

Oracle

Global Human Resources Cloud Using Global Human Resources

Release 12

This guide also applies to on-premises
implementations

Authors: Jyothi Meruva, Megan Wallace, Suzanne Kinkead, Hema Hardikar, Angela Brown, Lakshmi Venkat, Srinivas Vellikad, Phyllis Simons, Santosh Radhakrishnan

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

The business names used in this documentation are fictitious, and are not intended to identify any real companies currently or previously in existence.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Contents

Preface	i
1 Workforce Deployment Planning	1
Plan Workforce Deployment: Overview	1
Manage Departments, Divisions, and Other Organizations	1
Manage Locations	23
Define Collective Agreements	25
Manage Jobs and Positions	26
Manage Grades, Grade Rates, and Grade Ladders	34
2 Person Management	51
Manage Workforce Lifecycle: Overview	51
Add Person	51
Manage Personal Information	63
3 Roles Provisioning and Deprovisioning	79
Role Provisioning and Deprovisioning: Explained	79
FAQs for Role Provisioning and Deprovisioning	80
4 Employment Management	83
Manage Employment Information	83
Areas of Responsibility	99
Manage Work Schedule Assignment Administration	101
5 Employment Processes	111
Promote and Transfer Workers	111
Terminations	118
Manage Direct Reports	125
Manage Mass Updates	129



6	Hiring Management	135
	Hiring Manager Experience: Overview	135
	Hiring Activities: Overview	135
	Managing Requisitions: Explained	136
	Managing Candidates: Explained	136
	FAQs for Hiring Management	137
7	Base Pay	139
	Overview	139
	Calculating Full-Time Salary and Annualized Salary: Examples	139
	Editing Salaries in the Integrated Workbook: Procedure	142
	FAQs for Base Pay	144
8	Individual Compensation	145
	Overview	145
	Salary Growth Rate Calculations: Examples	145
	FAQs for Individual Compensation	146
9	Personal Contributions	149
	Overview	149
10	Workforce Records	151
	Manage Workforce Records: Overview	151
	Maintain Worker Directories	151
	FAQs for Manage Records Retention Program	160
	Manage Checklists	161
	Manage Competitions	167
	Networking at Work	169
11	Workforce Deployment Analysis	171
	Analyze Workforce Deployment: Overview	171
	Generate Workforce Deployment Intelligence	171
	FAQs for Evaluate Workforce Deployment Performance	184

12 Date Effectivity	187
Date Effectivity: Explained	187
Correcting Date-Effective Objects: Examples	188
Updating Date-Effective Objects: Examples	189
Effective Sequencing: Examples	190
Deleting Physical Records from Date-Effective Objects: Explained	191
Making Multiple Updates to Date-Effective Objects in One Day: Explained	192
FAQs for Date Effectivity	194


Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the [Oracle Accessibility Program](#).

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.

1 Workforce Deployment Planning

Plan Workforce Deployment: Overview

Use the Plan Workforce Deployment process to review workforce structures, and to revise your initial setup as your organization changes over time. For example, you may need to add new departments, create - jobs, or revise rates for grades. Using the tasks in this activity, you can review, revise, and create:

- Departments
- Divisions
- Disability organizations
- Organization trees
- Department trees
- Locations
- Jobs
- Positions
- Grades
- Grade rates
- Grade ladders

You can also use this activity to revise payroll statutory units, legal employers, and tax reporting units. However, to create them you must access the Manage Legal Entity task in the Setup and Maintenance work area to first create a legal entity.

Manage Departments, Divisions, and Other Organizations

Enterprise Structures: Overview

Oracle Fusion Applications have been designed to ensure your enterprise can be modeled to meet legal and management objectives. The decisions about your implementation of Oracle Fusion Applications are affected by your:

- Industry
- Business unit requirements for autonomy
- Business and accounting policies
- Business functions performed by business units and optionally, centralized in shared service centers
- Locations of facilities

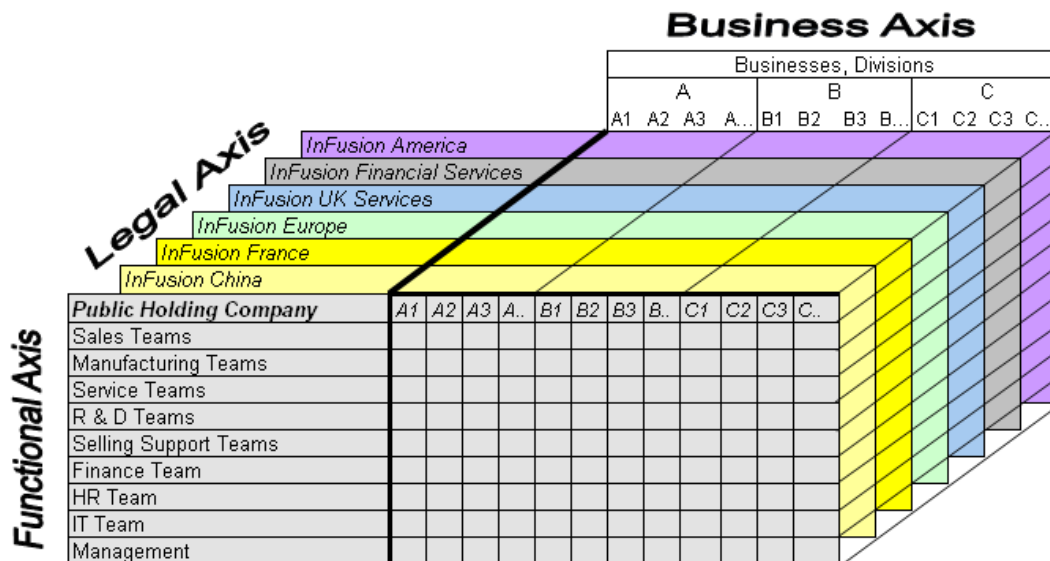
Every enterprise has three fundamental structures, that describe its operations and provide a basis for reporting.

- Legal
- Managerial
- Functional

In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments

Aligned these structures with your strategic objectives.



Legal Structure

The figure above shows a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.

Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies.

A legally recognized entity can own and trade assets and employ people in the jurisdiction in which the entity is registered. When granted these privileges, legal entities are also assigned responsibilities to:

- Account for themselves to the public through statutory and external reporting.
- Comply with legislation and regulations.
- Pay income and transaction taxes.
- Process value added tax (VAT) collection on behalf of the taxing authority.

Many large enterprises isolate risk and optimize taxes by incorporating subsidiaries. They create legal entities to facilitate legal compliance, segregate operations, optimize taxes, complete contractual relationships, and isolate risk. Enterprises use legal entities to establish their enterprise's identity under the laws of each country in which their enterprise operates.

In the figure above:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.
- Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

Successfully managing multiple businesses requires that you segregate them by their strategic objectives, and measure their results. Although related to your legal structure, the business organizational hierarchies do not have to be reflected directly in the legal structure of the enterprise. The management structure can include divisions, subdivisions, lines of business, strategic business units, profit, and cost centers. In the figure above, the management structure is shown on the Business Axis. In Oracle Fusion Applications, the management structure is implemented using divisions and business units as well as being reflected in the chart of accounts.

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure above. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development and selling, general, and administrative expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Designing an Enterprise Configuration: Example

This example illustrates how to set up an enterprise based on a global company operating mainly in the US and the UK with a single primary industry.

Scenario

InFusion Corporation is a multinational enterprise in the high technology industry with product lines that include all the components that are required to build and maintain air quality monitoring systems for homes and businesses. Its primary locations are in the US and the UK, but it has smaller outlets in France, Saudi Arabia, and the United Arab Emirates (UAE).

Enterprise Details

In the US, InFusion employs 400 people and has company revenue of 120 million US dollars.. Outside the US, InFusion employs 200 people and has revenue of 60 million US dollars.

Analysis

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, to employ and pay its workers in those countries.

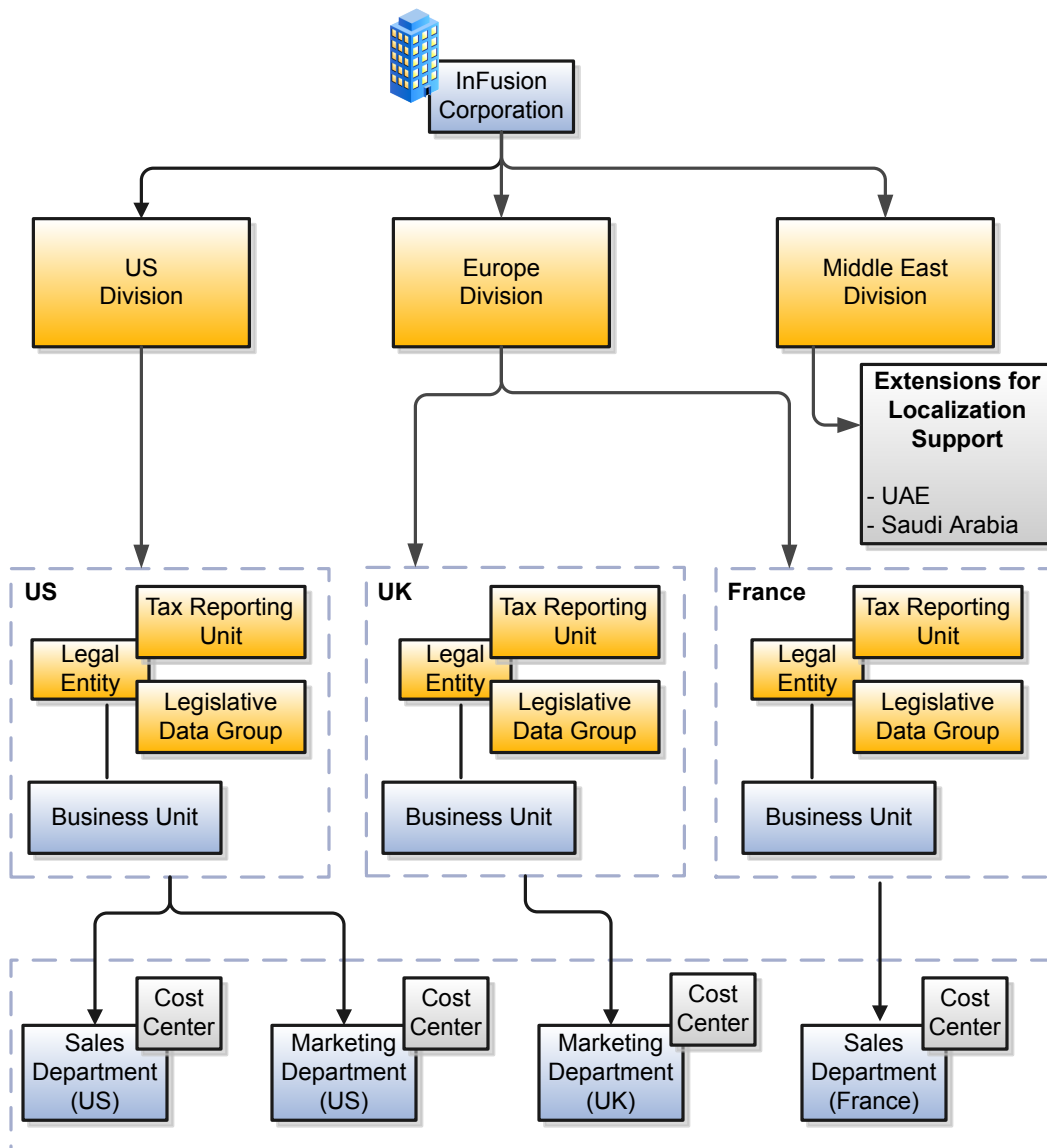
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration

Based on this analysis, InFusion requires an enterprise with multiple divisions, ledgers, legal employers, payroll statutory units, tax reporting units, legislative data groups, departments, cost centers, and business units.

This figure illustrates the enterprise configuration that results from the analysis of InFusion Corporation.



Related Topics

- Modeling Your Enterprise Management Structure in Oracle Fusion: Example

Enterprise: Explained

An enterprise is a collection of legal entities under common control and management.

Enterprise Defined

When implementing Oracle Fusion Applications you operate within the context of an enterprise that has already been created in the application for you. This is either a predefined enterprise or an enterprise that has been created in the application by a system administrator. An enterprise organization captures the name of the deploying enterprise and the location of the headquarters. In Oracle Fusion Applications, an organization classified as an enterprise is defined before defining any other organizations in the HCM Common Organization Model. All other organizations are defined as belonging to an enterprise.

Divisions: Explained

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results.

Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies do not reflect directly the legal structure of the enterprise. The management entities and structure can include:

- Divisions and subdivisions
- Lines of business
- Other strategic business units
- Their own revenue and cost centers

These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

A division refers to a business-oriented subdivision within an enterprise, in which each division organizes itself differently to deliver products and services or address different markets. A division can operate in one or more countries, and can be many companies or parts of different companies that are represented by business units.

A division is a profit center or grouping of profit and cost centers, where the division manager is responsible for achieving business goals including profits. A division can be responsible for a share of the company's existing product lines or for a separate business. Managers of divisions may also have return on investment goals requiring tracking of the assets and liabilities of the division. The division manager generally reports to a top corporate executive.

By definition a division can be represented in the chart of accounts. Companies can use product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise. This may coincide with the management segment used in segment reporting.

Oracle Fusion Applications supports a qualified management segment and recommends that you use this segment to represent your hierarchy of business units and divisions. If managers of divisions have return on investment goals, make the management segment a balancing segment. Oracle Fusion applications permit up to three balancing segments. The values of the management segment can be business units that roll up in a hierarchy to report by division.

Historically, divisions were implemented as a node in a hierarchy of segment values. For example, Oracle E-Business Suite has only one balancing segment, and often the division and legal entity are combined into a single segment where each value stands for both division and legal entity.

Use of Divisions in Oracle Fusion Human Capital Management (HCM)

Divisions are used in HCM to define the management organization hierarchy, using the generic organization hierarchy. This hierarchy can be used to create organization-based security profiles.

Cost Centers and Departments: Explained

The two important components to be considered in designing your enterprise structure are cost centers and departments.

A cost center represents the smallest segment of an organization for which you collect and report costs. A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager and has one or more workers assigned to it.

Cost Centers

A cost center represents the destination or function of an expense rather than the nature of the expense which is represented by the natural account. For example, a sales cost center indicates that the expense goes to the sales department.

A cost center is generally attached to a single legal entity. To identify the cost centers within a chart of accounts structure use one of these two methods:

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach requires defining more cost center values.
- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values. The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

Departments

A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager. For example, although the manager may change, the objectives do not change. Departments have one or more workers assigned to them.

A manager of a department is typically responsible for:

- Controlling costs within their budget
- Tracking assets used by their department
- Managing employees, their assignments, and compensation

The manager of a sales department may also be responsible for meeting the revenue targets.

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Applications, departments are defined and classified as Department organizations. Oracle Fusion Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

The granularity of cost centers and their relationship to departments varies across implementations. Cost center and department configuration may be unrelated, identical, or consist of many cost centers tracking the costs of one department.

Disability Organizations: Explained

Set up disability organizations to identify the external organizations with which workers with disabilities are registered. You manage disability organizations in the Workforce Structures work area. Disability organizations can also assess the degree to which a person is affected by the disability.

Disability organizations:

- Provide information and support to people with disabilities. The Royal National Institute of Blind People is an example of a disability organization.
- Can also assess the degree to which the disability affects a person

Disability Organizations and Person Records

When you create person records for workers with disabilities, you select the disability organization with which the worker is registered, identify the registration and expiration dates, and enter any other descriptive or legislative information that pertains to the disability.

To create disability organizations as TCA parties, use the Manage Third Parties task from the Setup and Maintenance work area, and select the disability organization party usage code.

Related Topics

- [Person Records: Explained](#)
- [Creating Third Parties: Points to Consider](#)

Using Single or Multiple Classifications for an Organization: Points to Consider

Organization classifications define the purpose of the organization, whether it's a department, a division, or a legal entity. In some enterprises, organization classifications overlap, which means that the same organization can be assigned multiple classifications. For example, one organization within an enterprise might be both a project organization and a department. The classifications of organizations vary according to business objectives, legal structure, industry, company culture, size and type of growth. You can create organizations in Oracle Fusion with one or more classifications to reflect your enterprise structure.

Defining an Organization with One Classification

Define each organization in your enterprise as a separate organization with a single classification to reflect your enterprise structure and provide flexibility for expansion. The advantage of setting up separate organizations is the ability to add further organizations to expand the enterprise easily. For example, if your enterprise acquires another company which has a different line of business in a country in which you employ people, you can create a division, a legal entity, and additional departments. Classify the new legal entity as a legal employer and payroll statutory unit for the company's payroll tax and social insurance.

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, use an organization within the Oracle Sales Cloud applications as a department that employs salespeople and classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, create a legal entity for each country using the Manage Legal Entity task. Then use the Manage Departments task to classify the legal entity as a department.

Related Topics

- [Modeling Your Financial Reporting Structure in Oracle Fusion: Example](#)

Legal Entities: Explained

A legal entity is a recognized party with rights and responsibilities given by legislation.

Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
- Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

- Facilitating local compliance
- Minimizing the enterprise's tax liability
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:

- Own the assets of the enterprise
- Record sales and pay taxes on those sales
- Make purchases and incur expenses
- Perform other transactions

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities' operations based on different jurisdictions' requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies do not have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise's reporting requirements in different currency.

A legal entity can represent all or part of your enterprise's management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

Legal Entity in Oracle Fusion: Points to Consider

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers. These registers are part of the Oracle Fusion Trading Community Architecture.

When your legal entities are trading with each other, represent them as legal entities and as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

Several decisions you should consider when you create legal entities.

- The importance of using legal entity on transactions
- Legal entity and its relationship to business units
- Legal entity and its relationship to divisions
- Legal entity and its relationship to ledgers
- Legal entity and its relationship to balancing segments
- Legal entity and its relationship to consolidation rules
- Legal entity and its relationship to intercompany transactions
- Legal entity and its relationship to worker assignments and legal employer
- Legal entity and payroll reporting
- Legal reporting units

The Importance of Using Legal Entities on Transactions

All of the assets of the enterprise are owned by individual legal entities. Oracle Fusion Financials allow your users to enter legal entities on transactions that represent a movement in value or obligation.

For example, a sales order creates an obligation on the legal entity that books the order to deliver the goods on the acknowledged date. The creation also creates an obligation on the purchaser to receive and pay for those goods. Under contract law in most countries, damages can be sought for both:

- Actual losses, putting the injured party in the same state as if they had not entered into the contract.

- What is called loss of bargain, or the profit that would have made on a transaction.

In another example, if you revalued your inventory in a warehouse to account for raw material price increases, the revaluation and revaluation reserves must be reflected in your legal entity's accounts. In Oracle Fusion Applications, your inventory within an inventory organization is managed by a single business unit and belongs to one legal entity.

Legal Entity and Its Relationship to Business Units

A business unit can process transactions on behalf of many legal entities. Frequently, a business unit is part of a single legal entity. In most cases, the legal entity is explicit on your transactions. For example, a payables invoice has an explicit legal entity field. Your accounts payables department can process supplier invoices on behalf of one or many business units.

In some cases, your legal entity is inferred from your business unit that is processing the transaction. For example, Business Unit ACM UK has a default legal entity of InFusion UK Ltd. When a purchase order is placed in ACM UK, the legal entity InFusion UK Ltd is legally obligated to the supplier. Oracle Fusion Procurement, Oracle Fusion Project Portfolio Management, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.<

Legal Entity and Its Relationship to Divisions

The division is an area of management responsibility that can correspond to a collection of legal entities. If wanted, you can aggregate the results for your divisions by legal entity or by combining parts of other legal entities. Define date-effective hierarchies for your cost center or legal entity segment in your chart of accounts to facilitate the aggregation and reporting by division. Divisions and legal entities are independent concepts.

Legal Entity and Its Relationship to Ledgers

One of your major responsibilities is to file financial statements for your legal entities. Map legal entities to specific ledgers using the Oracle Fusion General Ledger Accounting Configuration Manager. Within a ledger, you can optionally map a legal entity to one or more balancing segment values.

Legal Entity and Its Relationship to Balancing Segments

Oracle Fusion General Ledger supports up to three balancing segments. Best practices recommend one segment represents your legal entity to ease your requirement to account for your operations to regulatory agencies, tax authorities, and investors. Accounting for your operations means you must produce a balanced trial balance sheet by legal entity. If you account for many legal entities in a single ledger, you must:

1. Identify the legal entities within the ledger.
2. Balance transactions that cross legal entity boundaries through intercompany transactions.
3. Decide which balancing segments correspond to each legal entity and assign them in Oracle Fusion General Ledger Accounting Configuration Manager. Once you assign one balancing segment value in a ledger, then all your balancing segment values must be assigned. This recommended best practice facilitates reporting on assets, liabilities, and income by legal entity.

Represent your legal entities by at least one balancing segment value. You may represent it by two or three balancing segment values if more granular reporting is required. For example, if your legal entity operates in multiple jurisdictions in Europe, you might define balancing segment values and map them to legal reporting units. You can represent a legal entity with more than one balancing segment value. Do not use a single balancing segment value to represent more than one legal entity.

In Oracle Fusion General Ledger, there are three balancing segments. You can use separate balancing segments to represent your divisions or strategic business units to enable management reporting at the balance sheet level for each. This solution is used to empower your business unit and divisional managers to track and assume responsibility for their asset utilization or return on investment. Using multiple balancing segments is also useful when you know at the time of implementation that you are disposing of a part of a legal entity and want to isolate the assets and liabilities for that entity.

Implementing multiple balancing segments requires every journal entry that is not balanced by division or business unit, to generate balancing lines. You cannot change to multiple balancing segments after you begin using the ledger because your historical data is not balanced by the new balancing segments. Restating historical data must be done at that point.

If your enterprise regularly spins off businesses or holds managers accountable for utilization of assets, identify the business with a balancing segment value. If you account for each legal entity in a separate ledger, no requirement exists to identify the legal entity with a balancing segment value.

While transactions that cross balancing segments don't necessarily cross legal entity boundaries, all transactions that cross legal entity boundaries must cross balancing segments. If you make an acquisition or are preparing to dispose of a portion of your enterprise, you may want to account for that part of the enterprise in its own balancing segment even if the portion is not a separate legal entity. If you do not map legal entities sharing the same ledger to balancing segments, you cannot distinguish them using intercompany functionality or track individual equity.


Legal Entity and Its Relationship to Consolidation Rules

In Oracle Fusion Applications you can map legal entities to balancing segments and then define consolidation rules using your balancing segments. You are creating a relationship between the definition of your legal entities and their role in your consolidation.

Legal Entity and Its Relationship to Intercompany Transactions

Use Oracle Fusion Intercompany feature to create intercompany entries automatically across your balancing segments. Intercompany processing updates legal ownership within the enterprise's groups of legal entities. Invoices or journals are created as needed. To limit the number of trading pairs for your enterprise, set up intercompany organizations and assign them to your authorized legal entities. Define processing options and intercompany accounts to use when creating intercompany transactions and to assist in consolidation elimination entries. These accounts are derived and automatically entered on your intercompany transactions based on legal entities assigned to your intercompany organizations.

Intracompany trading, in which legal ownership isn't changed but other organizational responsibilities are, is also supported. For example, you can track assets and liabilities that move between your departments within your legal entities by creating departmental level intercompany organizations.

 **Tip:** In the Oracle Fusion Supply Chain applications, you can model intercompany relationships using business units, from which legal entities are derived.

Legal Entity and Its Relationship to Worker Assignments and Legal Employer

Legal entities that employ people are called legal employers in the Oracle Fusion Legal Entity Configurator. You must enter legal employers on worker assignments in Oracle Fusion HCM.

Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance for your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Related Topics

- [Creating Legal Entities in the Enterprise Structures Configurator: Points to Consider](#)

Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together

When you set up legal entities, you can identify them as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). Depending on how your organization is structured, you may have only one legal entity that is also a payroll statutory unit and a legal employer, or you may have multiple legal entities, payroll statutory units, and legal employers.

Legal Employers and Payroll Statutory Unit

Payroll statutory units enable you to group legal employers so that you can perform statutory calculations at a higher level, such as for court orders or for United Kingdom (UK) statutory sick pay. In some cases, a legal employer is also a payroll statutory unit. However, your organization may have several legal employers under one payroll statutory unit. A legal employer can belong to only one payroll statutory unit.

Payroll Statutory Units and Tax Reporting Units

Payroll statutory units and tax reporting units have a parent-child relationship, with the payroll statutory unit being the parent.

Tax Reporting Units and Legal Employers

Tax reporting units are indirectly associated with a legal employer through the payroll statutory unit. One or more tax reporting units can be used by a single legal employer, and a tax reporting unit can be used by one or more legal employers. For example, assume that a single tax reporting unit is linked to a payroll statutory unit. Assume also that two legal employers are associated with this payroll statutory unit. In this example, both legal employers are associated with the single tax reporting unit.

Use the Manage Legal Reporting Unit HCM Information task to designate an existing legal reporting unit as a tax reporting unit. If you create a new legal reporting unit that belongs to a legal employer (that is not also a payroll statutory unit), you select a parent payroll statutory unit and then, when you run the Manage Legal Reporting Unit HCM Information task, you designate it as a tax reporting unit and select the legal employer.

Legislative Data Groups: Explained

Legislative data groups are a means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

Payroll-related information, such as elements, is organized by legislative data groups. Each legislative data group:

- Marks a legislation in which payroll is processed.
- Is associated with a legislative code, currency, and its own cost allocation key flexfield structure.
- Is a boundary that can share the same set up and still comply with the local laws.
- Can span many jurisdictions as long as they are within one country.
- Can contain many legal entities that act as payroll statutory units.

HCM Organization Models: Examples

These examples illustrate different models for human capital management (HCM) organizations that include a legislative data group (LDG).

The example includes LDGs, which aren't organization classification, to show how to partition payroll data by associating them with a payroll statutory unit.

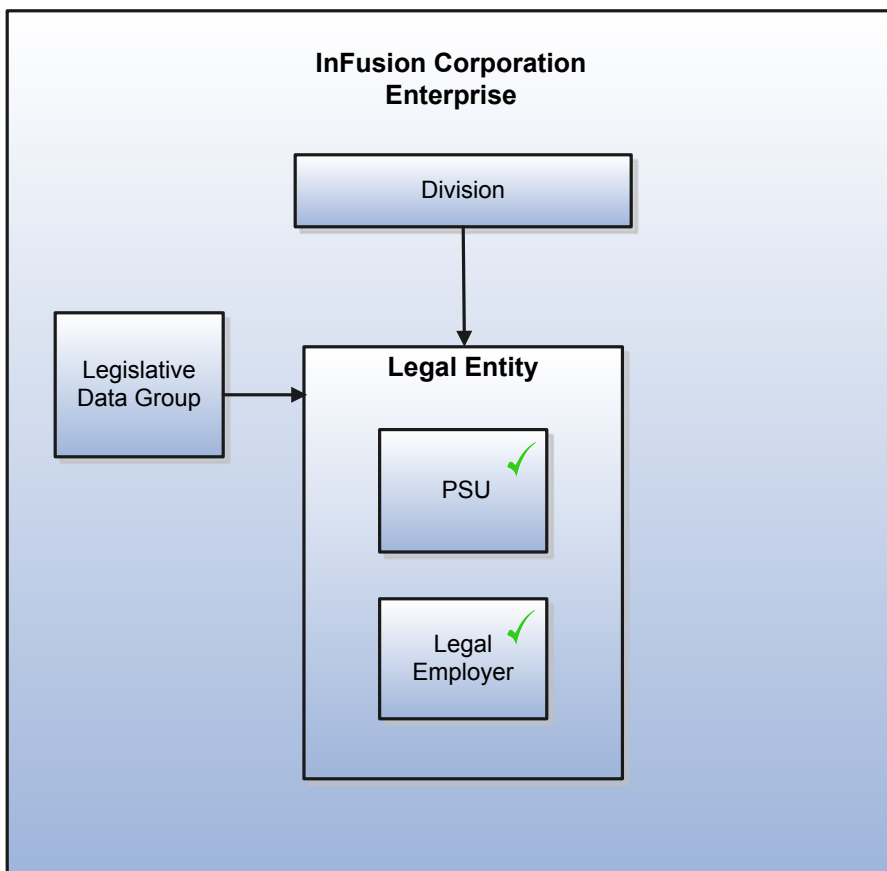
Simple Configuration

This example illustrates a simple configuration that does not include any tax reporting units.

Note the following:

- The legal employer and payroll statutory units are the same, sharing the same boundaries.
- Reporting can only be done at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as these countries report at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity, which is both a payroll statutory unit and a legal employer.



Multiple Legal Employers and Tax Reporting Units

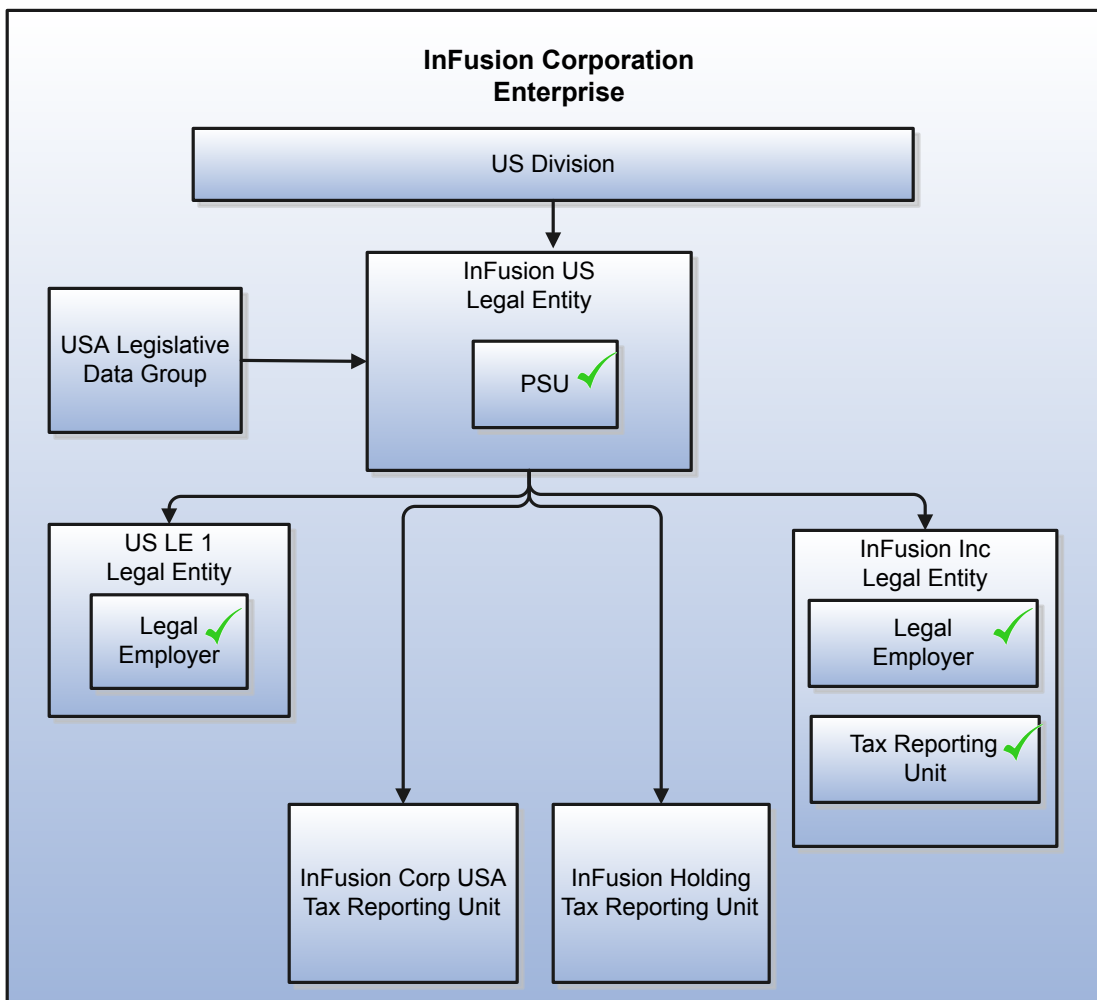
This example illustrates a more complex configuration. In this enterprise, you define one legal entity, InFusion US as a payroll statutory unit with two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit. Tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit.

The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately by one of the following:

- Payroll statutory unit
- Legal employer
- Tax reporting unit

This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US.

This figure illustrates an enterprise that has one payroll statutory unit and multiple legal employers and tax reporting units.

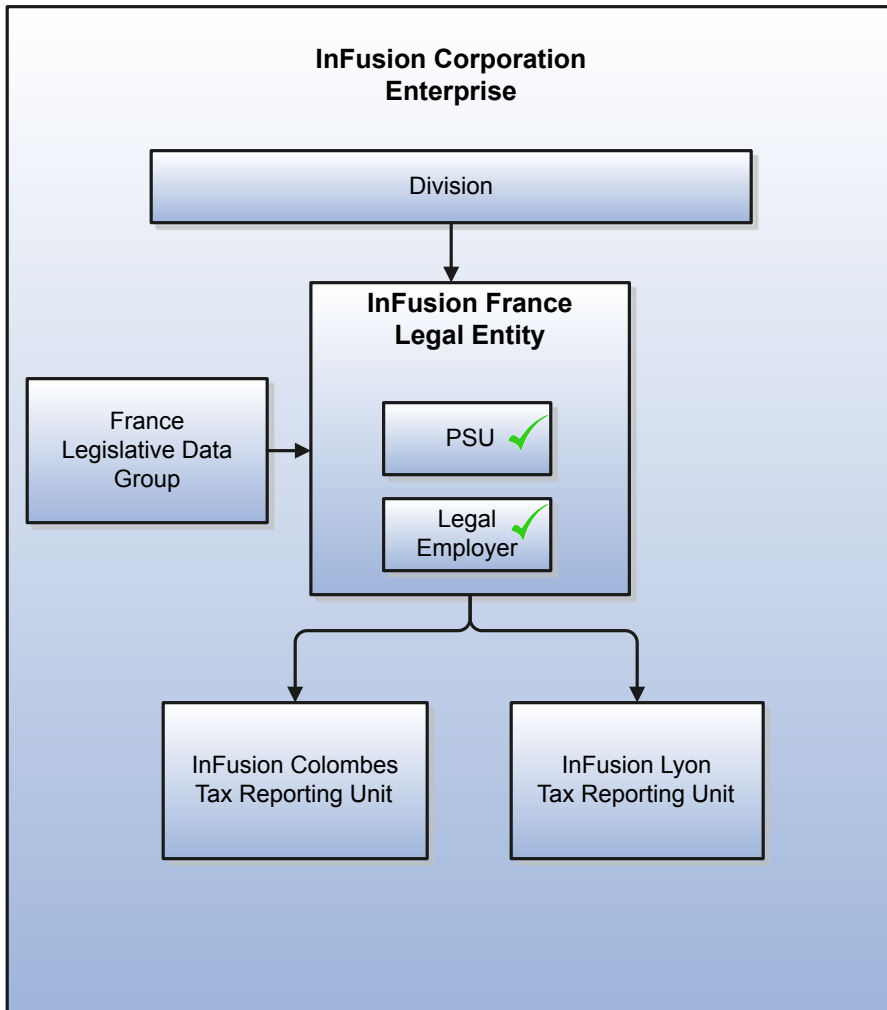


One Payroll Statutory Unit and Two Tax Reporting Units

This model makes no distinction between a legal employer and a payroll statutory unit. You define tax reporting units as subsidiaries to the legal entity.

In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting. Statutory reporting boundaries are the same for both payroll and HR management. An example of a country that might use this model is France.

This figure illustrates an example of an organization with one legal entity. The legal entity is both a legal employer and a payroll statutory unit and that has two tax reporting units.



One Payroll Statutory Unit with Several Tax Reporting Units

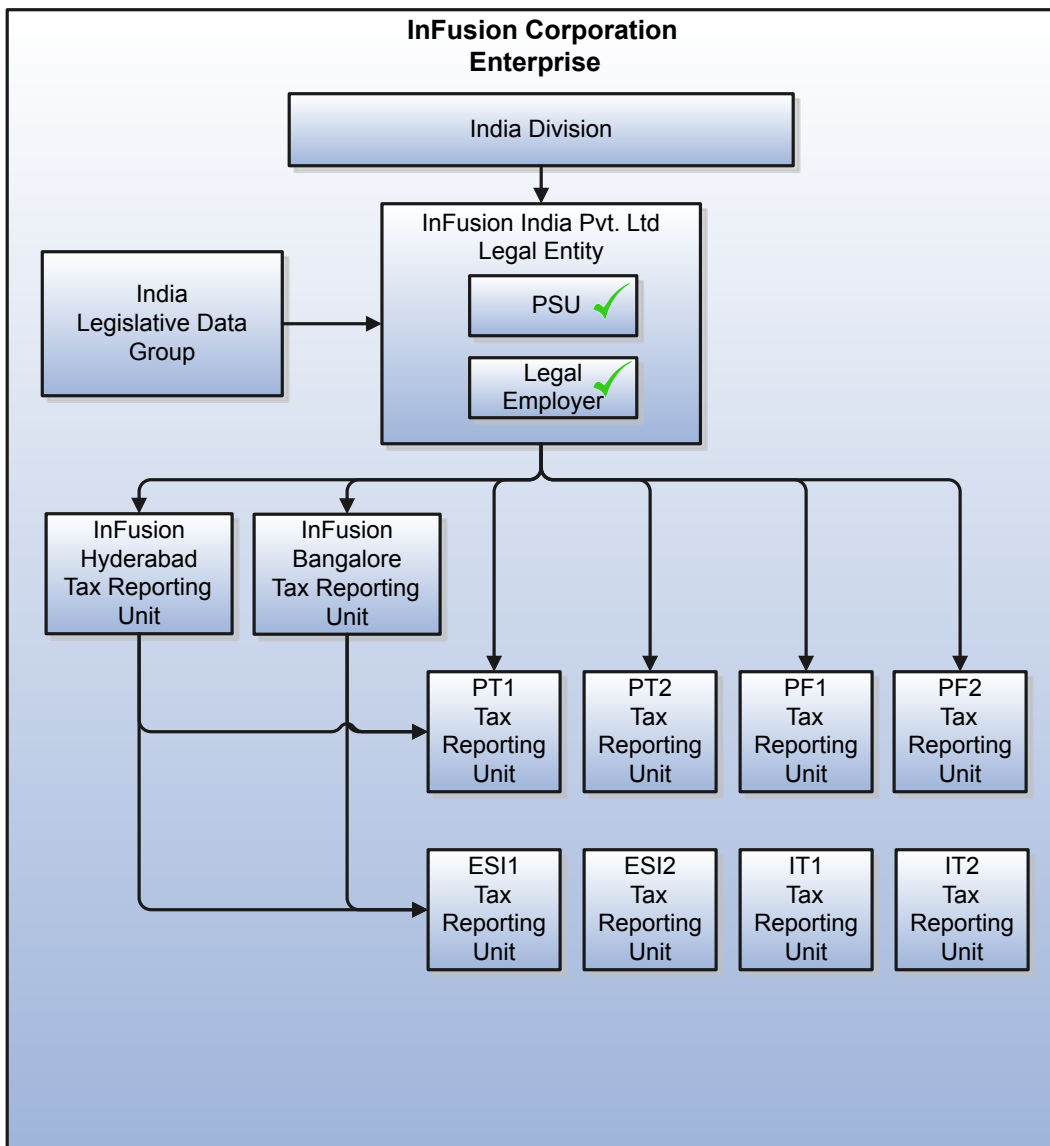
In this model, the enterprise has one legal entity. Legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn't typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required

An example of a country that might use this model is India.

This figure illustrates an enterprise with one legal entity that is a payroll statutory unit and a legal employer. The tax reporting units are independent from the legal employer.



Multiple Payroll Statutory Units with Several Tax Reporting Units

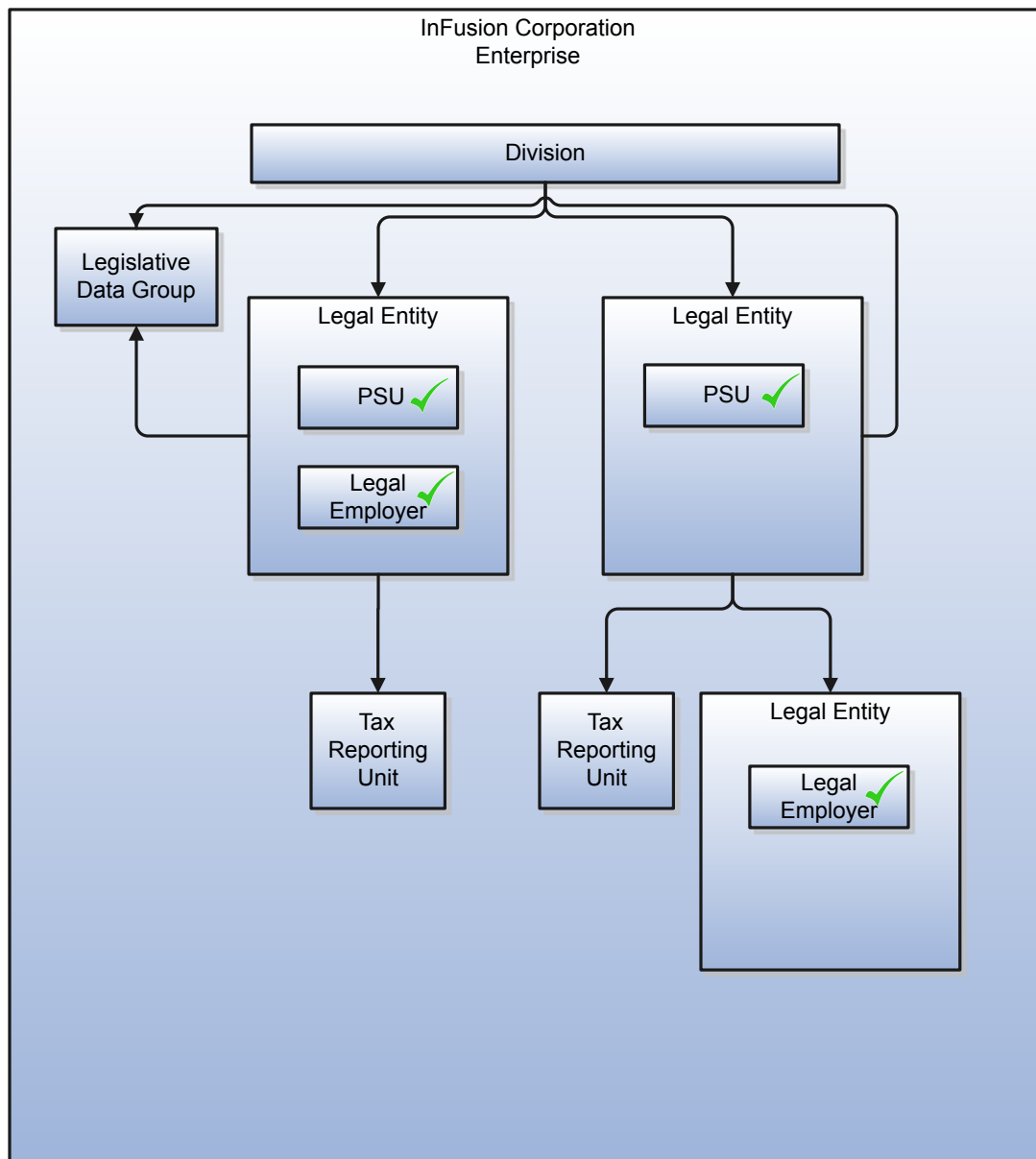
In this model, the enterprise has two legal entities. The legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn't typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required

An example of a country that might use this model is the United Kingdom (UK).

This figure illustrates an enterprise with two legal entities, and legal employers and tax reporting units are independent from each other.



Oracle Fusion HCM Trees: Explained

Oracle Fusion trees are graphical representations of hierarchical data such as the structure of your organization. You manage trees in the Workforce Structures work area.

Oracle Fusion Human Capital Management (HCM) provides predefined tree structures for department, organization, position, and geography trees.

Note the following:

- You cannot change the predefined HCM tree structures.
- With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree.

For all HCM tree types, however, only one version of each tree can be active at one time.

Department Trees

Using the predefined tree structure for a department tree, you can create multiple department trees and then create multiple versions of each tree to build hierarchical representations of the departments within your organization. You can secure data by using department trees in an organization security profile.

Note the following:

- The top node of the tree is a department, and all of the child nodes are also departments.
- You can have only one top-level node for a department tree.
- You can't add a department as a node more than one time in the same tree version.

Organization Trees

If you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise structure, you can automatically create a default organization tree, with the following:

- Ultimate holding company as the first node
- Divisions and country holding companies as the second level
- Legal employers as the third level

You can modify the organization tree, and create additional organization trees. If you do not use the Enterprise Structures Configurator, you can create organization trees based on the predefined organization tree structure. In an organization tree, you can select any type of organization for the top node and for the child nodes, but have only one top-level node.

You can secure HCM data using an organization tree, to identify organizations in an organization security profile.

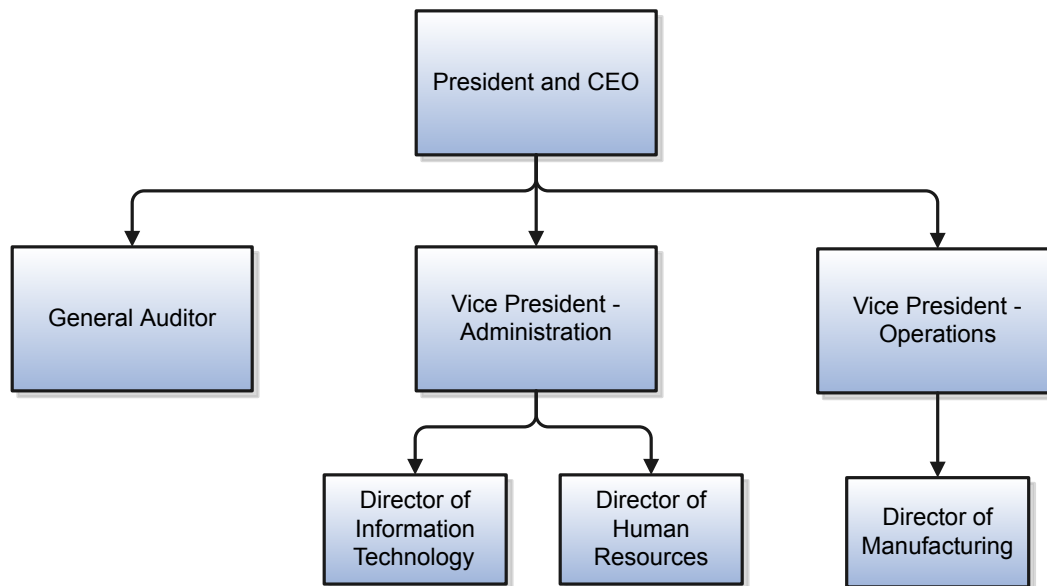
Position Trees

Using the predefined tree structure for a position tree, you can create multiple position trees and then create multiple versions of each tree to establish reporting relationships among positions. You can have only one top-level node for a position tree.

You can use position trees for the following purposes:

- Review position hierarchies for budgeting and organizational planning.
- Secure access to positions by identifying a position hierarchy in a position security profile. For example, you can create a position security profile that includes all positions in a position hierarchy below a specified top position. You can also include the position security profile in a person security profile to secure access to person records. In this case, the person security profile includes the person records of the people who occupy the positions in the position security profile.

The following figure illustrates a position hierarchy that you can establish using a position tree.



Geography Trees

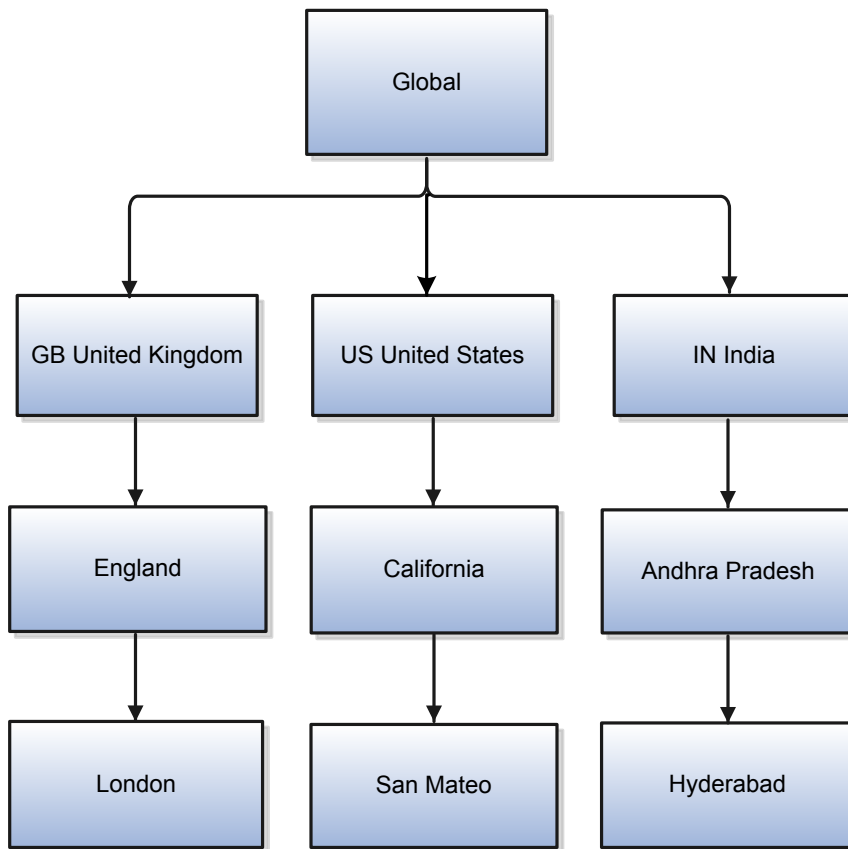
Using the predefined geography tree structure, you create a version to represent the countries in which your enterprise operates. For each country, you can define lower-level nodes such as states, and cities. For example, United Kingdom - England - London. Although you can create multiple versions, you can create only one geography tree in the hierarchy. You can have only one top-level node for a geography tree.

You use the geography tree to specify the locations to which calendar events apply.

Note the following:

- If an event applies to your entire enterprise, then you can attach it to the top-level node in the tree. For example, Global.
- If an event applies only to specific countries in your enterprise, then you can attach it to the nodes for those specific countries. For example, United Kingdom.
- If an event applies only to specific states or cities in a country, then you can attach it to the state or city level nodes. For example, England, London.

This figure illustrates the geographical hierarchy that you can establish using a geography tree.



Related Topics

- [Setting Up a Geographic Tree and creating a Calendar Event: Worked Example](#)
- [How can I associate calendar events with countries?](#)
- [Managing Trees and Tree Versions: Points to Consider](#)

FAQs for Manage Departments, Divisions, and Other Organizations

What's a tax reporting unit?

Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications.

To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are

associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage Legal Reporting Unit HCM Information task.

If you identify a legal entity as a legal employer, and not as a payroll statutory unit, you must enter a parent payroll statutory unit. The resulting legal reporting units are transferred to Oracle Fusion HCM as tax reporting units, but as children of the parent payroll statutory unit that you entered, and not the legal entity that you identified as a legal employer.

What's a payroll statutory unit?

Payroll statutory units are legal entities that are responsible for paying workers, including the payment of payroll tax and social insurance. A payroll statutory unit can pay and report on payroll tax and social insurance on behalf of one or many legal entities, depending on the structure of your enterprise. For example, if you are a multinational, multiple company enterprise, then you register a payroll statutory unit in each country where you employ and pay people. You can optionally register a consolidated payroll statutory unit to pay and report on workers across multiple legal employers within the same country. You associate a legislative data group with a payroll statutory unit to provide the correct payroll information for workers.

What's a legal employer?

A legal employer is a legal entity that employs workers. You define a legal entity as a legal employer in the Oracle Fusion Legal Entity Configurator.

The legal employer is captured at the work relationship level, and all assignments within that relationship are automatically with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

What's a reporting establishment?

A reporting establishment is an organization that is used for statutory reporting other than tax and social insurance reporting. A reporting establishment has a parent-child relationship with a legal employer, with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments. You create reporting establishments using the Manage Legal Reporting Unit HCM Information task in the Setup and Maintenance work area.

In some countries, such as France, a reporting establishment can also be a tax reporting unit.

Can I delete an organization?

No you can't. However, you can disable an organization if it's no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.

How can I identify my organization in a report?

Use the organization manager information to enter a reporting name to help you identify an organization in a report. You use organization hierarchies for statutory, legal and management reporting.

Manage Locations

Locations: Explained

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Manage Locations task in the Workforce Structures work area.

You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

The locations that you create exist as separate structures that you can use for reporting purposes, and in rules that determine employee eligibility for various types of compensation and benefits. You enter information about a location only once. Subsequently, when you set up other workforce structures you select the location from a list.

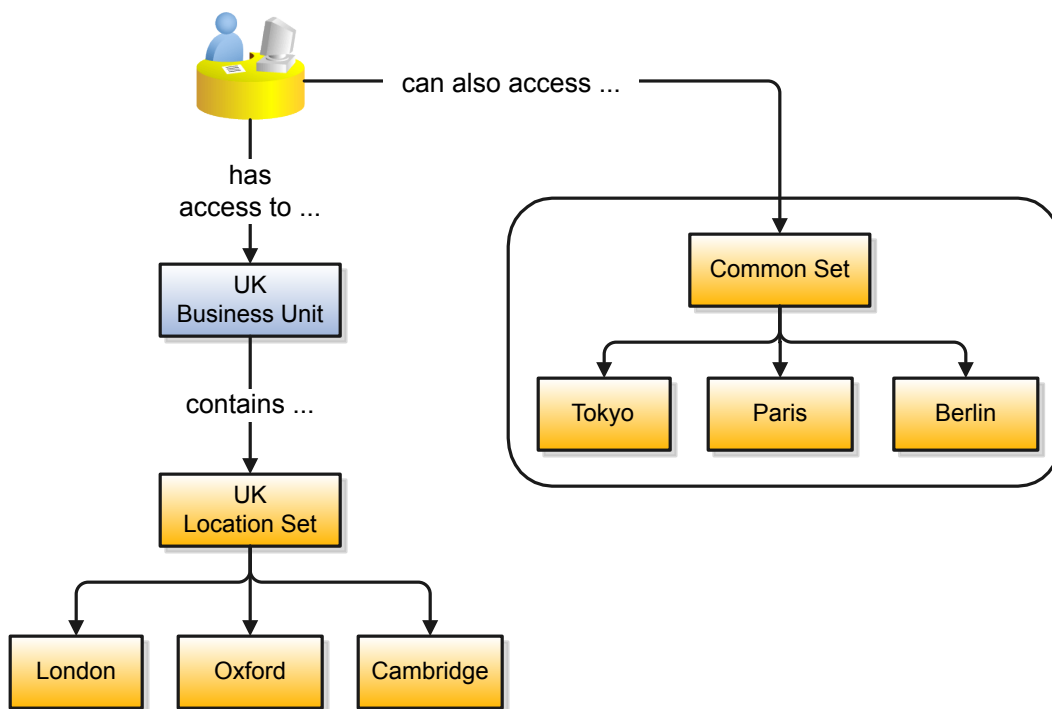
Location Sets

When you create a location, you must associate it with a set. Only those users who have access to the set's business unit can access the location set and other associated workforce structure sets, such as those that contain departments and jobs.

Note the following:

- You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit.
- When users search for locations, they can see the locations that they have access to along with the locations in the common set.

The following figure shows how locations sets restrict access to users.



Uploading Locations Using a Spreadsheet

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

- Download a spreadsheet template
- Add your location information to the spreadsheet
- Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- [Uploading Workforce Structures Using a Spreadsheet: Explained](#)

FAQs for Manage Locations

Why can't I see my location in the search results?

You can search for approved locations only. Also, if you created a location in Oracle Fusion Trading Community Model, then you can't access that location from Oracle Fusion Global Human Resources. For use in Oracle Fusion HCM, you must recreate the location from the Manage Locations page.

How can I associate a location with an inventory organization?

From the Oracle Fusion Global Human Resources, go to the Manage Locations page. Use the Manage Locations task in the Workforce Structures work area.

To appear on the Create or Edit Location pages, your inventory organization must be effective on today's date and must exist in the location set that you selected.

What happens if I select an inventory organization when I am creating or editing a location?

The location is available for selection in purchase documents of that inventory organization in Oracle Fusion Inventory Management. If you don't select an inventory organization, then the location is available in purchase documents across all inventory organizations.

What happens if I select a geographic hierarchy node when I'm creating or editing a location?

The calendar events that you created for the geographic node start to apply for the location and may impact the availability of worker assignments at that location. You manage locations using the Manage Locations task in the Workforce Structures work area.

The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

Related Topics

- [Worker Availability: How It Is Determined](#)

What happens if I inactivate a location?

Starting from the effective date that you entered, you can no longer associate the location with other workforce structures, assignments, or applications. If the location is already in use, it will continue to be available to the components that currently use it.

Define Collective Agreements

Managing Collective Agreements: Explained


A collective agreement is a special type of commercial agreement which is negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The collective agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer. You manage collective agreements using the Manage Collective Agreements task in the Workforce Structures or Setup and Maintenance work areas.

Creating Collective Agreements

You can provide details of the parties negotiating the collective agreement, such as the employee and employer organizations. The employee organization can be the trade union or bargaining unit representing the employee while the employer organization is represented by the company management.

The details of a collective agreement are country-specific. The country value is mandatory for a collective agreement; however, you may enter the bargaining unit, legal employer, and union code values depending on the country. For example, you can create a collective agreement without the bargaining unit and legal employer, or only with the legal employer. When you select the value in the Country field, the values in the Bargaining Unit, Legal Employer, and Union Code fields are filtered to match the country selected. You can optionally attach documents to the collective agreement.

Validity dates determine the period for which the collective agreement is valid. If you specify a valid to date, the collective agreement lapses after the date, and you can't link it to an employee. However, employees to whom it's already linked aren't affected.

 **Note:** If the collective agreement is linked to an assignment, you cannot edit the Identification Code, Country, Bargaining Unit, and Legal Employer fields. Additionally, you cannot delete the collective agreement.

FAQs for Define Collective Agreements

What's a collective agreement?

A special type of commercial agreement that is negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The collective agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

What's a bargaining unit?

A specific group of employees who are represented by one authorized union or association for purposes of collective bargaining.

Manage Jobs and Positions

Jobs and Positions: Critical Choices

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks.

Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.
- You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

During implementation, one of the earliest decisions is whether to use jobs or a combination of jobs and positions. The determinants for this decision are:

- The primary industry of your enterprise
- How you manage your people

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

Primary Industry	Workforce Setup
Mining	Positions
Utilities	Positions
Manufacturing	Positions
Retail Trade	Positions
Transportation and Warehousing	Positions
Educational Services	Positions
Public Transportation	Positions
Agriculture, Forestry, Fishing, and Hunting	Jobs
Construction	Jobs
Wholesale Trade	Jobs
Information	Jobs
Finance and Insurance	Jobs
Professional, Scientific, and Technical Services	Jobs

Primary Industry	Workforce Setup
Management of Companies and Enterprises	Jobs
Administrative and Support and Waste Management and Remediation Services	Jobs
Arts, Entertainment, and Recreation	Jobs
Accommodation and Food Services	Jobs
Other Services (Except Public Administration)	Jobs

Management of People

The following table displays suggestions of whether to use jobs or a combination of jobs and positions based on your industry and how you manage your employee turnover.

Industry	You always replace employees by rehiring to same role	You replace the headcount, but the manager can use the headcount in a different job	You rehire to the same position, but the manager can request a reallocation of budget to a different post
Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)	Positions	Jobs	Jobs
Controlled (An industry that is highly structured in which all aspects of work and remuneration are well organized and regulated.)	Positions	Positions	Positions
Manufacturing	Positions	Jobs	Positions
Retail	Positions	Jobs	Positions
Education	Positions	Jobs	Positions
Other	Positions	Jobs	Jobs

Jobs: Example

Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

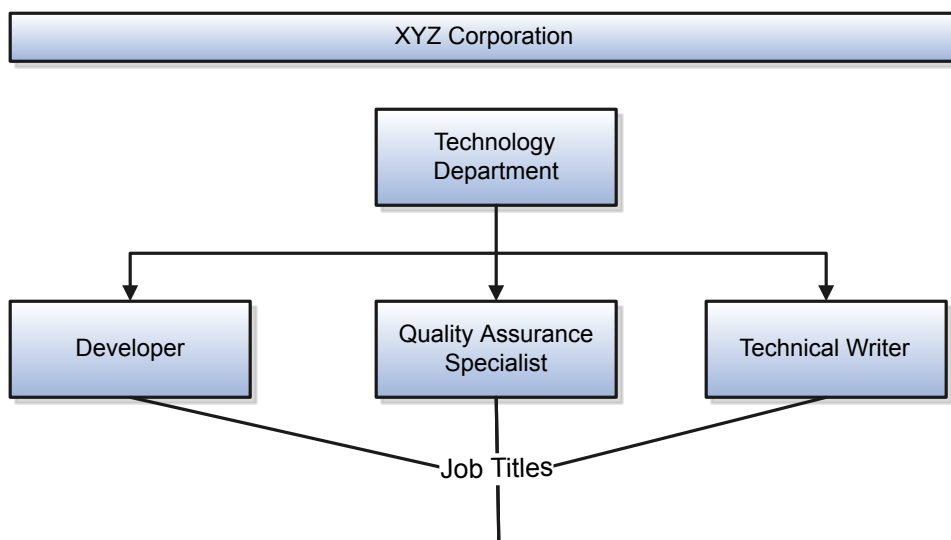
Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- Recently, three developers have left the company.
- The director decides to redirect the head count to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

In software industries, the organization is fluid. Using jobs gives an enterprise the flexibility to determine where to use head count, because the job only exists through the person performing it. In this example, when the three developers leave XYZ Corporation, their jobs no longer exist, therefore the corporation has the flexibility to move the headcount to other areas.

This figure illustrates the software industry job setup.



Positions: Examples

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain headcounts, or have high turnover rates.

Retail Industry

ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it's better for this industry to use positions.

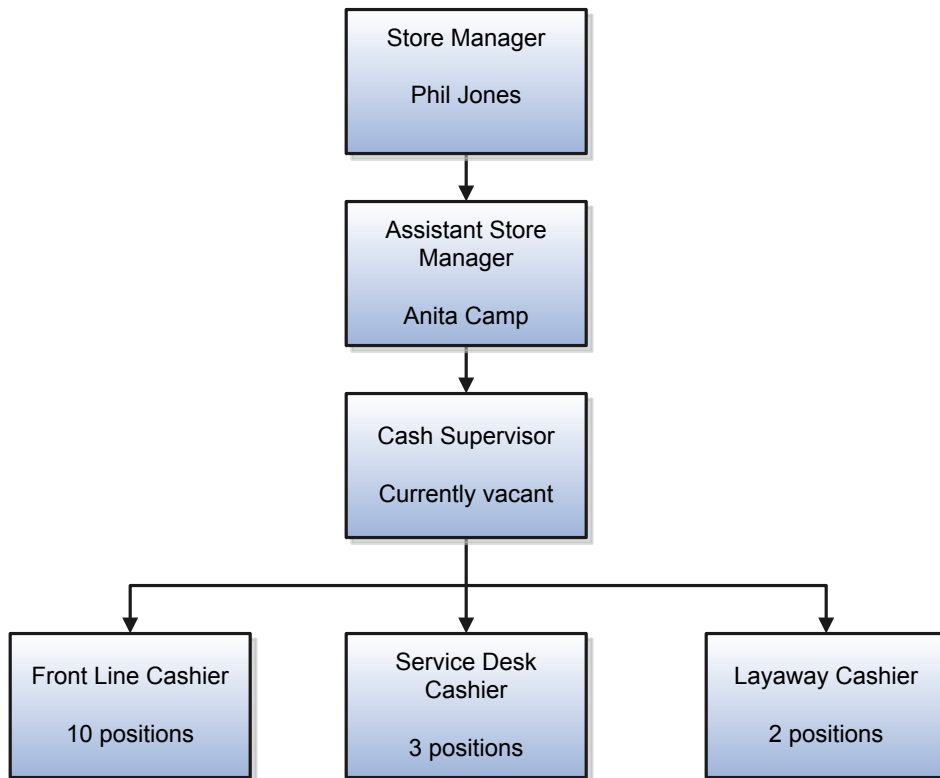
Note the following:

- An automatic vacancy is created when an employee terminates employment.

- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.

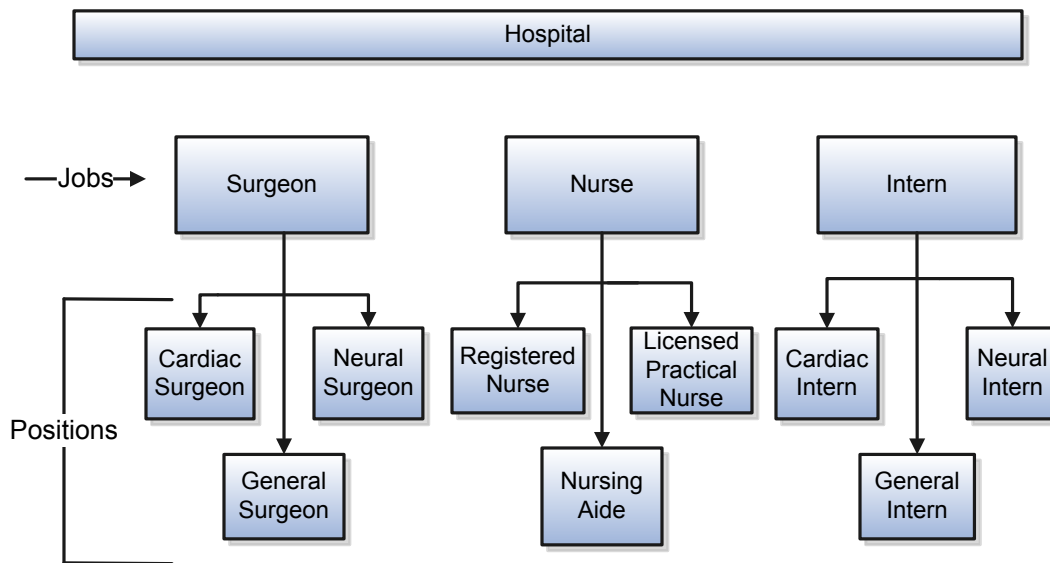


Health Care Industry

Health care is an industry that must regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.

This figure illustrates the hospital position setup.



Position Synchronization: Explained

If position synchronization is enabled, assignments inherit specified values from the associated position.

Synchronized Attributes

You can select any of the following attributes for synchronization when position synchronization is enabled:

- Department
- Job
- Location
- Grade
- Grade Ladder
- Manager
- Full Time or Part Time
- Regular or Temporary
- FTE and Working Hours
- Start Time and End Time
- Probation Period
- Bargaining Unit
- Synchronize Mapped Flexfields

Position Changes

All active assignments that are synchronized from position automatically inherit changes from the position. Assignment attributes synchronized from position automatically inherit changes from the position. For those attributes not synchronized from position, you can either retain the existing values or update values from the position.

The Review page in the Edit Position page displays the list of impacted assignments with a status for each assignment. The status indicates if there are any issues due to the position change. You must correct all errors before submitting the position changes.

Assignment Changes

When you change the position in existing assignments you have a choice whether to inherit the values for those attributes which are not synchronized from the position. If you choose not to inherit, then the previous values remain unchanged.

Position Synchronization Configuration Changes

If the position synchronization configuration is changed after person and assignments are created, then the Synchronize Person Assignment from Position process must be run to apply the changes in assignments.

Position Hierarchy Configuration Changes

When the manager is synchronized from the HCM position hierarchy and you change the parent position, all assignments inherit the new manager from the current parent position. When you remove a position from the hierarchy, all child positions move one level up in the hierarchy. Hence, the grandparent position is the new parent position.

The incremental flattening process is triggered when you add or change a parent position. The flattening process will update the changes in the position hierarchy.

When you change the position in an existing assignment, the manager value is updated based on the parent position of the changed position. If the parent position doesn't have an incumbent, the incumbent in the position in the next level up in the hierarchy is the new manager.

Uploading Changes Using HCM Data Loader

When you create or update assignments using HCM Data Loader, you can synchronize them from positions. In this case, you must:

- Enable position synchronization before you load the assignments. If you enable it after the assignments are loaded, then you can synchronize from positions for current and future dates only.
- Set the **Synchronize from Position** (PositionOverrideFlag) attribute on the employment terms or assignment object to Y.

After loading the assignments, you must run the Synchronize Person Assignments from Position process to perform the synchronization. When you run the process, set the **Past Period to Be Considered in Days** parameter to an appropriate value. For example, if you set this parameter to 60 days, then any assignment records with start dates during the previous 60 days are synchronized from positions. By default, **Past Period to Be Considered in Days** is set to 30 days.

Related Topics

- [Running the Synchronize Person Assignment from Position Process](#)


Inheritance of Assignment Values from Position: Explained

If you enable position synchronization, assignments inherit specified values from the associated position. You can also specify whether the inherited values can be overridden in the assignment. You can specify this at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks respectively.

Overriding of Assignment Values

When you enable position synchronization, you specify which attributes the assignment inherits from the position due to synchronization. Assignment attributes synchronized from position inherit their values from the position and are not editable. The restriction on editing values in the assignment applies only to the information that is entered in the position. For example, if the Bargaining Unit is not entered in the position, you can edit this value in the assignment even though it is one of the attributes inherited from the position. If override is allowed at the assignment level, then you can specify at the assignment level whether you want to synchronize from position or not. By default, the Synchronize from Position attribute on the Edit Assignments page is set to Yes. If you prevent override at the assignment level, users can't update the specified attributes that the assignment has inherited from the position. You can use personalization to enable managers to specify a value for the Synchronize from Position field.

You can choose to either retain the existing values in the assignment or update the values from the position for any attributes that aren't synchronized. So, if you don't select the grade attribute for synchronization and update the grade value in the position, you can either retain the existing grade value in the assignment or update it from the position.

 **Note:** If you choose to specify your own values for an assignment, then that assignment won't be synchronized with any future position changes.

FAQs for Jobs and Positions

Can I synchronize assignment values from the position when updating a worker assignment?

Yes, if position synchronization is enabled either for the enterprise or the associated legal employer and the Synchronize from Position attribute is set to Yes in the Assignments page. The Synchronize from Position attribute is not visible by default on the Assignment page; You can enable it using personalization.

What happens if I specify a parent position?

You can specify a parent position when you enable HCM position hierarchy using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. A parent position is one, which is the next position up in the position hierarchy.

On the Manage Positions page, click the parent position link to view the position details and click the icon next to the parent position to refresh the search with the parent position.

As a prerequisite, you specify a parent position to synchronize the line manager from the parent position. When you select to synchronize the line manager using the position hierarchy the incumbent in the parent position is populated as the new manager.

What happens if I specify the standard working hours in a position?

In an assignment, the standard working hours are inherited from the position. The working hours and the standard working hours provided in the position are used to calculate the FTE (Full Time Equivalent) in the assignment. If there is a FTE value

already existing in the position, you can choose to update it based on the ratio of the working hours to standard working hours.

When position synchronization is enabled, even if FTE value exists for the position, it is not copied to the assignment during synchronization. Instead, the assignment FTE value is calculated as a ratio of working hours to standard working hours, if specified.

Related Topics

- [Work Day Information: Explained](#)

Manage Grades, Grade Rates, and Grade Ladders

Grades: Explained

From the Manage Grades page, create grades to record the level of compensation for workers. You can:

- Create grades for multiple pay components, such as salary, bonus, and overtime rates
- Define one or more grades that are applicable for jobs and positions

This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments for a worker.

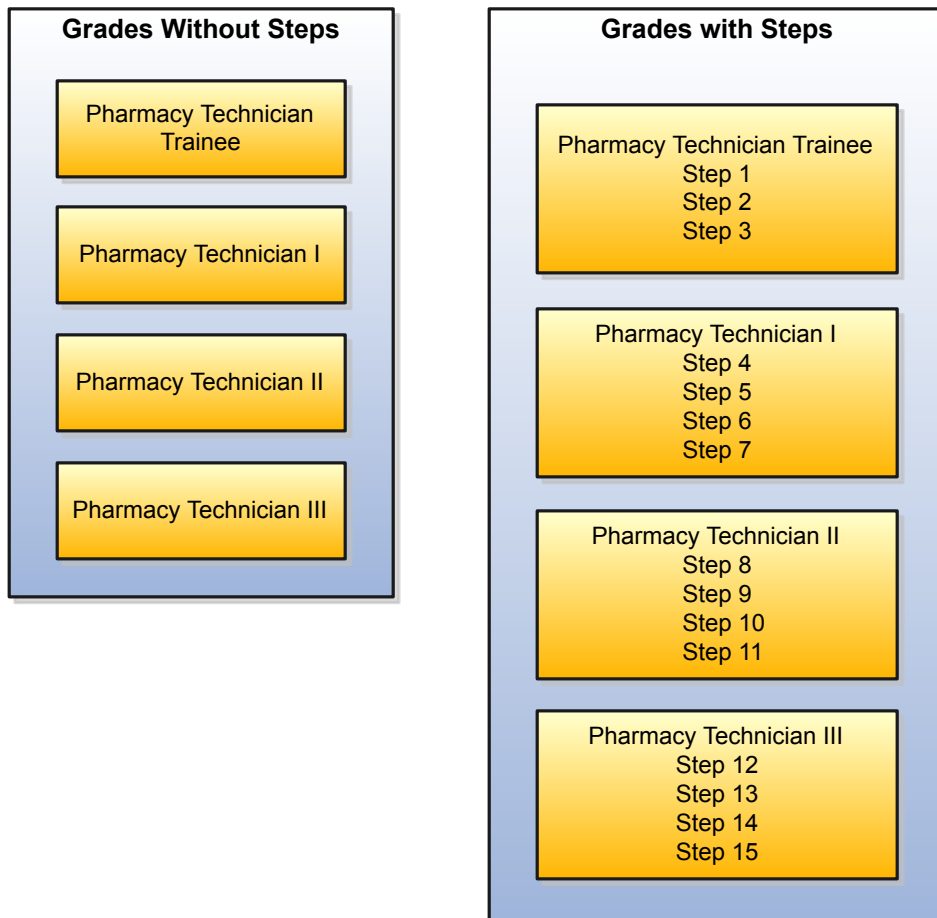
Grades and Sets

You assign each grade to a set. If you assign a grade to the common set, then the grade is available for use in all business units. To limit a grade to a single business unit, you can assign it to a set that is specific to that business unit.

Grade Steps

Grade steps are distinct increments of progression within a grade. You can set up grades with or without grade steps.

The following figure illustrates the difference between grades with and without steps.



Grade Rates

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades.

For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

Grade Ladders

You can combine grades into grade ladders to group your grades or grades with steps in the sequence in which your workers typically progress. For example, you might create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Grade Rates: Explained

Grade rates contain the pay values that are related to each grade.

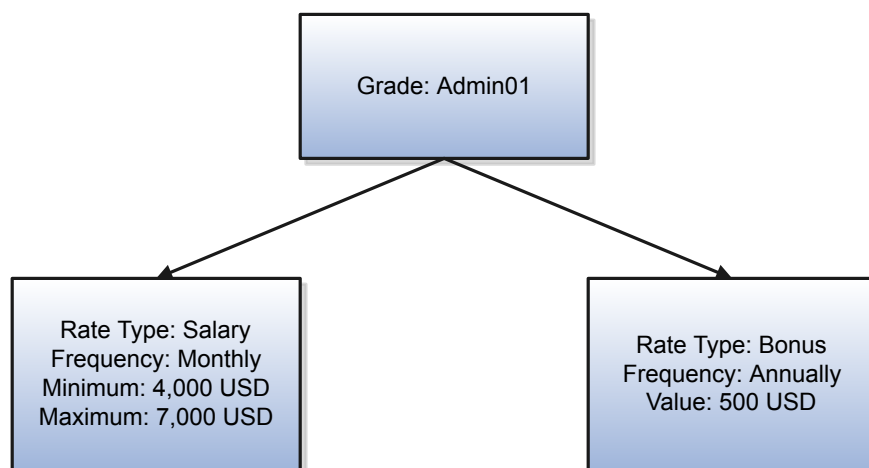
Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay such as salary, overtime, and bonuses.

Note the following:

- Grade rates for some jobs or positions might include an hourly salary rate and an overtime rate.
- Grade rates for other jobs or positions might contain a salary rate type with a range of amounts and a bonus rate type with a fixed amount.
- Grade rates typically serve only as a guideline to validate that the salary you propose during the compensation process for a worker on a certain grade is appropriate for that grade.

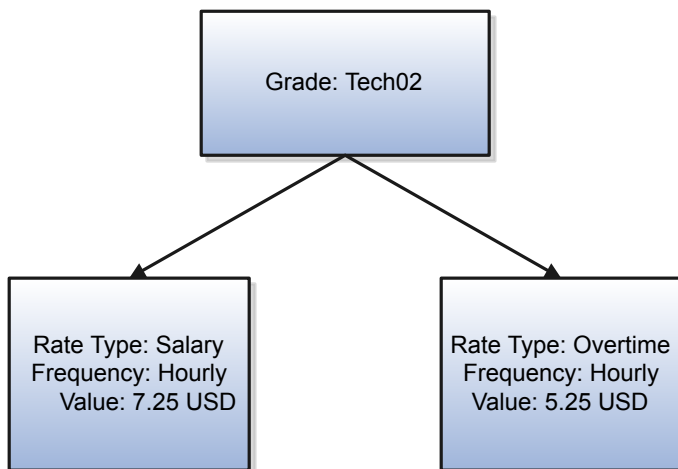
This figure illustrates a grade that has two rate types associated with it:

- Salary rate type that has a range of values
- Bonus rate type with a fixed amount



This figure illustrates a different grade that has two rate types associated with it:

- Salary rate type that has a fixed amount
- Overtime rate type that also has a fixed amount



Rate Types

The types of rates that you can set up depend on the values for lookup type `GRADE_PAY_RATE_TYPE`. Examples of rate types are salary, bonus, and overtime pay.

Grade Rates and Legislative Data Groups

You assign a legislative data group to each grade rate. Depending on how your enterprise is configured, you may have several legislative data groups. You can set up grades that are shared across different areas of your business, and enter rates that are specific to each legislative data group.

Grade Rates and Grades

You can do the following:

- Set up grade rates when you set up grades
- Set up grade rates independently from grades

For grades with steps, you enter rates when you attach the grades to a grade ladder.

Related Topics

- [Lookup Types for Grades: Explained](#)

Grade Ladders: Explained

From the Manage Grade Ladders page, you create grade ladders to group grades and grades with steps in the sequence in which your workers typically progress.

Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You may create different grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades

You create ladders with grades by building a hierarchy of grades that were created without steps. When you set up this type of ladder, only grades without steps are available to add to the ladder. You can't create a grade ladder with a combination of both grades and grades with steps.

You don't define any grade rates when you set up a ladder with grades; the rates for the grades within the ladder are inherited from the rates that were added when you set up the grades. To add or edit rates for grades, you must use the Manage Grade Rates task.

Ladders with Grade Steps

You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.


You define step rates when you set up the ladder, and the rates are unique to each ladder. You can't share step rates between grade ladders.

Grade Ladder on Worker Assignment: Explained

You can use the grade ladder in the worker assignment to ensure that workers are compensated according to the grade structure defined in the job or position.

Selecting Grade Ladder for Worker Assignment


Transactions, such as New Hire, Add Assignment, and Create Work Relationship involve creating a new assignment. During assignment creation, the grade ladder is automatically populated based on the selected job or position. This is not true for transactions that involve an assignment update (for example, promotion, transfer). You must manually select the grade ladder when you update the assignment.

 **Note:** The Grade Ladder field is not displayed if a grade ladder isn't defined for the worker organization.

You must select from the grades populated for the grade ladder. If the selected grade includes steps, you can view the steps and the associated salary rates by clicking the Grade Details icon. The step rate is displayed based on the legislative data group associated with the assignment business unit.

The grade step progression process evaluates a worker's eligibility to progress to a new grade or step based on the defined rules and updates the salary rate. The process can be run for workers associated with a particular grade ladder to move them to a new grade or step and update their salary rate.

If the grade ladder selected in the assignment is associated with an automatic grade step progression process, you can exclude the worker from the process. To exclude the worker, deselect the Include in grade step progression check box.

 **Note:** The Include in grade step progression check box is not displayed if a grade ladder isn't defined for the worker organization.

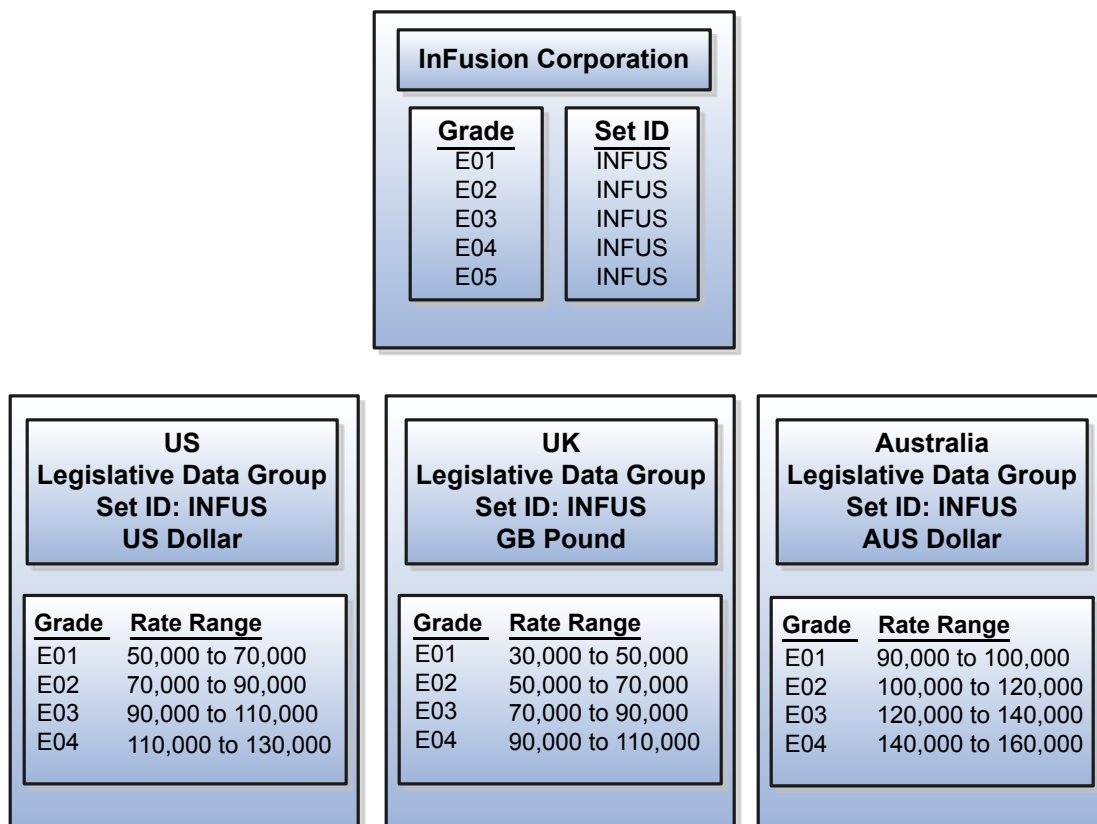
Grades, Grade Rates, Sets, and Legislative Data Groups: How They Work Together

You assign grades to sets, and grade rates to legislative data groups from the Workforce Structures > Manage Grade Rates page.

If you have grades that are common across multiple business units, you can:

- Assign them to the set that's associated with business units.
- Set up grade rates that are specific to each legislative data group.

The following figure illustrates how you can use sets to share grades across multiple business units and change the grade rates for each legislative data group.



Grades and Sets

Sets enable you to share grades that are common across business units in your enterprise. You can assign grades to either a specific set or to the common set to each grade. If you assign the grade to the common set, then the grade is available for use in all business units.

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people.

For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that is shared between the countries, but set up different grade rates for each country in the applicable currency.

Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll

You use grades and grade rates in the following components of Oracle Fusion HCM to ensure that workers are compensated according to the grade structure that you create:

- Jobs
- Positions
- Assignments
- Compensation
- Payroll

How Grades Work with Jobs and Positions

You can define one or more grades that are applicable for each job and position. Using this list of valid grades, combined with the settings for two profile options you restrict the grades that can be selected when you set up assignments for a worker.

Note the following:

- If you use positions, then the grades that you assign to jobs are the default grades for the positions that you associate with each job.
- You can use the default grades for the position, remove ones that don't apply, or add new ones.

How Grades Work with Assignments

When you set up assignments, you can select the applicable grade for the job or position.

Two profile options determine the grades that are available for selection:

Profile Option	Description
PER_ENFORCE_VALID_GRADES	<p>If you set this site-level profile option to Yes:</p> <ul style="list-style-type: none"> • Users can select a grade only from the list that you defined for the job or position. <ul style="list-style-type: none"> ◦ If users select both job and position for the assignment, they can select grades that are valid for the position only. ◦ If valid grades are defined for neither job nor position, then users can select from all grades. <p>If you set this site-level profile option to No:</p> <ul style="list-style-type: none"> • User can select from all the grades • This is also the default value

Profile Option	Description
PER_DEFAULT_GRADE_FROM_JOB_POSITION	<p>If you set this site-level profile option to Yes and there is only one valid grade for a job or position:</p> <ul style="list-style-type: none"> The grade is used by default in the assignment. <ul style="list-style-type: none"> If an entry grade is defined for a position, then that grade is used by default when the user creates a new assignment. <p>If you set this site-level profile option to No:</p> <ul style="list-style-type: none"> User can select from all the grades This is also the default value

How Grades and Grade Rates Work with Compensation and Payroll

Depending on the configuration of the legal employer to which workers belong, their salary can be stored at the assignment level. The grade rate can be linked to the salary basis within the salary record, in which case their salaries are validated using the grade rates.

For example, assume an assignment record for a worker indicates they are in Grade A1 with the salary of USD 40000.00:

- The grade rate range that's attached to Grade A1 is 30,000.00 USD to 50,000.00 USD. Therefore, the salary is within the grade rate range and no warnings are issued.
- If their manager or a human resource (HR) specialist changes their salary to 55,000.00 USD, a warning is issued that the new salary is outside their salary range.

In addition, compa-ratios and salary range positions for workers are calculated using the minimum and maximum amounts that are defined in the grade rates for their grades.

Payroll elements reference grades in the eligibility criteria. For example, assume you want to process a bonus for all workers who are at grade level A2. To accomplish this, you would create an earnings element for the bonus and specify A2 for the grade in the eligibility criteria. The result of this setup, when combined with additional eligibility criteria that may be applied by the bonus plan, is that when payroll is processed, workers who are at grade level A2 and who meet the additional eligibility criteria would receive the bonus.

Related Topics

- [How Many Salary Bases to Create: Points to Consider](#)
- [Individual Compensation Plans: Explained](#)

Grades, Grade Rates, and Grade Ladders: Examples

The following examples illustrate how InFusion Corporation might set up different types of grades, rates, and ladders for the different types of jobs within the company. The examples include grade structures for administrative workers, managers, senior executives, and line workers. All amounts in the examples are US dollars.

Grades with Steps

The grade structure for annual salary amounts for administrative workers in InFusion Corporation includes five grades, and each grade includes five steps.

- When workers move from one grade to another in this ladder, they don't always start at step 1 of a grade.
- The next step is based on their previous salary plus two steps.

For example, a worker could move from Step 5 in Grade 1 to Step 3 in Grade 2.

The following table lists the five grades, steps, and the rates associated with them for administrative workers at InFusion Corporation.

Grade	Step 1	Step 2	Step 3	Step 4	Step 5
1	17,803	18,398	18,990	19,579	20,171
2	20,017	20,493	21,155	21,717	21,961
3	21,840	22,568	23,296	24,024	24,752
4	24,518	25,335	26,152	26,969	27,786
5	27,431	28,345	29,259	30,173	31,087

To set up your grade structure to reflect this table, perform the following tasks:

- Set up five different grades and add five steps for each grade.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for annual salary amounts using the rates in the preceding table.

Grades Without Steps

The grade structure for annual salary amounts for level 3 managers at InFusion Corporation includes grades without steps. The grade rates are fixed amounts.

The following table lists the grades and associated rates for level 3 managers at InFusion Corporation.

Grade	Annual Salary Amount
1	103,900
2	111,800
3	119,900
4	127,800
5	135,900
6	143,700
7	151,800
8	155,500

To set up your grade structure to reflect this table, perform the following tasks:

- Set up eight separate grades.
- For each grade, enter the rates from the preceding table.
- Set up a grade ladder with the Grades type and add all eight grades to the ladder.

Grades with Grade Rate Ranges

The grade structure for annual salary amounts for senior executives at InFusion Corporation includes grades with no steps, and the rates are set up using ranges.

The following table lists the rate range for senior executives at InFusion Corporation.

Grade	Minimum Annual Salary Amount	Maximum Annual Salary Amount
SNREXEC	154, 300	243, 900

To set up a grade structure to reflect this table, perform the following tasks:

- Create a single grade.
- Create a grade rate and enter the minimum and maximum amounts from the preceding table for the grade rate range.

Grade Rates with Hourly Amounts

The grade structure for line workers at InFusion Corporation includes grades with steps, and the rates are hourly amounts.

The following table lists the hourly rates for line workers at InFusion Corporation.

Grade	Step 1	Step 2	Step 3	Step 4	Step 5
1	10.64	11.07	11.49	11.96	12.40
2	11.77	12.27	12.76	13.24	13.72
3	12.92	13.46	13.98	14.55	15.07
4	14.03	14.63	15.21	15.80	16.39
5	15.20	15.83	16.46	17.12	17.75

To set up your grade structure to reflect this table, perform the following tasks:

- Create five grades, each with five steps.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for hourly amounts using the rates in the table.

Setting Up Grade Ladders for Pay Scale Requirements: Worked Example

This example illustrates how to use a grade ladder to create a pay scale that's typical of technicians in the metal industry in Germany. The ladder includes four grades, and each grade includes four steps.

The following table summarizes key decisions for the grades, rates, and grade ladder in this scenario.

Decision to Consider	In This Example
Are steps required for the grades?	Yes.
Which step in each grade should be the ceiling step?	The last step in each grade.
What type of rates are necessary?	Salary rates only.
Will the ladder be created using grades or grades with steps?	Grades with steps.

Summary of the Tasks

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Creating Grades

1. In the Workforce Structures work area, click **Manage Grades** to open the Manage Grades page.
2. On the Manage Grades page, click **Create** to open the Create Grade: Grade Details page.
3. In the Grade Details region of the Create Grade: Grade Details page, complete the fields as shown in this table, using the default values unless otherwise indicated.

Field	Value
Grade Set	Common
Name	Technicians 03
Code	Tech03

4. Click **Next** to access the Create Grade: Grade Steps page.
5. In the Grade Steps region of the Create Grade: Grade Steps page, click **Add Row**.
6. Add four steps for the grade by completing the fields as shown in this table. You must click **Add Row** after adding each step.

Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

7. Verify that Year 4 is the ceiling step.
8. Click **Submit**. You will add the grade rates when you create the grade ladder.
9. In the Warning dialog, click **Yes**.
10. In the Confirmation dialog, click **OK**.
11. Repeat steps 2 through 9 to add three more grades with steps. Complete the information for each grade using the information in these tables. The ceiling step in each grade is Year 4.

Field	Grade 2	Grade 3	Grade 4
Grade Set	Common	Common	Common
Name	Technicians 04	Technicians 05	Technicians 06
Code	Tech04	Tech05	Tech06

Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

Creating a Grade Ladder

1. In the Workforce Structures work area, click **Manage Grade Ladders** to open the Manage Grade Ladders page.
2. On the Manage Grade Ladders page, click **Create** to access the Create Grade Ladder: Grade Ladder Details page.
3. In the Grade Ladder Details region of the Create Grade Ladder: Grade Ladder Details page, complete the fields as shown in this table, using default values unless otherwise indicated.

Field	Value
Grade Set	Common

Field	Value
Name	Metal Technicians
Grade Type	Grade with steps

4. Click **Next** to access the Create Grade Ladder: Grades page.
5. In the Search Grades region of the Create Grade Ladder: Grades page, enter TECH in the **Code** field and click **Search**.
6. Select Tech03 and click **Add to Grade Ladder**.
7. Select Tech04 and click **Add to Grade Ladder**.
8. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
9. Select Tech05 and click **Add to Grade Ladder**.
10. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
11. Select Tech06 and click **Add to Grade Ladder**.
12. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
13. Verify that the grades appear in numerical order, with Tech06 at the top of the ladder and Tech03 at the bottom of the ladder.
14. Click **Next** to access the Create Grade Ladder: Rate Values page.
15. On the Create Grade Ladder: Rate Values page, select the legislative data group for Germany.
16. In the Grade Step Rates region, click **Add Row**.
17. Complete the following fields as shown in this table.

Field	Value
Name	Technician Ladder Rates
Rate Type	Salary
Frequency	Monthly
Annualization Factor	12
Currency	EUR

18. In the Step Rate Values region, enter rates for the four steps in each grade by completing the fields as shown in this table.

Grade Name	Step Name	Value
Technicians 03	Step 1	1,750.73
Technicians 03	Step 2	1,878.90
Technicians 03	Step 3	2,009.79
Technicians 03	Step 4	2,143.92
Technicians 04	Step 1	2,238.57

Grade Name	Step Name	Value
Technicians 04	Step 2	2,408.39
Technicians 04	Step 3	2,577.68
Technicians 04	Step 4	2,744.81
Technicians 05	Step 1	2,831.87
Technicians 05	Step 2	3,047.14
Technicians 05	Step 3	3,257.52
Technicians 05	Step 4	3,469.00
Technicians 06	Step 1	3,586.36
Technicians 06	Step 2	3,851.38
Technicians 06	Step 3	4,122.34
Technicians 06	Step 4	2,143.92

19. Click **Next**.
20. On the Create Grade Ladder: Review page, review the grade ladder hierarchy and the rates, and click **Submit**.
21. In the Warning dialog, click **Yes**.
22. In the Confirmation dialog, click **OK**.

Setting Up Grade Ladders for Spine Point Requirements: Example

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points. You manage grade ladders using the Manage Grade Ladders task in the Workforce Structures work area.

Spine Points

Some public sector organizations in the United Kingdom (UK) use spine points to structure their grades. Each spine point corresponds to one or more steps within a grade, as grades often overlap each other.

Grade Structure

You can use grade ladders to meet the requirements of a grade structure with spine points. The following table illustrates a grade structure with spine points that is similar to the one used for university workers in the UK.

Spine Point	Salary	Grade	
1	25,674		1
2	26,361		
3	27,068		
4	27,796		
5	30,394		
6	31,778	2	
7	32,648		
8	33,542		
9	34,466		
10	35,425		
11	38,441		
12	39,510		3
13	40,634		
14	41,746		
15	42,914		
16	44,118		
17	45,358		

Analysis

To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number.
- Create a grade ladder with all three grades.
- Create step rates with annual salary amounts.

Resulting Grades, Rates, and Grade Ladder

The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

Grade Name	Steps	Ceiling Step
Grade 1	<ul style="list-style-type: none"> • Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6 	Spine Point 5
Grade 2	<ul style="list-style-type: none"> • Spine Point 6 • Spine Point 7 • Spine Point 8 • Spine Point 9 • Spine Point 10 • Spine Point 11 • Spine Point 12 	Spine Point 11
Grade 3	<ul style="list-style-type: none"> • Spine Point 12 • Spine Point 13 • Spine Point 14 • Spine Point 15 • Spine Point 16 • Spine Point 17 	Spine Point 17

The following table lists the grades, steps, and rates to add to the ladder.

Grade Name	Steps	Rates
Grade 1	<ul style="list-style-type: none"> • Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6 	<ul style="list-style-type: none"> • 25, 674 • 26, 631 • 27, 068 • 27, 796 • 30, 394 • 31, 778
Grade 2	<ul style="list-style-type: none"> • Spine Point 6 • Spine Point 7 • Spine Point 8 • Spine Point 9 • Spine Point 10 • Spine Point 11 • Spine Point 12 	<ul style="list-style-type: none"> • 31, 778 • 32, 648 • 33, 542 • 34, 466 • 35, 425 • 38, 441 • 39, 510
Grade 3	<ul style="list-style-type: none"> • Spine Point 12 • Spine Point 13 • Spine Point 14 • Spine Point 15 • Spine Point 16 • Spine Point 17 	<ul style="list-style-type: none"> • 39, 510 • 40, 634 • 41, 746 • 42, 914 • 44, 118 • 45, 358

FAQs for Manage Grades, Grade Rates, and Grade Ladders

What's a ceiling step?

A ceiling step is typically the highest step within a grade to which a worker may progress. When a worker reaches the ceiling step within a grade, typically any further progress must be made by moving the worker to another grade. You can override the ceiling for individual assignments.

In most cases, the ceiling step is the last step in the sequence. For example, if the grade has steps 1 through 5, step 5 is the ceiling step. However, you may have situations where you want another step to be the ceiling. For example, in a grade with steps 1 through 5, you might indicate that step 4 is the ceiling step, and workers can progress from step 1 to step 4, and then on to the next grade. You can use step 5 when a worker is not entitled to move to the next grade, perhaps because he doesn't yet have the required qualifications or certificates, but you still want to increase his pay to reward him for many years of experience and good performance. You can provide the pay increase by moving him to step 5.

How can I edit rates for a grade?

You can edit rates using the Manage Grade Rates task. However, you can't edit rates within the Manage Grades task, because grades and rates have separate effective dates.

How can I add rates to grade steps?

Rates can be added to a grade with steps, when you add the grade to a grade ladder.

Can I edit the legislative data group for a grade rate?

No. If you need to change the legislative data group for a grade rate, you must change the grade rate to inactive and create a new grade rate with the correct legislative data group.

2 Person Management

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.

Add Person

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
- Adding a contact to the record of another person

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	<p>Alex Morozov is starting a contingent worker placement with a legal employer in the enterprise. Alex has never:</p> <ul style="list-style-type: none"> • 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 <p>Therefore, Alex doesn't have a person record.</p> <p>To create both his person record and his first work relationship, you add him as a contingent worker.</p>
Rehiring an Employee	<p>Sonia Jalla starts her employment with the enterprise in France next month. Note the following:</p> <ul style="list-style-type: none"> • 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 France.

Action	Scenario
Hiring a Nonworker	<p>Arturo Ruiz has a nonworker work relationship with a legal employer:</p> <ul style="list-style-type: none"> • Arturo has been a volunteer mentor for young workers for several months. • Arturo recently applied for employment with the same legal employer and was successful. • Arturo will continue as a volunteer for this legal employer even after he has been hired. • When you attempt to hire Arturo, the application finds his person record. <p>When you confirm that the person record is Arturo's, you continue the hiring process by creating an employee work relationship with the legal employer.</p> <p>Arturo will then have both nonworker and employee work relationships with the same legal employer.</p>
Hiring a Contact	<p>Mary Wood starts her employment with the enterprise tomorrow.</p> <ul style="list-style-type: none"> • Mary has never been an employee, contingent worker, or nonworker in any legal employer in the enterprise. • Mary is married to Joe Wood, who is a contingent worker elsewhere in the enterprise. • Joe has identified Mary as an emergency contact; therefore, Mary already has a person record. <p>When you attempt to hire Mary, if there is enough information in her contact record to identify her, the application finds her existing person record.</p> <p>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 Mary.</p>

Hiring an Employee

 **Watch:** This tutorial shows you how to hire an employee.

Managing Person Work E-Mail: Explained

A person can have only one work e-mail. You can enter a work e-mail when you create a person record. It's stored in Oracle Fusion Identity Store. Thereafter, you must maintain it in the Security Console.

When you create a person record, you have the option of not entering a work e-mail.

Note the following:

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

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

Secondary Work E-Mail

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

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.

Access Security and Privileges


You can view a person's phones, including nonwork numbers, if you have a role that provides one of the following data security privileges:

- Manage person phones data
- View person phones data
- Report person phones data

Typically, workers can view their own phone details. They can also view phone details of other workers if the phones are defined and work related and selected as primary. If a worker has a nonwork phone type selected as primary, then other workers viewing their coworkers' phones can't see the primary phone.

Work Phones Lookup Codes

Predefined phone types that have a lookup code that begin with W are considered public. If you create a new lookup code that starts with W, it's considered as public and can be viewed by everyone. If the lookup code does not start with W, the phone type is considered as sensitive. Only those roles that have the requisite privileges can view nonwork phone details.

 **Note:** You must consider the implications of what you use for the lookup code and how the VPD policy interacts with the lookup codes before you extend or change the phone type that you are using.

The following table lists the predefined phone lookup codes 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

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.

The Convert option 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).


The default start date of the work relationship for the pending worker is the date on which the transaction is submitted for approval. However, you can change the 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 to convert the pending worker to the proposed worker type from the Worklist notification.

Quick Convert Option

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

All the hire records created through the pending worker conversion process require an approval by default. If the transaction is rejected, the pending worker record remains as is.

 **Note:** If the pending worker record includes a payroll assignment or payroll compensation details, that information is moved to the hire record during conversion. However, other types of payroll-related information, such as personal payment method or costing are not supported for pending workers and will not be reflected in the hire record.

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

Work Relationship Types

Work relationships are of three types:

- Employee
- Contingent worker
- Nonworker

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

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's an association between the person and the legal employer that's defined by the work relationship and assignment.

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.

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.

Related Topics

- [Worker Numbers: Explained](#)

Creating Multiple Work Relationships for a Person: Examples

When you create a person record, you also create that person's first work relationship. Once a person record exists, you can create additional work relationships with the same or different legal employers. The following scenarios describe some valid combinations of work relationships. You create a person record in the New Person work area. You manage work relationships in the Person Management work area.

Multiple Work Relationships of Different Types with a Single Legal Employer

The work relationships shown in this table can exist at the same time with the same legal employer because they are of different types.

Work Relationship Type	Legal Employer	Start Date	End Date
Employee	Corporation A	17 November, 2010	None

Work Relationship Type	Legal Employer	Start Date	End Date
Contingent Worker	Corporation A	4 August, 2010	12 January, 2012
Nonworker	Corporation A	4 August, 2010	None

Multiple Work Relationships of the Same Type with Multiple Legal Employers

The work relationships shown in this table can exist at the same time, even though they are all of the same type, because each is with a different legal employer.

Work Relationship Type	Legal Employer	Start Date	End Date
Employee	Corporation A	1 January, 2011	None
Employee	Corporation B	3 April, 2011	None
Employee	Corporation C	17 June, 2012	None

Multiple Work Relationships of the Same Type with a Single Legal Employer

The work relationships shown in this table can exist with the same legal employer, even though they are of the same type, because they are sequential. Any attempt to create the second work relationship before the first is terminated will fail.

Work Relationship Type	Legal Employer	Start Date	End Date
Employee	Corporation C	11 October, 2010	17 March, 2011
Employee	Corporation C	19 July, 2011	None

Multiple Work Relationships of Different Types with Multiple Legal Employers

The work relationships shown in this table can exist at the same time because relationships with a single legal employer are of different types.

Work Relationship Type	Legal Employer	Start Date	End Date
Employee	Corporation A	12 December, 2010	None
Nonworker	Corporation A	12 December, 2010	31 December, 2011
Contingent Worker	Corporation B	14 September, 2010	None
Employee	Corporation C	10 May, 2011	None
Nonworker	Corporation C	15 February, 2011	None

Work Relationship Type	Legal Employer	Start Date	End Date
------------------------	----------------	------------	----------

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	Corporation A	13 March, 2010	None
Employee	Corporation B	11 June, 2010	20 February, 2011
Nonworker	Corporation C	10 July, 2010	None
Employee	Corporation D	21 February, 2011	None
Contingent worker	Corporation 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

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.

Person Names: Explained

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

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 a country-specific name style doesn't exist, a universal name style (last name, first name, title, and middle names) is used.

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 Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person's contacts have the same name style as the person for whom they are contacts.

Name Formats

A name format is a template for arranging the following components in a specified folder:

- First name
- Last name
- Title

Four name formats are available, namely:

- Display name
- List name
- Full name
- Order name

Name formats can vary among countries; therefore, both global and local versions of names formats can exist.

When a person's name is displayed to the users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global and Local Name Formats

The profile option HR: Local or Global Name Format controls whether users see local names or global names by default.

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 Japan may prefer to see Japanese rather than global formats of person names.

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. Henceforth, 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.


Users can set preferences to select the language in which they see the display-name versions of person names.

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.

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.

Examples of Matching Person Records

You create a new person record with the following information:

First Name	Last Name	Date of Birth	National ID
John	Ward	25 March, 1963	3908-98-128

The application compares these details with those in existing person records and displays the following matching person records:

First Name	Last Name	Date of Birth	National ID
Jennifer	Tyler	19 June, 1969	3908-98-128
Juana	Ward	25 March, 1963	5587-43-776
Josie	Ward		8721-99-398

The following table explains how the records match:

Contact Name	Reason for Match
Jennifer Tyler	The national ID is the same as John Ward.
Juana Ward	<ul style="list-style-type: none"> • Same last name and DOB as John Ward • Their first names start with same character
Josie Ward	<ul style="list-style-type: none"> • Same last name as John Ward • First name starts with the same character
Because the above two criteria match, the absence of DOB in Josie's record is ignored.	

If you are a line manager, then the application displays matching records to you only if the matching records contain no national identifier. Matching records 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.

Providing Employment Information for Nonworkers: Examples

Some employment information is marked as required for all workers and nonworkers. The amount of additional information that you must provide in nonworker assignments depends on the nonworker type. You add employment information for nonworkers using the Add a Nonworker task in the New Person work area.

Adding a Nonworker Who Receives No Payments

Ellen Woods is a volunteer in your organization; a government body meets her expenses. She receives no payments from the legal employer, but does report to a manager there.

To ensure that Ellen's manager can see her as a direct report, identify Ellen's line manager and the relevant assignment, if the manager has more than one. All other information is optional.

Adding a Nonworker Who Receives Payments

Todd Granger is a retiree. When Todd retired, you terminated his employee work relationship with the legal employer and created a new, nonworker work relationship with the same legal employer.

As a retiree, Todd receives payments from the legal employer. Therefore, Todd's assignment must contain payroll information. The assignment status and person type values on the assignment must also allow payments to be made. All other information is optional.

Adding a Nonworker Who Has Other Work Relationships

A person can have multiple work relationships at once, but each relationship is always independent of the others. For the nonworker work relationship, you enter only the information required for that relationship. For example, if the person receives no payments in the nonworker assignments, then you don't provide payroll information for those assignments, even if the person receives payments in assignments of other types.

FAQs for Add Person

How can I create a user account for a new worker?

When you create a person record, an Oracle Fusion Applications user account is created automatically if automatic creation of accounts is enabled. If a user account isn't created automatically, then an authorized user can create it on the Security Console. You link an account created in this way to the person record on the Manage User Account page.

What's a pending worker?

A person who will be hired or start a contingent worker placement and for whom you create a person record that is effective before the hire or start date.

When the new hire or placement is finalized, you convert the new worker to the proposed worker type. For example, when a new employee's hire is completed, you convert the pending worker record to an employee record. Therefore, the pending-worker functions provide greater control of the hiring process than simply hiring an employee or adding a contingent worker with a future start date.

 **Note:** A person who already has a person record cannot be a pending worker.

What's the difference between person numbers and worker numbers?

Each person has a single person record in the Enterprise. The person number is the person record's unique ID, allocated automatically or entered manually when you create the record. The person number is required and valid throughout the Enterprise.

Note the following:

- Allocation of worker numbers in a legal employer can be either automatic or manual. The number sequence for automatic allocation can be either global or specific to each legal employer. In the latter case, worker numbers may not be unique in the enterprise. When you use a legal-employer sequence, the worker number does not change if you rehire in the same legal employer. However, the worker number changes if you rehire in a different legal employer or globally transfer to a different legal employer.
- If you use a global sequence, the worker number does not change when you:
 - Rehire in the same legal employer.

- Rehire in a different legal employer.
- Globally transfer to a different legal employer.

Related Topics

- Worker Numbers: Explained

Can I enter more information about an emergency contact?

Yes, you can. To enter additional information such as an address or a national ID, update the contact's person record, which is created automatically when you submit the associated worker or nonworker record.

Workers and nonworkers can also maintain information about their own contacts.

How can I create other types of contacts for a person?

When you create a person's record, you can identify an emergency contact for the person.

When you edit a person's record, you can create additional contacts, any of which you can identify as emergency contacts. To identify any of a person's contacts as a beneficiary or dependent, you update the person's benefits information.

How can I create multiple nonworker roles for a person?

A person can have multiple nonworker roles with a single legal employer, all of which must belong to the same nonworker work relationship. For each nonworker role, you can create a separate nonworker assignment, and in each nonworker assignment, you can select an appropriate nonworker person type. For example, a nonworker could have three assignments with a single legal employer, two as a paid volunteer, and one as a retiree.

Why can't I see the person number for this new person record?

Based on your enterprise settings, the person number is generated after the Add Person transaction is approved. For example, once the transaction is approved, you can see the person number on the Manage Person page.

Why can't I see the current manager when I am adding a person as a direct report?

If the Current Manager field in the Add Direct Reports section in the Manage Direct Reports region is blank, the worker isn't assigned to any manager.

Manage Personal Information

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.

Person Records Compared with Work Relationships

The following table compares Person Records and Work Relationship Records.

Information Type	Particulars
Person Records	<p>Holds personal information such as:</p> <ul style="list-style-type: none"> • Name • Date of birth • Disability information <p>May also apply to more than one work relationship such as National ID.</p>
Work Relationships	<p>Holds employment information such as:</p> <ul style="list-style-type: none"> • Job • Payroll • Working Hours <p>This can vary among work relationships and be specific to a legal employer.</p> <p> Note: A person's worker type (for example, employee) is derived from the person's work relationship; it is not part of the person record. A person with multiple work relationships of different types has multiple worker types.</p>

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.

Access to Person Information

Having security access to a person record does not automatically allow access to all of a person's work relationships and assignments.

For example, your access may be limited to specific legal employers, which may exclude some work relationships.

Reviewing Your Personal Information

 **Watch:** In this video tutorial, you will learn how to review and quickly update your personal information, including addresses, emergency contacts, and pay details. You will also learn how to view other personally relevant information, such as your compensation and benefit details and to collaborate with your colleagues using tools you are already familiar with.

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 and the Directory search results. You can have only one profile photo at a time.

Uploading a 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. 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**.

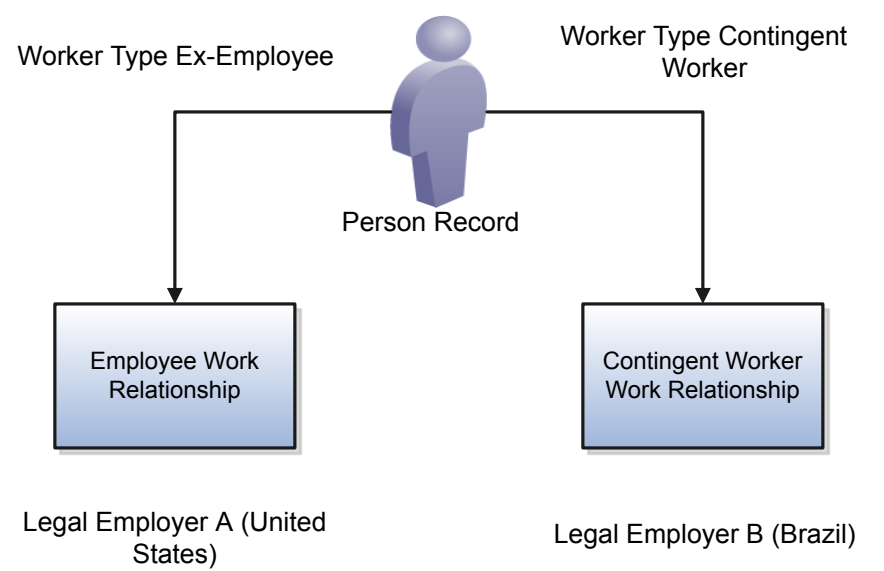
Managing Person Records: Examples

Multiple people may be able to manage a person record, including human resource (HR) specialists in any of the person's legal employers and the person to whom the record belongs. .

The first of the following examples show how multiple people can manage the person record sequentially; the second shows how multiple people can manage the person record simultaneously.

Updating the Person Record After a Break in Service

Miguel is an ex-employee of legal employer A in the United States. Today, Miguel starts a contingent workerwork relationship with legal employer B in Brazil, where you are the HR specialist.



When you attempt to add Miguel as a contingent worker, the application finds his existing person record; therefore, you need only to create the contingent worker work relationship. You also update his person record as follows:

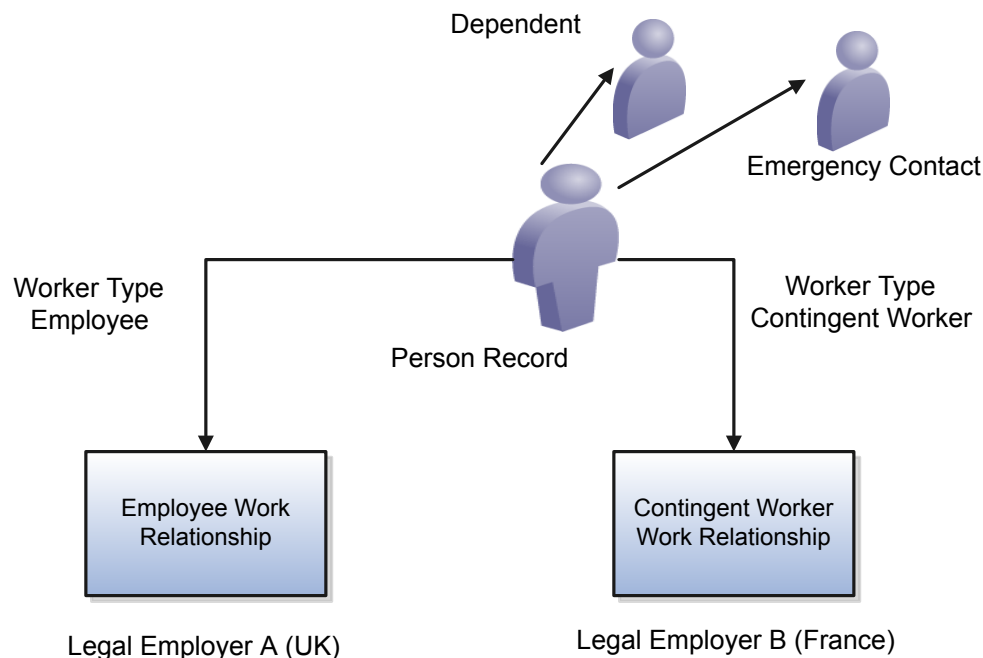
Details	Action Item
Miguel is married	<div>Do the following:</div> <ul style="list-style-type: none">• Enter his new marital status in the country information for Brazil• Update his marital status in the US country information.
Miguel has a new emergency contact	<div>Replace his previous emergency contact by doing the following:</div> <ul style="list-style-type: none">• End date the previous contact relationship.• Create a new one. <div>Contact relationship information is date-effective, which means you can retrieve his previous addresses if necessary.</div>
Miguel's address	Update his addresses. Address information is date-effective, which means you can retrieve his previous addresses if necessary.
Miguel's national ID(s)	Add his Brazilian national ID, therefore the person record now holds two national IDs.
Miguel's local name	As Miguel is living and working in Brazil, you enter a local name using the Brazilian name format.

Miguel can review some of the information in his person record from his portrait; he can also correct some information, such as his address, if necessary.

You have no access to legal employer A so can't see Miguel's work relationship with legal employer A. If you need more information about his previous work relationship, you must ask Miguel or his previous line manager to share this information with you.

Managing the Person Record When Multiple Active Work Relationships Exist

Marie is French but lives in London, where she has an employee work relationship with legal employer A. She also has a contingent worker work relationship with legal employer B in France. Marie has two contact relationships.



As the HR specialist for legal employer A, you manage Marie's employee work relationship. The HR specialist for legal employer B manages her contingent worker work relationship. You can both manage all components of Marie's person record. In addition, Marie can edit the following personal information from her portrait:

- Marital status and name
- Addresses
- Contacts
- Document records
- Phone numbers
- E-mail addresses
- Other communication methods
- Communication methods order of preference

A typical selection of updates to Marie's person record is as follows:

- Marie manages her own contacts and benefits information.
 - She names her son as a dependent and her husband as an emergency contact.
- Marie manages her home address, which is also her primary mailing address.
 - The enterprise has defined the address type Local Overseas.
 - The HR specialist for legal employer B enters a Local Overseas address for Marie in France.
- The HR specialist in legal employer B enters a local name for Marie in French.
- You enter details of Marie's UK driver's license. The HR specialist in France enters details of Marie's French driver's license and her passport. Marie can review this information, but she cannot update it.
- You enter Marie's UK national ID, and the HR specialist in France enters her French national ID.
- Both UK and French versions of Marie's marital status exist in her person record. When Marie's marital status changes, she edits both versions.

Any HR specialist who manages Marie's person record can view, and edit any of this information.

Person Names: Explained

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

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 a country-specific name style doesn't exist, a universal name style (last name, first name, title, and middle names) is used.

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 Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person's contacts have the same name style as the person for whom they are contacts.

Name Formats

A name format is a template for arranging the following components in a specified folder:

- First name
- Last name

- Title

Four name formats are available, namely:

- Display name
- List name
- Full name
- Order name

Name formats can vary among countries; therefore, both global and local versions of names formats can exist.

When a person's name is displayed to the users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global and Local Name Formats

The profile option HR: Local or Global Name Format controls whether users see local names or global names by default.

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 Japan may prefer to see Japanese rather than global formats of person names.

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. Henceforth, 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.

Users can set preferences to select the language in which they see the display-name versions of person names.

Deleting Person Data: Explained

You can't delete a person although you can delete some of the person data because a person is referenced from several applications.

Details such as phone numbers, e-mail addresses, and profiles related to a person can be deleted without restrictions. You can't delete person names and person legislative data although you can delete compensation and work relationships data generated from a process.

You can delete the following person data (with restrictions):

- Employment
- Person and user details
- Person Number
- Salary and compensation
- Benefits

Related Topics

- [Deleting Compensation and Benefits Data for a Person: Procedure](#)
- [Deleting Employment Data: Procedure](#)
- [Deleting Person Number: Procedure](#)

Person-Record Keyword Searches: Explained

The application searches for keyword values in these attributes of a person's records: department, job name and code, position name and code, person name, primary e-mail, 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

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.

Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that the source and indexed values don't differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

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 **Chris Harper** in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results.

The following table lists the multiple ways in which you can enter keywords to search for persons.

You enter...	Search Results
Harper Chris	<ul style="list-style-type: none"> Jenner, Chris Harper, Smith Chris, Ray Harper, Liam Harper, Chris Harper, Christopher
Chris Harper	<ul style="list-style-type: none"> Jenner, Chris Harper, Smith Chris, Ray Harper, Liam Harper, Chris Harper, Christopher
Chris%	<ul style="list-style-type: none"> Jenner, Chris Black, Chris Blake, Christopher Simpson, Christy Harper, Chris Harper, Christopher Christ Johnson
Chris	<ul style="list-style-type: none"> Jenner, Chris Black, Chris Harper, Chris
"Chris Harper"	<ul style="list-style-type: none"> Harper, Chris
Chris and Harper	<ul style="list-style-type: none"> Harper, Chris
"Chris" "Harper"	<ul style="list-style-type: none"> Harper, Chris

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.

Comparing Items: Explained

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile. You can compare items in the Profiles work area and on the talent review dashboard.

Selecting Items

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items. .

Controlling Results

Data sets control which attributes are displayed for each item in the comparison. For example, you must select the School Education data set to display and compare a person's education details.

The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. HR specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you are either a line manager or an HR specialist.

Performance Information in Comparison Results: Explained

The comparison displays the performance data of only those persons who are evaluated using the enterprise-wide designated rating model, because you can't compare persons who are evaluated using different rating models.

For each person, the comparison displays up to three performance documents. These performance documents include the latest document using the designated rating model plus the two most recent previous documents that use the same performance template as the latest document. However, the performance documents and performance periods for the persons being compared may be different. The comparison indicates the performance attributes' differences only if the performance documents are the same for the persons being compared.


Changing User Names: Explained

By default, user names are generated automatically in the enterprise default format when you create a person record. Users who have the human resource specialist (HR specialist) role can change user names for existing HCM users whose records they can access. This topic describes the automatic generation of user names and explains how to change an existing user name.

User Names When Creating Users

You create an HCM user by selecting a task, such as Hire an Employee, in the New Person work area. The user name is generated automatically in the enterprise default format. This table summarizes the effects of the available formats for Oracle HCM Cloud users.

User-Name Format	Description
E-Mail	The worker's work e-mail is the user name. If you don't enter the work e-mail when hiring the worker, then it can be entered later on the Security Console. This format is used by default. A different default format can be selected on the Administration tab of the Security Console.
FirstName. LastName	The user name is the worker's first and last names separated by a single period.
FLastName	The user name is the worker's last name prefixed with the initial of the worker's first name.
Person number	If your enterprise uses manual numbering, then any number that you enter becomes the user name. Otherwise, the number is generated automatically and you can't edit it. The automatically generated number becomes the user name.

 **Note:** If the default user-name rule fails, then a system user name can be generated. The option to generate a system user name is enabled by default but can be disabled on the Security Console.


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.

 **Tip:** When you change an existing user name, the user's password and roles remain the same. However, the user receives no automatic notification of the change. Therefore, you're recommended to send details of the updated user name to the user.

Processing a User Account Request: Explained

This topic describes the Process User Account Request action, which may appear on the Manage User Account page for users who have no user account.

The Process User Account Request Action

The Process User Account Request action is available when the status of the worker's user account is either **Requested** or **Failed**. These values indicate that the account request hasn't completed.

Selecting this action submits the request again. Once the request completes successfully, the account becomes available to the user. Depending on your enterprise setup, the user may receive an e-mail containing the user name and password.

Role Provisioning

Any roles that the user will have appear in the Roles section of the Manage User Account page. You can add or remove roles before selecting the Process User Account Request action. If you make changes to roles, then you must click **Save**.

The Send Pending LDAP Requests Process

The Process User Account Request action has the same effect as the Send Pending LDAP Requests process. If Send Pending LDAP Requests runs automatically at intervals, then you can wait for that process to run if you prefer. Using the Process User Account Request action, you can submit user-account requests immediately for individual workers.

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 extend 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.

Related Topics

- [Global Payroll Interface Extract Definition](#)

FAQs for Manage Personal Information

Can I add additional data sets to the comparison?

No, you can only select from the list of data sets available for an item type.

Can I compare all of the person's assignments?

No, you can compare only the primary assignments of a person.

How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon..

When the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. The comparison, however, doesn't display the differences for values that lie within the range. For example, consider that you are comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison doesn't display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

How is risk of loss assessed?

Line managers and human resource specialists enter the risk of loss information in a person's profile manually; there is no automated risk assessment process. They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings .

What happens if I remove the comparison base?

The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

What's the difference between global names and local names?

The following table outlines the difference between Global names and Local names.

Name Type	Description
Global Names	Are in a format and language that can be understood throughout a multinational enterprise.
Local Names	<p>Are understood by users in a single country, but may not be understood throughout a multinational enterprise.</p> <p>You can have only one local name at a time. Select the local-name language that is most appropriate for your primary assignment and reporting requirements. For example, if your home country is Sweden, you may enter a local name in the Swedish language and format.</p>

What's the difference between performing a best-fit analysis and comparing profiles?

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications.

Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

To compare or perform a best-fit analysis, use the Compare action in the smart navigation.

What's the effective start date?


Person attributes such as marital status and addresses are referred to as date-effective objects because they are likely to change over time. When you change a date-effective object, the new change is inserted in the object's history. Typically, you insert the new change following the latest change, and the effective start date is today's date; however, by setting an effective start date that is earlier or later than the current date, you can insert the new change at a different point, either to edit the object history or to create a future-dated change. For example, you could change your marital status to Married on 25 January, 2011 and enter an effective start date of 1 January, 2011 because you were married on that date. The following person related objects are date-effective: marital status, person name, person addresses, contact relationships, and gender.

What's the primary mailing address?

The address used by default for correspondence.

The home address is automatically the primary mailing address. To use a different address as the primary mailing address:

1. Create the new address. This can be of any type; you need not define it as a mailing address.
2. Edit the primary mailing address to select the new address.

 **Note:** If you create a mailing address, that address doesn't automatically become the primary mailing address; you must still select the new address as the primary mailing address.

Can I delete a person record?

No, you can't. But you may be able to cancel work relationships. If you cancel a person's only work relationship, and the person has no contact relationships, the person record is identified as associated with a canceled work relationship and does not appear in gallery searches.

Can I remove a contact from a person's record?

Yes, you can. If you delete the contact, the contact's own person record continues to exist, but the contact relationship between the contact and person whose record you are updating is purged. If you end date the contact relationship, the contact no longer appears in the person record from the specified date, but the history of the contact relationship is still available.

Can I edit the personal information of a worker's contacts?

Yes, the Human Resources Specialist and the Human Resources Analyst can edit the personal information for a person's contact even if the person security profile excludes related contacts, if they have the PER_CONTACT_PERSON_PIL_MANAGEMENT_DUTY role assigned to their job role. Click the **Go to the Manage Person for contact** link in the Edit Contact page to edit personal information of a person's contact.

Can workers manage their own contacts?

Yes. Workers can manage their contacts directly from their portraits or while updating their marital status. For example, workers can do the following:

- Edit existing contacts
- Create new contacts
- Identify emergency contacts

You can view the history of changes made to a contact relationship. To manage dependents and beneficiaries, workers edit the benefits information in their portraits.

What happens if I change the local-name language of a person's name?

A person can have only one local name at a time.

If you change the language of the local name, the new local name replaces the existing local name. For example, if you change a person's local-name language from Swedish to Greek, the Greek version of the person's name replaces the Swedish version. Thereafter, users who have chosen to see names in Swedish will see the global version of the person's name; only users who have chosen to see names in Greek will see the Greek version of the person's name. If you use local names, select the local-name language that is most appropriate for the user's primary work relationship and reporting requirements.

What happens if I reset a user's password?

A notification containing a reset-password link is sent to the user's work e-mail. A notification template for this event must exist and be enabled.

How can I reset a user's password?

If you're a human resource specialist, then you can reset a user's password by selecting **Actions - Reset Password** on the Manage User Account page.

You must have security access to the person whose password you want to reset.

How can I notify users of their user names and passwords?

You can run the process Send User Name and Password E-Mail Notifications in the Scheduled Processes work area. For users for whom you haven't so far requested an e-mail, this process sends out user names and reset-password links. The e-mail goes to the work e-mail of the user or the user's line manager. You can send the user name and password once only to any user. A notification template for this event must exist and be enabled.

Where do default user names come from?

User names are generated automatically in the format specified on the Security Console. The default format is the worker's primary work e-mail, but this value can be overridden for the enterprise. For example, your enterprise may use person number as the default user name.

What happens when I link a user account?

The request to link the person or party record to the account goes automatically to your LDAP directory. Once the account status is **Active**, current roles appear in the Roles section of the Manage User Account or Edit User page. At this point, the user can sign in. You're recommended to notify the user when the account is linked.

How can I create a user account for an existing worker?

On the Manage User Account page, select **Create User Account**. Update account details, if appropriate, and click **Save**. Once the request is processed successfully, the account becomes available.

If automatic creation of accounts is disabled, then you can't use the Create User Account action. Instead, authorized users can create user accounts on the Security Console.

What happens if I edit a user name?

The updated user name is sent to your LDAP directory for processing when you click **Save** on the Manage User Account or Edit User page. The account status remains **Active**, and the user's roles and password are unaffected. As the user isn't notified automatically of the change, you're recommended to notify the user.

Only human resource specialists can edit user names.

What happens when I copy personal data to LDAP?

User accounts are defined in your LDAP directory. The LDAP directory also holds some personal information about users, such as name, work phone, and work location address. Changes to personal information in Oracle Human Capital Management Cloud are copied automatically at intervals to your LDAP directory. To send any changes immediately, you can perform the Copy Personal Data to LDAP action. This action is optional.

Why does this worker have no user account?

Automatic creation of user accounts may be disabled in your enterprise. In this case, your enterprise may be managing user accounts outside Oracle HCM Cloud.

You can link an existing user account to the worker on the Manage User Account page. This action may be necessary if the account was created automatically but a problem occurred before a link to the worker was established.

FAQs for Sharing Personal Information

What happens if I share information?

You can share personal information with both internal recipients (people within the enterprise) and external recipients (people outside the enterprise) who otherwise have no access to this information. You share information using the Information Sharing task on your portrait.

Internal recipients receive a notification with a link to the line manager version of your portrait, which includes contact details, biographical and employment information, benefits and compensation details, payroll information, and user account details. A recipient's access to the information doesn't expire, but you can revoke it.

External recipients see only the information that you select for sharing. Each external recipient receives an e-mail with a link to the shared information. Their access to this information expires at a time that you specify.

If you're a line manager, you can share the information of people who report to you with both internal and external recipients. The approval of the people whose information you're sharing is required.

What's the purpose of sharing person information?

When you are transferring to a different legal entity, the destination legal employer may not be able to initiate your transfer because they do not have access to your records in the source legal entity. Either you or the releasing line manager can share your information with the receiving line manager or Human Resource Specialist, enabling them to initiate the transfer. Similarly, you can share selected information with external persons or organizations, for a specific purpose, for example to complete a mortgage or loan agreement. Use the Information Sharing action in your portrait to share information.

What happens if the information changes after I share it with an external recipient?

External recipients receive an e-mail with a link to the shared information. Any changes to the shared information are also accessible to external recipients. For example, if you share your information with an external recipient on June 1 and the recipient views it on June 5, they see the information effective as of June 5. If the worker was terminated on June 3, for example, no information is available to the recipient.

Why can't I select which information to share with internal recipients?

After you share your information with internal recipients, they can view all your information by accessing your person spotlight. However, external recipients can see only the information that you select for sharing. Each external recipient receives an e-mail with a link to the shared information. The information that you can share externally is also limited.

Do recipients of shared information have unlimited access to it?

No. Internal recipients retain access to the line manager version of your portrait until you revoke their access. External recipients' access to the shared information is controlled by the expiration date. You can also revoke access explicitly using the Information Sharing action in your portrait.

Can I initiate a transfer if I do not have access to the person's information?

No. You can initiate the transfer only after obtaining access to the person's information. Either the person or the releasing line manager can share the person's information with you. A person or the person's line manager can share the person's information by accessing the Information Sharing action in their portraits.

3 Roles Provisioning and Deprovisioning

Role Provisioning and Deprovisioning: Explained

You must provision roles to users. Otherwise, they have no access to data or functions and can't perform application tasks. This topic explains how role mappings control role provisioning and deprovisioning. Use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task to create role mappings.

Role Provisioning Methods

You can provision roles to users:

- Automatically
- Manually
 - Users such as line managers can provision roles manually to other users.
 - Users can request roles for themselves.

For both automatic and manual role provisioning, you create a role mapping to specify when a user becomes eligible for a role.

Role Types

You can provision data roles, abstract roles, and job roles to users. However, for Oracle HCM Cloud users, you typically include job roles in HCM data roles and provision those data roles.

Automatic Role Provisioning

Users acquire a role automatically when at least one of their assignments satisfies the conditions in the relevant role mapping. Provisioning occurs when you create or update worker assignments. For example, when you promote a worker to a management position, the worker acquires the line manager role automatically if an appropriate role mapping exists. All changes to assignments cause review and update of a worker's automatically provisioned roles.

Role Deprovisioning

Users lose automatically provisioned roles when they no longer satisfy the role-mapping conditions. For example, a line manager loses an automatically provisioned line manager role when he or she stops being a line manager. You can also manually deprovision automatically provisioned roles at any time.

Users lose manually provisioned roles automatically only when all of their work relationships are terminated. Otherwise, users keep manually provisioned roles until you deprovision them manually.

Roles at Termination

When you terminate a work relationship, the user automatically loses all automatically provisioned roles for which he or she no longer qualifies. The user loses manually provisioned roles only if he or she has no other work relationships. Otherwise, the user keeps manually provisioned roles until you remove them manually.

The user who's terminating a work relationship specifies when the user loses roles. Deprovisioning can occur:

- On the termination date
- On the day after the termination date

If you enter a future termination date, then role deprovisioning doesn't occur until that date or the day after. The Role Requests in the Last 30 Days section on the Manage User Account page is updated only when the deprovisioning request is created. Entries remain in that section until they're processed.

Role mappings can provision roles to users automatically at termination. For example, a terminated worker could acquire the custom role Retiree at termination based on assignment status and person type values.

Reversal of Termination

Reversing a termination removes any roles that the user acquired automatically at termination. It also provisions roles to the user as follows:

- Any manually provisioned roles that were lost automatically at termination are reinstated.
- As the autoprovisioning process runs automatically when a termination is reversed, roles are provisioned automatically as specified by current role-provisioning rules.

You must reinstate manually any roles that you removed manually, if appropriate.

Date-Effective Changes to Assignments

Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role provisioning occurs on the day the changes take effect. The Send Pending LDAP Requests process identifies future-dated transactions and manages role provisioning and deprovisioning at the appropriate time. These role-provisioning changes take effect on the system date. Therefore, a delay of up to 24 hours may occur before users in other time zones acquire their roles.

FAQs for Role Provisioning and Deprovisioning

What's the provisioning method?

The provisioning method identifies how the user acquired the role. This table describes its values.

Provisioning Method	Meaning
Automatic	The user qualifies for the role automatically based on his or her assignment attribute values.

Provisioning Method	Meaning
Manual	Either another user assigned the role to the user, or the user requested the role.
External	The user acquired the role outside Oracle Applications Cloud.

Why did some roles appear automatically?

In a role mapping:

- The conditions specified for the role match the user's assignment attributes, such as job.
- The role has the **Autoprovision** option selected.

Why can't I see the roles that I want to provision to a user?

You can provision a role if a role mapping exists for the role, the **Requestable** option is selected for the role in the role mapping, and at least one of your assignments satisfies the role-mapping conditions. Otherwise, you can't provision the role to other users.

Why can't I see the roles that I want to request for myself?

Before you can request a role:

- The role must appear in a role mapping where it's **Self-requestable**.
- At least one of your assignments must match all conditions, such as job and location, in the role mapping.

Typically, an application administrator or IT security manager creates and maintains role mappings.

What happens if I deprovision a role from a user?

The user loses the access to functions and data that the removed role was providing exclusively. The user becomes aware of the change when he or she next signs in.

If the user acquired the role automatically, then future updates to the user's assignments may mean that the user acquires the role again.

Why is the user losing roles automatically?

The user acquired these roles automatically based on his or her assignment information. Changes to the user's assignments mean that the user is no longer eligible for these roles. Therefore, the roles no longer appear.

If a deprovisioned role is one that you can provision manually to users, then you can reassign the role to the user, if appropriate.

What happens when I autoprovision roles for a user?

The role-provisioning process reviews the user's assignments against all current role mappings.

The user immediately:

- Acquires any role for which he or she qualifies but doesn't have
- Loses any role for which he or she no longer qualifies

You're recommended to autoprovision roles to individual users on the Manage User Account page when new or changed role mappings exist. Otherwise, no automatic updating of roles occurs until you next update the user's assignments.

What happens if I delegate a role?

The proxy user to whom you delegate the role can perform your tasks on your data. For example, you may be a line manager who manages the absence records of reports. If you delegate the line manager role, then the proxy user can also manage the absence records of your reports.

You don't lose the role while it's delegated.

Can I delegate any role?

No. You can delegate any role that you either have currently or can provision to other users. Also, delegation must be allowed for the role. Not all roles are enabled for delegation.

What happens if I delegate approvals?

Approval notifications for tasks in the selected category go automatically to the selected worker during the specified period. That worker approves transactions, for example, in your place. You don't receive approval notifications for the task category while approvals are delegated.

You may want to delegate approvals if you're also delegating a role in which you approve transactions. However, you can delegate roles and approvals independently of each other.

What's a delegated role?

A job, abstract, or data role that a user, known as the delegator, assigns to another user, known as the proxy user.

You can delegate a role either for a specified period, such as a planned absence, or indefinitely.

4 Employment Management

Manage Employment Information

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

Work Relationship Types

Work relationships are of three types:

- Employee
- Contingent worker
- Nonworker

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

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's an association between the person and the legal employer that's defined by the work relationship and assignment.

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.

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.

Related Topics

- [Worker Types: Explained](#)
- [Creating Multiple Work Relationships for a Person: Examples](#)

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

Assignments and Work Relationships

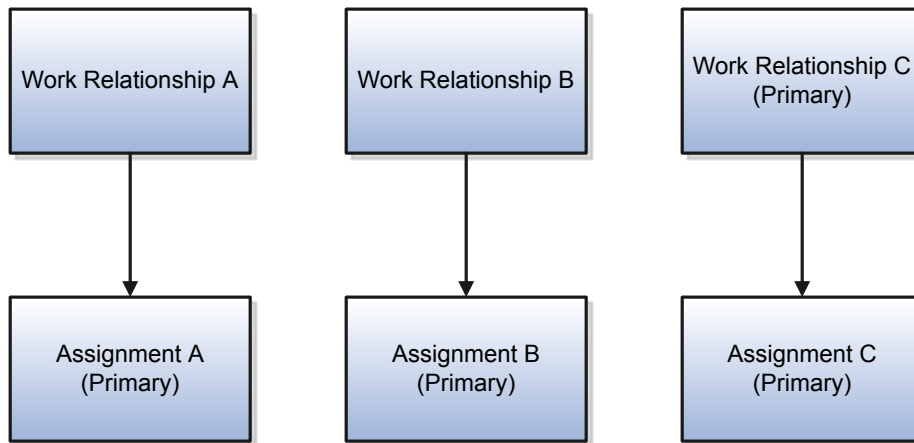
All work relationships, regardless of type, have at least one assignment. Your legal employer may allow multiple assignments in a single work relationship. Within a single work relationship, all assignments are of the same type. For example, in a nonworker work relationship, only nonworker assignments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

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.



Assignment Numbers

Assignments are identified by assignment numbers, which you can allocate either manually or automatically. If you allocate numbers manually, they must be unique in the enterprise.

The application creates numbers for automatic allocation by prefixing the person number with the character E (for employee), C (for contingent worker), or N (for nonworker). A person's second and subsequent assignments of the same type have a suffix number. For example:

1. E45678
2. E45678-2
3. E45678-3

The person number in this example is 45678. The suffix-number sequence is global and ensures that assignment numbers are unique in the enterprise. If the same person also has assignments of other types, the number sequence for those assignments starts from 1. For example:

1. N45678
2. N45678-2

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.

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.

Contracts and Collective Agreements

Assignments can include contract details, which some legal employers require. The contract details are for information only; they have no effect on processing. You can extend the period of a contract included in the assignment using the Contract Extension action. This action is available for selection only when you update the assignment and enter an effective date that is later than the current projected end date of the contract. You can either specify an extension period or update the current projected end date of the contract. You can view the history of extensions made to a contract in the contract details.

You can link a collective agreement to an assignment provided the bargaining unit, country, and legal employer of the collective agreement are consistent with the assignment. If a collective agreement was created without associating it with a legal employer or bargaining unit, you can link the collective agreement to any assignment within the same country. However, if a collective agreement was created by associating it only with a legal employer, you can link the collective agreement to any assignment for the legal employer.

Inheritance of Values in Assignments

If you use position synchronization, assignments automatically inherit attribute values specified in the position. Your enterprise or legal employer configuration determines which attributes are synchronized from the position and whether you can update inherited values in the associated assignments.

Related Topics

- [Assignment Statuses: How They are Set Up](#)

Worker Numbers: Explained

Worker numbers identify employee and contingent worker work relationships; therefore, any person with more than one such relationship may have multiple worker numbers.

This topic includes:

- Enabling worker numbers
- Allocating worker numbers
- Retaining worker numbers after termination

Enabling Worker Numbers

The decision to use worker numbers can be made at the enterprise and legal employer levels, using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks. If you enable worker numbers, each employee and contingent worker work relationship must have a worker number. If you do not enable worker numbers, they can't be used. If you enable the worker number at both the enterprise and legal employer levels, then the setting at the legal employer takes precedence.

Allocating Worker Numbers

You can allocate worker numbers:

- Manually
- Automatically from a global sequence
- Automatically from a legal-employer sequence

Each legal employer selects the number-allocation method for its work relationships. If you use a legal-employer sequence, worker numbers may not be unique in the enterprise. You can't change an automatically allocated worker number.

Retaining Worker Numbers After Termination

If you use a global sequence, the worker number does not change when you:

- Rehire in the same legal employer.
- Rehire in a different legal employer.
- Globally transfer to a different legal employer.

If you use a legal-employer sequence, the worker number does not change when you rehire in the same legal employer. However, the worker number changes when you rehire in a different legal employer or globally transfer to a different legal employer.

Seniority Dates: Explained

A seniority date is a date on which the calculation of a person's length of service 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.

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 service 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

Type	Start or Hire Date	Legal Employer Seniority Date
------	--------------------	-------------------------------

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

Enterprise Seniority Date


A person has a single enterprise seniority date, which is the date on which calculation of a person's enterprise service 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 service. 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 Hire Date	Enterprise Seniority Date	Termination Date
Employee	A	5 January, 2004	5 January, 2004	5 January, 2004	31 December, 2004
Employee	B	1 May, 2005	5 January, 2004	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 service. 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 set the Default Enterprise Seniority Date employment configuration option to yes or don't select any value, the enterprise seniority date defaults to the enterprise hire date of 5 January, 2004. If you set the same employment configuration option to no, the enterprise seniority date defaults to a blank. In both cases, you can update the enterprise seniority date to the desired value.

 **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.

Related Topics

- [Configuring Seniority Dates: Explained](#)

Managing Seniority Dates: Explained

You can view and manage the seniority dates of persons 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 for each seniority date and override the seniority date if the seniority date rule is configured to allow edits.

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

Seniority Dates - Person Level

All the work relationships and assignments for the person are considered while deriving the seniority date at the person level. Examples of person level seniority dates include:

Enterprise and legal employer seniority dates: These dates represent the joining dates of the person with the enterprise and legal employer respectively. The dates are populated for a hire and do not change upon rehire. As these dates are defined at the person level, they do not change even if multiple work relationships are created for the person.

Seniority Dates - Work Relationship Level

All the assignments under the work relationship are considered while deriving the seniority date at the work relationship level.

Legal employer seniority date: This date represents the joining date of the person with the legal employer for a work relationship. The date is populated for a hire and a new seniority date is created for a rehire because a new work relationship is created. Similarly, as the date is defined at the work relationship level, for each new work relationship, a new record is populated. Also, because the date is defined at the work relationship level, the scope of this seniority date is the current work relationship.

Seniority Dates - Assignment Level

The seniority dates of the following attributes are considered when deriving the seniority date at the assignment level:

- Bargaining Unit
- Collective Agreement
- Grade
- Grade Step
- Job
- Position
- Union

The seniority date for an attribute is the starting date of that attribute for an assignment. For example, the job seniority date is the starting date of the job on the person's assignment. The date is populated for a hire if the attribute is selected in the assignment and updated whenever the attribute is changed. For example, if you update the job on the person's assignment, a new seniority record is populated based on the starting date of the new job.

Union seniority date: This date represents the date a person becomes a union member for a collective agreement linked to an assignment. This date is populated for a hire if the Union Member attribute is set to Yes. If you change the attribute value, a new seniority record is populated based on the effective date of the change.

Related Topics

- [Configuring Seniority Dates: Explained](#)

Seniority and Service Dates: Examples

This topic illustrates the default behavior of seniority and service dates for a single worker, Mike Caruso. He has multiple work relationships of all types with multiple legal employers in the enterprise. You manage hire and seniority dates using the Create Work Relationship and Manage Work Relationship tasks in the Person Management work area.

Work Relationship 1 (Employee)

Mike's first and primary work relationship with the enterprise is an employee work relationship with legal employer A. His hire date is 21 March, 2011.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	21 March, 2011	Start date of the work relationship.
Enterprise Start Date	21 March, 2011	Start date of Mike's first employee work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 21 March, 2011 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can be entered.	If left blank, is 21 March, 2011 (the start date of Mike's primary work relationship).

Work Relationship 2 (Contingent Worker)

Mike starts a contingent worker work relationship, also with legal employer A, on 29 June, 2011. Mike now has two current work relationships with legal employer A.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	29 June, 2011	Start date of the work relationship.
Enterprise Start Date	29 June, 2011	Start date of Mike's first contingent worker work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 29 June, 2011 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can't be entered or viewed.	The date from work relationship 1 (the primary work relationship) applies. You can change the date by updating that work relationship.

Work Relationship 3 (Employee)

Mike starts a second employee work relationship, this time with legal employer B, on 10 July, 2011. This relationship becomes the primary work relationship, and Mike now has three current work relationships.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	10 July, 2011	Start date of the work relationship.
Enterprise Start Date	21 March, 2011	Start date of Mike's first employee work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 10 July, 2011 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can't be entered or viewed while creating the work relationship.	Once you save this work relationship, the date from work relationship 1 (the previous primary work relationship) copies to this work relationship and is removed from work relationship 1. You can change the date by updating this work relationship.

Mike leaves the enterprise on 30 September, 2011, and all three work relationships are terminated.

Work Relationship 4 (Employee)

After a break in service, Mike starts an employee work relationship with legal employer B on 1 January, 2012. This work relationship is Mike's primary work relationship.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	1 January, 2012	Start date of the work relationship.
Enterprise Start Date	21 March, 2011	Start date of Mike's first employee work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 1 January, 2012 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can be entered.	If left blank, the legal employer start date (1 January, 2012) applies. You can enter a new date to take account of previous service.

Work Relationship 5 (Nonworker)

Mike starts a nonworker work relationship with legal employer A on 20 February, 2012. Mike now has two current work relationships.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	20 February, 2012	Start date of the work relationship.
Enterprise Start Date	20 February, 2012	Start date of Mike's first nonworker work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 20 February, 2012 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can't be entered or viewed.	The date from the primary work relationship, work relationship 4 (1 January, 2012, by default) applies.

Work Relationship 6 (Contingent Worker)

Mike starts a contingent worker work relationship with legal employer B on 31 May, 2012. Mike now has three current work relationships.

The following table shows a summary of Mike's default seniority and service dates for this work relationship.

Date	Value	Comments
Legal Employer Start Date	31 May, 2012	Start date of the work relationship.
Enterprise Start Date	29 June, 2011	Start date of Mike's first contingent worker work relationship in the enterprise.
Legal Employer Seniority Date	Blank. Can be entered.	If left blank, is 31 May, 2012 (the start date of the work relationship).
Enterprise Seniority Date	Blank. Can't be entered or viewed.	The date from the primary work relationship, work relationship 4 (1 January, 2012, by default) applies.

On 31 May, 2012, Mike's default seniority and service dates for all work relationships are as shown in the following table.

Date	Value
Enterprise Seniority Date	1 January, 2012
Enterprise Start Date (Employee)	21 March, 2011

Date	Value
Enterprise Start Date (Contingent Worker)	29 June, 2011
Enterprise Start Date (Nonworker)	20 February, 2012
Legal Employer A Employee Seniority Date	21 March, 2011
Legal Employer A Contingent Worker Seniority Date	29 June, 2011
Legal Employer A Nonworker Seniority Date	20 February, 2012
Legal Employer B Employee Seniority Date	1 January, 2012
Legal Employer B Contingent Worker Seniority Date	31 May, 2012
Legal Employer B Nonworker Seniority Date	None

These dates apply if you make no manual adjustments to Mike's service and seniority dates. However, you may want to consider updating Mike's:

- Enterprise seniority date, to take account of enterprise service prior to 1 January, 2012
- Legal employer seniority date for employee service with legal employer B to take account of work relationship 3

Work Measures: Explained

Work measures are ways of accounting for a worker's time on an assignment. Work measures are of two types: FTE and Headcount. You maintain work measures for an assignment using the Manage Employment task in the Person Management work area.

FTE

By default, FTE is the result of dividing assignment working hours by standard working hours, which are generally those of a full-time worker. For example, if a person's working hours on an assignment are 20 and the standard working hours for the department are 40, then the FTE for the assignment is 0.5. If no standard-working-hours value is available for the enterprise, legal employer, position, or department, then an assignment has no FTE value. You can edit the FTE value on any assignment.

You can specify the assignment working hours in one of the following ways:

- Fixed hours: Enter the total hours for a week in the Working Hours field.

- Variable hours: Enter varying start and end times and the hours for each day of the week in the Assignment Hours Details window. The start and end times are used to determine the worker's availability by the day; they are not used in the working hours calculation.

Headcount

The default headcount value of a primary assignment in a primary work relationship is 1. The default headcount value of all other assignments is 0. You can edit the default headcount value for any assignment.

Work Measures Usage

You can use the Oracle Transactional Business Intelligence (OTBI) to see headcount information and the FTE.

Defining Multiple Managers for an Assignment: Examples

All assignments have at least one manager, who must be a line manager. Line managers see the line-manager version of a person's portrait and other restricted worker information. To support alternative management approaches, such as matrix management, you can identify additional managers of other types in a person's assignment. Managers other than line managers can see restricted worker information only if their roles are created with appropriate security access. You manage assignments using the Manage Employment task in the Person Management work area.

Engineering Company Using Matrix Management

Workers in an engineering company all have two managers, one functional and one operational. Engineers take their day-to-day functional guidance from the lead engineer and their project leadership from the operational manager. In this example, the lead engineer is the line manager: this manager has the most contact with the team members and conducts their evaluations. You identify the operational manager as the project manager for relevant assignments.

Services Organization Using Temporary Project Managers

A services organization assigns its workers to third parties, assembling teams as necessary to deliver contracted services. Each worker in the company has a single line manager, one of whose tasks is to help the worker to find his or her next role. A worker has the same line manager in all assignments. Once assigned to a project, each worker also has a temporary project manager, who manages a particular assignment but may not manage other assignments for the worker. You identify the project manager as an additional manager (for example, as a project manager) in relevant assignments.

Workers in Different Locations from Their Line Managers

A global enterprise is organized functionally and workers report to the most appropriate line manager, who may be in a different time zone. The functional manager is the line manager for relevant assignments. For day-to-day administrative purposes, such as approving expenses or enforcing local terms and conditions, each worker also has an administrative manager. Because this role is location-dependent, a worker has the same administrative manager in all assignments.

Synchronizing the Line Manager in Assignments Using Position Hierarchy: How It's Processed

You can use either the position manager or the HCM position hierarchy to synchronize the manager value in an assignment. This topic covers synchronizing the line manager in the assignment using HCM position hierarchy.

The following two sections appear on the Manage Employment page:

- The Add Direct Report section displays incumbents of child positions as potential direct reports.
- The Reassign Line Reports section displays the current direct reports and the proposed line manager based on the following synchronization conditions:

New Assignments

You can create a new assignment and select a position when you perform the following transactions:

- Hire
- Add Assignment
- Add Work Relationship
- Global Transfer
- Global Temporary Assignment

When the line manager is synchronized based on the position hierarchy for the above transactions, the incumbent of the parent position in the hierarchy is the new manager in the assignment.

The application adds, if there are any, incumbents of the child positions as direct reports. If there is already an existing manager in the child position, this value is ignored and replaced with the new manager. If the new manager is hired for the same position as the existing manager, then the current manager will remain.

When you update the position in existing assignments, the Reassign Directs section on the Manage Employment page displays the direct reports. The line manager of the direct report is synchronized based on the following conditions:

- If the position has multiple incumbents, the other incumbent is the new manager.
- If no other incumbent exists in the position, the incumbent in the parent position is the new manager. If the parent position doesn't have an incumbent either, the application checks for an incumbent one level up in the hierarchy or until it finds an incumbent.
- If the parent position has multiple incumbents, the incumbent with the longest tenure is the new manager.
- If a parent position doesn't exist or there are no incumbents in all the parent positions in the hierarchy, you can manually reassign the direct reports to other managers.

Related Topics

- [Position Synchronization: Explained](#)
- [Running the Synchronize Person Assignment from Position Process](#)

FAQs for Manage Employment Information

What's a primary work relationship?

The work relationship that's of most significance to the person in terms of status, pay, benefits, and working hours is typically a person's primary work relationship. The primary work relationship can be an employee, contingent worker, or nonworker work relationship. When you need information about a person from a single work relationship, the primary work relationship is the source. For example, when you need a single worker type for a person for reporting purposes, the primary work relationship provides it. When a person has only one work relationship with the enterprise, that relationship is the primary work relationship.

What happens if I change a person's primary work relationship?

The new primary work relationship becomes the main source of work-related information about the person.

The primary assignment in the new primary work relationship becomes the person's overall primary assignment, replacing the primary assignment from the previous primary work relationship. If the new primary work relationship contains any future-dated assignments, the change in primary status is propagated to the future records.

Analytic information and reports based on primary work relationships and assignments use information from the new primary work relationship and overall primary assignment.

The person's main worker type changes if the new primary work relationship is of a different type from the previous primary work relationship. For example, the person may become a contingent worker after having been an employee in the previous primary work relationship.

When you select a new primary work relationship, the previous primary work relationship automatically becomes a nonprimary work relationship. If there's no break in service between the two work relationships, the enterprise seniority date is copied automatically to the new primary work relationship. Otherwise, you may need to enter the date manually.

What happens if I cancel a work relationship?

Cancelling a work relationship automatically:

- Deletes the work relationship and any associated assignments, and payroll, benefits, and compensation records.
- Removes Roles allocated to the person for this work relationship, whether manually or automatically.
- Reinstates the person's status prior to the creation of the work relationship, if the person has other work relationships or contact relationships.

If you cancel a person's only work relationship and no contact relationships exist, the person record continues to exist but the person is identified as a canceled worker. Such records are excluded from general person searches. However, if you later hire the person or add the person as a contingent worker or nonworker, the application finds the existing person record.

You can't cancel a work relationship that has a current, past, or future-dated termination. In this case, you must reverse the termination before canceling the work relationship. If any of the assignments in a work relationship are included in a payroll run, you can terminate the work relationship but you can't cancel it.

You cancel work relationships using the Manage Work Relationship task in the Person Management work area.

Where do person types come from?

Person types, sometimes referred to as user person types, are subcategories of the predefined system person types, such as employee and nonworker. Each system person type has a single person type by default, which has the same name as the system person type. Your enterprise can define additional person types for each system person type. For example, for the system person type nonworker your enterprise could define the person types intern, retiree, volunteer, and counselor.

How can I create an assignment for a person type that is not in the list of person types?

If the missing person type is valid for the worker type, you must update the list of person types. For example, if the worker type is employee and you want to use the person type trainee, that value must appear in the list of employee person types.

If the missing person type isn't valid for the worker type, you must either create a new work relationship or update an existing work relationship of the relevant type. For example, to use the person type volunteer, if volunteers are classified as nonworkers, you create the assignment in a nonworker work relationship. You create and manage work relationships using the Create Work Relationship and Manage Work Relationship tasks in the Person Management work area.

Can I end any assignment?

Yes, you can end an assignment using the Manage Employment Information task in the Person Management work area. However, there are some restrictions. You can't end the primary assignment in a work relationship. Instead, you must identify a different assignment as the primary assignment before terminating the original assignment. Also, you can't end the only assignment in a work relationship; instead, you must end the work relationship.

What happens when I select a different line manager for an assignment?

If you are the person's line manager, you lose access to the assignment on the specified date. For example, the assignment ceases to appear in your management hierarchy. If you manage no other assignments for the person, you can no longer access the line-manager version of the person's portrait. You select managers for assignments using the Manage Employment task in the Person Management work area.

In addition, the following applies:

- The new line manager gains access to the assignment on the specified date. For example, the new manager sees this assignment in management hierarchies and can see the line-manager version of the person's portrait.
- From the specified date, the managed person sees the new manager's name in reporting hierarchies and other information about this assignment.
- If notifications are in use at your enterprise, the new line manager, the managed person, and you may be notified automatically of this change.

Why are some values completed automatically when I create assignments?

If you use positions, the selected position supplies the following values automatically: job, department, location, grade, ceiling step, payroll, salary basis, probation period, manager, working hours, working-hours frequency, start time, and end time. You manage positions using the Manage Positions task in the Workforce Structures work area.

If you do not use positions:

- Location is inherited from the department.
- Standard working hours, working hours, and working-hours frequency are inherited from the department, legal employer, or enterprise. Values specified on the department override those specified for the legal employer, and values specified for the legal employer override those specified for the enterprise.

You manage departments using the Manage Departments task in the Workforce Structures work area.

If you edit the source attributes of inherited values (for example, you update the salary basis of a position), the changes don't copy automatically to the assignments. However, you can edit the inherited values to match the updated source attributes.

If you change the business unit on assignments, the organization, job, position, grade, and job values are automatically set to null.

How can I access inactive assignments?

Use the **Employment Tree** on the Manage Employment page to switch between active and inactive work relationships and assignments for the person.

Alternatively, to find current inactive assignments for a person, you can search for the person. The person search returns all of a person's current assignments, regardless of their status.

If the assignments are inactive because of a termination, you must select the option in the advanced search to include terminated work relationships in the search results. Otherwise, inactive assignments in terminated work relationships don't appear in the search results.

What happens if I change a person's hire or start date?

If you change the hire or start date of a work relationship, the start dates of any assignments that had the same start date as the work relationship change automatically to the new date.

In addition:

- The enterprise start date change automatically to the new date if you change the start date of a person's first work relationship of a particular type in the enterprise. Otherwise, the enterprise start date is unaffected.
- The legal-employer seniority date is assumed to be the same as the new hire or start date if the dates were the same before the change was made. Otherwise, the date is unaffected by the change. You may have to adjust the legal-employer seniority date manually if you had previously entered a date.
- The enterprise seniority date adjusts automatically to match the new hire or start date if you change the start date of the primary work relationship and the dates were the same before you made the change. Otherwise, you may have to adjust the enterprise seniority date manually.

What happens if I change a person's seniority date?

Changes to a person's legal-employer or enterprise seniority dates affect the calculation of the person's length of service. Therefore, the changes may affect the person's entitlement to service-based benefits.

In addition:

- If you update the enterprise seniority date on a person's primary work relationship, that change applies automatically to all of the person's work relationships that had the same enterprise seniority date before the update. You can't update the enterprise seniority date on a nonprimary work relationship.
- If you leave a legal-employer seniority date blank, it's assumed to be the same as the start or hire date of the work relationship.

If you enter a value for the legal-employer seniority date, you may be required to maintain it subsequently.

What's the difference between legal employer service dates and enterprise service dates?

Legal employer service dates relate to work relationships with a legal employer.

- The legal employer start or hire date is the start date of the work relationship.
- The legal employer seniority date is the date on which a person's legal employer service of a particular type (employee, contingent worker, or nonworker) is based. A person can have up to three legal employer seniority dates for a single legal employer. If you enter no date, the legal employer seniority date is assumed to be the start date of the work relationship.

Enterprise service dates relate to a person's service with the enterprise rather than with individual legal employers.

The enterprise start or hire date is the start date of a person's first work relationship of this type (employee, contingent worker, or nonworker) in the enterprise. For example, a person's nonworker enterprise start date is the start date of the person's first nonworker work relationship with any legal employer in the enterprise. Therefore, a person can have up to three enterprise start dates.

The enterprise seniority date is the date on which a person's enterprise service is based. By default, the enterprise seniority date is the start date of the person's current primary work relationship.

You manage legal employer and enterprise service dates using the Create Work Relationship and Manage Work Relationship tasks in the Person Management work area.

What's the difference between working hours and standard working hours?

Standard working hours are usually those of a full-time worker. You define them for the enterprise, the legal employer, the department, or the position.

Working hours, which are the same as standard working hours by default, are defined for the assignment.

The two values may remain the same. For example, if an employee is working the department's standard working hours, standard working hours and working hours are the same. For part-time workers, there is usually a difference between standard working hours and working hours. Where there is a difference, you update the working hours for the assignment.

When do I need to edit work measures?

In general, you don't need to edit work measures because the application allocates default work measures automatically to assignments. However, you may want to enter an FTE value if no default value appears. You edit work measures using the Manage Employment Information task in the Person Management work area.

Any directive to edit work measures is issued locally. For example, your enterprise may instruct you to enter headcount values greater than zero for nonprimary assignments.

Areas of Responsibility

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.

Overlapping Scope

If you assign the same responsibility to multiple persons, overlap between scopes may occur. For example, you assign person A the HR Representative responsibility and define the scope of the responsibility using an organization hierarchy. You then assign the HR Representative responsibility to person B and define the scope using a supervisor hierarchy. The scopes overlap because some workers appear in both hierarchies. These workers then have both A and B as their HR representatives. If this is not the desired result, you may redefine the scope by specifying a different combination of information.

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.

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.

Related Topics

- Sensitive Transactions: How They are Processed

Setting Scope of Responsibility: Examples

You can set the scope of a responsibility in several ways. The following examples illustrate these options. You manage areas of responsibility in the Person Management work area.

Based on Assignment Information

Vision Corporation is a software company that has offices in the US and UK. Gail Williams is the Human Resources (HR) representative for applications developers based in Reading in the UK. You assign Gail the HR Representative responsibility and define the scope of the responsibility. Setting the scope identifies the people she's responsible for. To define the scope, complete the fields as shown in this table.

Field	Value
Business Unit	Vision Applications Development
Legal Employer	Vision UK
Country	UK
Location	Reading
Job	Applications Developer

Based on Name

Terry Smith is the benefits representative for a group of workers in Vision UK. He holds the responsibility for workers within an alphabetic range (A to L). You assign Terry the Benefits Representative responsibility and define the scope of the responsibility. Setting the scope identifies the people he's responsible for. To define the scope, complete the fields as shown in this table.

Field	Value
Legal Employer	Vision UK
From Last Name	A
To Last Name	L

Based on Payroll Information

Grace Miller is the payroll representative for the external training staff in Vision Corporation, US. You assign Grace the Payroll Representative responsibility and define the scope of the responsibility. Setting the scope identifies the people she's responsible for. To define the scope, complete the fields as shown in this table.

Field	Value
Statutory Unit	Vision Training US
Legislative Data Group	External Training

Related Topics

- [What's the recruiting responsibility type?](#)

FAQs for Areas of Responsibility

What happens if I don't record a person's areas of responsibility?

The person doesn't appear in the Work Contacts lists of people for whom the person holds an area of responsibility.

What happens if I reassign a responsibility?

The responsibility is immediately visible in the relevant assignment record of the person to whom it's reassigned. The From Date of the responsibility is the current date, and there is no To Date. In the assignment record of the person from whom the responsibility is being removed, the current date is added to the To Date field if there is currently no To Date. Otherwise, the existing To Date remains unaltered.

The scope of the responsibility remains the same. The change is visible in the Work Contacts list of affected people when the records are next viewed.

Manage Work Schedule Assignment Administration

Worker Availability: How It Is Determined

The availability of a worker during a selected time period is automatically determined using:

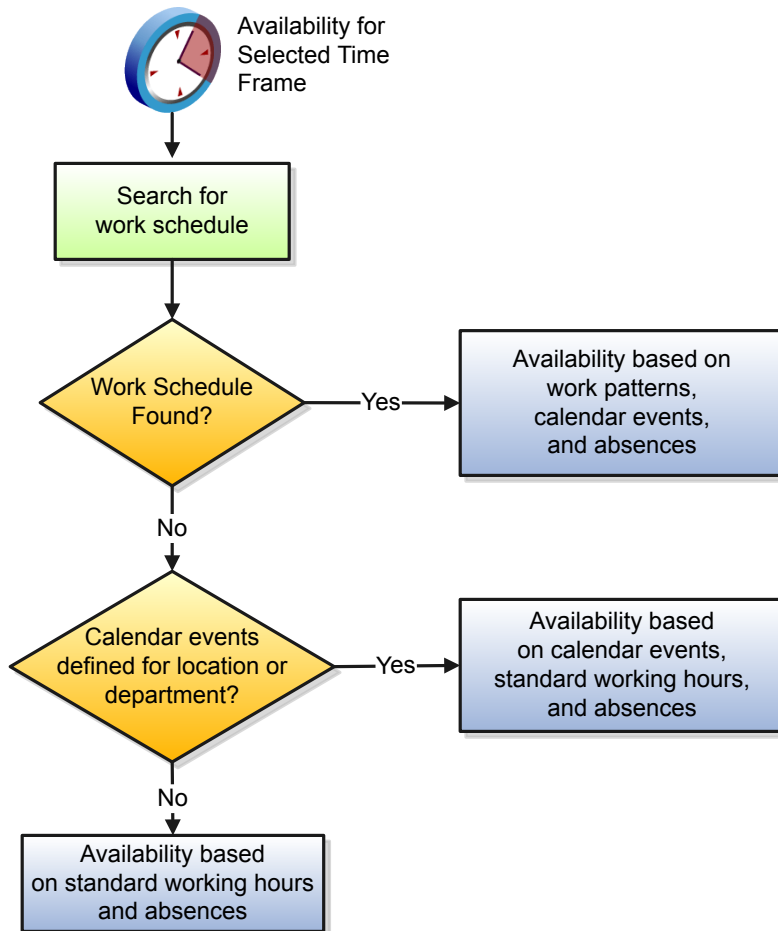
- Absence entries during that period
- The work schedule that the worker presently follows
- Calendar events

Settings That Affect Worker Availability

You specify which work schedules assigned to the worker's primary assignment or workforce structures are primary.

How Worker Availability Is Determined

The following figure shows how worker availability is determined.



The application searches for primary work schedules that were assigned to these workforce structure levels in the following order:

1. Primary assignment of the worker
2. Position
3. Job
4. Department
5. Location
6. Legal Employer
7. Enterprise

If there is no primary schedule assigned to any of the workforce structures, then the worker availability is determined by:

- Absences
- Calendar events, if created for the worker's location or department
- Standard working hours defined for the worker's primary assignment

If there are no calendar events created, then the application determines availability based on standard working hours and absences.

To determine availability, work schedules assigned to lower workforce structure levels take precedence over those defined at higher levels.

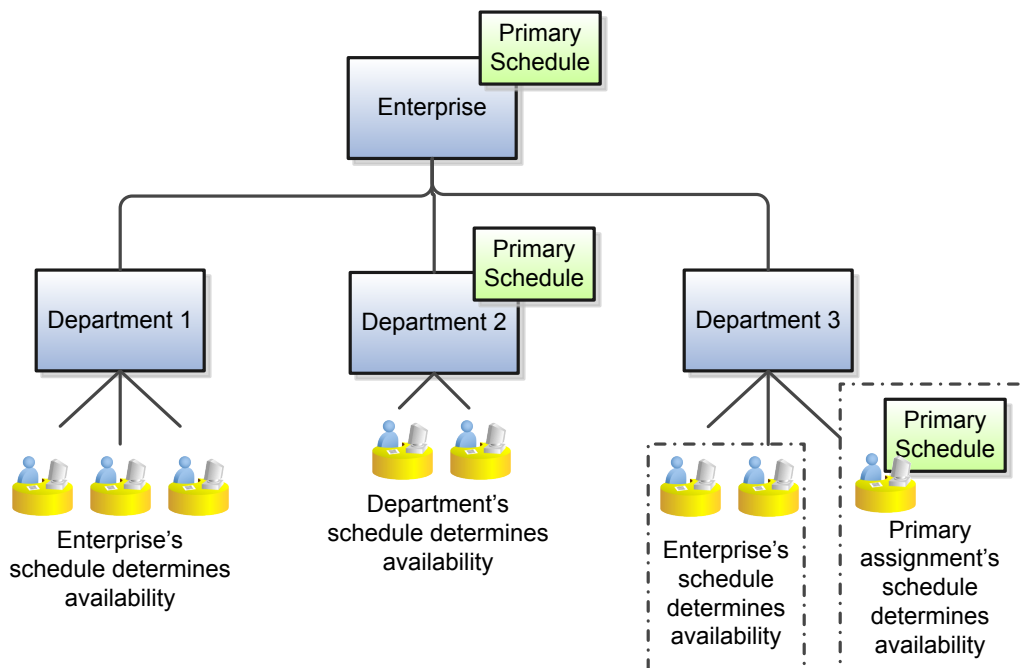
Scenario 1: You assigned a primary schedule at the enterprise level. However, since workers belonging to a particular department in that enterprise follow different work timings, you assigned a different primary schedule to that department.

Results: The department's primary schedule determines worker availability because that schedule takes precedence over the schedule defined at the enterprise level.

Scenario 2: In the same example, you assigned a primary schedule to a worker (primary assignment) belonging to the same department.

Results: That schedule determines the worker's availability because a schedule assigned to the primary assignment takes precedence over the ones defined at the department level and the enterprise level.

The following diagram illustrates this example:



The work patterns and exceptions that exist in the primary work schedule, and any absence entries during the selected time period, impact worker availability.

Exceptions in Work Schedules: Points to Consider

When you create a work schedule, you can include exceptions, such as public holidays or training sessions, and determine their impact on the availability of workers using that schedule. You can include the following exceptions in a work schedule:

- Calendar event

- Calendar event category
- Resource exception

Calendar Event

You can include as an exception a calendar event that you created.

Calendar Event Category

You can add an event category that you used to associate a group of calendar events, such as all voluntary holidays, as an exception in the work schedule. As a result, all calendar events under that event category automatically apply when you assign the schedule to workers.

Resource Exception

A resource exception is an event that you want to apply only for workers to whom you plan to assign the current work schedule. For example, for workers on the night-shift schedule, you want to specify that during a scheduled training event they will remain unavailable to attend support calls. When you create the work schedule, you define a resource exception for that training event and change the worker availability.

Creating and Assigning a Work Schedule: Worked Example

This example demonstrates how to create and assign a work schedule, incorporating shifts, patterns, and calendar events. The work schedule is for a support department in India, working in two shifts, and eligible for all public holidays.

The following table summarizes key decisions in this scenario:

Decisions to Consider	In This Example
Which calendar events must be included in the work schedule?	All public holidays
Which geographical location must the calendar events apply to?	India
What shifts must workers follow?	Day shift (9 a.m. to 5 p.m.). Night shift (5 p.m. to 1 a.m.).
What is the work pattern that workers must follow?	Day shift from Monday to Wednesday. Night shift on Thursday and Friday. Weekly holiday on Saturday and Sunday.
When must the work schedule start and end?	Starts on 1 January, 2011. Ends on 31 December, 2011.
Which shift must workers work first when the work schedule starts?	Day shift
What eligibility criteria must you associate the work schedule with so that line managers can easily find the schedule to assign to workers?	All employees from the support department

Decisions to Consider	In This Example
Which department must this schedule be assigned to?	Support department
What exceptions must be made to the work schedule of Vijay Singh who works in the same department?	Vijay Singh is scheduled to attend the Advanced Communication Skills training course on 8 February, 2011 during which time, the work schedule must indicate that he is unavailable.

Create calendar events within the Public Holiday category. Create two shifts (day and night), then create a weekly work pattern that uses these shifts. Create a work schedule using this work pattern, and select the Public Holiday calendar event category as an exception. Then assign this work schedule to the support department. Assign the same schedule to Vijay Singh and add the training course as an exception and indicate that the worker is unavailable during the course.

Prerequisites

1. On the Manage Trees page, ensure that the geographic hierarchy that you created for your enterprise contains a country node for India.
2. Create an eligibility profile Support_Workers for all workers in your Support department.

Creating Calendar Events

1. On the Manage Calendar Events page, click **Create**.
2. On the Create Calendar Event page, complete the fields, as shown in this table:

Field	Value
Name	Enter the name of the public holiday.
Category	Public Holiday
Start Date	Enter the date when the public holiday starts.
End Date	Enter the date when the public holiday ends.
Short Code	Enter a code to identify the public holiday.
Hierarchy Type	Geographic
Hierarchy	Select the geographic hierarchy that you created for your enterprise.

3. In the Coverage region that displays the geographic hierarchy you selected, select the India node, and click **Include**.
4. Click **Submit**.
5. If you want to add another calendar event, repeat steps 2 through 5.

Creating Shifts

1. On the Manage Work Shifts page, click **Create Time Shift** from the **Actions** menu.
2. In the Create Time Shift window, complete the fields for each shift, as shown in this table:

Field	Day Shift	Night Shift
Name	Day Shift	Night Shift
Start Time	0900 hrs	1700 hrs
Duration	8 hours	8 hours
Shift Detail Type	None	None

3. Click **Save and Close**.

Creating a Workday Pattern

1. On the Manage Work Workday Patterns page, click **Create Time Workday Pattern** from the Actions menu.
2. In the Create Workday Pattern window, complete the fields, as shown in this table:

Field	Value
Name	Weekly Work Pattern
Length in Days	7

3. In the Workday Pattern Details region, click **Add Row** from the **Actions** menu.
4. In the Workday Pattern Details table, complete the fields, as shown in this table:

Field	Day Shift	Night Shift
Start Day	1 (Monday)	4 (Thursday)
End Day	3 (Wednesday)	5 (Friday)

5. Click **Save and Close**.

Creating a Work Schedule

1. Navigate to the Manage Work Schedules page.
2. On the Manage Work Schedules page, click **Create**.
3. On the Create Work Schedule page, complete the fields, as shown in this table:

Field	Value
Name	Work Schedule for Support
Category	Work
Type	Time

Field	Value
Effective From Date	01 January, 2011
Effective To Date	31 December, 2011
Pattern	Weekly Work Pattern
Exceptions	Public Holiday event category
Eligibility Profile	Support_ Workers

4. Click **Submit**.

Assigning the Work Schedule to a Department

1. Navigate to the Manage Work Schedule Assignment Administration page.
2. Search for the Work Schedule for Support schedule.
3. Click the schedule to open it on the Edit Work Schedule Assignment page.
4. On the Resource Assignments region, click **Add Row** from the **Actions** menu.
5. Complete the fields, as shown in this table:

Field	Value
Resource Type	Department
Name	Support department
Start Date	01 January, 2011
End Date	31 December, 2011
Starting Shift	Day Shift
Primary	Yes

6. Click **Submit**.

Modifying the Work Schedule of a Worker

1. On the Person Search page, search for Vijay Singh, and select that record.
2. From the **Actions** menu, click Manage Work Schedule Assignment.
3. On the Manage Work Schedules page, click the **Add Row** icon on the tool bar.
4. Complete the fields in the Schedules region, as shown in this table:

Field	Value
Name	Select Work Schedule for Support.

Field	Value
	In this example, when you search for the schedule in the Search and Select window, select the Filter Using Eligibility check box to display all work schedules created for the Support department.
Start Date	01 January, 2011
End Date	31 December, 2011
Starting Shift	Day Shift
Primary	Yes

5. In the Exceptions region, click the **Add Row** icon on the tool bar.
6. Complete the fields, as shown in this table:

Field	Value
Type	Resource Exception
Name	Click Create in the choice list to create a resource exception called Advanced Communication Skills that starts on 8 February, 2011 and ends on the same day.
Availability	Off Period

7. Click **Submit**.

FAQs for Manage Work Schedule Assignment Administration

What's a primary work schedule?

Schedule that the application uses to determine the worker's availability.

Only primary schedules determine worker availability. For example, you want to assign two schedules for different time periods to a worker's primary assignment. If you want those schedules to determine the worker's availability for those time periods, you must select both schedules as primary. You manage work schedules using the Manage Work Schedule Assignment task in the Person Management work area.

If you assign only a single work schedule, that schedule automatically determines u availability.

When do calendar events affect workers?

When you include that event as an exception in a work schedule and assign it as a primary work schedule to the worker's assignment. However, if no work schedule exists for the worker's assignments, then the calendar events that cover the worker's location or department apply.

How do I change exceptions in work schedules for individual workers?

When you assign the schedule to a worker using the Manage Work Schedule Assignment page, you can change the exceptions and their impact to that worker's availability. For example, if you added a calendar event as an exception that impacts all workers, but want a particular worker to remain available to handle critical customer queries, you can change the availability for that exception.

5 Employment Processes

Promote and Transfer Workers

Simple Transfer Process: Explained

As a Line Manager, you can transfer your workers using a simplified process, by accessing your workers from the Directory or the My Team page and selecting the Transfer action. Human Resource Specialists may also use this process as an alternative, to initiate a simple transfer from the Directory.

When you transfer a person, 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 aren't changed and remain active even after the transfer.

You can also reassign and add direct reports to a manager during the transfer process. You can reassign reports to the same manager or to different managers and add reports to line managers, project managers, or 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.

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

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.

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.

Related Topics

- What's the purpose of sharing person information?
- Can I initiate a transfer if I do not have access to the person's information?

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 Pleasanton to San Francisco in the US, 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.

Settings That Affect Transfers

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

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 existing 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.

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.

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.

Settings That Affect Global Transfers

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


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.

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.

Transferring a Worker

 **Watch:** This tutorial shows you how to transfer a worker.

Transferring a Worker: Example

This example shows how to transfer a worker and shows the impact of a transfer on the employment data, depending on certain policy choices.

Scenario

Alice Walker and Gail Williams are employed by a health care company, Cook County Healthcare, in the UK. Alice works as a nurse in Archer hospital and Gail as an emergency room (ER) nurse in Butler hospital. Alice is transferring to Cook County Healthcare in the US, so Gail is working temporarily as a nurse in Archer hospital.

Employment Details

Alice and Gail have the following work relationships:

Person	Work Relationship	Assignment
Alice Walker	Archer Hospital	Nurse
Gail Williams	Butler Hospital	ER Nurse


The following table explains the policy decisions to be followed when transferring these workers:

Transfer Details	Alice Walker	Gail Williams
What is the transfer action?	Global Transfer	Add Temporary Assignment
Who is the initiating the transfer?	Human resource (HR) specialist for the US legal employer	Current HR specialist
Does the initiator of the transfer have access to the worker's information?	No	Yes
Do any direct reports exist for the person?	Yes	No
Should the direct reports be reassigned to the same manager?	No	Not applicable
What should be the status of the current assignment?	Inactive	Suspended - No Payroll, since Gail is not paid for the current assignment during the temporary assignment period.

Analysis

As the HR specialist for the current legal employer, you must do the following before transferring the workers:

- Share Alice Walker's information with the US HR specialist.
- Reassign Alice Walker's direct reports to Gail Williams.

 **Note:** You can also perform this step after transferring the workers.

Resulting Transfers

Alice Walker:

1. The HR specialist for the US legal employer performs the transfer after obtaining access to Alice's information.
2. The transfer process automatically terminates the Archer Hospital work relationship and the HR specialist creates a work relationship in the US legal employer.
3. The transfer process automatically ends the Nurse assignment and the HR specialist creates the assignment in the US legal employer.
4. The transfer process automatically sends a notification of the global transfer to the Payroll Administrator, who then completes the tasks for transferring Alice to the US payroll.
5. The HR Specialist reassigns the direct reports to Gail Williams during the transfer process.


Gail Williams:

1. The transfer process creates a temporary assignment in the current legal employer.
2. The Butler Hospital work relationship remains unchanged.
3. The transfer process suspends the ER Nurse assignment without pay.

Related Topics

- [What happens if I share information?](#)

Promoting a Worker

 **Watch:** This tutorial shows you how to promote a worker.

Promoting a Worker: Worked Example

This example illustrates how to promote a worker. Kate Williams is employed by a health care company, Cook County Healthcare. Kate is currently working as an Emergency Room Nurse in the Emergency Nursing department in Archer hospital. Kate's current grade is E4. Kate's manager has decided to promote her to an Emergency Nurse Manager.

The following table summarizes key decisions for this scenario:

Decisions to Consider	In This Example
When is the promotion effective from?	June 1, 2011
What is the new job name?	Emergency Nurse Manager
Is there a department change?	No
What is the new grade?	M1
Is there a salary change?	Yes, the salary basis is changed from monthly to annually and the new annual salary is \$85,000 .
Is there a manager change?	Yes, the new manager is Pat Miller.
Are there any direct and other report types to be added?	Yes, three people will directly report to Kate.
Is there a change in the compensation distribution?	No
Does the promotion involve any role change?	Yes, Kate has two additional roles Emergency Nurse Manager and Emergency Room Administrator.

Use the default values except where indicated.

Enter Employment Details

1. On the Person Gallery page, search for and select **Kate Williams**.
2. Select **Personal and Employment - Promote** in the Actions list to open the Promote Kate Williams: Employment Details page.
3. Complete the fields as shown in this table.

Field	Value
Promotion Date	6/1/11
Job	Emergency Nurse Manager
Working as a Manager	Yes
Grade	M1

4. Complete the manager details, as shown in this table.

Field	Value
Name	Pat Miller
Type	HR Manager

5. In the Add Direct Reports section, complete the fields as shown in the table.

Field	Value
Name	<input type="radio"/> Ashley Richardson <input type="radio"/> Bradley Randall <input type="radio"/> Ward Scott
Proposed Manager Type	<input type="radio"/> Line Manager <input type="radio"/> Line Manager <input type="radio"/> Line Manager

View Supporting Analytics

The analytics provide supporting information relevant to the promotion and aid you in completing the task.

1. Select the **Performance** tab to view Kate's recent performance documents.
2. Select the **Peer Comparison** tab to compare Kate's performance and potential scores with the scores of the other reports.
3. Select the **Competency Match** tab to compare Kate's competencies with the competency requirements of her new job.
4. Select the **Promotion Analytics** tab to compare Kate's promotion information with that of workers of similar job and grade.
5. Select the **Assignment Changes** tab to view Kate's assignment history and analyze the salary changes.
6. Select the **Probability of Attrition** tab to analyze the effect of the promotion on Kate's predicted performance and attrition level.
7. Click **Next** to enter the compensation details.

Enter Compensation Details

1. On the Promote Kate Williams: Compensation Details page, complete the fields, as shown in this table.

Field	Value
New Salary Basis	Annually
New Salary	85,000

View Compensation-Related Analytics

1. Select the **Salary Range** tab to analyze whether Kate's proposed salary falls within the specified grade range.
2. Select the **History** tab to view Kate's salary changes over time.
3. Select the **Percentage Change** tab to view what percentage Kate's salary has changed over time.
4. Select the **Compa-Ratio** tab to analyze how the change in Kate's compa-ratio compares to change in salary, over time.
5. Select the **Growth Rate** tab to analyze how Kate's salary has grown over time.

Enter Roles Information

1. On the Promote Kate Williams: Roles page, click **Add Role**.
2. Search for and select the **Emergency Room Administrator** role.
3. Click **Next** to review your choices and entries.
4. On the Promote Kate Williams: Review page, click **Submit**.

Social Networking with Promotions : Explained

If the Promote page has a Social link, you can invite others to collaborate about a promotion. For example, a manager can initiate a conversation with the human resources (HR) specialist to ask questions about completing the promotion transaction. The conversation remains with the promotion as a historical record.

Collaborating About Promotions

- Tips for collaborating: To get started, click Social on the Promote page. Click the Share button, or click Join if collaboration is in progress.
- Click the name of the promotion to access its wall, where you can start conversations and add members
- After collaboration starts for a promotion, anyone at your company can be invited to participate in a conversation about it. For example, the manager invites the HR specialist.
- On the wall of the promotion, everyone invited can view basic attributes of the promotion and post documents and comments that all members can see.
- Tip: Use the presence indicators to identify who is available to answer your questions.

FAQs for Promotions and Transfers

Can I initiate a transfer if I do not have access to all of the person's assignments?

No. Only a user who has access to all of the person's assignments can initiate a transfer for the person. To initiate a transfer for a person, use the Manage Employment page in the Person Management work area. Select the Update option in the Edit menu and then select any of the transfer actions from the Actions list.

Does a person automatically transfer to another payroll during a global transfer?

No. If you use Oracle Fusion Global Payroll, a notification is automatically sent to the Payroll Administrator when you create a new work relationship in the course of initiating a global transfer or global temporary assignment. The Payroll Administrator then completes the relevant tasks to transfer the person to another payroll.

Can I perform a global transfer for a person with a future termination date?

Yes, you can from the Person Management work area or using HCM Data Loader. The global transfer terminates the existing work relationship a day before the start date of the new work relationship.

Terminations

Terminations: Explained

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

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.

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.)

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.

Direct Reports

When you terminate a manager, 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.

Related Topics

- [Employment Model: Explained](#)
- [What's the difference between legal employer service dates and enterprise service dates?](#)

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.

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.

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.

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.

User Access and Roles

When you reverse a termination:

- Any role, such as Beneficiary, that 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.

Sensitive Transactions: How They are Processed

Certain future-dated terminations, such as involuntary layoffs, may be sensitive and must be hidden from everyone until an appropriate time. Any future-dated termination transaction having a deferred processing date is considered a sensitive transaction. You enter terminations using the Manage Work Relationship task in the Person Management work area.

Sensitive Terminations

To identify a termination as sensitive, you must enable deferred processing and specify when to process the changes. The processing of the termination is deferred to the date you specify. If the transaction goes through an approval process, and the processing date you specified occurs prior to approval, then processing is deferred until final approval. In either case, the termination is hidden from everyone except the initiator, approvers, and notification recipients until the time the transaction is processed and applied to the database.

Sensitive and Concurrent Transactions

Sensitive transactions affect how concurrent transactions are processed. You can't initiate a transaction for a person if there is a concurrent transaction pending approval for the same person. If, however, the concurrent transaction is a sensitive termination, you can initiate a transaction for the same person because the presence of a sensitive transaction can't be disclosed. Enabling concurrent transactions can create potential data conflicts. If the conflicts can't be resolved automatically, the application routes the actions to a person with a Human Resources (HR) Representative responsibility. The following example illustrates some potential data conflicts and suggests ways of resolving them.

Example: Concurrent Transfer and Termination

Suppose a line manager initiated a transfer for a worker when a sensitive termination was pending approval for the same person. The termination is now approved and applied to the database, which may give rise to data conflicts. As the worker's HR Representative, you must manually apply the required changes to resolve the following data conflicts:

- The transfer is still pending approval and the effective date of the transfer is later than or the same as the termination date. In this case, the application automatically rejects the transfer and notifies you.
- The transfer is still pending and the effective date of the transfer is earlier than the termination date. You receive a notification that you can withdraw the transfer because the worker is already terminated. If you choose not to withdraw the transfer, you receive a notification again (when the transfer is applied) that you must reenter the transfer. You must reenter the transfer so that the transfer details are reflected in the inactive assignment created by the termination.
- The transfer is applied to the database and the effective date of the transfer is later than or the same as the termination date. The sensitive termination was hidden at the time the transfer was initiated, however the transfer

conflicts with the termination. You receive a notification that you must delete the transfer and reenter the termination. You must reenter the termination because of data changes that occurred after the termination was initiated.

- The transfer is applied to the database and the effective date of the transfer is earlier than or the same as the termination date. You receive a notification that you must reenter the termination. You must reenter the termination because of data changes that occurred after the termination was initiated.

Simple Termination Process: Explained

As a Line Manager, you can terminate your workers using a simplified process, by accessing them from the Directory or the My Team page and selecting the Terminate action. Human Resource Specialists can also use this simplified process as an alternative, to initiate a simple termination from the Directory.

When you terminate a work relationship:

- The assignments associated with the work relationship are ended automatically, and their status is 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).

Related Topics

- [What's the difference between legal employer service dates and enterprise service dates?](#)

Hiding Terminations: Critical Choices

To terminate a person's work relationship, select the Manage Work Relationship task in the Person Management work area. If you are entering a future-dated sensitive termination and want to hide the termination for a specified period, you can use one of the following two options:

- Termination display
- Deferred processing

Termination Display


Before submitting a termination, you can hide the termination using the Termination Display option. This option controls whether the termination appears in the person spotlight of the terminated employee. You can also use this option to hide the termination for a specified period after the termination date. During this period, the termination is visible only to those users who have access to the terminated person's record.

Deferred Processing

As part of submitting the termination, you can defer the processing of the termination transaction. The Deferred Processing option is typically useful to hide terminations with a future-effective date. For example, consider that you want to enter an involuntary future-dated termination. You want to submit the termination but defer processing until the termination date, because the person you are terminating has access to the functionality that exposes the termination to the person. Use the

Deferred Processing option to postpone processing the termination until the termination date. This hides the termination from everyone except the initiator, approvers, and notification recipients, until the time the transaction is processed.

Terminating a Work Relationship

 **Watch:** This tutorial shows you how to terminate a work relationship.

Terminating a Work Relationship: Example

This example illustrates how to terminate a work relationship when the person has multiple assignments, direct reports, and future-dated transfer actions. The example also shows the impact of a termination on the employment data, depending on certain policy choices.

Scenario

Samantha Green and John Smith are employed by a health care company, Cook County Healthcare. Samantha works primarily as a nurse in Archer hospital and as a volunteer nurse in Butler hospital. John works as a radiologist in Kent hospital. The enterprise has decided to terminate John whereas Samantha's termination is voluntary.

Employment and Termination Details

Samantha and John have the following work relationships:

Person	Work Relationship	Worker Type	Assignment	Future-Dated Transfer Actions	Direct Line Reports Existing	Other Reports Existing
Samantha Green	Archer Hospital	Employee	Nurse	No	Yes	Yes
Samantha Green	Butler Hospital	Nonworker	Volunteer Nurse	No	No	No
John Smith	Kent Hospital	Contingent Worker	Radiologist	Yes	No	No

This table explains the policy decisions to be followed when terminating these work relationships:

Termination Details	Samantha Green	John Smith
Can the termination be made public?	Yes	No. Postpone displaying the termination in the person spotlight for a week since other involuntary terminations have to be entered.
When should the user access be revoked?	After the termination date	Immediately after termination is approved and saved, not waiting until the termination date
Is the person recommended for rehire?	Yes	No

Termination Details	Samantha Green	John Smith
Is payment processing required after termination?	Not required for Butler Hospital since this is a nonworker relationship and payment for this relationship is not through payroll	Yes
When should the direct line and other report types be reassigned?	Direct line reports for the nurse assignment must be reassigned during the termination transaction. Other report types must be reassigned from the Manage Direct Reports task before the termination effective date.	Not applicable

Analysis

Before terminating these work relationships, you must:

- Reassign Samantha Green's direct reports to another manager using the Change Manager page.
- Delete John Smith's future-dated global transfer and cancel the new work relationship created for the transfer.

You cannot terminate the primary work relationship when there are other nonprimary work relationships existing for the person. So, terminate Samantha's nonworker relationship to Butler Hospital first.

Resulting Terminations

When you terminate Samantha Green's two work relationships:

- The associated assignments are ended, and their status is changed to inactive on the day following the termination date.
- Her roles and user accounts are revoked after the termination date.
- Her period of service with the legal employers Archer Hospital and Butler Hospital and the enterprise Cook County Healthcare is ended on the termination date. She becomes an ex-employee for the legal employer Archer Hospital and ex-nonworker for Butler Hospital.
- A notification of the Archer Hospital work relationship termination is sent automatically to the Payroll administrator, who then completes the tasks for terminating the payroll.
- Direct line reports for the nurse assignment must be reassigned during the termination transaction. Other report types must be reassigned from the Manage Direct Reports task before the termination effective date.
- Other report types are reassigned to other managers using the Manage Direct Reports task.

When you terminate John Smith's work relationship:

- The work relationship and the assignment are ended. The status of these objects is changed to inactive on the day following the termination date.
- His roles and user accounts are revoked before the termination date, as soon as the termination is approved.
- His period of service with the legal employer Kent hospital and the enterprise Cook County Healthcare is ended on the termination date. He becomes an ex-contingent worker for the legal employer.
- A notification of the termination is sent automatically to the Payroll Administrator, who then completes the tasks for terminating the payroll.

Synchronizing the Line Manager Using Position Hierarchy During Termination: How It's Processed

When the application reassigns direct reports of a terminated manager, the line manager value is updated for all direct reports, including active and suspended assignments. This topic explains how the line manager value is synchronized during termination if you enable synchronization using HCM position hierarchy.

How Line Manager Is Synchronized

When you terminate a manager with direct reports, the Reassign Directs section on the Manage Employment page displays the direct line reports in read-only mode. The line manager for the direct reports is synchronized based on the following conditions:

- If the position has multiple incumbents, the other incumbent is the new manager.
- If no other incumbent exists in the position, the incumbent in the parent position is the new manager. If the parent position doesn't have an incumbent either, the application checks for an incumbent one level up in the hierarchy or until it finds an incumbent.
- If the parent position has multiple incumbents, the incumbent with the longest tenure is the new manager.
- If a parent position doesn't exist or there are no incumbents in all the parent positions in the hierarchy, you can manually reassign the direct reports to other managers.
-

Related Topics

- [Running the Synchronize Person Assignment from Position Process](#)

FAQs for Terminations

What's termination notification date?

Termination notification date is the date the initiator of the termination notifies the other party of the termination. For example, a worker notifies an employer of his resignation or an employer notifies a worker of an involuntary termination, such as a layoff. The termination date is the worker's last date of employment; this date defaults to the notification date plus the notice period derived from the assignment. You can override this default when entering the termination. You enter a termination using the Manage Work Relationship task in the Person Management work area.

How can I change the termination date of an already terminated worker?

You can change the termination date by using the Correct Termination action. To correct a termination, select the Manage Work Relationship task in the Person Management work area. On the Manage Work Relationship page, select **Correct Termination** from the **Actions** menu.

 **Note:** You are recommended not to use the Reverse Termination action in place of the Correct Termination action.

Can I terminate a work relationship if there are future-dated employment changes?

Yes, provided the future changes aren't related to global temporary assignments. If any future-dated changes related to global temporary assignments exist, you must manually delete them and cancel any new work relationship before you terminate the current work relationship. All future-dated changes are lost when you terminate the work relationship. To terminate a work relationship, use the Manage Work Relationship task in the Person Management work area.

However, for worker and line manager initiated terminations, you can't terminate a work relationship if any future-dated changes exist.

How can line managers reassign persons' direct reports?

Line managers can access their direct reports from the My Team page and use the Change Manager action to reassign their reports.

What happens if there are data conflicts after terminating a person?

It is not possible to automatically identify and resolve every conflict scenario resulting from terminating a person. You must make any required changes to the data manually. For example, you must manually reassign any checklist tasks assigned to the terminated person or cancel any training scheduled for the person.

What happens if I revoke user access from a person with multiple active work relationships?

The person loses roles provisioned automatically for assignments in this work relationship only.

The person keeps roles that were:

- Provisioned manually
- Acquired automatically for other active work relationships

If the person has roles at termination, then the user account remains active. Otherwise, it's suspended automatically.

What's the impact of entering a rehire recommendation?

The rehire recommendation you enter for a termination is for information purposes only, and doesn't automatically determine whether a person can be rehired. You can enter a rehire recommendation when you perform terminations in the My Team work area or, for HR Specialist only, using the Manage Work Relationship task in the Person Management work area.

Manage Direct Reports

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.

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, John Smith'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.

When you use position synchronization and choose to synchronize the line manager using the HCM position hierarchy, the line manager changes automatically for all direct reports. During reassignment, the application assigns the incumbent in the parent position as the new manager for the direct reports. If there is no incumbent in the parent position, the application checks one level up in the hierarchy or until it finds an incumbent.

 **Note:** The Manage Direct Reports task doesn't assign new roles to managers during the reassign process. Use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task in the Setup and Maintenance work area to manage the assignment of roles. For people who didn't have reports before the reassign process, you must assign manager roles.

Areas of Responsibility

Areas of responsibility associated with the manager's role aren't affected by the Manage Direct Reports task. For example, if a line manager also has an area of responsibility as an HR representative, the HR reports can't be managed from this task.

Related Topics

- [Areas of Responsibility: Explained](#)


Reassigning Direct Reports for Terminations and Resignations: Explained

If the resigning or terminating worker is a line manager with direct line and other report types such as project reports and resource reports, you must reassign all reports to new managers before approving the resignation request or terminating the work relationship. When you reassign direct reports, changes occur at the assignment level for each report. However, within the termination, correction of termination, and resignation transactions, the only type of reports you can reassign are direct line reports. To reassign other types of reports, use the Manage Direct Reports task.

Reassigning Direct Reports

You can reassign all or selected direct line reports to new managers during resignation or termination processes. You can select the same new manager for all the direct line reports or a different new manager for each report. If the resigning or terminated worker is a manager for multiple assignments, each assignment is listed separately with the direct line reports to be reassigned.

You must reassign other report types, such as project reports, resource reports, or mentees using the Manage Direct Reports task before the termination effective date.

 **Note:** The Reassign Line Reports area is displayed only if the worker has line reports.

For example, John Smith has submitted his resignation or has to be terminated, and his direct line reports need to be reassigned. John has four direct line reports and you want to reassign them to new line managers.

You can reassign:

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

If the majority of direct line reports 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 direct line reports to different managers.

When reassigning direct line 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.

The direct line reports of the resigning or terminated worker are displayed as of the termination date and not the current date. By default, the effective date of the reassignment will be the termination date of the worker plus one day.

Related Topics

- [Employment Configuration Options: Explained](#)

Adding and Reassigning Direct Reports for Global Transfers and Global Temporary Assignments: Explained

You can add and reassign direct reports of a manager's primary assignment when creating a global transfer or temporary assignment for the manager. Use the Manage Directs Reports page to reassign direct reports in the secondary assignment

before the global transfer takes effect. You can add direct reports for the secondary assignment when you create it. When you add or reassign direct reports, changes occur at the assignment level for each report.

You can select the same new manager for all the direct reports or a different new manager for each report. When you select reports for reassigning during global transfer or temporary assignment, deselect any direct reports continuing to report to the transferring manager in the new assignment. If you select any direct reports and don't specify a new manager, they will continue to report to the current manager in the inactive assignment.

Reassigning Direct Reports During Global Transfer: Examples

This topic illustrates the different scenarios while reassigning direct reports during global transfer using the Person Management work area.

Reassigning Direct Reports to the Transferring Manager

When you are reassigning direct reports to the transferring manager, you must deselect all reports continuing to report to the same manager in the new assignment. Use the Reassign Line Reports section on the Global Transfer: Employment Information page to reassign the direct reports.

Reassigning Direct Reports to the Transferring Manager's Manager

When you are reassigning direct reports to the transferring manager's manager, you can use any one of the following methods:

- Schedule the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments process to automatically reassign the direct line reports. All direct reports are reassigned to the transferring manager's manager as of the date following the transfer, or
- Reassign the line reports manually to the transferring manager's manager during the global transfer transaction

Reassigning Direct Reports to the Transferring Manager, Other Managers, and Manager's Manager on Different Dates

When you are reassigning direct reports:

In the primary assignment:

- Reassign any direct reports before transferring the worker using the Manage Direct Reports page
- Deselect any direct reports continuing to report to the transferring manager
- Reassign the remaining direct reports to the same or different new managers
- Reassign any direct reports on specific dates using the Change Manager page

In the secondary assignment:

- Reassign any direct reports to new managers using the Manage Direct Reports page
- Schedule the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments process to automatically reassign any remaining direct reports to the manager's manager. The direct reports are reassigned as of the date following the transfer
- Reassign any direct reports on specific dates using the Change Manager page

Pending Approvals and Invalid Supervisor Assignments: Explained

When a manager assignment becomes inactive, you must reassign the direct reports. If the manager had pending approval notifications, you must also reassign the notifications. An inactive assignment can result from:

- Ending an assignment or work terms
- Terminating the employee
- Performing a global transfer

Pending Approvals and Invalid Supervisor Assignments

If the terminated manager has any direct reports then these invalid supervisory assignments must be corrected. The terminated worker or manager may also have pending approval notifications such as approving a promotion or a new hire, which must be reassigned.

Reassign Pending Approvals and Direct Reports

Run the Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments process to reassign the direct reports and any pending approval notifications of a manager who is either terminated or globally transferred. You can manually run the process or schedule it to run automatically at a specific time in the Scheduled Processes work area. It's strongly recommended that you schedule this process to run daily to avoid any unassigned workers.

The process reassigns the direct reports of a terminated manager to that person's line manager. Similarly, it assigns any pending approval notifications to the line manager.

You can either reassign pending notifications or skip this step when you run the process. If you choose to reassign pending notifications, then you must specify the number of days to be considered for reassigning the pending approvals. For example, if you specify 30 days, the process reassigns pending approvals of workers or managers terminated in the past 30 days.

FAQs for Manage Direct Reports

What's the difference between the Change Manager and Manage Direct Reports functionalities?

The Change Manager functionality enables you to change managers of all types, but only one worker at a time. The Manage Direct Reports functionality enables you to reassign all the line reports of a manager to new managers in a single process.

Can I reassign indirect reports of the manager from the same Manage Direct Reports task?

No, you can reassign only direct reports of the Manager.

Manage Mass Updates

Mass Updates: Explained

You can use a mass update to update multiple employment-related records with a single request. For example, you can transfer all workers in a department together as part of a company reorganization. You manage mass updates in the Mass Updates work area.

Mass Assignment Change

Create a mass assignment change to update multiple worker assignments at once. The action categorizes the type of assignment change. For a mass assignment change, you can select from a list of employment-related actions such as Assignment Change, Transfer, or Promotion.

Mass Assignment Change Using Spreadsheet


You can download your data from the Verification page into a spreadsheet if there are too many rows and if it is easier to make the changes in a spreadsheet format. Before you do this, you must:

- Install the desktop client Oracle ADF 11g Desktop Integration.
- Enable the Trust Center setting **Trust access to the VBA project object** in Microsoft Excel.

Using the spreadsheet, you can:

- Make the changes offline
- Check in the data
- Verify the changes from within the spreadsheet

Using personalization, you can add additional attributes on the Changes page; however, these attributes are hidden when you download the data into a spreadsheet. To display the hidden attributes in the spreadsheet, use the Unhide feature in Microsoft Excel. You can check in and verify the data in the spreadsheet multiple times to accommodate revisions. After the final check in, you must navigate to the Review page of the mass assignment change (in the application) to submit the changes.

 **Note:** The mass update transaction saves automatically when you navigate to the Verification page. The current changes overwrite the earlier mass update and can't be restored by canceling the current transaction.

Assignments With Future Changes

You can either include or exclude assignments with future changes in the mass update. If you include assignments with future changes, you must manually adjust those records whose effective date of change is later than the mass update date to resolve any conflicts. For those assignments with changes existing on the same date of the mass assignment change, the mass update is applied as the last change and previous assignment changes are retained.

Related Topics

- [Setting Up the Desktop Integration for Excel: Procedure](#)

Mass Update Statuses: Explained

The mass update status indicates what actions have been completed in the mass update process and what actions are yet to complete. You can view the status of a mass update in the Mass Updates work area.

The following table summarizes the mass update statuses and their meanings.

Status	Meaning
Initiated	The status is automatically set to Initiated when you create a mass update
Awaiting user verification	Mass update changes are awaiting verification
Awaiting user verification - exported	You have exported the mass update rows to a spreadsheet
Awaiting user verification - imported	Changes in the checked-in spreadsheet are awaiting verification
Completed	Mass update is complete

Creating a Mass Transfer: Worked Example

This example illustrates how to update multiple assignments at one time using mass update. As part of the company reorganization, all workers in the Applications Support business unit must be transferred to the Global Support business unit. The transfer involves a change in department and work location.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Include assignments with future changes?	No, transfer these assignments separately and not as a part of this mass update
Department and location changes applicable to all workers?	No, the location change doesn't apply to persons working at home

Creating a Mass Transfer

1. On the Manage Mass Updates page, click **Create** to open the Create Mass Assignment Change: Basic Details page.
2. Complete the fields, as shown in this table.

Field	Value
Name	Reorganization September 2011
Action	Transfer
Assignments with Future Changes	Show errors and exclude assignments

3. Click **Next**.

Selecting the Population

1. On the Create Mass Assignment Change: Population page, click **Select and Add** to open the Select and Add: Persons page.
2. Click **Advanced** to open the Advanced Search page.
3. Select the Applications Support department and click **Search**.
4. Select all the rows in the search results.
5. Click **OK** to display the search results in the Selected Persons region.
6. Click **Next**.

Entering the Changes

1. On the Create Mass Assignment Change: Changes page, complete the fields, as shown in this table.

Field	Value
Business Unit	Global Support
Department	Global Applications Support
Building	New Pleasanton Campus

2. Click **Next**.

Verifying the Changes

1. On the Create Mass Assignment Change: Verification page, in the Proposed Changes column, delete the Building value **New Pleasanton Campus** for those persons working at home.
2. Click **Verify Changes** and review any errors and warnings.
3. Click **Next**.
4. On the Create Mass Assignment Change: Review page, review the current and proposed values.
5. Click Submit.

FAQs for Manage Mass Updates

Can I make changes in the mass update after submitting it?

No, but you can save the mass update for later, and edit or delete the mass update any time before submitting it. You can manage mass updates in the Mass Updates work area.

What are worker and assignment category tags?

When you select a worker or assignment category in the Job Details section of the Create Mass Assignment Change page, you can see tags displayed next to the fields. These tags specify the legislations associated with the selected category and have the following meaning:

- Tags with + prefixes: Indicate that the selected category only applies to the legislations with the + prefix. For example, Tags +FR,+IE,+NZ indicate that the selected category only applies to France, Ireland, and New Zealand.

- Tags with - prefixes: Indicate that the selected category applies to all legislations except the legislations with the - prefix. For example, Tags -FR,-IE,-BR indicate that the selected category applies to all legislations except France, Ireland, and Brazil.
- Tags with + and - prefixes: If the tags contain a combination of + and - prefixes, the first prefix is considered and the rest is ignored. For example, Tags +FR,-IE,-BR indicate that the selected category only applies to France, Ireland, and Brazil.

6 Hiring Management

Hiring Manager Experience: Overview

Hiring Manager Experience is delivered as part of the Oracle HCM Cloud and provides access to hiring manager functions with a simplified Web experience.

Hiring managers can view active candidates, requisitions they own, and job submissions, including associated files. They can approve, decline, or pass requisitions and offers. They can move candidates forward, enter comments about them, or reject them where applicable. They can evaluate candidates by comparing their submitted details side by side, filling evaluation management questionnaires, skill ratings, or recommendations.

You can access the Hiring Manager Experience by clicking the Hiring link from the Navigator page (Navigator > My Team > Hiring). Hiring Manager Experience requires the following product pairing:

- Oracle HCM Cloud R12.PB5 and Oracle Taleo Enterprise Cloud Service 15B.6, as well as any future monthly or quarterly updates of those versions (Oracle HCM Cloud R13.0 and Oracle Taleo Enterprise Cloud Service R17.0 are not yet supported).
- The pairing is done with Version 1 of the out-of-the-box (OOTB) integration between Oracle Fusion Applications Cloud Service and Oracle Taleo Enterprise Cloud Service.

Hiring Activities: Overview

Hiring managers can use the Hiring Activities page to view their pending tasks related to requisition approval, offer approval, and evaluations.

Requisition Approval

In the Requisition Approval section, you can view the requisitions listed for your approval. If you have already reviewed the details for a particular requisition, you can directly proceed to approve or decline the requisition. Alternatively, you can review the requisition details, such as the approval flow and comments from other approvers before you decide to approve or decline.

Offer Approval

In the Offer Approval section, you can view the offers listed for your approval. If you have already reviewed the details for a particular offer, you can directly proceed to approve or decline the offer. Alternatively, you can review the offer details, such as the approval flow and comments from other approvers before you decide to approve or decline.

Evaluations

In the Evaluations section, you can view upcoming interviews for which you are a participant. Clicking the requisition title opens the evaluations feedback form. From there, you can fill out the candidate responses in the evaluation questionnaire.

Managing Requisitions: Explained

Hiring managers can use the Requisitions page to manage open active requisitions that they own. They can access candidates who have applied to their requisitions through career sites. They can view the requisitions based on the security permissions assigned to their role. Requisition ownership refers to the individuals chosen as the recruiter, the hiring manager, the recruiter assistant or the hiring manager assistant for a specific requisition.

Browse Requisitions

You can browse through a set of requisition cards containing your open active requisitions. You can search for a particular requisition and review its candidate details. You can compare the candidates who have applied for the requisition and move them forward in the hiring process or reject them.

Review Candidate Progress

Each requisition card displays the number of candidates at each stage of the hiring process (New, Review, Evaluation, and Selection). Alternatively, the candidate progress is displayed when you view the details of a requisition. These candidates have been matched against the requisitions by recruiters or have applied to your requisitions. You can review the candidate card details at each stage and add your comments. Based on your assessment, you can move the candidate forward in the hiring process or reject the candidate.

Compare Candidates

Each requisition is part of the hiring workflow. You can obtain an overview of the candidate progress at different stages of the hiring process and compare candidates at each stage. You can compare candidates by using any candidate progress filter (New, Review, Evaluation, or Selection). You can use the drag-and-drop operation to compare 3 candidates side by side. You can compare by the summary, prescreen results, evaluation results, or comments. After the comparison, you can move the candidates forward in the hiring process or reject the candidate.

Compare Candidate Resumes

You can also compare candidates by their resumes. When you access the PDF resume of a candidate from the candidate card in the requisition, you can navigate through all the candidate resumes in that requisition. You can add comments and move the candidate forward in the hiring process or reject the candidate.

Managing Candidates: Explained

Hiring managers can use the Candidates page to quickly locate candidates who applied to requisitions and perform actions, such as adding comments or moving a candidate in the hiring process. You can access information about candidates who have applied to your requisitions through career sites. You can view the candidate applications based on the security permissions assigned to your role.

Browse Active Candidate Applications

In the list of active candidates, you can view all candidate applications that are in various stages of the hiring process. You can search for a particular candidate application, review the details, and add comments. Based on your assessment, you can move the candidate forward in the hiring process or reject the candidate.

Review New Candidate Applications

You can view new candidate applications for various job positions by using the New candidate progress filter at the top of the page. These applications are yet to be prescreened in the hiring process. After you review the candidate details, you can move the candidate forward in the hiring process or reject the candidate.

Review Prescreened Candidate Applications

You can view prescreened candidate applications for various job positions by using the Review candidate progress filter at the top of the page. Recruiters prescreen and select candidate applications after determining that the candidate profiles meet the minimal requirements necessary for the position. These candidates are associated with requisitions owned by the hiring manager. You can review each prescreened application and move the candidate forward in the hiring process or reject the candidate.

Evaluate Candidate Applications

You can view candidates who are scheduled for interviews by using the Evaluation candidate progress filter at the top of the page. You can view interview schedules and access the evaluation questionnaire forms of candidates. You can complete and submit the evaluation questionnaire during the interview or after.

Select Candidate Applications

You can view candidates who have cleared the interview evaluation process by using the Selection candidate progress filter at the top of the page. These candidates are associated with requisitions owned by the hiring manager. You can review each candidate application and decide to move forward and make an offer to the most suitable candidate.

FAQs for Hiring Management

What's the difference between requisition approval and offer approval?

A requisition approval is required before you can post a requisition on career sites or job boards to receive candidate applications.

An offer approval is required at the end of the candidate selection workflow before you make a formal offer to hire the candidate.

What does it mean to pass on an offer or requisition approval?

Passing allows you to push an approval task to another user. The offer or requisition is routed to the next approver in the approval flow.

7 Base Pay

Overview

View and adjust workers' base salary. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- View a worker's salary basis and change it, subject to security and other constraints.
- Adjust base pay by adjusting:
 - Amount
 - Percentage
 - Compa-ratio
 - Other salary factors
- View salary history, as well as graphical analysis of current and new salary.

To manage base pay, start from the following work areas:

Role	Work Area
Line Manager	My Dashboard - Manager Resources
	Directory - Person Gallery
	My Workforce - Person Management
Compensation Manager	Compensation
HR Specialist	My Workforce - Person Management
	Directory - Person Gallery

Calculating Full-Time Salary and Annualized Salary: Examples

The following scenarios illustrate how the application calculates annual salary and annualized full-time salary. The scenarios use standard working hours, worker's working hours and full-time equivalent (FTE), salary amount, annualization factor, and frequency.

This topic lists the common assumptions and calculations for the following three scenarios:

- Worker's hours equal the standard working hours
- Worker's hours are less than the standard working hours
- Worker's hours are greater than the standard working hours

Assumptions

All of the examples assume the following:

- Legal employer standard working hours per week is 40.
- Currency is US dollars (USD).
- FTE is calculated by dividing the worker's working hours per week by the standard working hours per week.
- Annualization factor for hourly workers represents the Legal Employer Standard Working Hours per Week x Weeks per Year.

The standard working hours, working hours, and FTE come from the worker's employment record. You can view it using the Manage Employment task in the Person Management work area. The annualization factor and the frequency for the salary come from the salary basis associated with the worker's salary record.

Worker's Hours Equal the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

Calculation Input	Value
Worker's standard working hours	40
FTE	1
Annualization factor	2080
Base Pay	15 USD

Calculation:

- Annual salary: $15 \times 2080 = 31,200$ USD
- Annualized full-time salary: $15 \times (2080/1) = 31,200$ USD

Worker's Hours Are Less Than the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

Calculation Input	Value
Worker's standard working hours	20
FTE	0.5
Annualization factor	2080
Base Pay	15 USD

Calculation:

- Annual salary: $15 \times 2080 \times 0.5 = 15,600$ USD
- Annualized full-time salary: $15 \times (2080/1) = 31,200$ USD

The following table shows the inputs for this scenario for a monthly rate:

Calculation Input	Value
Worker's standard working hours	20
FTE	0.5
Annualization factor	12
Base Pay	5,000 USD

Calculation:

- Annual salary: $5,000 \times 12 = 60,000$ USD
- Annualized full-time salary: $5,000 \times (12/0.5) = 120,000$ USD

The following table shows the inputs for this scenario for an annual rate:

Calculation Input	Value
Worker's standard working hours	20
FTE	0.5
Annualization factor	1
Base Pay	50,000 USD

Calculation:

- Annual salary: $50,000 \times 1 = 50,000$ USD

- Annualized full-time salary: $50,000 \times (1/0.5) = 100,000$ USD

Worker's Hours Are Greater Than the Standard Working Hours

The following table shows the inputs for this scenario for an annual rate:

Calculation Input	Value
Worker's standard working hours	48
FTE	1.2
Annualization factor	1
Base Pay	20,000 USD

Calculation:

- Annual salary: is $20,000 \times 1 = 20,000$ USD
- Annualized full-time salary: $20,000 \times (1/1.2) = 16,667$ USD

Related Topics

- [How Many Salary Bases to Create: Points to Consider](#)

Editing Salaries in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook, populated with the salary information that matches your download parameters. Use the integrated workbook to edit the salary information. Then, upload your changes into the application database. The workbook enables you to edit salary by providing a salary change percentage or amount, but you can't change the salary basis.

The basic process for downloading salaries using the workbook is:

1. Generate and populate the workbook.
2. Edit workbook data.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

In the Compensation work area:

1. In the tasks panel tab, click **Download Salaries**.

2. Select the download parameters, including salary start date, and currency.
3. Select the latest salary start date and local currency options, if you plan to upload your workbook edits.
The currency shown comes from the input value of the payroll element attached to the salary basis.
4. Click **Preview Download** to view the data that matches your download parameters.
5. Click **Prepare in Workbook** to generate the workbook and populate it with the data that matches your download parameters.


Editing Workbook Data

After the download completes, you can modify data in cells with a white background. The workbook displays a symbol in the **Changed** cell to mark the rows where you entered data in one of the white cells. If you enter a new base salary or new amount, you must also enter a new salary start date. Ensure that the new base salary and current base salary aren't the same. Otherwise, you'll receive update failed errors when you upload your changes.

The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have fewer than five active salary components for a salary basis, only the column cells for the active salary components contain values. The other column cells remain blank. If you have more than five active salary components, the download includes only the first five.

Uploading Edits

After you complete your edits, click **Upload** to load into the application those rows that are marked as **Changed**. The application doesn't upload edits in cells with a nonwhite background.

-  **Caution:** Don't select the **Upload and then immediately download** option when prompted during an upload. This action causes the committed data to immediately download back into the workbook obscuring any errors that occurred during the upload.

To validate the changes, open the Manage Salaries page, then search for and select a person whose salary you updated.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)
- [What's the difference between export to Excel and desktop integration for Excel?](#)
- [Setting Up the Desktop Integration for Excel: Procedure](#)

FAQs for Base Pay

What's a salary basis?

The salary basis determines the period in which base pay is expressed, specifies whether salaries can be itemized with components, and identifies any associated grade rate for salary validation. A worker's salary basis generally remains constant, however it can change. For example:

- A worker changes from an individual contributor to a manager. The salary basis changes from hourly to annual.
- A union contract amendment mandates itemizing a worker's pay rate. The hourly salary basis that does not use components changes to an hourly salary basis that uses components.

How can I edit multiple salaries at one time?

Use the integrated workbook in the Compensation work area to view and edit salaries for multiple persons. Follow these steps:

1. Use the Export Salaries task to set your export parameters.
2. Click **Prepare in Workbook** in the **Edit Preview** section to generate the workbook.
3. Make your edits in the workbook.
4. Upload your changes into the application database.

8 Individual Compensation

Overview

Award variable compensation to individual workers outside of the regular compensation cycle, such as a spot bonus, education reimbursement, or car allowance. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- Award ad hoc bonuses, allowances, and other compensation.
- Initiate and update recurring payments.
- View a worker's compensation history to help determine if an award is deserved and to view past award amounts.

To manage Individual compensation, start from the following work areas:

Role	Work Area
Line Manager	My Dashboard - Manager Resources
	Directory - Person Gallery
Compensation Manager	Compensation
HR Specialist	My Workforce - Person Management
	Directory - Person Gallery

Salary Growth Rate Calculations: Examples

The following examples show how the application calculates the average annual salary growth rate and the cumulative salary growth rate. The examples show calculations over three and five year periods. This information appears in compensation history and in salary analytics.

Scenario

The following table shows the salary change information for both examples.

Year	Starting Salary	Ending Salary	Annual Growth Rate	Three Year Period
2010	38,000	41,000	7.89	NA

Year	Starting Salary	Ending Salary	Annual Growth Rate	Three Year Period
2011	41,000	43,000	4.88	NA
2012	43,000	49,000	13.95	Included
2013	49,000	54,000	10.20	Included
2014	54,000	54,000	0.00	Included

Average Annual Growth Rate

Average annual growth rate is the statistical average of the total percentage increase from January to December of each full year. To calculate this average, the application sums the annual growth rate of all the years in the calculation period and divides by the number of years.

The following table shows the calculation using the scenario data.

Period	Average Annual Growth Rate	Calculation
Three year	8.05	$(13.95 + 10.20 + 0.00) / 3 = 8.05$
Five year	7.38	$(7.89 + 4.88 + 13.95 + 10.20 + 0.00) / 5 = 7.38$

Cumulative Growth Rate

Cumulative growth rate is the total percentage of salary change over the period. To calculate the cumulative rate, the application:

1. Determines the amount of the salary increase for the period by subtracting the period starting salary from the period ending salary
2. Calculates the cumulative rate by dividing the salary increase amount by the starting salary

The following table shows the calculation using the scenario data.

Period	Cumulative Growth Rate	Calculation
Three year	25.58	$(54,000 - 43,000) / 43,000 = 25.58$
Five year	42.10	$(54,000 - 38,000) / 38,000 = 42.10$

FAQs for Individual Compensation

Why does the history displayed on the Manage Compensation page differ from what I see in compensation history?

The Prior Compensation section on the Manage Compensation page shows the full individual compensation history for a worker for the past five years. Compensation history includes only individual compensation for the payroll elements that you add to the Manage Compensation History page.

What's the difference between Other Compensation and Prior Compensation sections?

The Other Compensation section on the Manage Compensation page includes all current individual compensation awards for a worker, including active recurring plans. Current awards are those whose effective end dates are greater than or equal to the current date.

The Prior Compensation section shows up to five years of previous compensation. Recurring awards appear as prior compensation when their end date is earlier than the current date. These plans are view-only.

9 Personal Contributions

Overview

Manage your own enrollment and voluntary contributions in company-sponsored savings and charitable contribution plans.

To manage personal contributions, start from the My Portrait page. Select **Navigator - My Portrait**.

10 Workforce Records

Manage Workforce Records: Overview

The Manage Workforce Records business process enables access to the worker directory and management of worker document records and checklists.

The business activities of this process are:

- **Maintain Worker Directories**
All workers access public information about a person in the person's public portrait.
Line managers access information about their direct and indirect reports in the line manager portraits of those workers and perform manager self-service actions.
Workers access their own information on the **My Portrait** tab of the gallery and perform employee self-service actions.
Administrators display messages to portrait users in selected portraits.
- **Manage Records Retention Program**
Human resource (HR) specialists and line managers create records of worker documents and store copies as attachments.
- **Manage Checklists**
HR specialists and line managers create checklists for standard and repeatable tasks, such as those associated with hiring an employee, allocate the tasks to task performers, and monitor task completion.

Maintain Worker Directories

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
- Person Smart Navigation

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.
- Add workers to social networks.
- Plan workers' careers.
- Specify goals for their workers.
- Enter feedback for workers.

Worker Self-Service

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

- Update their 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.

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
- View requisitions and vacancies, along with new positions that are a part of the HCM position hierarchy.
- Initiate actions for your workers
- Access reports and analytics

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.

Requisitions, Vacancies, and Positions

You can view positions in the HCM position hierarchy along with the existing assignment manager hierarchy if position hierarchy is enabled in the Manage Enterprise HCM Information page. Drill-down to see the incumbents for each position, which can be either assignments or requisitions.

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.

Reports and Analytics

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

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.

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.

Related Topics

- [What happens if I share information?](#)
- [What's the purpose of sharing person information?](#)

Vacancies in the Organization Chart: Explained

You can create and display vacancies in the organization chart, including vacancies that are imported from Oracle Taleo Recruiting Cloud Service. You can access the organization chart from the My Team and the Directory work areas.

Vacancy Creation

To create a vacancy:

- Select the person card in the organization chart under whom you want to create the vacancy.
- Click the Actions menu in the person card and select Vacancy > Create Vacancy.

You can enter the following details for a vacancy: Manager, Job, Department, Location, Position, Openings, and Requisition. The Position field is disabled by default; you can enable it through page customization. If position synchronization is enabled, the position-related fields (Job, Department, and Location) automatically inherit the values from the selected position. The number of openings isn't automatically updated against a hire; you must manually update it whenever the vacancy is filled. You typically use the Requisition field if you are using a third-party recruiting application and want to enter a requisition number for the vacancy; This is not a required field and is used for information purposes only.

Vacancy Update and Removal

You can update and remove any vacancies that are manually created (not imported from Oracle Taleo Recruiting Cloud Service). You can associate an existing vacancy with yourself by editing the vacancy and changing the manager name to yourself. To remove a vacancy, click the Actions menu in the vacancy card and select Remove Vacancy.

Vacancies Imported from Oracle Taleo Recruiting Cloud Service

You can import requisitions from Oracle Taleo Recruiting Cloud Service to Oracle HCM Cloud using the Import Oracle Taleo Recruiting Cloud Service Data scheduled process. The application automatically creates vacancy nodes for the imported requisitions in the organization chart. The organization chart however does not display requisitions that have any one of the following statuses:

- Filled - All the positions for the requisition are filled
- Deleted - The requisition is deleted
- Canceled - The requisition is canceled
- Rejected - The requisition is rejected by the approver

You cannot edit or remove any vacancies in the organization chart that are imported from Oracle Taleo Recruiting Cloud Service. All the details in the imported vacancy nodes appear as read-only.

Person-Record Keyword Searches: Explained

The application searches for keyword values in these attributes of a person's records: department, job name and code, position name and code, person name, primary e-mail, 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

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.

Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that the source and indexed values don't differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

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 **Chris Harper** in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results.

The following table lists the multiple ways in which you can enter keywords to search for persons.

You enter...	Search Results
Harper Chris	<ul style="list-style-type: none">• Jenner, Chris• Harper, Smith• Chris, Ray• Harper, Liam• Harper, Chris• Harper, Christopher
Chris Harper	<ul style="list-style-type: none">• Jenner, Chris• Harper, Smith• Chris, Ray• Harper, Liam• Harper, Chris• Harper, Christopher
Chris%	<ul style="list-style-type: none">• Jenner, Chris• Black, Chris• Blake, Christopher• Simpson, Christy• Harper, Chris• Harper, Christopher• Christ Johnson
Chris	<ul style="list-style-type: none">• Jenner, Chris• Black, Chris• Harper, Chris
"Chris Harper"	<ul style="list-style-type: none">• Harper, Chris

You enter...	Search Results
Chris and Harper	<ul style="list-style-type: none"> Harper, Chris
"Chris" "Harper"	<ul style="list-style-type: none"> Harper, Chris

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.

Optimize Person Search Keywords: Explained

The Oracle Text index in the PER_KEYWORDS table is utilized for person searches in Person Management work area, and the Directory. This index may become fragmented over a period of time and may cause a delay in displaying search results.

Why You Run the Optimize Person Search Keywords Index Process

You run the Optimize Person Search Keywords Index process to identify the fragmented indexes and help improve the overall search performance.

- You run the Update Person Search Keywords process first and then the Optimize Person Search Keywords process. You cannot schedule both processes simultaneously. If you schedule them at the same time, the second process will wait for the first process to complete before it starts.

When to Run the Optimize Person Search Keywords Index Process

You must run the process daily at times of low activity with the options, Full mode and the appropriate maximum time. The default time is 180 minutes. Although, you specify a maximum time, but if the process is run consistently over time it may take about 10-30 minutes only.

However, you can run the Optimize Person Search Keywords Index process based on the size of your customer base, system usage, database usage, data loaders used, index fragmentation, and schedule of the Update Person Search Keywords process.

Update Person Search Keywords: Explained

Several attributes of person, employment, and profile records are used as person-search keywords. To launch this process, use the Navigator > Scheduled Processes > Schedule New Process button in the search results table.

Keyword values are copied automatically from the originating records to the PER_KEYWORDS table, where they are indexed to improve search performance.

This topic explains:

- How person keywords are updated
- Why you run the Update Person Search Keywords process
- How to schedule the Update Person Search Keywords process

How Person Keywords Are Updated

You raise an event, when the value of a keyword attribute changes. For example, if a person acquires a language skill or a different phone number.

In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table, therefore most changes are made in PER_KEYWORDS immediately and automatically. When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.

Why You Run the Update Person Search Keywords Process

Although most changes to the PER_KEYWORDS table are automatic, you need to run the Update Person Search Keywords process regularly because: the automatic process does not apply future-dated changes to the PER_KEYWORDS table. Running the Update Person Search Keywords process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

- The automatic process doesn't apply future-dated changes to the PER_KEYWORDS table.
- The process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

How to Schedule the Update Person Search Keywords Process

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals (for example, weekly at a specified time).

The likely volume and frequency of changes to person records in your enterprise will determine how often you run the Update Person Search Keywords process:

- If the volume and frequency are high, you need to schedule the process to run frequently.
- If the volume and frequency are low, running the process once a month is recommended.

Running the Update Person Search Keywords process refreshes the whole PER_KEYWORDS table. Therefore, you must run the process at times of low activity to avoid performance problems.

Related Topics

- [Person-Record Keyword Searches: Explained](#)

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.

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.

Viewing Other Transactions

You can view transactions that you saved for later, and transactions that aren't pending with you anymore, such as your 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. However, the ability to suspend transactions is controlled by the workflow role BPMWorkflowSuspend. The suspend and resume actions are available only to users having this role.

FAQs for Maintain Worker Directories

Why can't I see the roles that I want to request for myself?

Before you can request a role:

- The role must appear in a role mapping where it's **Self-requestable**.
- At least one of your assignments must match all conditions, such as job and location, in the role mapping.

Typically, an application administrator or IT security manager creates and maintains role mappings.

What happens if I share information?

You can share personal information with both internal recipients (people within the enterprise) and external recipients (people outside the enterprise) who otherwise have no access to this information. You share information using the Information Sharing task on your portrait.

Internal recipients receive a notification with a link to the line manager version of your portrait, which includes contact details, biographical and employment information, benefits and compensation details, payroll information, and user account details. A recipient's access to the information doesn't expire, but you can revoke it.

External recipients see only the information that you select for sharing. Each external recipient receives an e-mail with a link to the shared information. Their access to this information expires at a time that you specify.

If you're a line manager, you can share the information of people who report to you with both internal and external recipients. The approval of the people whose information you're sharing is required.

What's the purpose of sharing person information?

When you are transferring to a different legal entity, the destination legal employer may not be able to initiate your transfer because they do not have access to your records in the source legal entity. Either you or the releasing line manager can share your information with the receiving line manager or Human Resource Specialist, enabling them to initiate the transfer. Similarly, you can share selected information with external persons or organizations, for a specific purpose, for example to complete a mortgage or loan agreement. Use the Information Sharing action in your portrait to share information.

Why can't I select which information to share with internal recipients?

After you share your information with internal recipients, they can view all your information by accessing your person spotlight. However, external recipients can see only the information that you select for sharing. Each external recipient receives an e-mail with a link to the shared information. The information that you can share externally is also limited.

Why does my keyword search not return the expected results?

Keywords are indexed attributes copied automatically from real-time person records to a keywords table and organized for efficient searching.

Additional Information:

- Keywords are copied only when your enterprise runs the keyword-refresh process in some cases.
 - Depending on how frequently your enterprise runs this process, some recent changes to person records may not appear in keyword-search results.
- Keyword searches return a result only if you have security access to the information in which the keyword is found.
 - For example, if your keyword search is procurement and a match occurs in a person's competencies, the person appears in the search results only if you have security access to the person's competencies information.
- You may be able to include an effective as-of date in the search criteria.
 - 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.
 - When you enter both a keyword value and an effective as-of date, the search results include only those assignments for which the keyword value in the keywords table matches the keyword value on the effective as-of date.

Why do some people appear more than once in the search results?

Each search result relates to an assignment. Any person who has multiple assignments can appear more than once in the search results.

If the search criteria include assignment attributes, such as department or job, only those assignments that satisfy all the search criteria appear in the search results.

What's a matrix chart?

A matrix chart displays dotted line relationships. The chart displays employees by manager type (for example, project manager, line manager, and functional manager) in a tabular format. It lists the employees as rows and manager types as columns.

What's the difference between rejecting and withdrawing an approval transaction?

The effect of these actions is the same: the transaction is not applied to the database. However, the persons performing the actions are different.

Only the initiator of a transaction can withdraw the transaction. Only the current approver in the approval chain can reject the transaction.

For example, suppose you submitted a transfer request for approval. Following a change in the transfer policy, the transfer request is now invalid. Either you can withdraw the transaction or the current approver in the approval chain can reject the transaction. In either case, the transaction is not applied to the database.

Why was my saved transaction deleted?

Because an identical transaction initiated for the person by another user was applied to the database.

What's a calendar event message?

Calendar events identify dates, such as public holidays, on which the standard work patterns of a workforce are likely to be disrupted. Calendar event messages appear in the portraits of people affected by a calendar event. For example, a message about a Spanish public holiday could appear in the portraits of workers in Spain. Portrait users can then understand why workers in Spain are unavailable on that date. You create calendar event messages using the Manage Gallery Administration Messages task in the Setup and Maintenance work area.

Why did a calendar event message not appear in all portraits in an organization or location?

If you use work schedules and a person is affected by a calendar event, you must include the calendar event in the person's primary schedule or schedule assignment as an exception to the schedule. Otherwise, even though the person belongs to the organization or location affected by the calendar event, no calendar event message will appear.

FAQs for Manage Records Retention Program

What's the purpose of creating a document record?

Create document records to store information about documents such as work permits and visas, and upload electronic versions of the documents as attachments. Use the Document Records work area to create and maintain document records for a person. Document records store necessary document details such as the period for which the document is valid. This information can then be used for reporting purposes. For example, HR specialists can see the reports of documents that are near expiration in their dashboard.

Why are some approvers already appearing for the document record?

You create a document record using the Manage Document Records task in your portrait. The document type you select when creating a document record determines whether the document record requires approval. The list of approvers is predefined for the document type. However, you can add additional approvers. You receive a notification once the document record is approved. Following approval, the document record is then accessible and available for use in reports and analytics, for example.

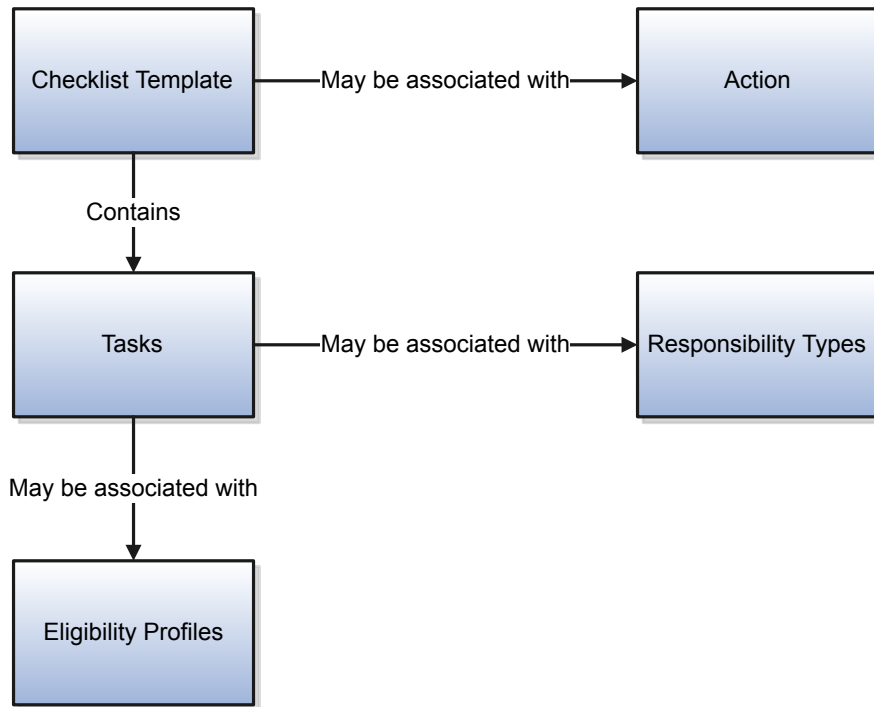
Manage Checklists

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.

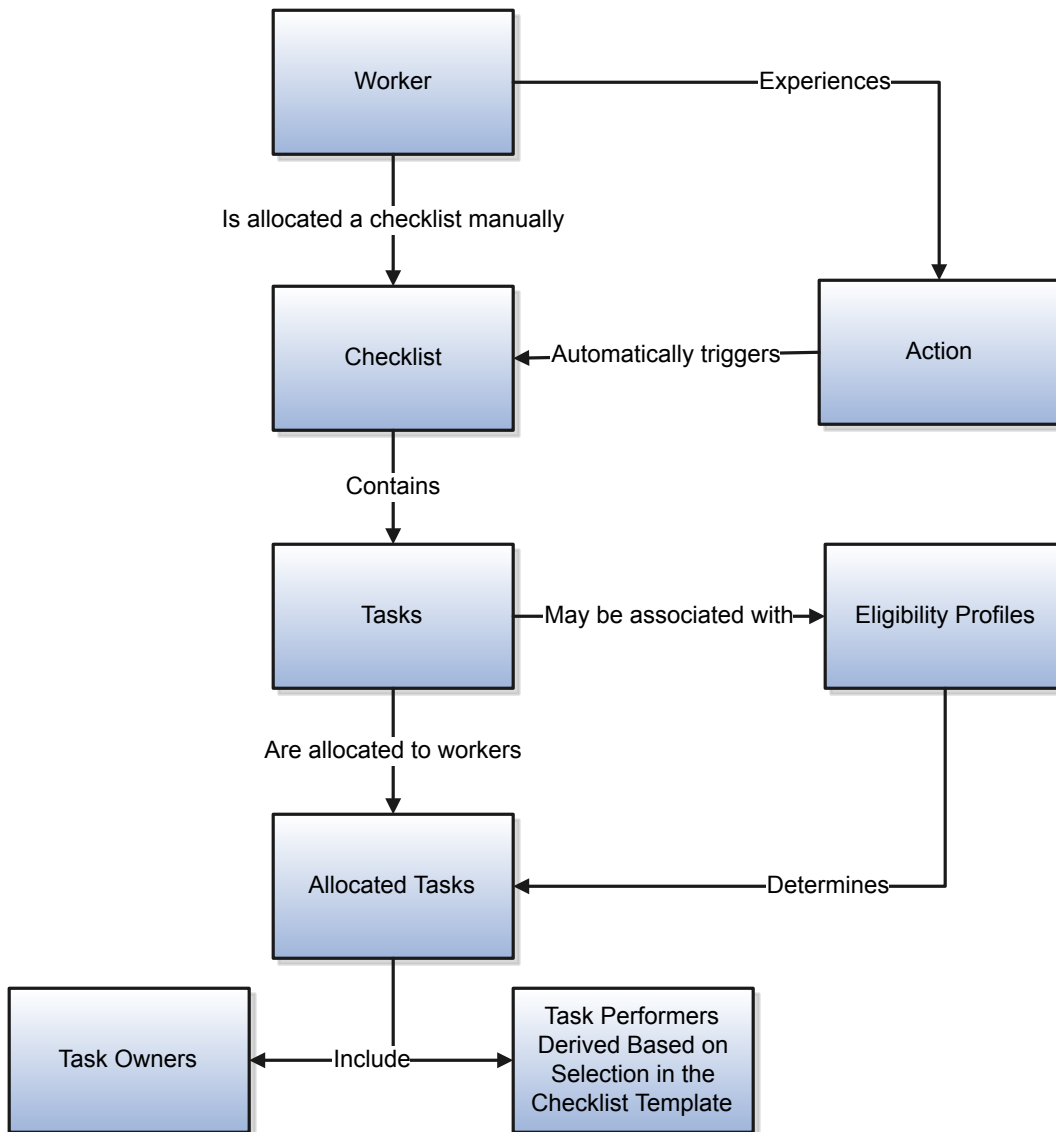
The figure shows the components of a checklist template and their major relationships. The Human Resources (HR) specialist creates the checklist template and assigns tasks and actions.

HR Specialist Creates Checklist Template



The figure shows the tasks workers perform for automatically allocated checklists for which they are eligible.

Checklist is Allocated to Worker



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.

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.

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.

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.

Allocated Checklist

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

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.

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 their portrait. 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

Initiated

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

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.

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.

Outstanding

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

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.

Creating a Checklist Template: Worked Example

This example demonstrates how to create a checklist template that is automatically allocated to newly hired workers to track tasks involved in hiring a worker. The tasks in the checklist vary according to eligibility rules.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Allocate checklist automatically?	Yes, checklist is allocated automatically to persons experiencing new hire action.
Which tasks to include in the checklist?	<ul style="list-style-type: none"> • Plan and Schedule Training • Issue Laptop • Procure Meal Vouchers
What are the task performers' responsibilities?	<ul style="list-style-type: none"> • The worker's line manager is the performer of the task Plan and Schedule Training • Performer for the task Issue Laptop has the responsibility type IT Support Representative. • The worker himself is the performer of the task Procure Meal Vouchers.
Do eligibility rules apply to any tasks?	<ul style="list-style-type: none"> • Issue Laptop task applies to manager users only. • Procure Meal Vouchers task applies to work location India only.

Create a checklist template, associate it with the Hire action, and create three tasks for the template.

Prerequisites

1. Create an eligibility profile **Manager_Users** for all manager users.
2. Create an eligibility profile **Work_Location_India** for work location India.
3. Create a responsibility **IT Support Representative** and assign persons to this responsibility.

Creating a Checklist Template

1. On the Person Management Overview page, click **Manage Checklist Templates** to open the Manage Checklist Templates page.
2. Click **Create**.
3. On the Create Checklist Templates page, complete the fields, as shown in this table:

Field	Value
Name	New Hire
Category	On Boarding
Action	Hire

Creating Checklist Tasks

1. In the Tasks region, click **Create**.
2. For each task, complete the fields, as shown in this table:

Field	Plan and Schedule Training Task	Issue Laptop Task	Procure Meal Vouchers Task
Required	Yes	No	No
Eligibility Profile		Manager_Users	India_Work_Location
Performer	Line Manager	Responsibility Type	Worker
Responsibility Type		IT Support Representative	

3. Click **Submit**.

Related Topics

- [Eligibility Profiles: Examples](#)

FAQs for Manage Checklists

Can managers create checklist templates?

No. Managers can't create checklist templates which are available for allocation to all users. They can only create specific checklists for their workers, and allocate existing checklist templates to their workers, using the Manage Allocated Checklists

action in their portrait. Human Resource (HR) specialist users can create both checklist templates and checklists for specific persons. HR specialists can also save specific checklists as templates to make them available for allocation to all users.

Can workers view the checklist tasks allocated to them?

No. Only task owners and performers can view and update checklist tasks. You can, however, designate workers as task owners or performers if you want workers to track the progress of their tasks or perform the task actions.

How do changes in the checklist template affect allocated checklists?

Each allocated checklist is a specific instance of the checklist template. Therefore, changes in the checklist template don't affect allocated checklists. Similarly, the checklist template is unaffected by changes in allocated checklists.

What happens when I allocate a checklist template?

The allocated checklist contains the tasks relevant to the person to whom the checklist is allocated; For example, tasks associated with eligibility profiles appear in the allocated checklist only if the person meets the eligibility criteria. During allocation, performers are derived for the tasks based on the option selected in the checklist template. Both task performers and owners are notified of the assignment. They can access the checklist either from the Recent Notifications Alert or from the My Tasks section in their BPM worklist. They can optionally create a user view to filter the tasks in their worklist. For example, task owners may create a user view to only display those tasks that they own and not display tasks for which they are performers.

Where there are multiple performers for a task, a performer can claim a task by accessing the notification. Once a performer claims the task, the task assignment notification disappears from the worklists of other performers.

Where can an owner or performer view details of the person to whom the task is allocated?

As a task owner or performer, you receive a worklist notification when a task is assigned to you. Click the person context information icon in the notification to view details of the person to whom the task is allocated.

Where do the checklist category values come from??

The values for a category are dependent on the country selected. If a category is configured for a country, then it will be displayed in the list. The country- category mapping is configured in the Manage Checklist Lookups task.

What's delay duration?

Delay duration enables you to delay the actual start date of the task for a specified time. For example, if you specify the target start date as Jan 1st and enter delay duration of 5 days, you can delay the actual start date until Jan 5th.

Manage Competitions

Creating Worker Competitions : Explained

The Competitions functionality facilitates worker engagement by providing a simplified user interface to create and run competitions for workers. Use the Competitions page in the About Me work area in the simplified user interface to create and run competitions.

Competition Creation

When you create a competition, you specify

- Who can compete, whether teams or individuals.
- How to score the competition. You enter a score type, which is the metric or criterion used for scoring, and the number of points allocated to the score type. For example, you could enter the following score types and points in a competition: Closed Priority 1 Bug (3 points), Closed Priority 2 Bug (2 points). For a team-based competition, use the Score Added By field to specify who can add scores. If you specify that score can be added by a team captain, then the person designated as the Team Captain only can add scores for the whole team.
- Who are the participants. You must add a minimum of 2 participants (either teams or individuals, depending on the type of competition) to create a competition. If it is a team based competition, you specify the team name, team captain, and the team members in each team. If it is a competition for individuals, you can add the participants by selecting them individually. You can also select a manager and add either the manager or all of the manager's directs as participants in a single request.
- What are the awards. You also select the award type or the criterion used to determine the winners in the competition.

Awards Definition

You can select one of the following two award types when creating a competition:

- Rank: The individual or team with the most points gets the first place, next most gets the second place, and so on. You can define the name and award for each place. For example, you can define the first place with the name Top Bug Fixers and award \$100 gift card, second place with the name Bug Controllers and award \$50 gift card. Since there can be multiple winners for this award type, you must also specify how to resolve a tie situation. You can resolve a tie in one of the following three ways:
 - First to reach rank wins
 - Each tied participant gets an award
 - Award split among tied participants
- Threshold: The individual or team with points above a certain threshold gets the corresponding place. For example, the team with more than 60 votes gets the first place. You can define the name, threshold value and the award for each place.

Scoring Competitions : Explained

As the participant in a competition, you can submit your score and access the Leader Board to view your rank in the competition. You can do so using the Competitions page in the About Me work area in the simplified user interface.

Score Submission

You can submit your scores only until the time the competition is in progress. If the competition is team-based, and the Score Added by field is set to Team Captain, then the Add Score button is available only to the Team captain and not to all members in the team.

Score Calculation

The competition owner is the person who creates the competition. If the owner has added you as a participant, you can submit your score by accessing the competition from the My Competitions page. You can enter and update your scores until the competition end date.

Your total score is calculated using the quantities that you enter for each score type. For example, if you enter the quantities for the score types as below, your total score would be 60.

Score Type	Quantity	Score
Closed Priority 1 Bug (3 Points)	5	15
Closed Priority 2 Bug (2 Points)	10	20
Closed Priority 3 Bug (1 Point)	25	25

Leader Board

Use the Leader Board to view your rank and the ranks and scores of other participants. Your rank is automatically updated in the Leader Board when you add or update your scores. You can drill down into other participants' scores and view their scores for each score type.

As the competition owner, you can edit the competition details and add new participants using the Leader Board.

Networking at Work

Networking at Work: Explained

Using the network at work capabilities, you can:

- Follow people
- Post your person spotlight updates to your wall in Oracle Social Network

Follow People

Following a person enables you to see activity about that person in your Overview page in Oracle Social Network. You can follow people from multiple places within Oracle Social Network. Outside of Oracle Social Network, the Follow action is available in multiple places in the HCM application:

- In the Search Person page, a Follow icon is displayed for each person displayed in the search results.
- When you select a person in the directory search results, you are taken to the person's spotlight. A person's spotlight displays the Follow action.

Post Person Spotlight Updates to Oracle Social Network

When you update Areas of Interest, Bookmarks, About Me details and Areas of Expertise in your person spotlight, the updates are automatically posted to your wall in Oracle Social Network (OSN). This is true only if integration with OSN is enabled in the network at work settings.

11 Workforce Deployment Analysis

Analyze Workforce Deployment: Overview

The Analyze Workforce Deployment business process enables line managers and human resource (HR) specialists to view statistical and employment-related information for individual workers and the workforce. HR specialists and line managers can perform actions for individual workers.

The business activities of this process are:

- Generate Workforce Deployment Intelligence

In the Manager Resources Dashboard and the Worker Predictions work area, line managers view system-generated predictions of high performance and voluntary termination for their direct and indirect reports. In the Worker Predictions work area, line managers perform what-if analyses.

- Evaluate Workforce Deployment Performance

In the Manager Resources Dashboard, line managers view information, such as promotion potential and worker availability, for their direct and indirect reports.

In the Human Resources Dashboard, HR specialists view information, such as service anniversaries and onboarding progress, for the workers to whom they have security access.

Generate Workforce Deployment Intelligence

High Performance: How It Is Predicted

System-generated performance predictions can help you to validate your own assessments of employees. Performance predictions, in conjunction with voluntary-termination predictions, enables you to avert the voluntary terminations that are the most damaging to the enterprise.

Settings That Affect Performance Predictions

Performance predictions are based on data from all employees. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining (ODM) and predicts voluntary termination. You can manage predictive models using the Manage Predictive Models task in the Setup and Maintenance work area.

You can perform data collection either for the enterprise or for a specified manager assignment. However, the data-mining stage of the process is always performed on all of the latest available data.

The process has no default schedule. You are recommended to run the process weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high; otherwise, run the process at least monthly. Schedule the process at a time of low system activity to avoid performance impacts.

How Performance Is Predicted

Performance is predicted as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes, such as:
 - Time in grade
 - Current job
 - Latest salary increase
 - Performance rating
 - Number of sickness absences in the previous year

The attributes of interest include those most likely to show a correlation with high performance. In some cases, simple values, such as manager name are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a model for predicting employee performance.
3. ODM makes performance predictions for current employees according to the predictive model. For example, if performance is high in a particular job and grade, current employees with that job and grade may have a greater likelihood of high performance than workers in other jobs and grades.

Each prediction relates to an employee assignment. For employees with multiple assignments, multiple performance predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

Performance predictions are available for both teams and individual assignments.

- Team predictions show the average predicted performance for the team. They also show, for each factor, such as current performance rating or length of service, the percentage of employee assignments for which the factor is the main contributory factor.
- Individual predictions show the predicted performance for the employee assignment. The values of relevant factors, such as previous performance, and the relative contribution that each factor makes to the prediction, also appear.

Voluntary Termination: How It Is Predicted

People are often the enterprise's greatest asset, and their loss can be expensive for many reasons. System predictions can make you aware of potential issues and their likely causes so that you can address them. For example, if an employee whose performance is predicted to be high is also identified as likely to leave voluntarily, you can consider changes to relevant factors, such as grade or location, to reduce the risk. Voluntary predictions appear on the Manager Resources dashboard.

Settings That Affect Prediction of Voluntary Termination

Predictions of voluntary termination are based on existing data from all work relationships. The process that collects relevant data and generates the predictions is Collect Data and Perform Data Mining for Predictive Analytics, which uses Oracle Data Mining (ODM) and also predicts performance.

You can perform data collection either for the enterprise or for a specified manager assignment; however, the data-mining stage of the process is always performed on all of the latest available data.

The process has no default schedule. You are recommended to run the process:

- Weekly if the volume of relevant transactions in your enterprise (such as hires, terminations, and promotions) is high
- At least monthly if the volume of transactions isn't high

Schedule the process at a time of low system activity to avoid performance impacts.

How Voluntary Termination Is Predicted

Each prediction is a percentage value, which is the predicted probability of voluntary termination. It is calculated as follows.

1. For all employee work relationships, the process collects the values of a large set of attributes. The attributes include, for example, time in grade, current job, latest salary increase, performance rating, and number of sickness absences in the previous year. The attributes of interest include those most likely to show a correlation with voluntary termination. In some cases, simple values, such as manager name, are required; in others, such as percentage increase in sickness leave, the process calculates the values. Most of these attributes are held at the assignment level; therefore, for work relationships with multiple assignments, multiple values are collected.

Contingent worker and nonworker work relationships are excluded.

2. The attribute values are passed to ODM, which identifies patterns and relationships in the data and builds a predictive model that captures the differences between employees who have terminated voluntarily and all other employees.
3. ODM makes predictions of voluntary termination for current employees according to the predictive model. For example, if voluntary termination is high in a particular job and department, current employees with that job in that department may have a greater risk of voluntary termination than workers in other jobs or departments.

Each prediction relates to an employee assignment. For employees with multiple assignments, multiple voluntary-termination predictions are made (one for each assignment). If an employee reports to a single manager in multiple assignments, the manager sees multiple predictions for that employee.

These predictions enable you to identify employees at highest risk of voluntary termination. The absolute risk of voluntary termination for the high-risk group may still be low in percentage terms, but relative to that for other groups of employees, the risk is high.

Voluntary-termination predictions are available for both teams and individual assignments:

- Team predictions show the average risk for the team. They also show, for each factor, such as current salary or grade, the percentage of employee assignments for which the factor is the main risk factor.
- Individual predictions show the predicted risk for the employee assignment. The values of relevant factors, such as current salary, and the relative contribution that each factor makes to the prediction, also appear.

Predictive Attributes: Explained

Voluntary-termination and performance predictions are based on specific attributes from a worker's personal, employment, absence, compensation, and talent management information, most of which are held at the assignment level. This topic identifies the relevant attributes by their factor names, as they appear in predictive analytics, and explains how each attribute value is calculated or derived.

Person Attributes

Person attributes are described in the following table.

Factor Name	Description
Worker is an employee	Worker has a current employee work relationship
Home city	City from the worker's current home address
Home country	Country from the worker's current home address
Time until work permit or visa expiration	Number of weeks until the worker's next visa or work-permit expiration
Has a second passport	Worker has a second passport
Worker is a rehire	Worker was previously employed by the enterprise
Tobacco user	Worker uses tobacco
Time until contract expiration	Number of months until expiration of the worker's contract
Willing to relocate domestically	Worker is willing to move to a different location in the same country
Willing to relocate internationally	Worker is willing to move to a different country

Employment Attributes

Employment attributes are described in the following table.

Factor Name	Description
Current legal employer	Legal employer from the assignment
Current enterprise	Current enterprise
Worker category	Worker category from the assignment
Length of service	Worker's enterprise service in years
Time since last probation ended	Number of months since completion of the worker's latest probation period
Current assignment status	Status of the assignment
Legislation	Legislation of the legal employer
Current or most recent manager	Line manager of the assignment
Time with current manager	Number of months the worker has been reporting to the current manager

Factor Name	Description
Average time with each manager	Average number of months the worker has reported to each manager in all employee assignments in the enterprise
Number of manager changes in the last 5 years	Number of manager changes in all of the worker's employee assignments in the last 5 years
Normal start time	Work start time from the assignment
Normal end time	Work end time from the assignment
Normal working hours	Expected number of hours worked each day
FTE	Sum of the FTE values from the worker's current employee assignments
Current grade	Grade from the assignment
Time in current grade	Number of months between the last grade change or the start of the assignment and the current date
Average time in each grade	Average number of months between grade changes for all of the worker's past and current employee assignments in the enterprise
Number of different grades	Number of different grades for this worker in all past and current employee assignments in the enterprise
Number of grade changes in the last 2 years	Number of different grades for this worker in all employee assignments in the last 2 years
Current department	Department from the assignment
Time in current department	Number of months between the last department change or the start of the assignment and the current date
Number of different departments	Number of different departments for this worker in all past and current employee assignments in the enterprise
Average time in each department	Average number of months between department changes for all of the worker's past and current employee assignments in the enterprise
Current job	Job from the assignment
Time in current job	Number of months between the last job change or the start of the assignment and the current date
Average time in each job	Average number of months between job changes for all of the worker's past and current employee assignments in the enterprise
Current position	Position from the assignment

Factor Name	Description
Time in current position	Number of months between the last position change or the start of the assignment and the current date
Average time in each position	Average number of months between position changes for all of the worker's past and current employee assignments in the enterprise
Current location	Location from the assignment

Absence Attributes

Absence attributes are described in the following table.

Factor Name	Description
Amount of leave taken in the previous year	Number of days' leave taken in the previous year
Total enterprise leave	Number of days' leave taken since the start of the worker's enterprise service
Time since last leave	Number of months between the latest leave and the current date
Amount of sickness in the current year	Number of sickness days taken in the current year
Amount of sickness in the previous year	Number of sickness days taken in the previous year
Increase in sickness over previous year	Percentage change in the number of sickness days for the year to date compared with the previous year
Time since last sickness	Number of months between the latest sickness day and the current date
Number of sickness absences in the previous year	Number of distinct periods of sickness in the previous year
Increase in sickness absences over previous year	Percentage change in the number of sickness absences for the year to date compared with the previous year

Compensation Attributes

Compensation attributes are described in the following table.

Factor Name	Description
Latest salary change	Latest salary change as a percentage of the annualized salary before the change
Reason for latest salary change	Reason for the latest salary change

Factor Name	Description
Time since latest salary change	Number of months between the latest salary change or the hire date and the current date
Average salary change	Average of all salary-change percentages since the hire date
Time until next salary review	Number of months between the current date and the date of the next salary review
Time since last received options	Number of months since stock options were last granted
Ratio of vested to unvested options	Vested stock options expressed as a percentage of the worker's total stock options

Talent Management Attributes

Talent management attributes are described in the following table.

Factor Name	Description
Current performance self rating	Worker's current self-assessment for the assignment
Current manager performance rating	Manager's current overall performance rating for the worker's assignment
Difference between manager rating and self rating	Difference between the manager's overall rating of the worker and the worker's self-assessment
Current appraising manager	Name of the manager performing the evaluation of the worker
Previous manager performance rating	Manager's previous overall performance rating for the assignment
Current performance rating	Current overall performance rating for the assignment
Change in current performance	Current overall performance rating for the assignment expressed as a percentage of the rating for the previous year

Performance Percentages in Predictive Analytics: Explained

All performance predictions appear as percentages. To arrive at the percentage value, the predicted numeric rating from the rating model is expressed as a percentage of the maximum numeric rating in that rating model.

For example, if the predicted performance for an employee assignment is numeric rating 4, the employee's predicted performance is presented as:

- 57.14%, if the maximum numeric rating is 7
- 80%, if the maximum numeric rating is 5

Mapping Performance Predictions to Rating Levels

In performance documents, you rate employee performance using rating levels from a rating model. To map a predicted performance percentage to a rating level, you must first map it to the numeric rating in the relevant rating model. Once you have the numeric rating, you can identify the associated rating level.

In the following example, a predicted performance of 71.5% is between numeric ratings 3 and 4, and between Good and Very Good in the rating levels.

Performance Percentage	Numeric Rating	Rating Level
20%	1	Poor
40%	2	Satisfactory
60%	3	Good
80%	4	Very Good
100%	5	Outstanding

In the following example, a predicted performance of 71.5% is between numeric ratings 5 and 6, and between 10 and 14 in the rating levels.

Performance Percentage	Numeric Rating	Rating Level
12.5%	1	1
25%	2	4
37.5%	3	6
50%	4	8
62.5%	5	10
75%	6	14
87.5%	7	17
100%	8	20

Predictive Model Accuracy: How It's Measured

You can view latest accuracy information for the voluntary-termination and performance predictive models on the Manage Predictive Models page.

How Predictive Model Accuracy Is Measured

The predictive models for both voluntary termination and performance are built using a subset (approximately 70%) of the available historical data. Oracle Data Mining (ODM) tests the accuracy of the models by making voluntary-termination and performance predictions for the remaining held-aside data (the 30% not used in building the predictive models). ODM then compares its predictions with actual outcomes.

The percentage accuracy of the predictive model:

- For voluntary-termination predictions, derives from the percentage of correct predictions made for all employees, both those who leave the enterprise and those who remain.
- For performance predictions, is a measure of how closely the predicted values match the actual values.

Workforce Modeling: Explained

Workforce Modeling provides managers and human resource (HR) specialists with the ability to plan, model, and execute workforce changes using a graphical tool.

You can perform the following actions on workers and managers:

- Promote
- Transfer
- Terminate
- Change manager
- Change location

You can move people with or without direct reports either by dragging and dropping or using the table view and selecting a new manager. You can create vacancies in the model, and on final approval they're added to the database. Use an existing model or create a new one to terminate workers. Review the impact of your planned terminations using the analytics. The modeled changes are saved to the Oracle Fusion database when the model is approved.

Security and Access

Line managers and HR specialists have access to Workforce Modeling. You can access all the Workforce Modeling features if you are either an author or the top manager of a model. To access the model as the top manager, the author of the model can give you access in the model properties. HR representatives can edit the model, and other approvers can open and view the model.

The following rules define who the default approvers are:

- If all the modeled changes occur within the top manager's organization, then the approvers are the author's HR Representative, the top manager's manager and one level of manager approval above.
- In addition to the above rule, the manager who has authority to approve all the changes and one level above, are the approvers. These approvers are in addition to the author's HR Representative and two levels above the top manager.

Statuses

The following table describes the Workforce Modeling statuses.

Status	Description
Draft	<p>A model is in the Draft status:</p> <ul style="list-style-type: none">• Until it's submitted• Once it's edited• If an approver edits a model during approval• If the author withdraws a pending model
Pending	A model is in the Pending status after it's submitted from the Draft, Rejected, or Returned modes.
Rejected	A model is in the Rejected status if an approver rejects it.
Returned	A model is in the Returned status if an approver requests more information.
Completed	A model is in the Completed status after it's approved by all approvers. At that point, transactions are created and assignments are updated with effective dated changes.

Effects of Reorganizing

Once the newly created workforce model is approved, the relevant assignments are updated using the model effective date. Currently, notifications aren't issued for this. Role provisioning Security occurs automatically if it's set up accordingly. For example, if the line manager role is enabled for autoprovisioning, then a user who becomes a manager is given the line manager role automatically.

 **Note:** Vacancy changes appear on the date the model is approved, irrespective of the model effective date.

Workforce Modeling Analytics: Explained

The Workforce Modeling analytics appear on the Overview and Modeling pages for the modeled changes as of the model effective date. Use the analytics to view the impact of proposed changes to headcount, salary costs, predictive effectiveness, count of alerts and changes.

Once a model is complete, the analytics are frozen as of the date of the final approval. The Projected Worker Cost and Projected Headcount analytics don't include information for any worker assignments that the model doesn't have the security to see.

The following table describes the Workforce Modeling analytics.

Analytic	Description
Changes	<p>Shows the number of worker assignments with changes.</p> <p>For example, if you move an assignment to a new manager and then to another manager and then make a job change, then all these actions count as one change.</p>

Analytic	Description
Projected Worker Cost	<p>Displays the change in the total cost for the top manager as a result of modeling. The analytic on the Overview page only displays the cost change due to modeling. The analytic on the Modeling page displays the cost due to modeling and the change due to modeling.</p> <p>Cost is based on the annualized salary and changes are only included if you have security access to the assignment.</p> <p>For example, you can move a worker to report to you and update their salary. However, if you don't have security access to view the worker's salary, then any change you make to that worker's pay in the workforce model isn't included in the analytic.</p>
Projected Headcount	Displays the change in the headcount for the top manager as a result of modeling based on the workforce measurement value of headcount.
Alerts	<p>Displays the number of outstanding alerts for the model.</p> <p>The two types of alerts are:</p> <ul style="list-style-type: none"> • Validation Error: occurs when the Fusion assignments are updated on final approval and issues exist • Assignment Change: occurs if an assignment has changed in the live system since modeling started and that change has not yet been resolved using the synchronization dialog
Predictive Effectiveness	<p>Displays the factors that were changed during modeling and that made the greatest impact on performance and voluntary termination predictions.</p> <p>Predictive Effectiveness displays the impact of modeling on individual workers, managers, or on the top manager. View the factors that have the largest impact on the change in the prediction as a result of modeling and whether that impact was positive or negative. The analysis represents the impact the attribute had on the change in the prediction and whether the attribute caused the prediction to increase or decrease.</p> <p>Predictive Effectiveness = Predicted performance * (100% - Predicted voluntary termination) / 2</p>

Workforce Modeling Actions: Explained

You can access Workforce Modeling actions from the following locations:

- Main page
- Worker assignment node
- Vacancy node
- Workers region in the table view
- Terminated Workers region in the table view
- Vacancies region in the table view
- Holding Area

This table lists and describes the actions available on the Modeling page:

Action	Where Available	Description
Edit Worker Assignment	Worker Assignment Node, Chart and Holding area	Move or edit the modeled attributes for a worker assignment. If you change a worker's manager, then the worker moves to that manager's hierarchy.
Create Vacancy	Worker Assignment Node, Chart and Holding area	Create a vacancy node as a placeholder for an open headcount.
Edit Vacancy	Vacancy Node, Chart and Holding area	Edit the vacancy.
Delete Vacancy	Vacancy Node, Chart and Holding area	Delete the selected vacancy node. You must confirm the deletion to remove the node from modeling.  Note: You cannot delete vacancies imported from Oracle Taleo Recruiting Cloud Service.
Edit Assignment	Modeling page	Select a worker assignment node in the chart, holding area, or the table and edit the assignment.
Undo and Redo	Modeling page	Select this option to undo and redo a change.
Edit Model Properties	Modeling page	Edit the model details.
Synchronize	Modeling page	Run the synchronization process to update any information that has changed in the live system.
Terminate	Worker Assignment Node	Select a termination action, reason and notification date.
Cancel Termination	Terminated Worker Assignment Node	Select this option to cancel the termination within the model.
Export to Excel	Terminated Workers, Workers, and Vacancies, in the table view	Select this option to open and save the information in a spreadsheet.

Terminating Workers in Workforce Modeling: Explained

You can use workforce modeling to create or edit a model to terminate workers. You can use existing models to terminate workers, and these models can also include other planned updates, such as promotions and transfers. Any workers you terminate will display as grey in the model. The terminations affect the analytics which you can use to review the impact of your planned terminations. The termination changes are only applied to the transactional system when the model is approved.

Canceling Terminations

Cancel a termination, if, for example, you realize that the planned termination could harm the business or you terminated a worker as part of a planned restructure, which has been canceled. Canceling a termination also affects the analytics.

Analyzing Terminations

The impact of the termination or canceled termination in terms of headcount, salary cost and predicted effectiveness is calculated and displayed, providing you with immediate feedback on your modeled changes.

Terminating Managers with Subordinates

If you terminate a manager with subordinates, then you can decide to terminate them also. If you cancel this termination, then you must cancel the termination of each subordinate separately. If you decide not to terminate the subordinates, then the subordinates are assigned to the terminated manager's manager. If you cancel the termination, then you must manually move each reassigned subordinate back to their original manager.

Synchronizing in Workforce Modeling: Explained

Planning workforce changes can take time, and changes can occur in the live transactional system that affect the model. Therefore, Workforce Modeling runs a synchronization process that checks the attributes in the live transactional system against the attributes in the model, and makes some automatic updates, and other recommendations. The synchronization process ensures the assignment and vacancy information in Workforce Modeling are up to date with any changes made in the live transactional system.

The synchronization process runs automatically when you:

- Open the model for editing.
- Open the Review page.
- Open the Approval page.

You can also run the process manually from the Actions menu on the Modeling page.

Synchronization Rules

When you open a saved model, the synchronization process runs automatically to review all system changes that occur after the date the model was last updated, and on or before the model effective date. If there are any changes in the live system, for example, one of the workers in the model has been transferred and another worker has been terminated, then the application synchronizes each attribute using the following rules:

- If the live system has changed but the model hasn't, then automatically update the model.
- If the same attribute has changed in the model and in the live system, and if the live system changes are irreversible, then automatically update the model with the live system change. Irreversible changes include any moves in or out of the hierarchy, such as, hires, transfers, and terminations.
- If the same attribute has changed in the model and in the live system, and you can update the live system change, then the application recommends the modeled value. If this scenario occurs, then the application recommends the model changes for all attribute updates.


Synchronization Alerts

When you reopen a saved model, and the synchronization process finds changes in the live transactional system and in the model, then you can review the automatic updates and recommendations in the Alerts page. If you confirm the changes, the application updates the analytics and the information in the hierarchy.

FAQs for Generate Workforce Deployment Intelligence

What happens if I save a what-if analysis?

The attribute values that you change for a worker while performing a what-if analysis are saved as a worker plan using a plan name that you supply. View the associated predictions later or rerun a saved scenario by selecting the plan from the list of saved worker plans for a worker on the What-if Analysis tab. You can also select a worker plan from the list of all worker plans for all workers.

 **Note:** The voluntary termination and performance predictions in a worker plan are those that applied when you last saved the what-if analysis. To update the predictions, you must rerun the scenario.

When you select a worker plan, only the attributes in the saved what-if analysis appear; attributes that you didn't change in the original what-if analysis aren't saved. To make further changes to the scenario (for example, to include different attributes), you must reset the scenario and then perform the what-if analysis.

Saving a what-if analysis has no effect on the worker's records. If you want to make any of the changes permanent (for example, promoting a worker), then you must do so explicitly.

What happens if I apply a what-if analysis?

The effect of any changes made to the what-if-analysis attributes on current performance and voluntary termination predictions is calculated, and new predictions appear. The attribute changes are not applied to the worker's records; however, you can save the what-if analysis as a worker plan for later retrieval.

What's a worker plan?

A worker plan is a saved what-if analysis for a worker. When you view worker plans, you display a list of all saved what-if analyses for all workers. Each worker plan is identified by the name you supplied when you saved the what-if analysis. The predicted performance and voluntary termination values for each scenario are those that applied when you last saved the what-if analysis. To update the predictions, you must rerun the what-if scenario.

If you have never saved a what-if analysis for a worker, then the list of worker plans includes no entry for that worker.

What happens if I move or edit a worker assignment in Workforce Modeling?

If you move a worker assignment in the organization chart, the **Manager** and **Department** fields in the **Edit Assignment** dialog box default to the new manager and the new manager's department.

All the other fields show their most recent values as of the model effective date. The current values are secured to ensure that people with no access to a worker's grade and salary can't view them.

FAQs for Evaluate Workforce Deployment Performance

When do changes to my organization hierarchy appear?

The hierarchy is based on completed transactions. Incomplete transactions, such as transfers or new hires awaiting approval, don't appear. However, terminations that are withheld from publication until a specified date are evident in your organization hierarchy from the termination date rather than the publication date.

Where do promotion-readiness values come from?

A person's readiness for promotion is based on the time since the person's last promotion relative to the average time between promotions for people in the same job or position and grade. For example, if the average time between promotions for people in the same job and grade is 5 years, a promotion appears due if the time since a person's last promotion is within range of 5 years. If the gap is outside this range, the promotion appears as either not due or overdue. Additional factors, such as performance and length of service, determine whether you decide to promote a person whose promotion appears due or overdue. Readiness for promotion values appear on the Manager Resources dashboard.

Why do some people appear more than once in my organization hierarchy?

Each entry in the hierarchy is an assignment. If a person has more than one assignment, and each assignment reports to a manager in the hierarchy, then the hierarchy contains an entry for each of the person's assignments.

Can I terminate a manager's whole organization in Workforce Modeling?

Yes, when terminating a manager you can select an option to also terminate his or her subordinates. The default behavior is not to terminate a manager's subordinates, but to automatically reassign them to the terminated manager's manager.

Can I update a worker's salary in Workforce Modeling?

Yes. Edit the assignment and select the Promotion or Location Change action. You can update a worker's salary information if the worker has a current salary record, their assignment does not have a grade ladder and if their salary basis does not use components or payroll rates.

Can I terminate a worker outside the top manager's hierarchy in Workforce Modeling?

You can search for workers, place them in the holding area, and then terminate them. Predefined approval rules ensure that the appropriate manager approves such changes. For example, if you terminate a worker who does not directly report to you, then the first manager in the hierarchy who you both report to, must approve the termination. The approver's manager must also approve the change.

Can I cancel a termination in Workforce Modeling?

Yes you can cancel a termination. For example, if you terminate a worker in the model and then cancel that termination, there is no change in the model. You can select to cancel the termination within the model without affecting the live transactional system.

12 Date Effectivity

Date Effectivity: Explained

Date effectivity preserves a history of changes made to the attributes of some objects. Professional users can retrieve and edit past and future versions of an object.

Many Human Capital Management (HCM) objects, including person names, assignments, benefits plans, grades, jobs, locations, payrolls, and positions are date-effective.

Logical and Physical Records

Date-effective objects include one or more physical records. Each record has effective start and end dates. One record is current and available to transactions. Others are past or take effect in the future. Together, these records constitute the logical record or object instance.

This table shows changes to the department manager attribute in a department business object. Each row represents a single physical record.

Physical Record	Effective Start Date	Effective End Date	Department Manager
4	18 January, 2011		C. Woods
3	15 October, 2010	17 January, 2011	A. Chan
2	13 June, 2009	14 October, 2010	T. Romero
1	22 March, 2007	12 June, 2009	G. Martin

 **Note:** The physical record number doesn't appear in the record.

Effective End Dates in Physical Records

Every physical record except the last has an effective end date. The update process adds this date, which is the day before the effective start date of the next record, whenever you update the object.

Object End Dates

You can enter a final effective end date for some date-effective objects. For example, terminating an assignment adds a final effective end date to the assignment. Alternatively, the **End Date** action may be available. If you end date a date-effective object, then it isn't available to transactions after that date. However, the object's history is retrievable.

Status Values in Date-Effective Objects

Some date-effective objects, such as grades and jobs, have both effective dates and status values. When the object status is **Inactive**, the object isn't available to transactions, regardless of its effective dates. Setting the status to **Inactive** makes objects unavailable to transactions. If you can't enter an effective end date for an object, then changing its status has the same effect.

Future-Dated Changes

For date-effective objects, you can enter future changes. For example, you enter the following worker promotion on 25 October, 2011 to take effect on 18 January, 2012.

Physical Record	Effective Start Date	Effective End Date	Grade
2	18 January, 2012		IC2
1	14 October, 2010	17 January, 2012	IC1

Physical record 2 becomes current on 18 January, 2012. From 14 October, 2010 until 17 January, 2012 physical record 1 is current and available to transactions. Users who can access the object history can see physical record 2 before it takes effect.

When future-dated changes exist, other actions may be limited. For example, to end this worker's assignment before the promotion takes effect, you must first delete the promotion.

Date-Enabled Objects

Some objects, such as work relationships, are date-enabled rather than date-effective. They have start and end dates that define when they're available, but they have no history of changes. New attribute values overwrite existing attribute values.

Correcting Date-Effective Objects: Examples

You can correct most attributes of date-effective objects, regardless of whether they occur in current, past, or future physical records.

If you correct the effective start date of an object's first physical record, then the revised date must be before the current effective start date. For the second and subsequent records, the revised date must be between the record's current effective start and end dates.

Correcting a Current Error

On 11 March, 2011 you create a location definition but enter the wrong phone. On 21 March, 2011, you search for the definition and select the **Correct** action. Before correction, the object history is as follows.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 March, 2011		650.555.0175

After correction, the object history is as follows.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 March, 2011		650.555.0176

Because you corrected the object, no change history exists.

Correcting a Past Error

A worker's assignment history is as follows.

Physical Record	Effective Start Date	Effective End Date	Job	Working at Home
4	20 October, 2010		Line Manager	No
3	18 August, 2010	19 October, 2010	Senior Administrator	No
2	10 May, 2010	17 August, 2010	Senior Administrator	Yes
1	25 July, 2009	9 May, 2010	Administrator	Yes

You learn that the worker's job was actually Project Leader from 10 May to 19 October, 2010. As this period spans physical records 2 and 3, you must correct both.

To retrieve physical record 2, you set the effective as-of date in the person search to any date between 10 May and 17 August, 2010. You select the assignment from the search results and make the correction.

You then retrieve physical record 3 and make the same correction.

Updating Date-Effective Objects: Examples

When you update a date-effective object, you insert a physical record in the object's history. Typically, the inserted record follows the current record and the effective start date is today. However, you can also enter future-dated changes and update past records.

Entering Future-Dated Changes

The grade EC3 exists from 17 June, 2009. Its ceiling step changes from 1 January, 2012. On 30 November, 2011, you change the grade's ceiling step and enter an effective start date of 1 January, 2012. This change creates a physical record in the grade definition, as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Ceiling Step
2	1 January, 2012		4
1	17 June, 2009	31 December, 2011	3

From 1 January, 2012 physical record 2 is in effect. Until then, physical record 1 is in effect.

Applying Historical Updates to Later Records

Jennifer Watts has one assignment, as follows:

Physical Record	Effective Start Date	Effective End Date	Grade	Location
2	18 September, 2010		A1	Area Office
1	10 April, 2010	17 September, 2010	A1	HQ

You promote Jennifer to grade A2 from 1 July, 2010. You update her assignment with an effective start date of 1 July, 2010 and enter grade A2. This update:

- Inserts a physical record between existing records 1 and 2
- Sets the effective end dates of physical record 1 to 30 June, 2010 and of the inserted record to 17 September, 2010

You also correct existing physical record 2 to change the grade from A1 to A2.

Jennifer's assignment history is now as follows:

Physical Record	Effective Start Date	Effective End Date	Grade	Location
3	18 September, 2010		A2	Area Office
2	1 July, 2010	17 September, 2010	A2	HQ
1	10 April, 2010	30 June, 2010	A1	HQ

Effective Sequencing: Examples

Some date-effective objects, such as assignments, create a physical record for each update on one day. Physical records with the same effective start date have effective sequence numbers. This topic provides examples of effective sequencing in assignment histories.

Changing the Assignment Working Hours

You create an assignment for a worker. Later the same day, you update the assignment working hours. This change isn't a correction, but an update. The assignment history is as follows.

Physical Record	Effective Sequence Number	Effective Start Date	Effective End Date	Working Hours
2	2	28 June, 2011		42
1	1	28 June, 2011		40

Changing the Assignment Manager

You update a worker's assignment twice on 14 March, 2010. You change the:

1. Assignment manager from S. Taylor to J. Miles.
2. Assignment manager from J. Miles to M. Scott and the grade from C14 to C15.

Effective sequencing doesn't apply to assignment manager and work measures. Because effective sequencing applies to grades but not assignment managers, the assignment history is as follows after you make both updates.

Physical Record	Effective Sequence Number	Effective Start Date	Effective End Date	Grade	Assignment Manager
3	2	14 March, 2010		C15	M. Scott
2	1	14 March, 2010		C14	M. Scott
1	1	30 May, 2009	13 March, 2010	C13	S. Taylor

Changes to assignment managers and work measures are corrections rather than updates. Only the last change made on any day remains in the object history. The change of manager to M. Scott overwrites the first change from S. Taylor to J. Miles.

Deleting Physical Records from Date-Effective Objects: Explained

The effect of deleting a physical record from a date-effective object depends on the record's position in the object's history. Consider the following date-effective object, which includes 3 physical records.

Physical Record	Effective Start Date	Effective End Date	Attribute Value
3	15 August, 2011		C
2	30 October, 2010	14 August, 2011	B
1	10 June, 2009	29 October, 2010	A

Intermediate Records

If you delete physical record 2, where the attribute value is B, then the object is as follows after the deletion.

Physical Record	Effective Start Date	Effective End Date	Attribute Value
2	15 August, 2011		C
1	10 June, 2009	14 August, 2011	A

If physical records exist both before and after the deleted record, then the deletion adjusts the dates of the surrounding records automatically. The effective end date of the previous record is now the day before the effective start date of the following record. This change closes the gap in the object's effective dates.

First or Only Records

In most cases, you can't delete the first or only physical record.

If you can delete the first physical record, then the object exists from the effective start date of the next physical record (30 October, 2010 in this example). If only one physical record exists, then deleting that record is the same as deleting the object.

Final Records

If you delete the final physical record, then the deletion removes the effective end date automatically from the previous physical record (14 August, 2011, in this example).

Making Multiple Updates to Date-Effective Objects in One Day: Explained

For most date-effective objects, only one physical record exists per day. Therefore, the object history shows only the latest update to each attribute in any one day. For example, if you update a location phone three times in one day, then only the last update appears in the physical record for that date. The update process overwrites the previous two values.

For some objects, such as assignments, the update process creates a physical record for each update in a day. Such objects include an effective sequence number in each physical record to show the update order. Changes are cumulative, and the physical record with the highest effective sequence number is available to transactions for that date.

For example, this table shows multiple updates to a person's assignment working hours and job on 14 October, 2010 and 30 April, 2012.

Physical Record	Effective Sequence Number	Effective Start Date	Working Hours	Job
6	2	30 April, 2012	40	Lead Technician
5	1	30 April, 2012	42.5	Lead Technician
4	3	14 October, 2010	42.5	Senior Technician
3	2	14 October, 2010	42.5	Technician
2	1	14 October, 2010	40	Technician
1	1	17 June, 2010	40	Junior Technician

Object Correction

Effective sequence numbers apply only when you update an object. If you correct an object, then the new value overwrites the previous value. The correction process doesn't create a separate physical record for each change.

This table shows the person's assignment record when you correct rather than update the working hours and job attributes multiple time in one day.

Physical Record	Effective Start Date	Working Hours	Job
3	30 April, 2012	40	Lead Technician
2	14 October, 2010	42.5	Senior Technician
1	17 June, 2010	40	Junior Technician

FAQs for Date Effectivity

What's the difference between updating and correcting a date-effective object?

When you update an object, you insert a physical record in the object's history. Typically, the inserted record follows the current physical record, and the effective start date is today's date. However, you can edit the object history or create a future-dated change by setting an appropriate effective start date.

When you correct a date-effective object, you edit the information in an existing physical record. You don't create a physical record.

What's the effective as-of date?

A date value that filters search results. For any date-effective object that matches the other search criteria, the search results include the physical record for the specified effective as-of date. The effective as-of date is one of the search criteria. Therefore, objects with effective dates that don't include the specified date don't appear in the search results. By default, the effective as-of date is today's date.

How can I see future-dated or past records for a date-effective object?

When searching for a date-effective object, you can enter an effective as-of date. The search returns the physical record from the object with an effective date range that includes the specified effective as-of date.

While viewing or editing an object, you can see its history, which includes all current, past, and future physical records. You can select any of these records from the object history.

Can I delete a date-effective object?

In most cases, yes. If the **Delete** icon appears in the search results table when you search for the object, then you can delete it. Deletion purges all of the object's physical records and isn't reversible. After deletion, the object's history is no longer available.

Alternatively, enter an effective end date for the object or change its status to make it unavailable to transactions. With these approaches, the object's history remains available.

What happens when I end date an object?

The date that you enter becomes the final effective end date for the object. If physical records exist for the object beyond the effective end date, either they're deleted automatically or you delete them.

The object's history remains available. For example, the object may appear in search results if the search criteria include an effective as-of date that's within the object's effective dates.

What's an effective sequence number?

A number that's added automatically to physical records with the same effective start date in a single date-effective object, such as an assignment. The number differentiates the physical records and identifies the update order. The physical record with the highest effective sequence number is available to transactions for the relevant date.

Glossary

abstract role

A description of a person's function in the enterprise that is unrelated to the person's job (position), such as employee, contingent worker, or line manager.

assignment

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

balancing segment

A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

beneficiary

A person or organization designated to receive benefits from a compensation plan on the death of the plan participant.

business unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

calendar event

A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

ceiling step

Highest step within a grade that a worker may progress to.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

compa-ratio

Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.

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.

concurrent transaction

Another transaction (of any type) existing for the same data item at the same time.

contact relationship

A relationship between an employee, a contingent worker, or a nonworker and another person, who may be an emergency contact, a dependent, or a beneficiary.

contingent worker

A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.

cost center

A unit of activity or a group of employees used to assign costs for accounting purposes.

country holding company

A legal entity that acts on behalf of several divisions within an enterprise, and is the legal employer in a country.

date-effective object

An object with a change history. Professional users can retrieve the object as of a current, past, or future date.

department

A division of a business enterprise dealing with a particular area of activity.

dependent

A person who has a personal relationship with a participant in a compensation plan whom the participant designates to receive coverage through the plan.

disability organization

An organization with which employee disabilities are registered.

division

A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

document record

Stores information about person documents such as visas, licenses, and medical certificates, and can include electronic versions of the documents as attachments.

effective as-of date

A date used for filtering search results for date-effective objects. For objects that match the search criteria, the search results include the physical record in effect on the specified date.

effective end date

For a date-effective object, the end date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

effective sequence number

A number that identifies the order of changes made to a date-effective object in one day. On any day, the physical record with the highest number is the current record.

effective start date

For a date-effective object, the start date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

emergency contact

Any of a person's contacts whom the enterprise can call in an emergency.

enterprise

An organization with one or more legal entities under common control.

FTE

Abbreviation for full-time equivalent, such as .5 for half-time work.

gallery

A searchable collection of portraits that combines the functions of the person directory with corporate social networking and self-service applications for both workers and managers.

global name

A person's name in a format and language that can be understood throughout a multinational enterprise.

grade

A component of the employment model that defines the level of compensation for a worker.

grade rate

Used to define pay values for grades in a legislative data group.

HCM data role

A job role, such as benefits administrator, associated with instances of HCM data, such as all employees in a department.

headcount

A work measure recorded on an assignment. By default, the headcount of an organization is the total of primary assignments in primary work relationships.

HR

Abbreviation for human resource.

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

job role

A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

LDAP

Abbreviation for Lightweight Directory Access Protocol.

legal employer

A legal entity that employs people.

legal entity

An entity identified and given rights and responsibilities under commercial law through the registration with country's appropriate authority.

legal reporting unit

The lowest level component of a legal structure that requires registrations. Used to group workers for the purpose of tax and social insurance reporting or represent a part of your enterprise with a specific statutory or tax reporting obligation.

legislative data group

A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

local name

A person's name in a format and language that are readily understood by users in a single country but that may not be understood throughout a multinational enterprise.

logical record

One or more physical records that constitute a date-effective object.

node

A logical term that refers to the data in a specific data source such as a product-specific table or a storage entity. A tree management solution must have established the data source.

nonworker

A person, such as a volunteer or retiree, who is not engaged in the core businesses of the enterprise or legal employer but who may receive payments from a legal employer. Any person who has a nonworker work relationship with a legal employer is a nonworker.

party

A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

payroll statutory unit

A legal entity registered to report payroll tax and social insurance. A legal employer can also be a payroll statutory unit, but a payroll statutory unit can represent multiple legal employers.

pending worker

A person who will be hired or start a contingent worker placement and for whom you create a person record that is effective before the hire or start date.

performance document

Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

person number

A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person's work and person-to-person relationships.

person type

A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the assignment level.

physical record

A single record, with effective start and end dates, in the history of a date-effective object. Each physical record is a row in a database table.

portrait

A selection of information about a worker or nonworker, including contact details, social connections, and activities and interests, that can be viewed and edited. Both the amount and type of information and the available actions depend on the role of the portrait user.

position

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

primary work schedule

Schedule that the application uses to determine the worker's availability.

rating model

A scale used to measure the performance and proficiency of workers.

role

Controls access to application functions and data.

role mapping

A relationship between one or more roles and one or more assignment conditions. Users with at least one assignment that matches the conditions qualify for the associated roles.

role provisioning

The automatic or manual allocation of a role to a user.

salary basis

Characterizes worker's base pay. Identifies payroll details used to pay base earnings, period of time pay is quoted, factor used to annualize base pay, components used to itemize adjustments into different reasons, and grade rate used for salary validation.

seniority date

The date on which the calculation of a person's length of service and consequent entitlement to benefits is based. A person has one enterprise seniority date and one or more legal-employer seniority dates.

set

Classified and grouped reference data that organizational entities share.

temporary assignment

The transfer of a person for a limited term. You terminate the temporary assignment at the end of a term, facilitating the person's return to the source assignment.

transfer

The movement of a person within the same legal employer.

tree

Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

tree structure

A set of guidelines or a framework applied to create a tree, include data, version a tree, or access a tree.

work relationship

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

work schedule exception

An event that impacts the normal working pattern in a work schedule.

worker number

An optional ID for employee and contingent worker work relationships. The decision to use worker numbers is made for the enterprise and inherited by all legal employers.

worker type

A classification selected on a person's work relationship, which can be employee, contingent worker, pending worker, or nonworker.

