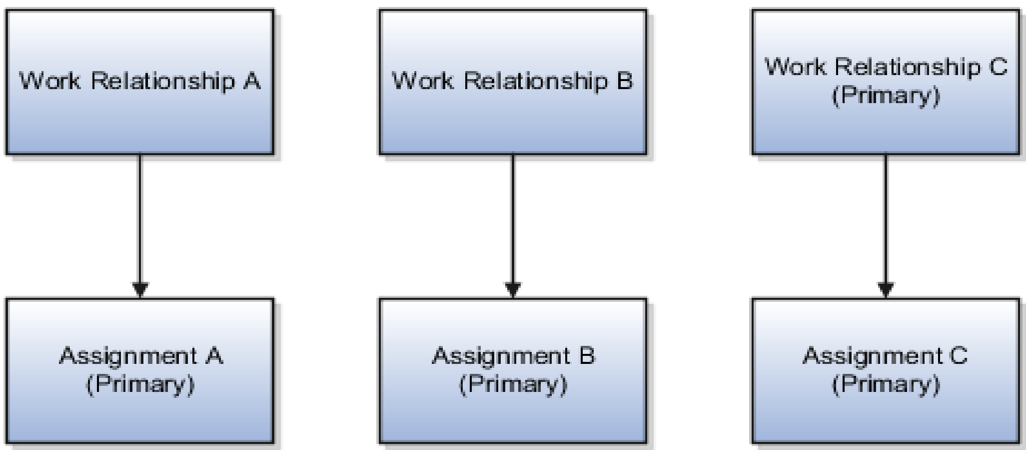
All work relationships, regardless of type, have at least one assignment. Your legal employer may allow multiple assignments in a single work relationship. Within a single work relationship, all assignments are of the same type. For example, in a nonworker work relationship, only nonworker assignments are possible.

2.3.2.2 Primary Assignments

When you need information about a person from a single assignment, the person's overall primary assignment supplies it. For example, some government reports are based on one assignment only.

You must identify one assignment as the primary assignment in each work relationship. When a person has multiple work relationships, the overall primary assignment is the primary assignment in the primary work relationship.

In this example, assignment C is the overall primary assignment because it is the primary assignment in the primary work relationship.



2.3.2.3 Assignment Names

An assignment has a name, which provides an easily understood method of identifying the assignment. By default, the assignment name is not displayed on the assignment; however, you can display the assignment name using personalization.

The assignment name is the job name. A suffix number identifies a person's second and subsequent assignments when the jobs are the same. For example:

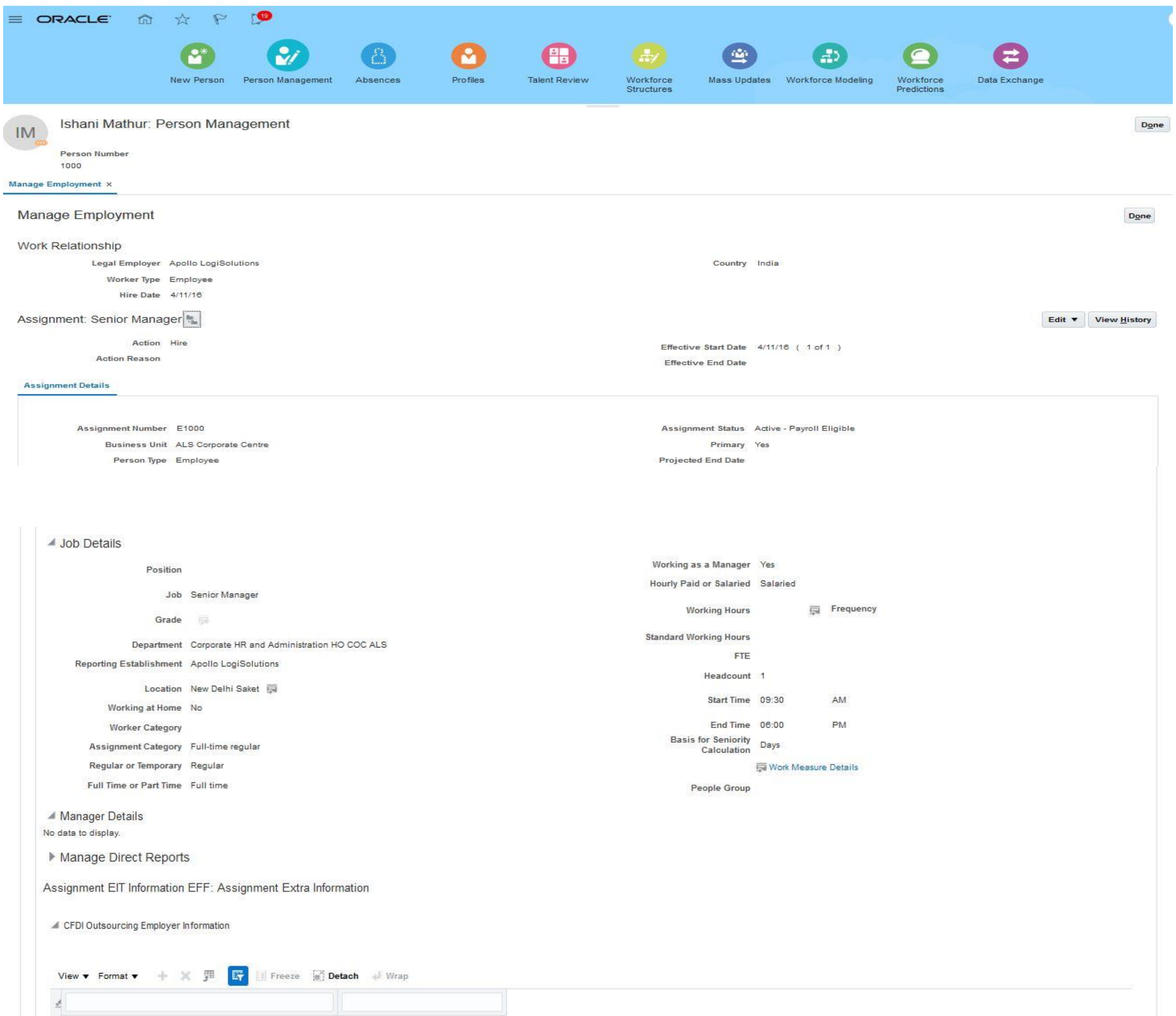
1. Sales Director
2. Sales Director-2

If the assignment doesn't contain a job name, the assignment number copies automatically to the assignment name. You can edit assignment names.

2.3.2.4 Assignment Statuses

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

When you create or edit an assignment, you select an action to categorize the change for reporting and analysis purposes. Some actions make an automatic change to the assignment status. For example, when you create an assignment, its status is set automatically to Active - payroll eligible. Otherwise, you must set the assignment status directly.



[Proprietary and Confidential]

2.3.3 Seniority Dates: Explained

A seniority date is a date on which the calculation of a person's length of seniority with the enterprise or a legal employer is based. In most cases, seniority dates are the same as start or hire dates; however, using separate seniority dates you can manage them independently of start or hire dates. You manage hire and seniority dates using the Create Work Relationship and Manage Work Relationship tasks in the Person Management work area.

This topic describes legal-employer and enterprise seniority dates.

2.3.3.1 Legal-Employer Seniority Dates

A person can have three work relationships simultaneously with a single legal employer:

- Employee
- Contingent worker
- Nonworker

Legal employer seniority dates are maintained for all three types of work relationships; therefore, a person can have up to three legal employer seniority dates for a single legal employer.

If you leave the legal-employer seniority date in a work relationship blank, it's assumed to be the same as the start or hire date of the work relationship.

You can adjust legal-employer seniority dates for any reason. For example, if a person takes an absence of one month that can't be included in seniority calculations, you can adjust the dates of the person's work relationship as shown in this table.

Type	Start or Hire Date	Legal Employer Seniority Date
Employee	1 March, 2010	1 April, 2010

This adjustment has the effect of reducing the person's employee legal-employer seniority by one month, which may affect the person's entitlement to seniority-related benefits.

When a person has multiple sequential relationships of the same type with a single legal employer, you can adjust the legal employer seniority date of the latest work relationship manually to include the previous seniority.

2.3.3.2 Enterprise Seniority Date

A person has a single enterprise seniority date, which is the date on which calculation of a person's enterprise seniority is based. The enterprise seniority date is the start date of a person's primary work relationship by default. You can update a person's enterprise seniority date only when you create or edit the person's primary work relationship.

You can adjust the enterprise seniority date for any reason; for example, you may want to adjust the date to include previous seniority. Consider the following employee work relationships, where a break exists between the end of the first work relationship and the start of the second.

Type	Legal Employer	Hire Date	Enterprise Seniority Date	Termination Date
Employee	A	5 January, 2004	5 January, 2004	31 December, 2004
Employee	B	1 May, 2005	5 May, 2004	

In this example, the person's enterprise seniority date, until the start of the work relationship with legal employer B, is 5 January, 2004. When you create the second work relationship, you can enter a new enterprise seniority date that takes account of the person's previous employee seniority. To calculate the person's new enterprise seniority date, you would add 120 days (the period from 1 January, 2005, to 30 April, 2005, when this person was not employed) to the previous enterprise seniority date, 5 January, 2004, to give a revised enterprise seniority date of 5 May, 2004. If you didn't enter the new date, the enterprise seniority date is 1 May, 2005.

Note: If you select a different primary work relationship for a person, the existing enterprise seniority date copies automatically to the new primary work relationship and removed from the previous primary work relationship.

2.3.4 Managing Seniority Dates: Explained

You manage seniority dates using the Manage Seniority Dates task in the Person Management work area.

In the Manage Seniority Dates page, the seniority dates are organized in a hierarchy that shows all the work relationships and assignments for a person. You can view the length of service, history, and other details for each seniority date by selecting the date in the hierarchy tree. Additionally, you can adjust the seniority by updating or correcting it and override the seniority date if the seniority date rule is configured to allow edits.

After you adjust the seniority for a person, you can recalculate the seniority by using the Recalculate Seniority feature. If you want to populate the seniority dates for all workers, run the Calculate Seniority Dates batch process.

You can view the seniority dates at the person, work relationship, and assignment levels.

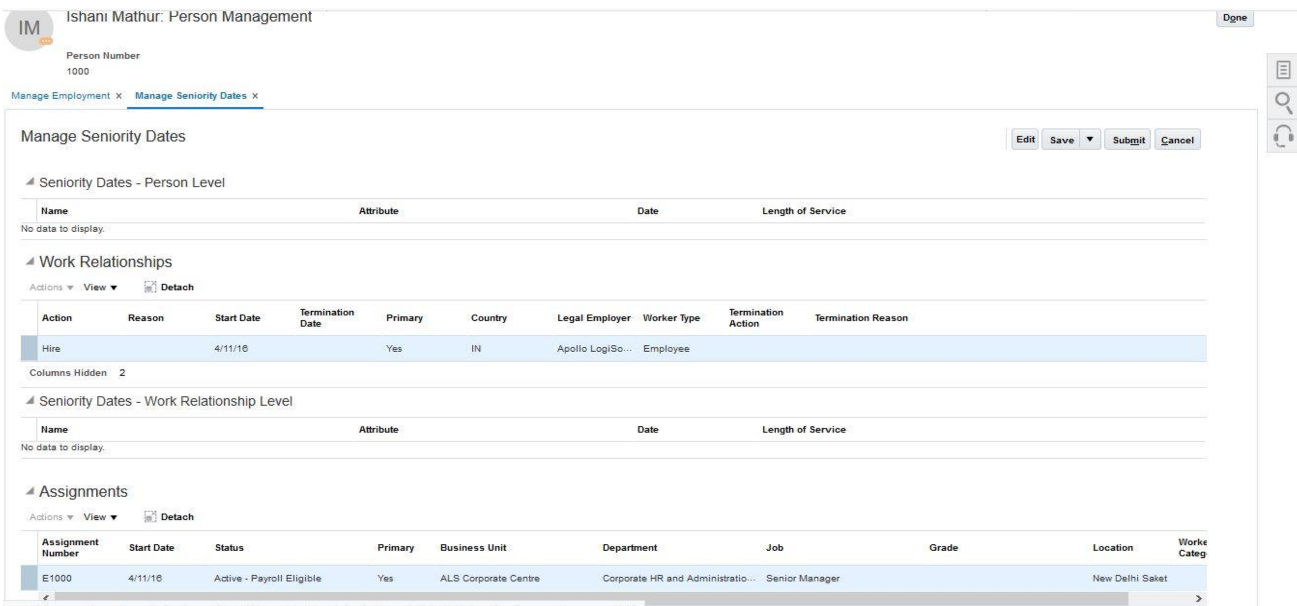
2.3.5 Calculate Seniority Dates Process: Explained

Use the Calculate Seniority Dates process to calculate the seniority dates for workers based on the seniority rules configured in the application. You can run this process for all persons, selected persons, individual legal employer, or a worker union. Use the Scheduled Processes work area to schedule and run the process.

2.3.5.1 Process Parameters

You can run this process for more than one person by entering the person numbers separated by commas. For example, use the following format: Person Number 1, Person Number 2, Person Number 3. Do not enter leading or trailing space, or special characters. If you want to run this process for all persons, do not enter any value.

The past period in days indicates the earlier period in days from the date you run this process to evaluate the assignment changes.



2.4 Areas of Responsibility

2.4.1 Areas of Responsibility: Explained

You can assign a responsibility to a person and define the scope of the responsibility by identifying the people for whom the person has the responsibility; the person then appears in the Work Contacts list of those people. For example, you can assign a worker as the Human Resources (HR) representative for people in a specific organization or department hierarchy. You manage areas of responsibility using the Manage Areas of Responsibility task in the Person Management work area.

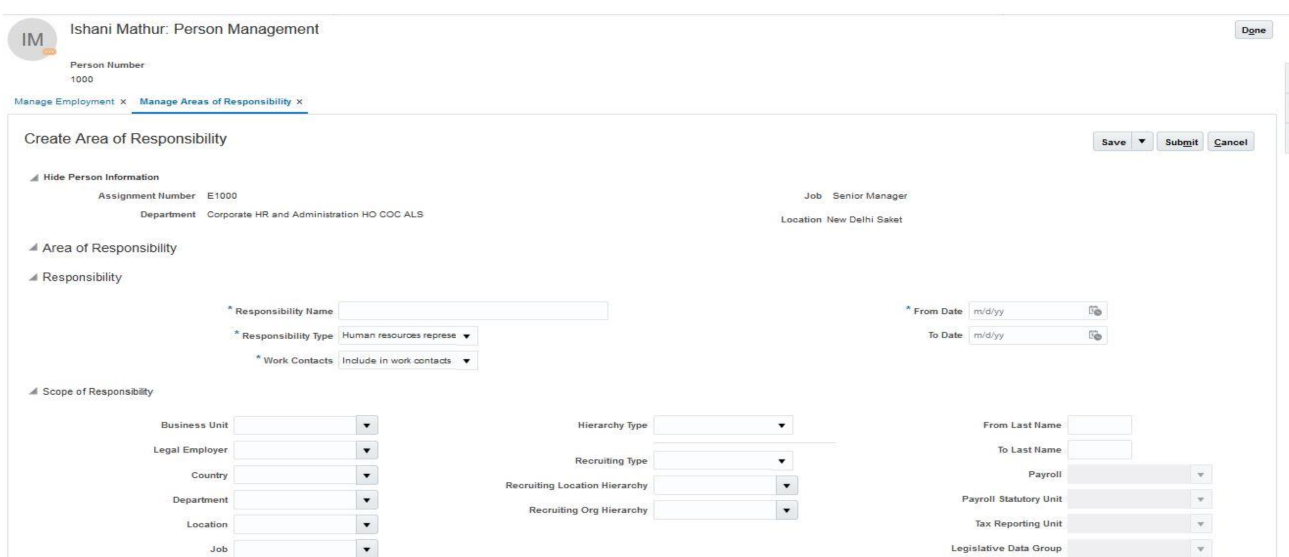
Assigning an area of responsibility doesn't affect the person records the representative can see. Access to records is controlled through security. Your security administrator can set up security profiles using areas of responsibility.

2.4.1.1 Integration with Checklists

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

2.4.1.2 Integration with Sensitive Transactions

You can use responsibilities in conjunction with sensitive transactions to identify the recipients of notifications involving sensitive terminations. Certain future-dated terminations may be identified as sensitive and hidden from everyone until an appropriate time. Any conflicts involving sensitive terminations are handled by routing the actions to a person with an HR Representative responsibility.



2.5 Promote and Transfer Workers

2.5.1 Line Manager Transfer Actions: Explained

As a Line Manager, you can transfer your workers within the same legal employer or perform a global transfer by changing the legal employer.

2.5.1.1 Transfer Actions

You can access the Transfer and Change Legal Employer actions from the following places in the application:

- My Team page
- Directory page
- Quick Actions menu
- All pages where the person smart navigation window is accessible

2.5.1.2 Transfer

When you transfer a worker, the work relationship remains unchanged. You make any necessary changes in the current assignment. If the worker you're transferring has other active assignments in the current work relationship, they aren't changed and remain active even after the transfer.

2.5.1.3 Legal Employer Change

When you perform a legal employer change, the current work relationship is terminated and a new work relationship is created in the destination legal employer. The existing primary assignment is terminated and the assignment status is set to inactive. The worker's primary assignment data is copied to the new assignment in the destination legal employer. You can change the assignment data as a part of the legal employer change process.

2.5.1.4 Direct Reports

If the worker you're transferring is also a Line Manager, you can reassign the worker's direct reports and add new reports as a part of the transfer. You can reassign reports to the same new line manager or to different line managers. In addition to line reports, you can reassign reports of other manager types, for example, project managers and resource managers. The reports are reassigned or added when the transfer is approved. You can deselect the reports that you want to continue reporting to the same manager. If you are performing a legal employer change and you don't reassign the reports during this transaction, the application automatically reassigns all the direct reports to the transferring line manager's new assignment.

2.5.2 Transfer Actions: Explained

To initiate any type of transfer for a person, select the Manage Employment task in the Person Management work area, update the assignment, and select the relevant transfer action from the Actions list. You can select from the following transfer actions:

- Transfer
- Temporary Assignment
- End Temporary Assignment
- Global Transfer
- Global Temporary Assignment
- End Global Temporary Assignment

2.5.2.1 Transfers and Temporary Assignments

Use the Transfer or the Temporary Assignment action to initiate a transfer or create a temporary assignment in the same legal employer, respectively. Use the End Temporary Assignment action to terminate a temporary assignment in the same legal employer and reinstate the original assignments automatically on a date that you specify.

2.5.2.2 Global Transfers and Temporary Assignments

Use the Global Transfer or the Global Temporary Assignment action to initiate a transfer or create a temporary assignment in another legal employer, respectively. Use the End Global Temporary Assignment action to terminate a temporary assignment in another legal employer and reinstate the original assignments in the source legal employer automatically on a date that you specify.

2.5.3 Transfers and Temporary Assignments: How they are Processed

A transfer is the movement of a person within the same legal employer (a change of location from Gurgaon to Mumbai in the India, for example). A temporary assignment is a transfer for a limited term (temporary assignment in another department, for example). To initiate a transfer or temporary assignment for a person, select the Manage Employment task in the Person Management work area, update the assignment, and then select the relevant transfer action from the Actions list.

2.5.3.1 Settings That Affect Transfers

The type of transfer, whether permanent or temporary, determines how it is processed.

2.5.3.2 How Transfers are processed

When you transfer a person within the same legal employer the work relationship remains unchanged. You make any necessary changes in the current assignment. If the worker being transferred has other active assignments in the current work relationship, they are terminated and their status is changed to Inactive-Payroll Eligible by default. If you create new assignments, the assignments in the current work relationship are terminated and their status is set to Inactive- Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to terminate; these assignments retain their original statuses. You can deselect all assignments except the primary assignment and the current assignment.

2.5.3.3 How Temporary Assignments are processed

When you create a temporary assignment for a person in the same legal employer the work relationship remains unchanged. The existing assignments in the current work relationship are suspended and their status is changed to Suspended- Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to suspend; these assignments retain their original statuses. You end the temporary assignment by selecting the End Temporary Assignment action and specifying a return date. The suspended objects become active as of the return date.

2.5.4 Global Transfers and Temporary Assignments: How they are processed

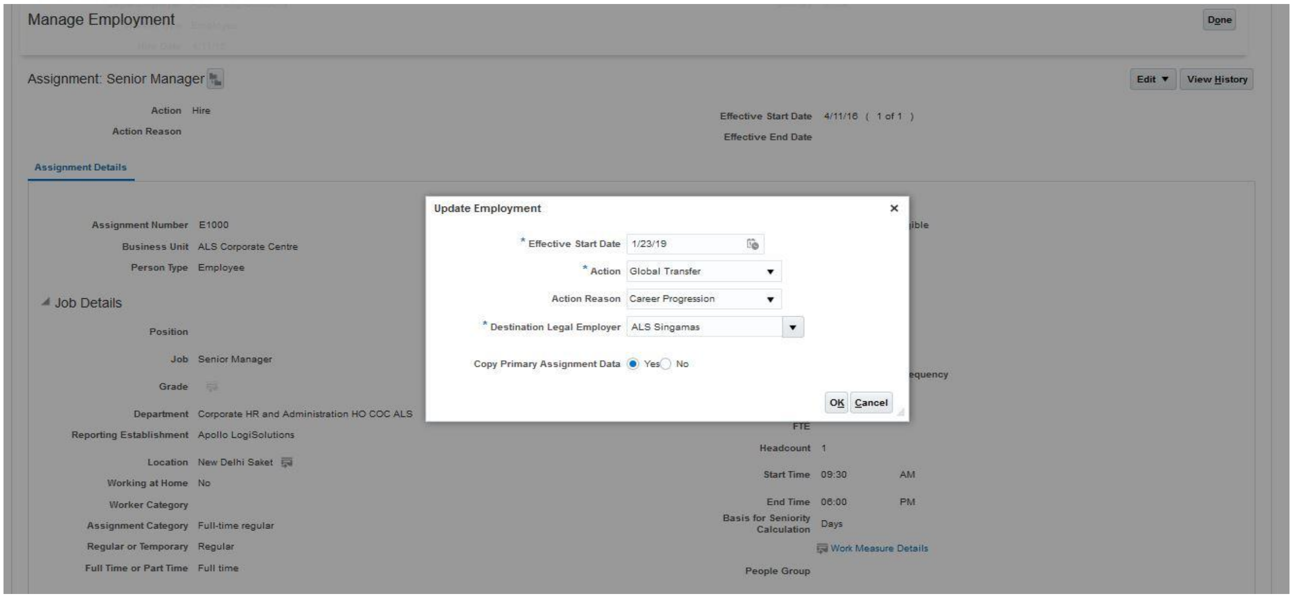
A global transfer is the transfer of a person to another legal employer (transfer of an employee from a UK subsidiary to a US subsidiary, for example). A global temporary assignment is the temporary transfer of a person to another legal employer (US employee sent on a temporary assignment to the UK, for example). To initiate a global transfer or temporary assignment for a person, select the Manage Employment task in the Person Management work area, update the assignment, and then select the relevant transfer action from the Actions list.

2.5.4.1 Settings That Affect Global Transfers

The type of global transfer, whether permanent or temporary, determines how it is processed.

2.5.4.2 How Global Transfers are Processed

When you transfer a person to another legal employer, the source work relationship is terminated automatically using the default values. You create a new work relationship in the destination legal employer. The existing assignments in the source work relationship are terminated and their status is set to Inactive-Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to terminate; these assignments retain their original statuses and the work relationship is not terminated. You can deselect all assignments except the primary assignment and the current assignment.



2.5.5 How Global Temporary Assignments are processed

When you create a global temporary assignment, the existing assignments in the source work relationship are suspended, and you create new objects in the destination legal employer. The status of the assignments in the source work relationship is set to Suspended-Payroll Eligible by default. You can override the default by deselecting the assignments that you do not want to suspend; these assignments retain their original statuses. You end a global temporary assignment by selecting the End Global Temporary Assignment action and specifying a return date. The global temporary assignment is terminated and the assignments in the source legal employer are reinstated automatically on the return date.

2.6 Terminations

2.6.1 Terminations: Explained

You can terminate the work relationship of workers or nonworkers using the Manage Work Relationship task in the Person Management work area.

2.6.1.1 Terminating Work Relationships

Terminate a work relationship, either worker or nonworker, if you want to end all the assignments in the work relationship. To end an individual assignment, select the Manage Employment task in the Person Management work area, update the assignment and select the End Assignment action in the Actions list. If the person has a single assignment, however, the only way to end the assignment is to terminate the entire work relationship. If a person has multiple work relationships and you want to terminate all of them, you must terminate one work relationship at a time, leaving the primary relationship until last.

2.6.1.2 Ending Employment

When you terminate a work relationship:

- Any assignments associated with the work relationship are ended automatically.
- The status of the work relationship and the associated assignments are changed to inactive on the day following the termination date.
- The period of service, both legal employer and enterprise, ends on the termination date. The person becomes an ex-employee or ex-contingent worker for that legal employer.
- The person's user access and roles are revoked by default after the termination date. You can choose to revoke user access earlier, as soon as the termination is approved. (This could mean revoking user access before the termination date.)

2.6.1.3 Payroll Termination

If you are using Oracle Payroll, a notification is sent to the Payroll Administrator informing the administrator of the termination. The Payroll Administrator then completes the relevant tasks required to complete the payroll termination.

2.6.1.4 Direct Reports

When you terminate a manger, if the worker has direct reports, they are reassigned to the terminated manager's manager.

- If position synchronization is enabled and manager is synchronized to the manager value in the position then all direct report will report to the manager in the position.
- If position synchronization is enabled and manager is synchronized to the position hierarchy then all direct reports will report to the incumbent in the parent position in the hierarchy. If there is no incumbent in the parent position, the application checks for the incumbent in the position which is one level up in the hierarchy, or until it finds an incumbent. If there are multiple incumbents in a parent position, the person with the longest tenure in that position will be the new manager.

2.6.2 Reversing Terminations: Explained

You can reverse a termination and reinstate the person's work relationship as it was prior to the termination, using the Manage Work Relationship task in the Person Management work area.

2.6.2.1 Reversing a Termination

You can reverse a termination at any time provided the same legal employer has not rehired the employee (or started a new placement for a contingent worker). This is because a person cannot have multiple employee or contingent worker relationships with the same legal employer at the same time. For example, consider that an employee was terminated on April 15, and the same legal employer rehired the employee on May 1. You want to reverse the termination on May 15, but you cannot do so because this causes the employee to have two concurrent work relationships with the same legal employer.

2.6.2.2 Restoring Employment Data

When you reverse a termination:

- Any work relationships and assignments previously ended are restored with the statuses prior to the termination.
- The Payroll Administrator is notified of the reversal of the termination, who then completes the relevant tasks required to reverse the payroll termination.
- If the termination caused reassignment of a primary work relationship or assignment, then the reversal of the termination restores their primary statuses as they were before the termination.

2.6.2.3 Validating Employment Data

When you reverse a termination, the elements assigned to the person prior to termination action being taken are restored. This means that any future-dated employment changes or employment actions occurring after the termination action are not restored. For example, consider that the employee's department was end-dated after his termination and all employees were relocated to another department. The reversal of the termination restores the end-dated department and not the new department. You must manually verify the validity of the employment data after reversing a termination and make any required changes.

2.6.2.4 User Access and Roles

When you reverse a termination:

- Any role, such as Beneficiary, which was automatically provisioned to the person at termination, is automatically deprovisioned.
- Both manually and automatically provisioned roles that were deprovisioned when the work relationship was terminated are automatically restored to the person.
- If the person's user account was disabled at termination, it is automatically re-enabled.

2.7 Manage Direct Reports

2.7.1 Managing Direct Reports: Explained

You can reassign existing direct line reports and other report types, such as project reports, resource reports, or mentees as of the same effective date. You use the Manage Direct Reports task available in the Person Management or the Person Gallery work areas to reassign direct reports. When you reassign direct reports, changes occur at the assignment level for each report.

2.7.1.1 Adding and Reassigning Direct Reports

You can add and reassign a manager's direct reports when you perform the following transactions:

- Change Location
- Change Manager
- Create Work Relationship
- Hire
- Promotion
- Transfer
- Termination

You can reassign and add all, or selected direct reports. You can select the same new manager for all the reports or a different new manager for each report.

For example, John Smith has been transferred to another department and his direct reports need to be reassigned. John has four direct line reports and two mentees. You want to reassign them to new line managers and mentor. .

You can reassign:

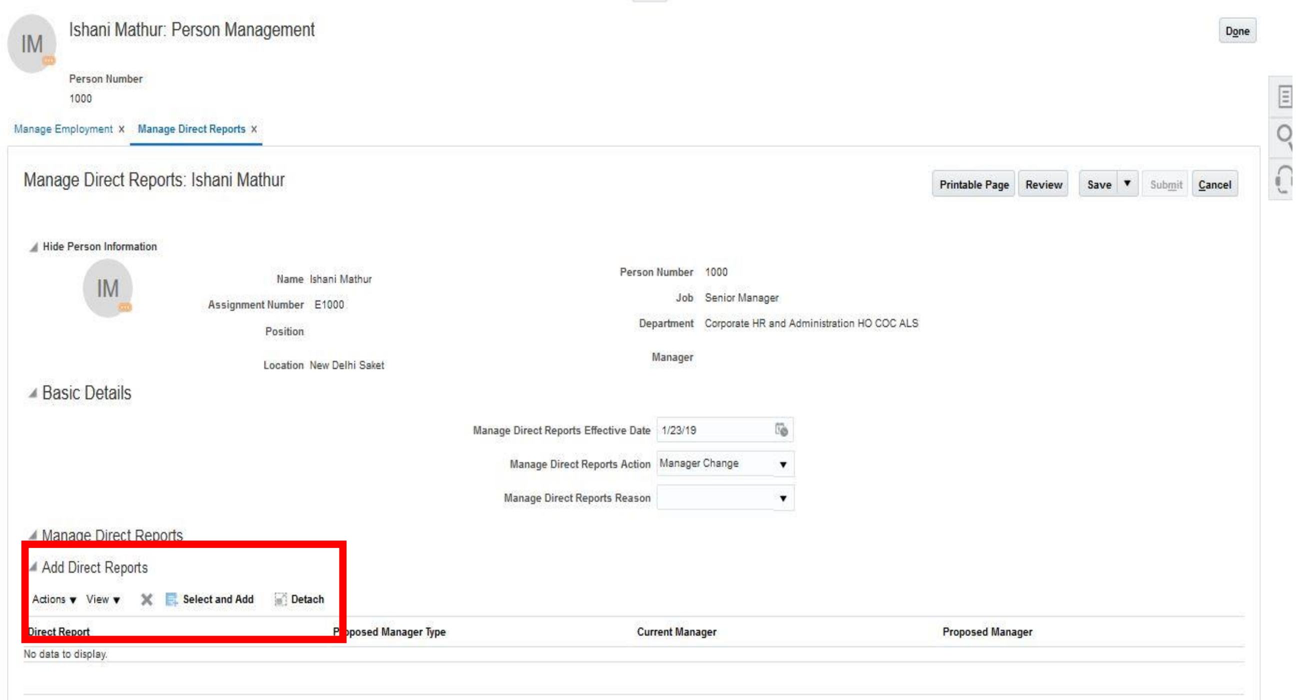
- Three of his reports to the same new line manager
- Fourth report to a different line manager
- Two of his mentees to a different mentor

Some of John's existing reports may still be reporting to him in his new department. If a majority of directs are being reassigned to the same new manager, you can select this manager as the proposed manager by default for all the reports, and later reassign selected directs to different managers.

When reassigning reports, you can't change the manager type. For example, if the direct is a line report for the current manager, you can reassign the direct only as a line report to a new manager, but not as a direct of other type, such as a project report or a mentee.

You use the Manage Direct Reports task to reassign reports on different effective dates. For example, Ishani Mathur’s date of transfer is 1st October, 2016 and you want to reassign his direct reports on 15th September, 2016. You reassign his direct reports with an effective date of 15th September, 2016 on the Manage Direct Reports page.

The newly added direct reports are approved when the parent transaction is approved.

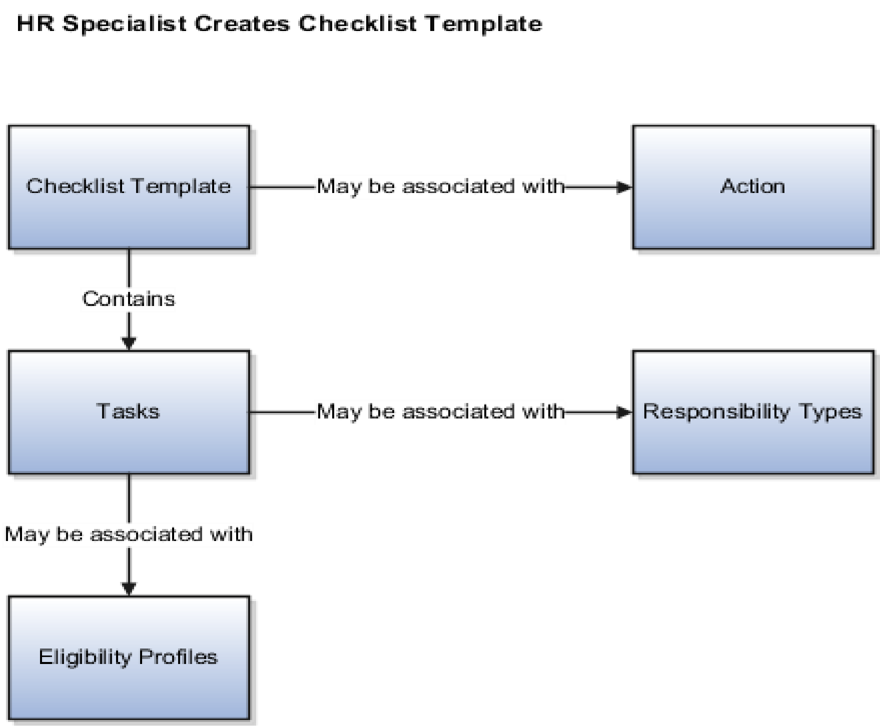


2.8 Manage Checklists

2.8.1 Checklist Components: How They Work Together

Use checklists for actions that require the completion of standard tasks, such as creating users or reassigning resources. For example, employee hire and termination actions typically require a number of people to complete standard tasks. You create and maintain tasks within a checklist template. You can create checklist templates that can be allocated to persons either automatically or manually. Create checklists using the Manage Checklist Templates task in the Setup and Maintenance work area.

The following figure shows the components of a checklist template and their major relationships. The Human Resources (HR) specialist creates the checklist template and assigns tasks and actions.



2.8.1.1 Action

Actions track changes in personal circumstances, for example, new hire, transfer, or termination. Link an action to a checklist template to allocate the checklist to persons automatically when they experience the action. The checklist template is still available for manual allocation, even if it is linked to an action.

2.8.1.2 Task

Creating, maintaining, and viewing tasks in templates can be performed by these roles:

- HR Specialists can create and maintain tasks in checklist templates and the allocated checklists.
- HR Analysts can only view the tasks.
- Managers can create and maintain tasks in their allocated checklists only.

You can enter the task duration and specify if the task is required, during task creation. When the task is allocated, the target end date is derived based on the duration entered. The checklist status is automatically set to Completed once all the required tasks are complete though you can manually change the status anytime.

2.8.1.3 Eligibility Profile

Link an eligibility profile to a checklist task to control whether that task appears in a specific allocated checklist. The task appears in the allocated checklist of a worker only if the worker matches the eligibility criteria.

2.8.1.4 Task Performer

Performer is the person carrying out the task. You can select a performer in one of the following ways:

- Specify the performer's areas of responsibility in the checklist template; during checklist allocation, the persons with the selected responsibilities are automatically assigned as performers for the tasks and notified of the assignment.
- Select the worker as the performer
- Select the worker's line manager as the performer
- Select the initiator as the performer

  The initiator is the person who initiated the transaction, such as the action itself or the manual checklist allocation.

Based on your selection, the performer names are derived and displayed for the tasks in the allocated checklist. You can update the performer details for a task in an allocated checklist until the time the task is allocated to a user.

2.8.1.5 Allocated Checklist

Allocated checklists are those that have been allocated to workers and contain the tasks relevant to them.

2.8.1.6 Task Owner

Task owner, generally synonymous with a manager, is the person responsible for ensuring task completion. Managers can view the tasks within an allocated checklist and monitor the status themselves or assign alternative owners for the tasks. If a performer is invalid (person derived as performer is terminated, for example) or not assigned, the task owner is designated as the performer by default. If a checklist is assigned automatically to a person based on an action, then the task owner is the user who performed the action on the person.

2.8.2 Checklist and Task Statuses: Explained

Managers can display the allocated checklists for their workers, and update the checklist and task statuses, using the Manage Allocated Checklists action in My Team - Smart Navigation window. Performers can view the checklist tasks assigned to them in their worklist, update the task status, and review to whom the task is allocated. Task owners can review task allocation details. These statuses aren't used to determine the checklist or task availability; they are for information purposes only.

The checklist and task statuses are:

- Initiated
- Completed
- Rejected
- Outstanding
- In Progress
- Suspended

2.8.2.1 Initiated

The status of the checklist and the tasks in the checklist is set automatically to initiated when you allocate the checklist.

2.8.2.2 Completed

Use this status to indicate that the checklist or task is complete. You can set the checklist status to completed only if all the required tasks are complete. The checklist status is set automatically to completed when you set the status of the last required task to completed. The task doesn't disappear from the allocated checklist or the worklist when you set the status to completed. You must delete it yourself if required.

2.8.2.3 Rejected

Use this status to reject a checklist, for example, because it was wrongly allocated to a person. Task owners or performers can use this status to decline ownership of a task, for example, if the task has been wrongly assigned to them.

2.8.2.4 Outstanding

Use this status to indicate that the checklist or task is not complete by the target date.

2.8.2.5 Other Task Statuses

Use the other statuses to record progress made against the checklist or tasks. For, example, use them to indicate that tasks are in progress or the checklist is suspended because of resources are unavailable.

2.9 Maintain Worker Directories

2.9.1 Person Spotlight: Explained

You can access public information about a person in the person spotlight. The information that you see in a worker's person spotlight depends on your security privileges. A worker can access and update private information such as addresses, payslips, benefits, compensation, and documents from the Personal Information work area.

You can access a worker's person spotlight when you click the person's name in the following pages:

- Directory Search Results
- My Team
- Team Talent
- Team Compensation

3 Line Manager Self-Service

Line managers can view detailed information of their subordinates based on the security configuration of their role. Additionally, they can perform actions on their team members. For example, line managers can:

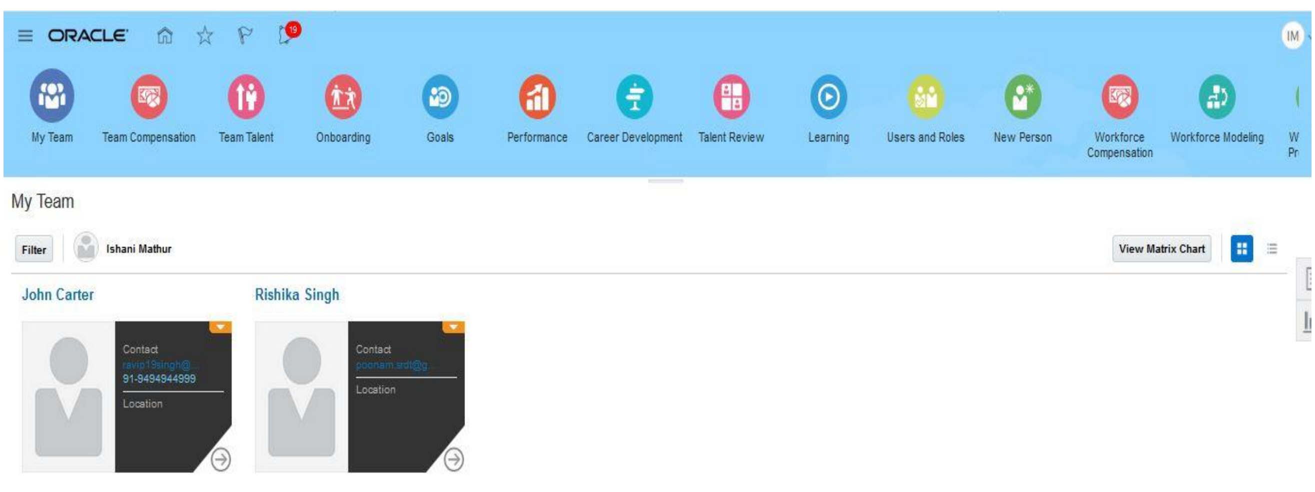
- Promote, transfer, or terminate workers.
- Manage workers' salary and compensation.
- Share worker information with third parties.
- Plan workers' careers.
- Specify goals for their workers.
- Enter feedback for workers.

3.1 My Team: Overview

You can access information about your workers and perform manager self-service actions using the My Team page in the My Team work area.

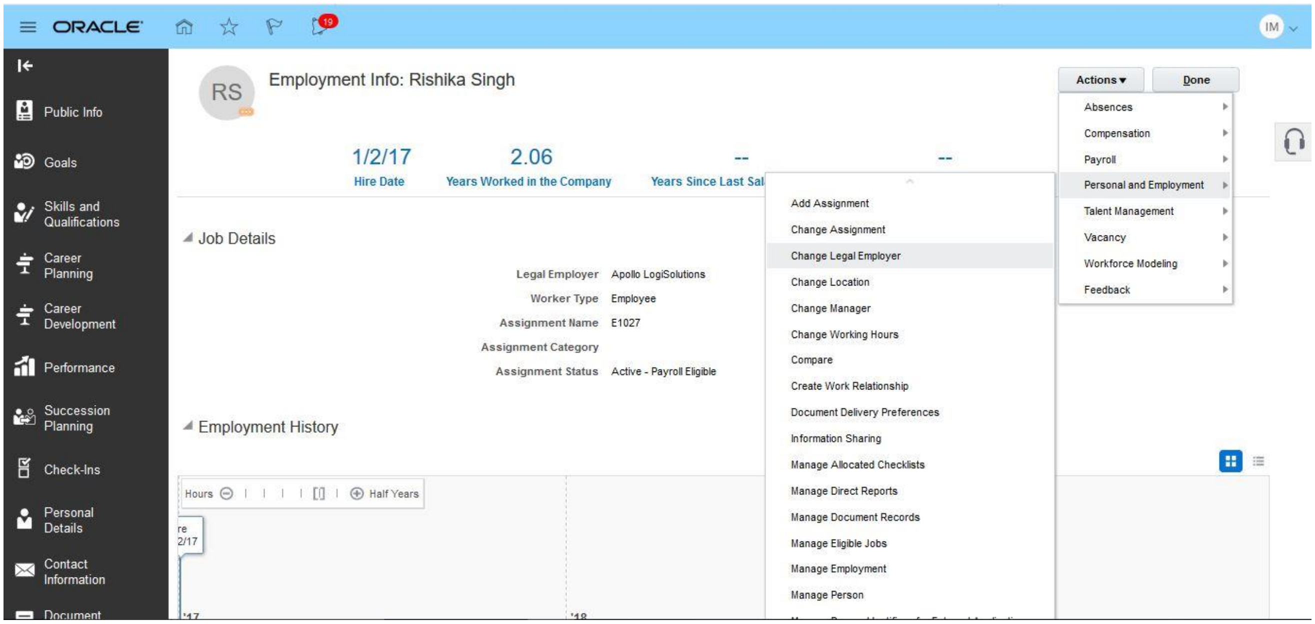
From the My Team page, you can

- View information about your direct and indirect reports



- Initiate actions for your workers

- Access reports and analytics



3.1.1 Worker Information

You can see more detailed information than is available in the public information page of a worker. You can view a worker's employment history, competencies, careers of interest, goals, performance, succession plans for a worker, salary and compensation details.

3.1.2 Actions

You can perform actions that are also available in the public person page. You can initiate actions including transfer, promotion, termination, location and manager change, compensation and salary adjustments, and share information about a worker with selected recipients.

3.1.3 Reports and Analytics

You can view the headcount and workforce mobility analytics for your team

3.2 Searching for People in the Directory: Explained

Use the directory, which you can access from the Home page, to search for people in your organization.

The directory shows people's public information. If you search for yourself, you can see more information and start self-service actions. For example, you can maintain your talent profile such as competencies and development goals, update your contacts, share information, and participate in social connections. If you're a manager, you can perform actions for your team members here, such as promoting them, sharing information with selected recipients, or providing them with roles.

From the directory, you can:

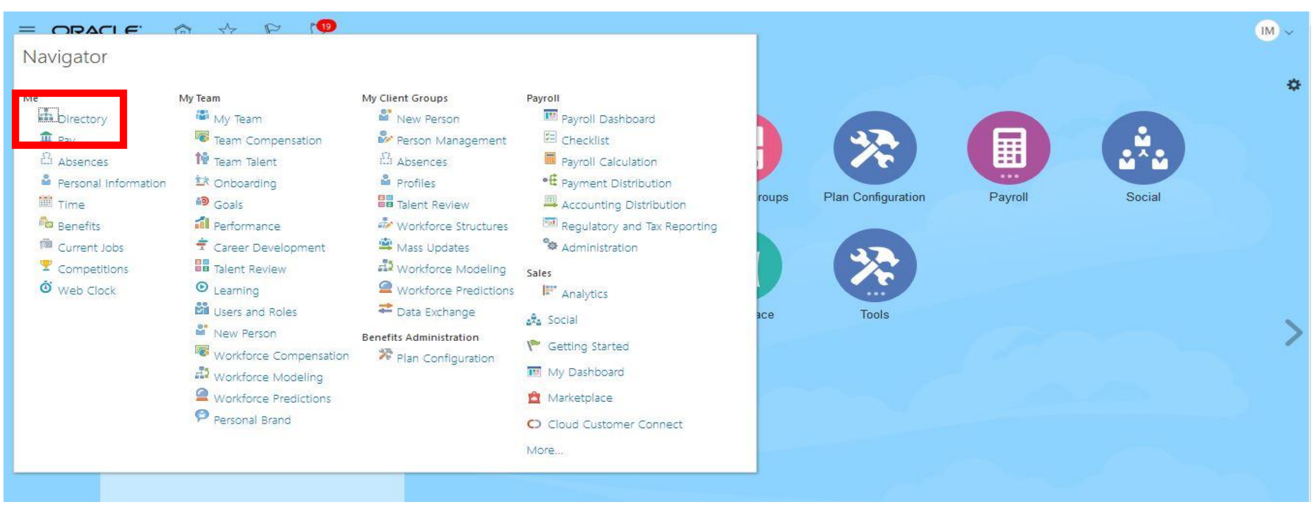
- Search for and select people in the search results, to view their public information.
- View a person in the organization chart, which is based on the line manager hierarchy defined in the person's assignment.

3.2.1 Directory Search

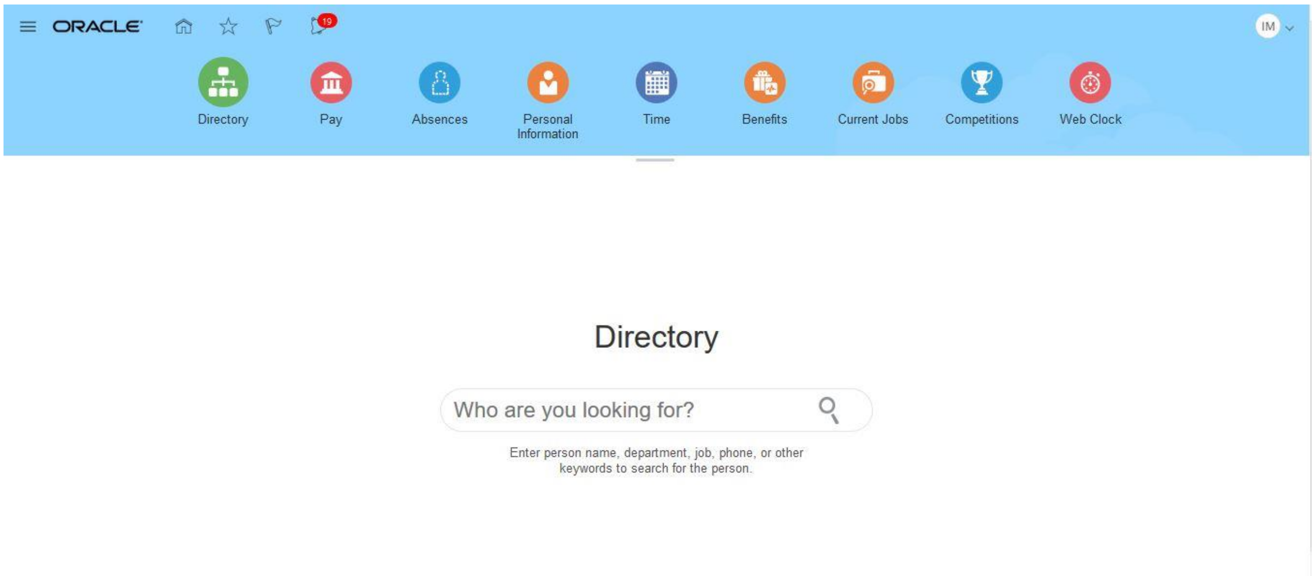
Directory search is based on keyword attributes of a person record. You can filter the search to get precise results.

The people you see in the search results and the details you see for those people depend on your security privileges. Anyone in the organization can access public information about people who are designated as public during security implementation. Human resource specialists and line managers can access more detailed information about people in their teams or for whom they are responsible.

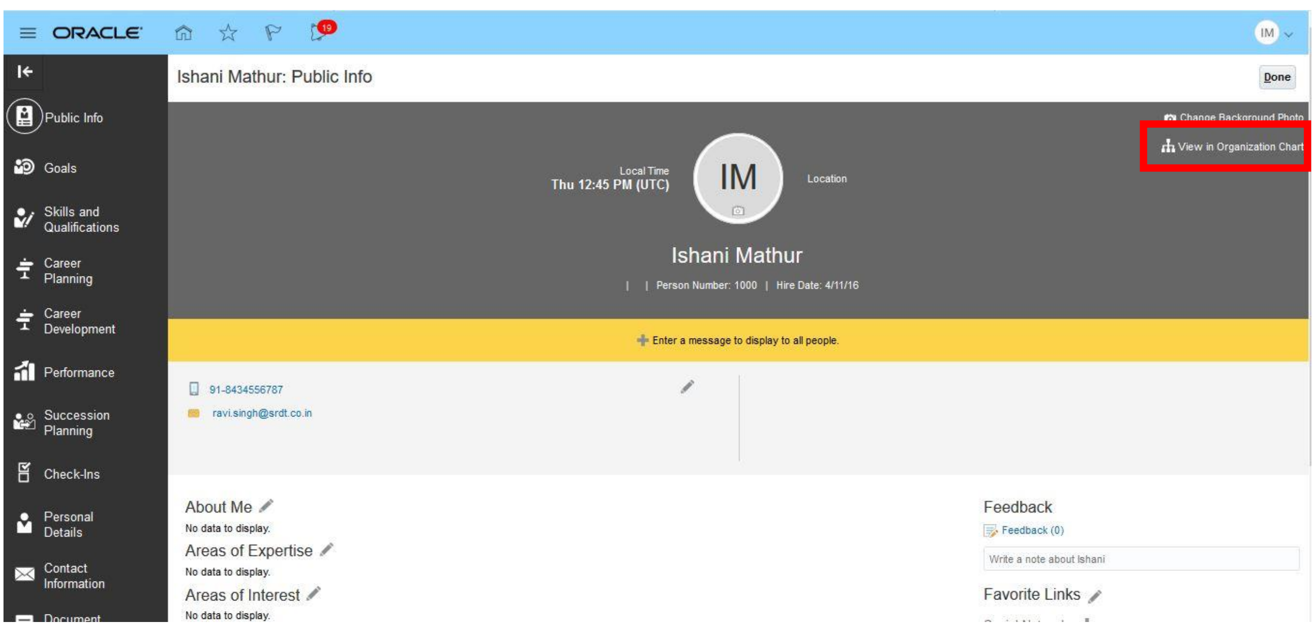
1. For the Directory Search, On the Home page, click **Navigator >Me>Directory**.



2. Then, Directory page will be opened and now you can search



3. Search for any person name like **Ishani Mathur** and now all the details will be opened for that particular.
4. You can also **View Organization Chart** for the person name searched.



5. Click on View Organization Chart button to view your hierarchy in the organization.

3.3 Pending Approval Transactions: Explained

Transactions may undergo an approval process before being applied to the database. A transaction typically passes through a chain of approvers, and remains in pending status until the final approver in the approval chain approves the transaction.

3.3.1 Viewing Pending Transactions

The Worklist: Notifications and Approvals region on your Welcome page displays your pending transactions, including transactions that you:

- Initiated
- Approved, but the transactions are still pending because one or more approvers in the approval chain haven't approved yet
- Returned to the previous approver
- Reviewed as a notification recipient

This list also includes transactions routed to any approval groups that you belong to, even though you may not have approved the transactions. You can edit a pending transaction and perform the same actions as those available in your worklist or notification summary. You can approve, reject, or return a transaction to the previous approver. Also, you can withdraw transactions that you have initiated. For example, you may want to withdraw a new hire transaction after initiating it, because of budget constraints.

3.3.2 Viewing Other Transactions

You can view transactions that you saved for later, and transactions that aren't pending with you anymore, such as you're approved and rejected transactions. You can suspend transactions that you have initiated or approved. For example, you may want to suspend a new hire transaction that you have approved, until the hiring policy changes are finalized. A suspended transaction remains inactive until you resume the transaction. The suspend and resume actions are available only to users having this role.

4 Employee Self-Service

Employees can view and update public information visible to others in their person spotlight. They can perform the following self-service actions:

- Update his/her image.
- Maintain their contact information such as phone number and email address.
- Add social networks they are subscribed to.
- Add their areas of interest and expertise.
- Add messages to display to all people.
- Manage their document records such as visas, licenses, and awards.
- Share information with others.

For all other self-service actions such as maintaining the address, and viewing benefits, payslips, and compensation, use the Personal Information work area.

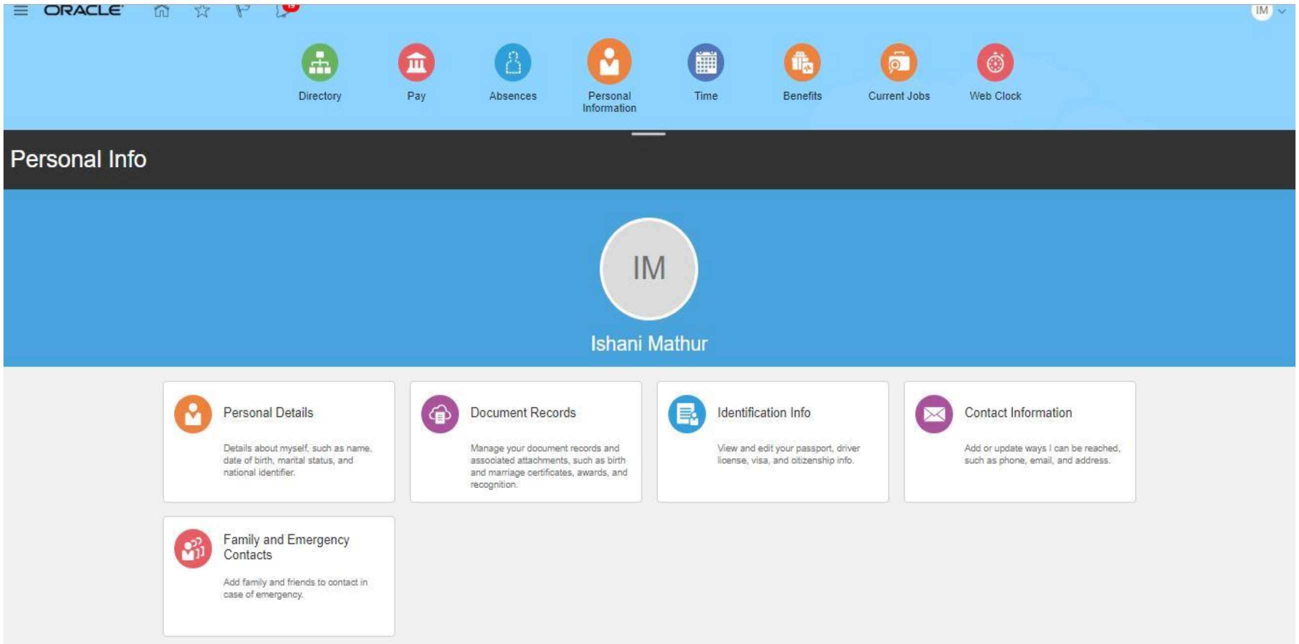
4.1 Reviewing Your Personal Information

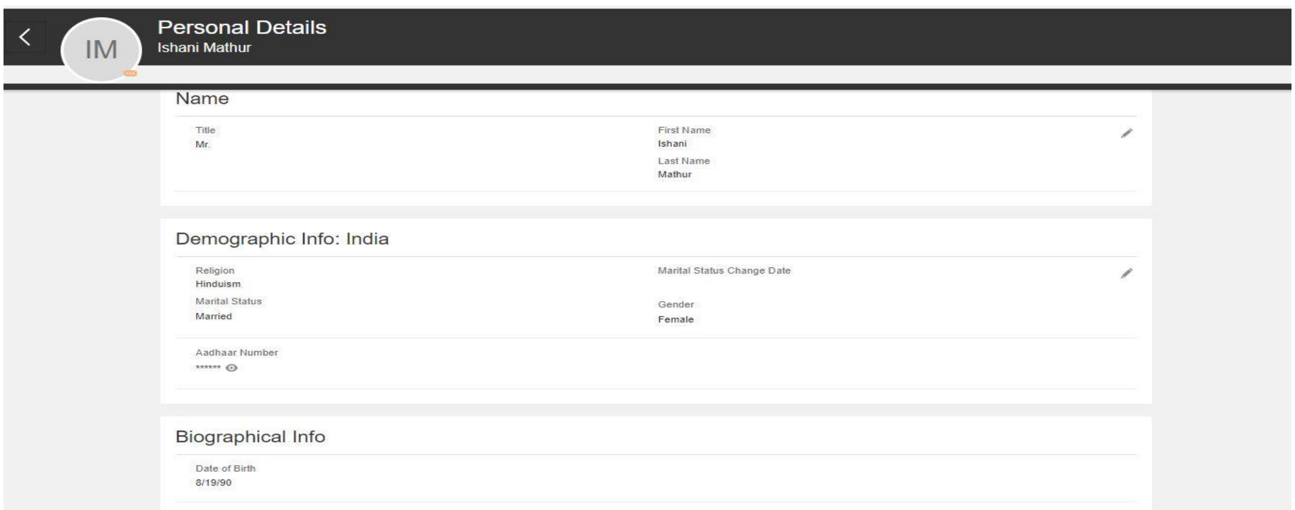
4.1.1 Procedure

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

To review and update your personal information:

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





4.1.2 Uploading My Photo: Procedure

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

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

To upload or update your photo:

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