



ERP

Human Resource

Work Structure

Types of Organizations

You can define organizations and the relationships among them.

1. Set of Books

A financial reporting entity that uses a particular chart of accounts, functional currency, and accounting calendar. Oracle General Ledger secures transaction information (such as journal entries and balances) by set of books. When you use Oracle General Ledger, you choose a responsibility that specifies a set of books. You then see information for that set of books only.

2. Business Group

The business group represents the highest level in the organization structure, such as the consolidated enterprise, a major division, or an operation company. The business group secures human resources information. For example, when you request a list of employees, you see all employees assigned to the business group of which your organization is a part.

Note: This is true in all applications except the HR applications, which support more granular security by a lower-level organization unit, the security profile. Multiple sets of books can share the same business group if they share the same business group attributes, including HR flexfield structures.

3. Legal Entity

A legal company for which you prepare fiscal or tax reports. You assign tax identifiers and other legal entity information to this type of organization.

4. Balancing Entity

Represents an accounting entity for which you prepare financial statements. This is a segment in the Accounting Flexfield structure (usually the Company segment) at which all accounting entries must balance. There may be multiple companies within the same structure, and each of these must balance within it. Each legal entity can have one or more balancing entities. You can use Flexfield Value Security rules to restrict data entry of balancing segment values by legal entity or operating unit.

5. Operating Unit

An organization that uses Oracle Cash Management, Order Management and Shipping Execution, Oracle Payables, Oracle Purchasing, and Oracle Receivables. It may be a sales office, a division, or a department. An operating unit is associated with a legal entity. Information is secured by operating unit for these applications. Each user sees information only for their operating unit. To run any of these applications, you choose a responsibility associated with an organization classified as an operating unit.

6. Inventory Organization

An organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products. Examples include (but are not limited to) manufacturing plants, warehouses, distribution centers, and sales offices. The following applications secure information by inventory organization: Oracle Inventory, Bills of Material, Engineering, Work in Process, Master Scheduling/MRP, Capacity, and Purchasing receiving functions. To run any of these applications, you must choose an organization that has been classified as an inventory organization. You create sets of books using the Define Set of Books window in Oracle General Ledger. You define all other types of organizations using the Define Organization window.

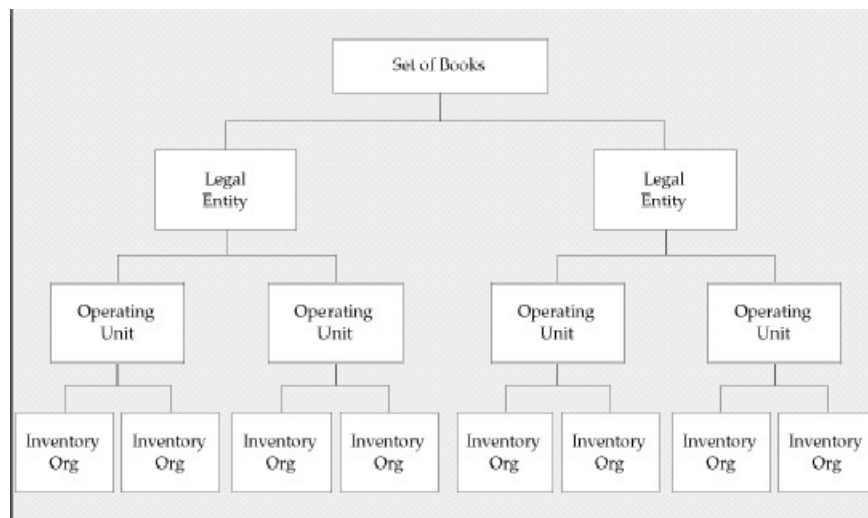
7. HR Organization

HR organizations represent the basic work structure of any enterprise. They usually represent the functional management, or reporting groups that exist within a business group. In addition to these internal organizations, you can define other organizations for tax and government reporting purposes, or for third part payments.

Types of Organization Models

1. Human Resources Organization Model

With Oracle Human Resources, you can define multilevel organization hierarchies, with a business group at the top of each hierarchy. When you define new organizations, they are automatically assigned to the business group associated with your current session. Each organization is part of a business group. The business group is usually the top box on an enterprise organization chart, as in. The business group is the largest organization unit you set up in Human Resources to represent your enterprises as an employer. Below this level, you represent the groupings in which employees' work, such as branches, departments, or sections,



by means of internal organizations. To enable the assignment of employees to an internal organization, you classify the internal organization as a HR organization. You can define external organizations in the same way as internal organizations, so that you can represent organizations that are not part of your enterprise (such as training vendors or tax offices). The major difference between internal and external organizations is that you cannot assign people to an external organization.

2. Accounting / Distribution / Materials Management Organization Model

Using the accounting, distribution, and materials management functions in Oracle Applications, you define the relationships among inventory organizations, operating units, legal entities, and sets of books to create a multilevel company structure, as shown in

- **Legal Entities Post to a Set of Books**

Each organization classified as a legal entity identifies a set of books to post accounting transactions.

- **Operating Units Are Part of a Legal Entity**

Each organization classified as an operating unit is associated with a legal entity.

- **Inventory Organizations are Part of an Operating Unit**

Each organization classified as an inventory organization references an operating unit.

- **Inventory Organization Determines Items Available to Order Management**

The OM: Item Validation Organization profile option specifies the inventory organization that Order Management uses to validate items. Some inventory item attributes for Receivables and Order Management, including Tax Code and Sales Account, are specific to an operating unit or an accounting flexfield structure. Therefore, you should define an item validation organization for each operating unit.

- **Inventory Organization Determines Items Available to Purchasing**

The inventory organization you specify in the financial options for each operating unit determines the items available in Purchasing. You can only choose an inventory organization that uses the same set of books as your operating unit.

Controlling Secure Access

1. Data Security

You can limit users to information relevant to their organization. For example, you can limit access for order administration clerks to sales orders associated exclusively with their sales office.



2. Inventory Organization Security by Responsibility

You can specify which inventory organizations are available to users in each responsibility. The Choose Inventory Organization window automatically limits available inventory organizations to those authorized for the current responsibility.

3. Responsibility Determines Operating Unit

Your responsibility determines which operating unit you access when you use Oracle Applications. When you use Oracle Payables, Receivables, Order Management and Shipping Execution, Purchasing, Projects, and Sales Compensation you see information that is relevant to your operating unit. All transactions you create are automatically assigned to your operating unit.

Setting Up a Multiple Organization Enterprise

This essay describes how to implement your organizational structure within the Oracle Applications Multiple Organization model.

1. Develop the Organization Structure
2. Define Sets of Books
3. Define Locations
4. Define Business Groups
5. Associate Responsibilities with Business Groups
6. Define Organizations
7. Define Organization Relationships
8. Define Responsibilities
9. Set MO: Operating Unit Profile Option
10. Convert to Multiple Organization Architecture
11. Change Order Management Profile Option
12. Set Profile Options Specific to Operating Units
13. Define Inventory Organization Security (optional)

Step 1 Develop the Organization Structure

A successful implementation of Multiple Organization support in Oracle Applications depends primarily on defining your organizational structure in the multi-level hierarchy used by Oracle Applications. The Levels are:

- Business groups
- Accounting sets of books
- Legal entities
- Operating units
- Inventory organizations
- HR Organizations

First, you need to decide on the organizations you will use in your multiple organization implementations.

Step 2 Define Sets of Books

Use the Define Set of Books window to enter your sets of books.

Note: If your enterprise structure requires that you define a business group, you should define sets of books before business groups.

Step 3 Define Locations

Use the Define Location window to define names and addresses for the locations you use within your enterprise. You define each location once only. This saves your time if you have multiple organizations with the same location. You should define locations for your legal entities and inventory organizations. Oracle Applications products use locations for requisitions, receiving, shipping, billing, and employee assignments.

Step 4 Define Business Groups (optional)

This section applies to you if you have more than one business group, or if you do not choose to use the pre-defined business group provided by Oracle Applications. Oracle Applications secures human resources information, including organization definition, by business group. You must have at least one business group. For a fresh installation, Oracle Applications provides a pre-defined business group, Setup Business Group. You can define additional business groups as required for your enterprise. We recommend that you modify the pre-defined business group rather than defining a new one. If you define a new business group instead of modifying the pre-defined business group, you need to set the Business Group profile option at the responsibility level for the new business group. Oracle Human Resources automatically create a security profile with the business group name when you define a new business group. You should define all your business groups before defining any other type of organization.

Step 5 Associate Responsibilities with Business Groups (optional)

This section applies to you if you have multiple business groups, or if you do not choose to use the default business group provided by Oracle Applications. If you have multiple business groups, you must associate each Responsibility to one and only one business group. You associate a business group with a responsibility via the HR: Business Group system profile option. If you are upgrading to Multiple Organizations, you must also associate previously created responsibilities to the appropriate business group.

Step 6 Define Organizations

Use the Define Organization window to define all your organizations. You can perform this step and the next step (Define Organization Relationships) at the same time. The steps are presented separately to emphasize the difference between the organizational entity and the role it plays in your organizational structure.

To define legal entities, operating units, and inventory organizations:

1. Log in to the responsibility associated with the business group for which you are defining an organization.
2. Define a legal entity. It is then automatically attached to the correct business group.
3. Define operating units.
4. Define your inventory organizations for each operating unit that will have an inventory organization.

- If you have more than one business group, switch to the responsibility associated with the other business group and continues to define your organization structure.

Step 7 Define Organization Relationships

Use the Define Organization window to define organization relationships by assigning classifications to each organization. Attributes of certain classifications relate organizations and the roles they play. You can classify an organization as any combination of legal entity, operating unit, and inventory organization. Specify your Organization classifications in the following order:

- Legal Entities Attach organizations designated as legal entities to a set of books. You must also specify a location in the Define Organization window. Use the Define Location window to define locations for your legal entities.
- Operating units attach the operating units to the correct set of books and legal entity.
- Inventory organizations attach the inventory organizations to the correct operating unit, legal entity, and set of books. If you have more than one business group, change to the responsibility associated with the other business group and continues defining your organization classification.

Required information for organization classifications

| Classification | Information Type | Required Attribute |
|------------------------|----------------------------|--|
| Business Group | Business group information | Short Name, Employee/Applicant Numbering, Key Flexfield Structures, Default Legislation Code, and Currency |
| GRE/Legal Entity | Legal Entity Accounting | Set of Books, Location |
| Operating Unit | Operating Unit Information | Legal Entity, Set of Books |
| Inventory Organization | Accounting Information | Set of Books, Legal Entity, Operating Unit |

Step 8 Define Responsibilities

Use the Define Responsibility window to define responsibilities for each operating unit by application. When you sign on to Oracle Applications, the responsibility you choose determines the data, forms, menus, reports, and concurrent programs you can access. You should consider using naming conventions for the responsibility names in a Multiple Organization environment. It is a good idea to use Abbreviations of the business function and the organization name to uniquely identify the purpose of the responsibility, for example, Super User TCL HR



Step 9 Set MO: Operating Unit Profile Option

Oracle Applications uses the profile option MO: Operating Unit to link an operating unit to a responsibility. You must set this profile option for each responsibility. When you connect to the Oracle Applications, you sign on by entering your username and password. Then, you choose a responsibility that is available to your user. After you choose your responsibility, there is an initialization routine that reads the values for all profile options assigned to that responsibility, including the value for MO: Operating Unit. Oracle Applications allows you to see only the information for that particular operating unit that is assigned to your responsibility. If you use Oracle Training Administration (OTA) in a Multiple Organization environment, you must set the MO: Operating Unit profile option. This ensures that the OTA customer and supplier function works correctly in a Multiple Organization environment.

Step 10 Convert to Multiple Organization Architecture

Ask your database administrator to run the AutoInstall utility *adadmin*. One of the options in *adadmin* is to convert to Multiple Organization architecture. Choosing this option will enable the Multiple Organization Support features as well as add operating unit context to all existing data. This process will also replicate seed data to all operating units that have been defined. Before running this step, you must define an operating unit and set the site-level AOL profile option MO: Operating Unit to use your new operating unit. This profile option tells *adadmin* what operating unit it should use when converting your existing data. If you define Additional operating units, the seed data will be replicated for all operating units. The Convert to Multiple Organization Architecture option does not display on the menu if you already have Multiple Organizations Installed in your database. You no longer need to run the Convert to Multiple Organizations Architecture option again since the Multiple Organizations architecture is built into the underlying applications.

Step 11 Change Order Management Profile Option

If you have different item validation organizations for your operating units, use the Define User Profile Option window to change the level characteristics of your OM: Item Validation Organization profile option so that they are visible and updateable at the responsibility level. This change allows Order Management and Shipping Execution to default tax code and revenue account information correctly.

Step 12 Set Profile Options Specific to Operating Units

Some profile options, including AR: Receipt Batch Source and AR: Transaction Batch Source, reference data that is secured by operating unit. You must set these profile options at the responsibility level. You should choose a value corresponding to the operating unit of the responsibility.

The following profile options need to be set for each responsibility for each operating unit where applicable:

- HR: Business Group (all responsibilities)
- HR: User Type The HR: User Type profile option limits field access on windows shared between Oracle Human Resources and other applications. If you do not use Oracle Payroll, it must be to HR User for all responsibilities that use tables from Oracle Human Resources (for example, responsibilities used to define employees and organizations).
- GL: Set of Books Name Oracle General Ledger forms use the GL:Set of Books profile option to determine your current set of books. If you have different sets of books for your operating units, you should set the GL:Set of Books profile option for each responsibility that uses Oracle General Ledger forms.

Step 13 Define Inventory Organization Security (optional)

With inventory organization security you can restrict inventory organization access to specific responsibilities. You may want to restrict your manufacturing users to certain organizations according to your organizational hierarchy. This feature has the following characteristics:

- Until you assign an organization to a responsibility in this window, all responsibilities have access to all organizations. Once you have restricted any responsibilities to certain organizations, you must then explicitly define the organizations that all responsibilities can access.
- This feature does not restrict access once the user is in the product. Users with access to functions that cross multiple organizations (such as ATP, Inter-Organization Transfers, Item Search, and Multi-Org Quantity Report, and so forth) can still specify any valid organization when running these functions.

Changing the Organization Structure

At some point, your company may need to make organization changes. Companies usually make organization changes to better adapt themselves to the new business needs and challenges of the market.

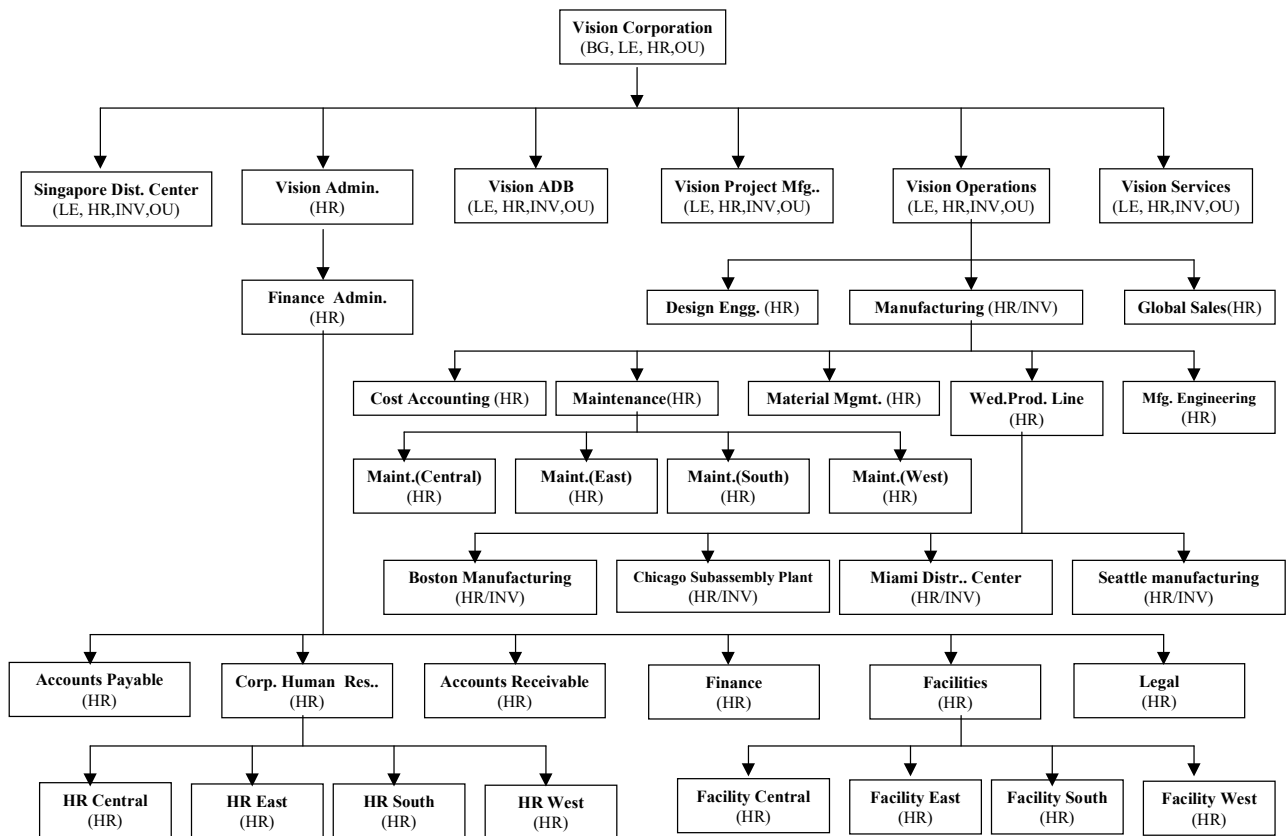
One type of organization change you can make is to discontinue one organization. You can use the Define Organizations window to discontinue one organization by putting an end date in its definition. You can perform other organization changes by enabling or disabling organization classifications or changing the classification attributes. When you do that, you must consider the following:

- The Define Organizations window does not re-validate the relationships among legal entities, operating units, and inventory organizations.
- You should not try to move one set of books or legal entity to another because your data may not be valid for the new set of books or legal entity. Instead, you should disable the old organization and create a new one for the appropriate set

of books or legal entity. The new organization will contain your new data, and the disabled organization will act as an old or history entity that stores past transactions.

- If you create a new organization, you can still access your historical transactions by logging to the responsibility tied to the disabled organization. To enter new transactions, you must log into the responsibility tied to the new organization. The data for each of the two organizations are kept separate from one another, and must be accessed separately.

Vision Organization Model



Organization Management

Organization Management

To set up organizations for the first time, complete steps one and two. Once you are up and running, you can create new organizations and Manage organizations as and when required.

Step 1: Set Up Organizations

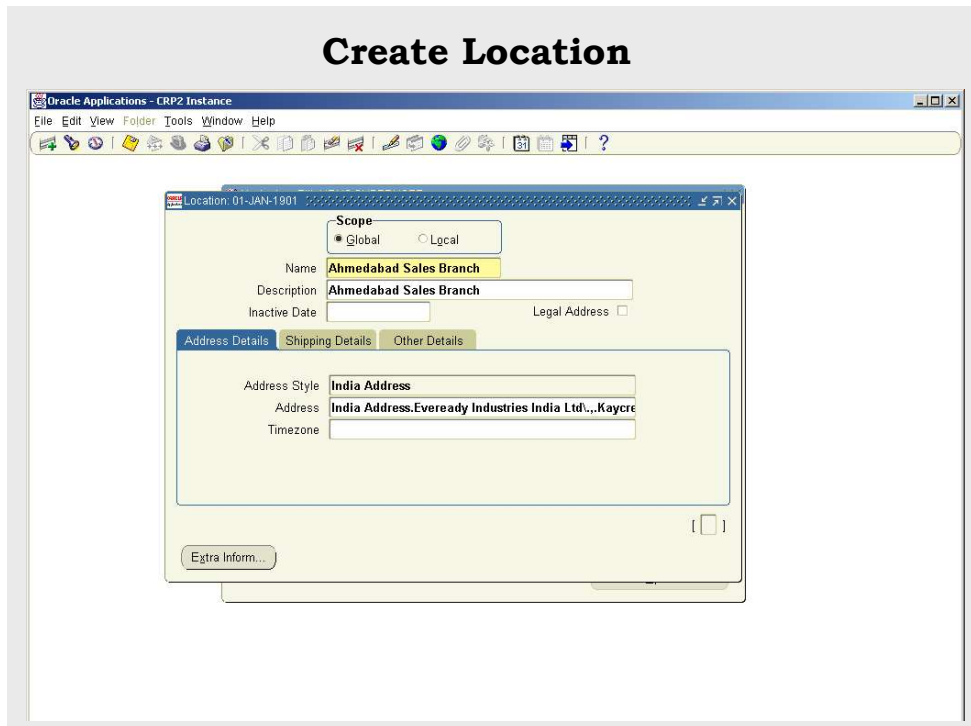
- Set Up Site Locations
- Create a New Business Group

Step 2: Create Organizations

- Create an Organization
- Enter Organization Classifications
- Enter Additional Information

Step 3: Create Organization Hierarchies

1. Creating Location



Locations

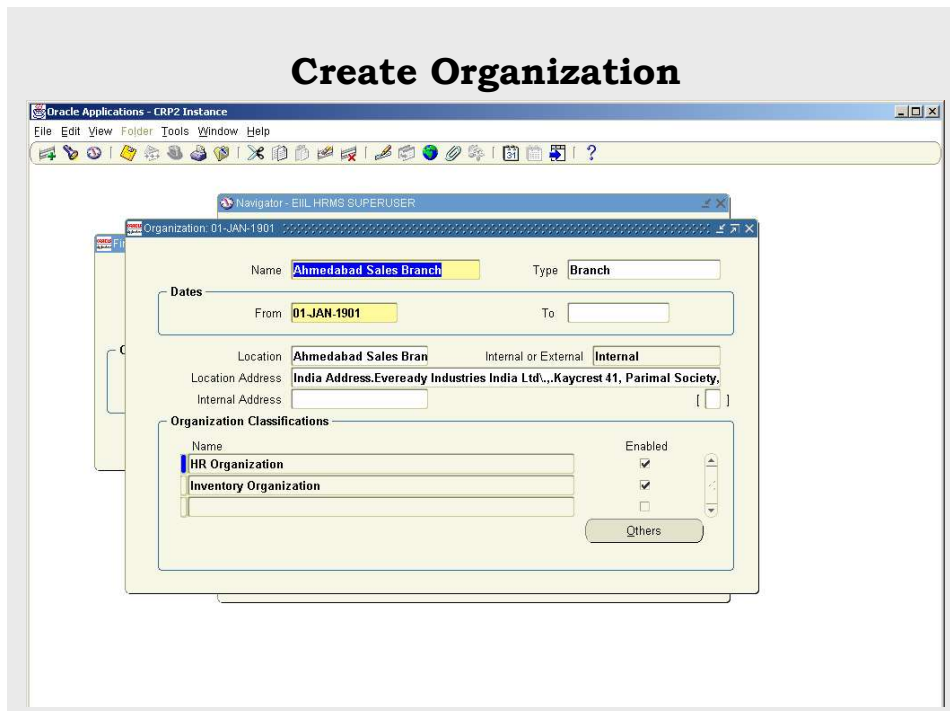
Work Structure -> Location

In Oracle HRMS, you set up each physical site where your employees work as a separate *location*. Locations are shared across Business Groups in HRMS and with two other Oracle applications: Inventory and Purchasing. HRMS does not use some of the fields in the Location window. These fields are disabled for HRMS users.

How to Create Location

1. Enter the name of the location, and a description if required.
2. Uncheck the Global check box if you want the **location** to only be available within the default Business Group of your current responsibility. Accept the default if you want the **location** to be a global location and therefore available to all Business Groups.
3. Select a national address style from the list. A window opens with the address format for the selected country.
4. Enter address information in this window and choose OK.
5. Choose the **Extra Information** button to enter any additional information required by your enterprise.
6. Save your **location**.

2. Organization



Organization

Work Structure -> Organization -> Description

Use the Organization window to create:

1. **Business Groups** The first organization you must set up is the Business Group, to which all other organizations belong. You must then create a responsibility that enables you to access the Business Group.
2. **Internal organizations** (for example, plants, corporate office, branch offices etc.)

To create an organization you must follow following steps:

- ◆ Create an Organization
- ◆ Enter Organization Classifications
- ◆ Enter Additional Information

How to create an organization:

1. Navigate to the Organization window and select the new button to create a new organization.
2. Enter a name for your organization in the Name field. All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be **unique** within a **Business Group**, and Business Group names must be unique across your applications network.
3. Optionally, select an organization type in the Type field. Organization types do not classify your organization; you use them for reporting purposes only. The type may identify the function an organization performs, such as Administration or Service, or the level of each organization in your enterprise, such as corporate office, Branches, Plants etc.
4. Enter a start date in the From field. This should be early enough to include any historical information you need to enter. You cannot assign an employee to an organization before the start date of the organization.
5. Enter a location, if one exists. You can also enter an internal address to add more details such as floor or office number.
6. Enter internal or external in the Internal or External field. You cannot assign people to an external organization. Examples of external organizations that may require entry are benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.
7. Save the basic organization details.

Entering Organization Classifications

To determine the purpose and use of each organization you create, you give it one or more classifications. The setup information you enter for an organization depends in large part on its classification.

Note: Classifying an organization, as a Business Group is not reversible. Business Group partitions employees, organizations, and other data. You can only view the records of one Business Group at a time.

Organization Classifications

The following classifications can be used by all legislation:

- ◆ **Business Group:** Use this to define a Business Group.
- ◆ **HR Organization:** Use this for all organizations (including Business Groups) to which you want to assign employees.
- ◆ **Registered Company:** In the Indian scenario, there has to be an organization which has to be defined as a registered company. This registered company has to be filled in the Income tax Information(Additional information) for the GRE/Legal entity organization. Here, the business group is defined as a Registered Company
- ◆ **GRE/Legal Entity:** An organization has to be defined as a GRE(Government Reporting Entity) and its income tax information has to be filled in. This is necessary to give a payroll to the employees

How to enter organization classifications

1. Enter the classification for your organization in the Name field.
2. Enable the classification by checking the Enable box. This allows you to use and enter the essential additional information for your organization.
3. Save the classification details.
4. You can either enter additional information for the classification type or enter another classification.

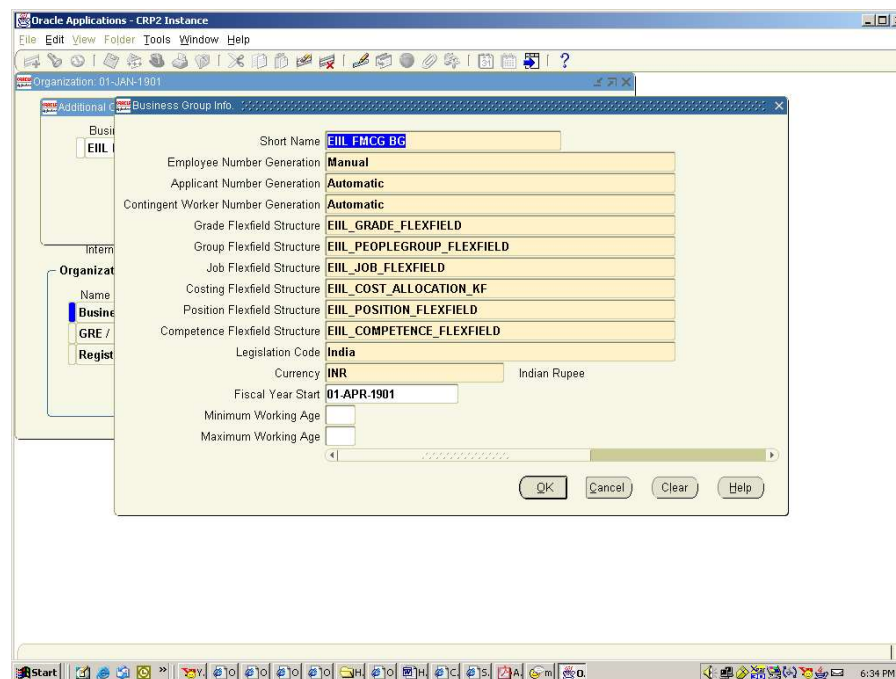
Entering Additional Information

For each organization classification you select, you can enter additional information. This information can be different for each classification.

How to enter additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Select Business Group to enter additional details about an organization that is classified as a Business Group.
3. Select HR Organization to enter additional details about an organization that is classified as a HR Organization.
4. Choose the others button to open the Additional Organization Information window.

Business Group Additional Information



The screenshot shows the 'Business Group Info' window in Oracle Applications. The window is titled 'Additional Business Group Info' and is open over the 'Organization: 01-JAN-1901' window. The 'Business Group Info' window has a tree view on the left with 'Business Group' selected. The main area contains the following fields:

| | |
|-------------------------------------|---------------------------|
| Short Name | EIL_FMCG_BG |
| Employee Number Generation | Manual |
| Applicant Number Generation | Automatic |
| Contingent Worker Number Generation | Automatic |
| Grade Flexfield Structure | EIL_GRADE_FLEXFIELD |
| Group Flexfield Structure | EIL_PEOPLEGROUP_FLEXFIELD |
| Job Flexfield Structure | EIL_JOB_FLEXFIELD |
| Costing Flexfield Structure | EIL_COST_ALLOCATION_KF |
| Position Flexfield Structure | EIL_POSITION_FLEXFIELD |
| Competence Flexfield Structure | EIL_COMPETENCE_FLEXFIELD |
| Legislation Code | India |
| Currency | INR Indian Rupee |
| Fiscal Year Start | 01.APR.1901 |
| Minimum Working Age | |
| Maximum Working Age | |

At the bottom of the window are buttons for OK, Cancel, Clear, and Help.

Business Group Additional Information

➤ Business Group Information

1. You can enter a short name for the Business Group. This name is no longer used in Oracle HRMS. It is provided for compatibility with earlier releases, where it appeared in the header line of each form.
2. Select the method of creating identifying numbers for employees and applicants. The choices are:
 - Automatic number generation
 - Manual entry

Note: Once you save your method, you cannot later change to either of the automatic options. You can only change to manual entry.

3. Select the names of the key flexfield structures (Position, Job, Grade, Competency etc.) you want to use in this Business Group.
4. Select the appropriate Legislation Code and default currency. The Legislation Code determines the startup data you can access and the contents of some legislation-specific windows.

Note: Selecting the correct legislation code is essential for the correct functioning of Oracle HRMS. You cannot change the legislation code after entering employees against the Business Group.

5. You can enter a Minimum and Maximum Working Age for the Business Group. When you enter or hire employees, you receive a warning if the person's age is outside this range.
6. Save your work.

➤ Work Day Information

1. Enter the normal start and end times in 24-hour format. For example, for 5.30 p.m., enter 17:30.
2. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.

Note: You can add to the list of available frequencies by making entries for the Lookup Type **FREQUENCY**, using the Application Utilities Lookups window.

HR Organization Additional Information

➤ Costing Information

Select the appropriate cost code in each segment. For individual employees, you can override these organizations–level codes by entering costing information on their assignments.

➤ Parent Organization Information

After you set up organization hierarchies, use the Parent Organization window to place a subordinate organization in hierarchies by naming its immediate parent in each hierarchy.

1. Select the hierarchy name.
2. Select the name of the parent organization to which the HR Organization is subordinate in this hierarchy.
3. To enter the HR Organization in another hierarchy, repeat steps 2 and 3.

➤ Work Schedule

Work schedules show the number of working hours scheduled each day of the week for employees, starting with Monday. For example, for an employee who works 7 hours and 45 minutes each day Sunday through Thursday, with Friday and Saturday off, the work schedule is:

775-775-775-775-0-0-775.

Select the default work schedule for the organization. You can override this default for individual employees on their assignments.



3. Organization Hierarchy

Create Organization Hierarchy

Table: **EIIL_ORG_HIERARCHY** Key Units of Measure: **Text**

Column Name: **Parent**

| Exact | Value | Effective Dates | |
|-------|--------------------|-----------------|--|
| | | From To | |
| 1 | EIIL_SETUP_BUSINE | 01-JAN-1901 | |
| 10 | BPDO | 01-JAN-1901 | |
| 100 | Tefco Plant Luckno | 01-JAN-1901 | |
| 101 | Tefco Plant Luckno | 01-JAN-1901 | |
| 102 | Tefco Plant Luckno | 01-JAN-1901 | |
| 103 | Natco Hyderabad P | 01-JAN-1901 | |
| 104 | Natco Hyderabad P | 01-JAN-1901 | |
| 105 | Natco Hyderabad P | 01-JAN-1901 | |
| 106 | Natco Hyderabad P | 01-JAN-1901 | |

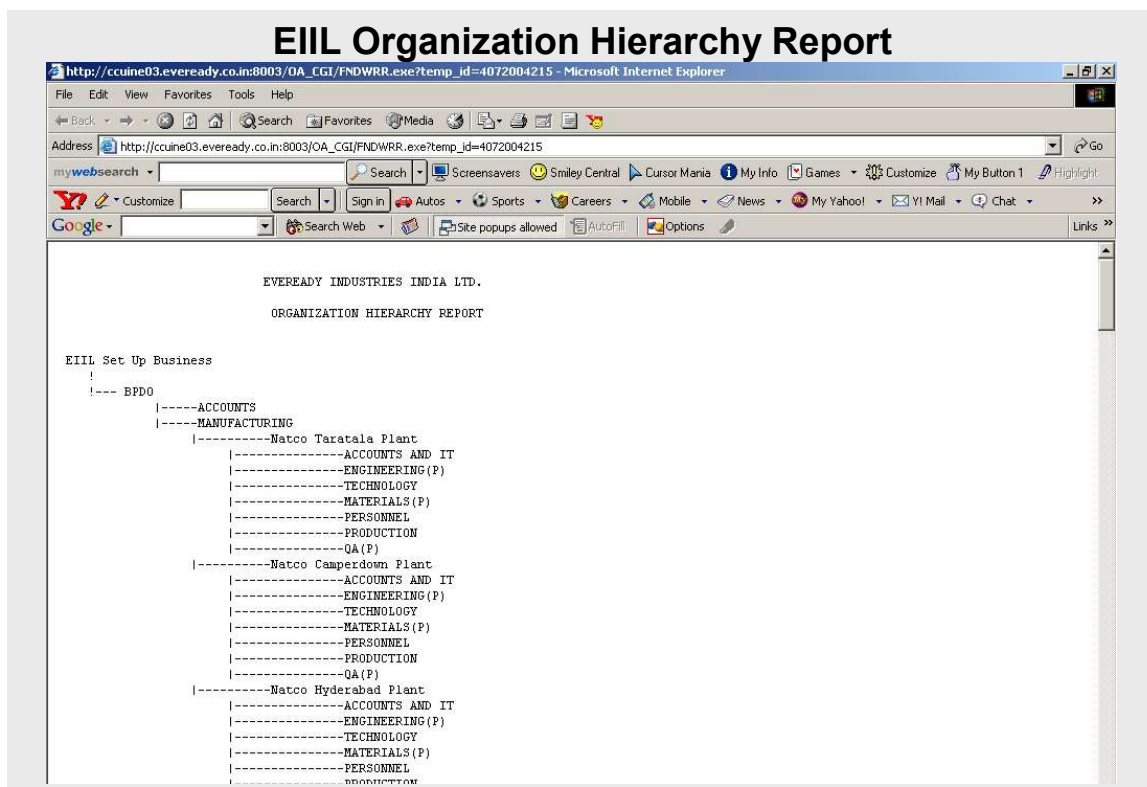
Table: **EIIL_ORG_HIERARCHY** Key Units of Measure: **Text**

Column Name: **Child**

| Exact | Value | Effective Dates | |
|-------|------------------|-----------------|--|
| | | From To | |
| 1 | BPDO | 01-JAN-1901 | |
| 10 | EXPORTS DIVISION | 01-JAN-1901 | |
| 100 | PERSONNEL | 01-JAN-1901 | |
| 101 | PRODUCTION | 01-JAN-1901 | |
| 102 | QA(P) | 01-JAN-1901 | |
| 103 | ACCOUNTS AND IT | 01-JAN-1901 | |
| 104 | ENGINEERING(P) | 01-JAN-1901 | |
| 105 | TECHNOLOGY | 01-JAN-1901 | |
| 106 | MATERIALS(P) | 01-JAN-1901 | |

Creating Organization Hierarchy

Here, the organization hierarchy is not created the conventional way. Here, the organization reporting structure is defined in a table named EIIIL_ORG_HIERARCHY where there are 2 columns with 1 as the parent organization and another column as the child organization. The hierarchy is generated as a report by a concurrent process where the parent and the child names are picked up from the table EIIIL_ORG_HIERARCHY

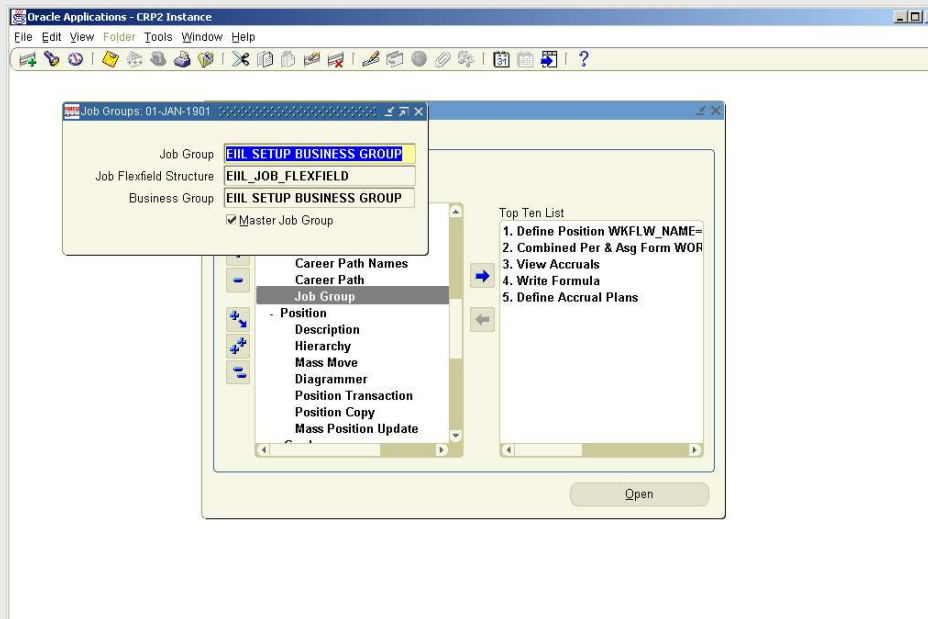


To add a new parent and a child organization to the hierarchy

1. Go to table structure(Other Definitions>Table Structure)
2. Query the table EIIIL_ORG_HIERARCHY
3. Add a row value
4. Go to table values(Other Definitions>Table Values)
5. Add a parent name and child name for the corresponding row value entered in the table structure
6. Run the concurrent process EIIIL Organization Hierarchy Report. The output will show the new parent and child organization in the hierarchy

4. Job Group

Create Job Group



Create a Job

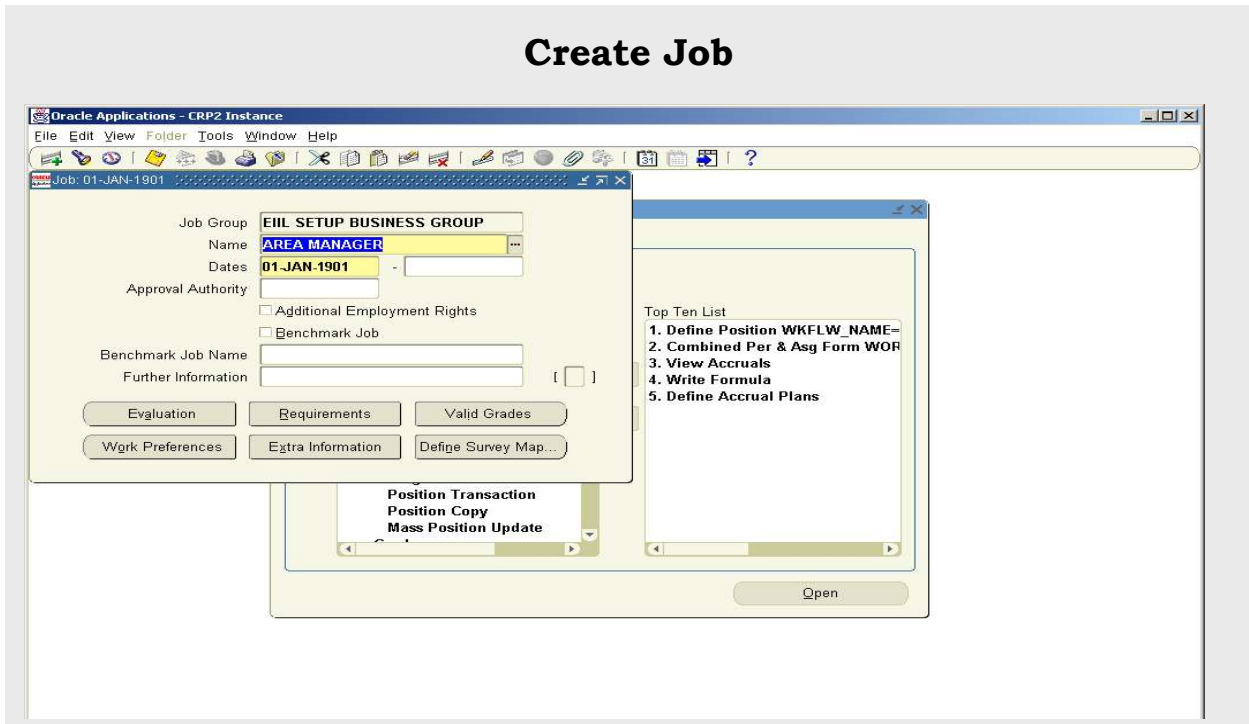
Work Structure -> Job -> Job Group

How to Create a Job Group:

You create Job Groups in the Job Group's window.

1. Enter a name for the Job Group. If the HR: Cross Business Group profiles option is set to Y then this name must be unique across the system. If it is set to N then it must be unique within the Business Group.
2. Select the required flexfield structure. This will determine the fields that are displayed in the Job window when this Job Group is chosen.
3. Select a Business Group if required. If the HR: Cross Business Group profile option is set to N, then your Business Group will be displayed and you will not be able to amend it. If the profile option is set to Y then you can either select your Business Group, or leave the field blank to create a global Job Group.
4. Check the Master Job Group check box if this is to be the master job group. If the HR: Cross Business Group profiles option is set to Y then you may only have one master job group across the system. If it is set to N then you can only have one for your Business Group.
5. Save your changes.

5. Job



Create a Job

Work Structure -> Job -> Description

How to Create a Job:

You use the Job window to define jobs, the skills that jobholders require, and the grades to which they can be assigned. You can also enter job evaluation scores, if you have set up a job evaluation system.

Check with your HR manager or system administrator whether this is the right window for entering job requirements. You use the Job window if requirements were defined using Special Information Types. You use the Competence Requirements window if you are following the competence approach.

1. Enter a start date early enough to handle any historical information you want to enter.
2. Select the required Job Group. This defaults to the Default HR Job Group for your Business Group and should not be changed unless you want to enter a job that describes a supplementary role to a person's normal employment, such as a fire warden or health and safety representative.



Note: Only jobs entered in the Default HR Job Group will be available in other windows such as Position, Competencies, or Assignment. The only window within Oracle HRMS that can access jobs outside of the Default HR Job Group is the Supplementary Roles window.

3. Enter a unique name for the job. If there is more than one segment in the Job Name flexfield, a window opens when you enter the Name field. You must enter a unique **combination** of segments in this window.
4. Save the job.
5. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.
6. Choose the Requirements button to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

Note: You use the Competence Requirements window to enter competencies if you are following the Competence approach.

7. Choose the Valid Grades button to enter the grades to which jobholders can be assigned.
8. Choose the Survey Mapping button to link salary survey lines to your job.

Note: You use the Map Salary Survey window to map the job details from market surveys, called salary survey lines, to jobs within your enterprise.

9. Choose the Extra Information button to enter job categories for the job. You can link as many categories as you can need to a job, for example, technical, managerial or administration.

6. Position

Create Position

Create a Position

Work Structure -> Position -> Description

You use the Position window to define positions within your organizations and to add them to position hierarchies. You can also enter the skills that position holders require and the grades to which they can be assigned. You can enter position evaluation scores, if you have set up a position evaluation system.

Note: The four check boxes at the top of the window (Open, Under Review, Approved Future Actions and Temporarily Transferred) are not used in the first version of Release 11*i*. They will be used for Position Control, to be available in a later release.

How to Create a Position:

1. Set your effective date early enough to handle any historical assignment information you want to enter.. You cannot assign an employee to a position before the start date of the position.
2. If you are selecting the Active hiring status for the first time (see step 9), enter a Start Date. This is the earliest date on which a person can be hired into this position.
3. Enter a unique name for the position in the Name field in the Position Details tabbed region.

Note: The Name field at the top of the window displays the latest name on record for the position, irrespective of your effective date. This name is used on all other windows, such as assignment.

If there is more than one segment in the Position Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.

4. Select the position type. The choices are:
 - **Single Incumbent:** Only one employee is allowed to hold the position at any time
 - **Shared:** There can be several incumbents, up to the value of the FTE field
 - **Pooled (Public Sector only):** Position is loosely defined so rules about FTE and hours are not enforced by the system
 - **None:** If you do not need to record position types
5. If the position is permanent and budgeted every year, select the Permanent check box.
6. If the position is only used in one season each year (such as a summer teacher), select the seasonal check box. You can enter the season dates in the Seasonal Information extra information type.
7. Select the organization and job for this position. They must have a start date on or before the start date of this position. You can set up several positions that have the same job in the same organization. Each position name must be unique.
8. If you know that the position will be transferred to another organization or job in the future, enter the proposed end dates now, for information.
9. Select a hiring status. The Start Date field indicates when the current hiring status came into effect.
10. If the status is frozen, you must enter a proposed end date for the status. Optionally, you can enter a proposed end date for Proposed or Active statuses, for information.
11. Select a location for the position, or leave the default, which is the location of the organization.
12. Optionally, select a status for the position. Selecting Valid or leaving the Status field blank enables employees to be assigned to the position provided other conditions (such as an Active hiring status) are met. If the status is Invalid or any other status defined at your site, employees cannot be assigned to the position.

Entering Hiring Information

13. Enter the number of Full Time Equivalentents to be assigned to this position. If the Position Type is Single Incumbent, FTE must be 1.0 or less.
14. You can enter the number of incumbents that are planned for the position in the Headcount field.



15. If appropriate, select a bargaining unit code for the position. This is usually the legally recognized collective negotiating organization.
16. If required, enter the earliest date at which incumbents can be hired into this position. If you have created a requisition and vacancy for this position, the earliest hire date must be within the vacancy dates.
17. Enter the date by which the position should be filled. This date must be on or after the Earliest Hire Date.
18. Select the Permit Recruiting check box if the position is not open but you want to enable advertising, job posting and acceptance of applications. For example, you might select this check box for a position that is frozen but due to become active in the near future.

Proposed Entry Salary

19. Select the payroll to which the position's incumbents are normally assigned. This payroll's calendar can be used for calculations of budgeted amounts and commitments.
20. Select the salary basis to which the position's incumbents are normally assigned.
21. Select the default grade to be used to determine the entry salary of position incumbents.
22. Do one of the following, or leave these fields blank:
 - If the position is paid from a pay scale, select the grade step and scale rate that represent the entry-level salary for this position. The system displays the value of the step on the scale rate you selected.
 - If you maintain a grade rate to hold entry salary for this position, select the appropriate grade rate. The value or range (minimum, maximum and midpoint values) for this grade rate is displayed.

Probation Period

23. If there is a probation period for this position, you can enter its length in the Probation region.

Overlap

24. Select the length of time a new incumbent can overlap with a leaving incumbent for transfer of skills.

Proposed Layoff for a Position

For planning purposes, you can record information about a proposed Layoff. When the layoff actually occurs, you terminate the employees, reduce the position's FTE, and change its hiring status to Frozen or Closed Due To Layoff.

Enter the amount by which the position's FTE is to be reduced and the date on which the layoff is expected to take effect.

Entering Work Terms

25. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.
26. Enter the normal start and end times in 24-hour format. For example, for 5.30 p.m., enter 17:30.
27. Select the name of a person who supervises this position. See also the Supervisor field in the Related Positions region if the holder of a specified position rather than a named person supervises the position.
28. Select the Replacement required field if you want users to be warned that they should enter the name of a replacement when they enter an absence for a holder of this position. You might do this for positions where it is essential that a person be in charge at all times.
29. **European users:** Select the Works Council Approval checks box if the position falls under the jurisdiction of Works Council.

Related Positions

30. Select the position held by the supervisor or manager of this position.
31. In the Relief field, you can select the position that should be held by people who cover this position when the incumbent is absent.
32. Select the position from which a successor will move to fill this position.

Extended Pay Term

33. For academic positions, if salary can be paid over a longer period than the work term (such as a 9-month appointment paid over 12 months), select the Extended Pay Permitted check box.
34. If extended pay is permitted, enter the start and end dates of the work and pay terms.

Entering Additional Details

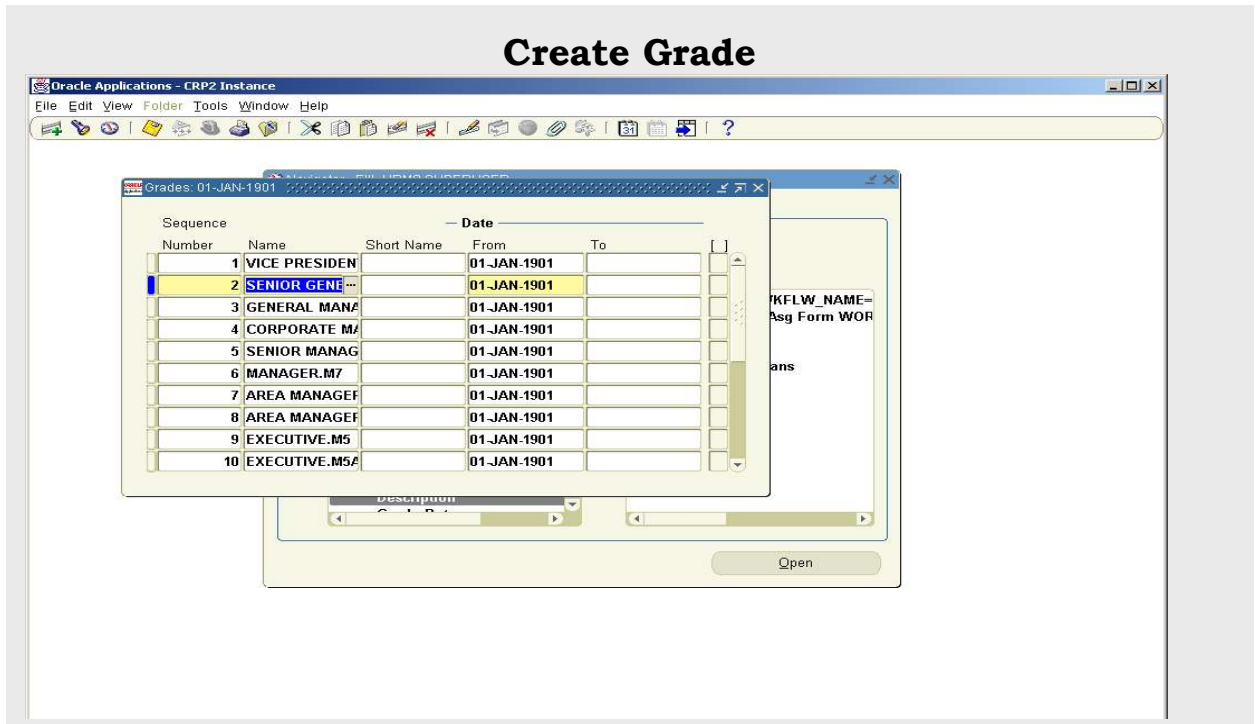
35. If required, enter comments, a posting description for recruitment purposes, and any special confidentiality or security requirements, such as a clearance level.
36. Save your position.
37. If you want to add the position to one or more position hierarchies, choose the Reporting To button. Select a hierarchy and the name of the position to which this position reports.
38. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the position.
39. Choose the Requirements button to enter position requirements, such as required qualifications or valid experience, to help you match people to roles.
40. Choose the Valid Grades button to enter the grades to which position holders can be assigned.
41. Choose the Occupancy button to view all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This



information could be relevant for selecting people with the necessary skills for similar positions.

42. Choose the Work Choices button to enter work choices that can affect an employee's, applicant's, contractor's, or ex-employee's capacity to be deployed within your enterprise (or a customer's).
43. Choose the Survey Mapping button to link salary survey lines to your position.
44. Choose the Extra Information button to enter any additional information required by your enterprise.

7. Grade



Create a Grade

Work Structure -> Grade -> Description

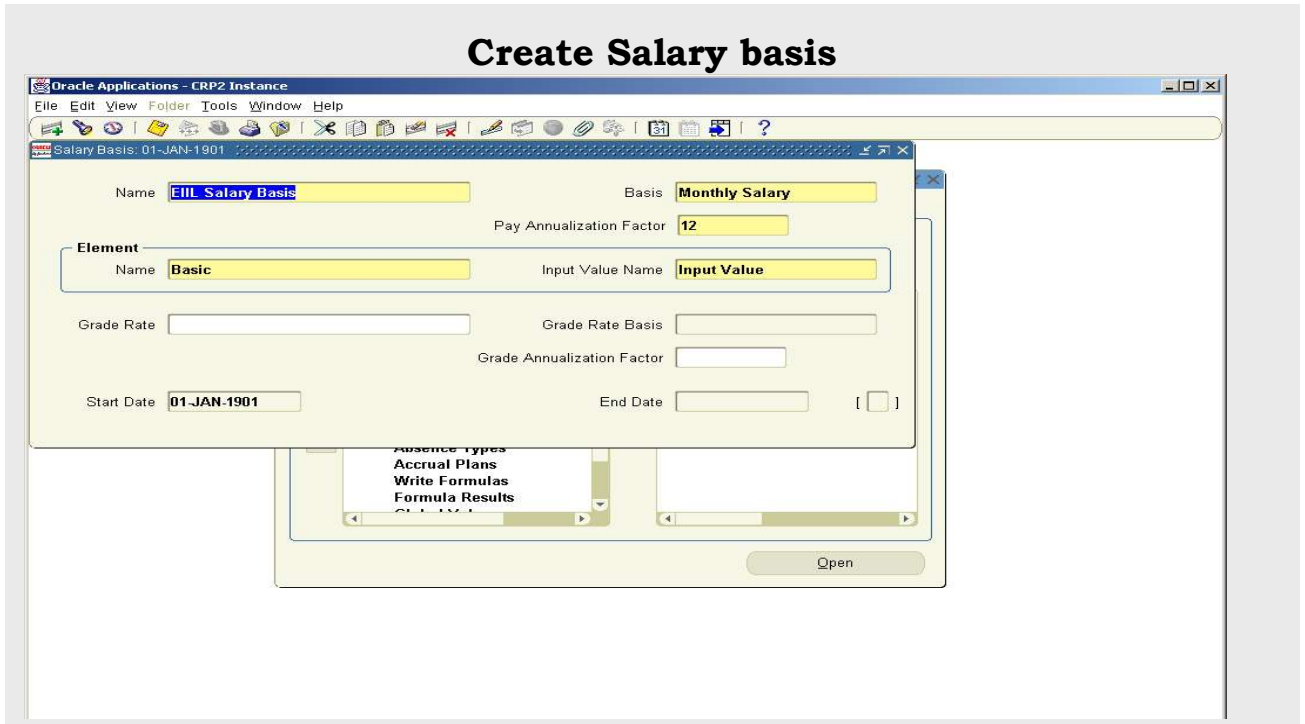
If you intend loading historic assignment details into Oracle HRMS, make sure you enter valid start dates for your grades. You cannot assign an employee to a grade before the start date of the grade.

How to Create a Grade:

1. Enter your grades in sequence number order. The sequence number can be any number from 1 upwards. The number indicates the rank order of the grade; 1 indicates the highest grade. This is the sequence in which the grades appear to users in lists of values. Consider sequencing each grade at intervals of 10 or more, to accommodate any future changes to grades.
2. Enter a unique name for the grade. If there is more than one segment in the grade name structure, a window opens when you enter the Name field. You must enter a unique *combination* of segments.
3. Enter a start date early enough to handle any historical information you want to enter.
4. Save your work.



8. Salary Basis



Create a Salary Basis

Work Structure -> Salary Basis

Use the Salary Basis window to define a *salary basis* for each salary element to be used for salary administration. This establishes the duration for which a salary is quoted, for example, hourly, monthly or annually.

How to Create a Salary Basis:

1. Enter an appropriate name for the salary basis. If you are using predefined elements, go to step 4, otherwise go to Step 2.

Without predefined elements

2. Select a pay basis, for example, Annual or Hourly. If you selected annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Pay Annualization Factor field. You can change this value, if required. If you selected hourly, the Pay Annualization Factor field is blank. Enter your own values, if required. If you select period, leave the Pay Annualization Factor field blank, Oracle HRMS uses the payroll period of your employee as the Annualization factor.



3. Select the name of the salary element and input value associated with this salary basis. Now go to step 6.

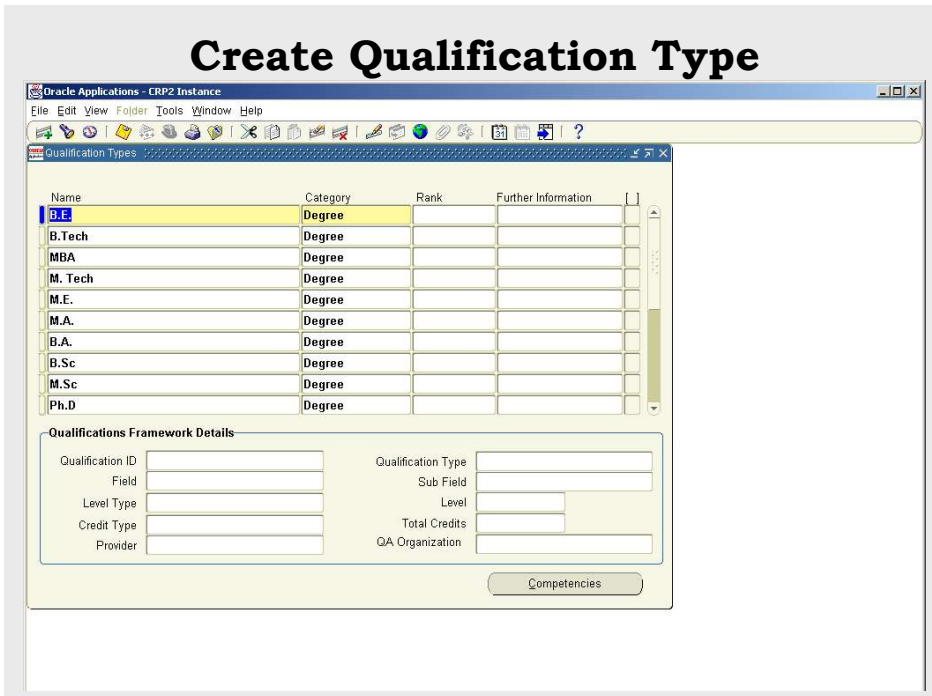
With predefined elements

4. Select the appropriate pay basis for the predefined element you plan to use.
5. Select the appropriate element and input value (for example, in the US, Regular Salary and the input value Monthly Salary, or Regular Wages and the input value Rate).

All

6. Select a grade rate to associate with the salary basis, if required. Oracle HRMS uses the grade rate to validate your salary proposals.
7. Select the grade rate basis (Hourly, Monthly, Annual, or Period) for the rate if you selected a grade rate. For example, if your grade rate specifies the valid *monthly* salary ranges for each grade, select Monthly Salary in the Grade Rate Basis field.
8. Save your changes.

Qualification Type



Qualification Types

Career Management -> Qualification Types

Competencies can have identified qualification methods, such as a license or a test, for example, a life-saving qualification or a degree. Oracle HRMS enables you to determine the qualifications recognized by your enterprise, including:

- All educational qualifications
- Licenses
- Awards
- Honors

Not only can you enter different types of qualifications, but you can also rank them, if required. For example, you could rank a Masters degree as 1, a degree as 2, school levers' qualifications as 3, and so on.

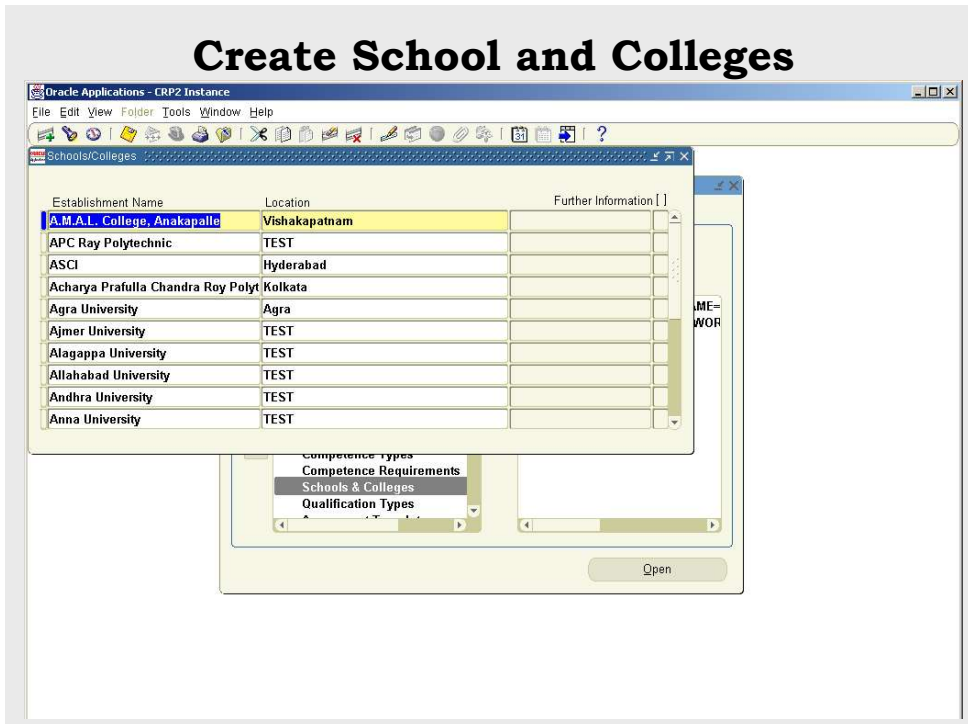


How to create new Qualification Type:

Use the Qualification Types window to create the qualifications that are recognized by your enterprise. Before you start this task, you must define generic qualification types as values for the Lookup Type PER_CATEGORIES.

1. Enter the name of the qualification, for example, a Masters degree.
2. Select the type of qualification, for example, educational, honorary.
3. If required, rank the qualification.
4. Continue to enter and rank qualifications, then save your changes.

School and Colleges



School & College

Career Management -> Schools and Colleges

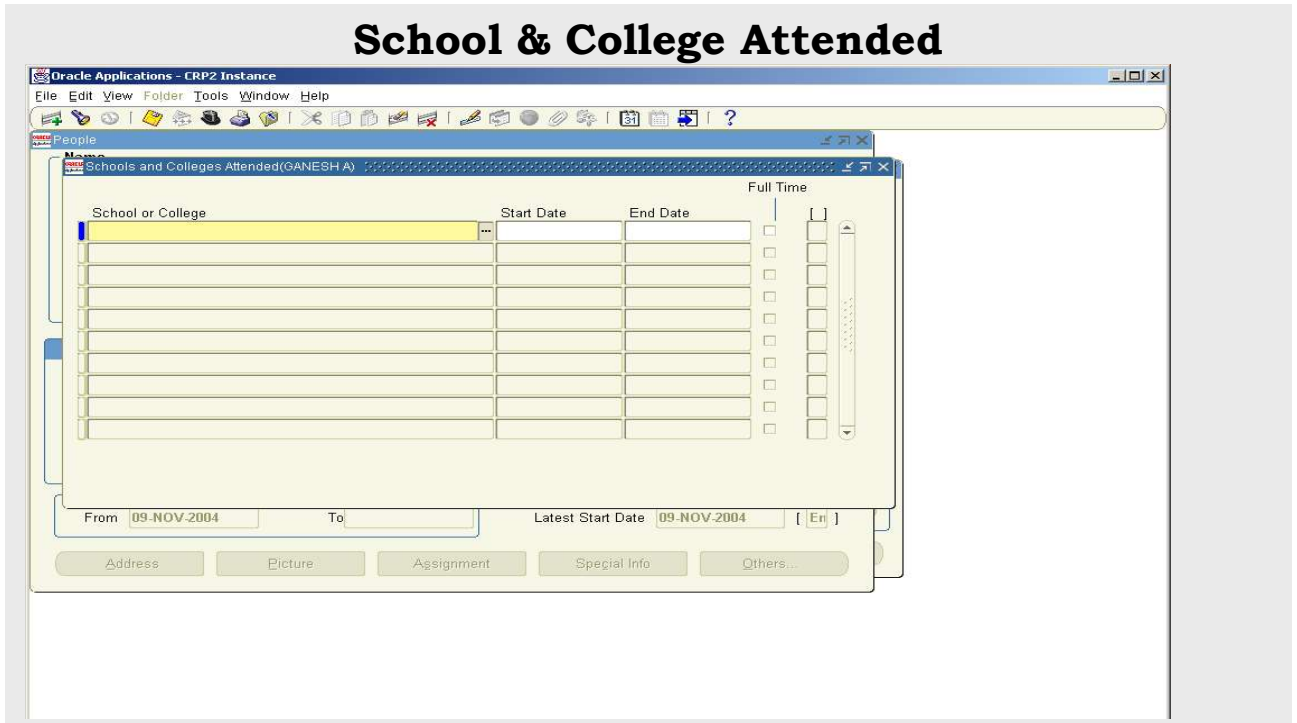
You need to identify the schools and colleges that deliver the qualifications your enterprise recognizes. You can then record where a person gained the qualification. If you have not automatically loaded these schools and colleges into Oracle Human Resources, you can enter them manually. You can also record the different sites or locations that comprise an establishment. This is useful, for example, where an establishment has several sites, colleges, campuses or locations.

How to create new School or College:

Use the Schools and Colleges window to enter the establishments that deliver the qualifications recognized by your enterprise.

1. Enter the name of the establishment.
2. Enter the name of the location.
3. Continue to enter establishments, and then save your changes.

School and Colleges Attended



Enter Schools and Colleges Attended

People -> Enter and Maintain -> Others -> Schools and Colleges Attended

You can enter the school or college at which the person gained a qualification. Use the School and College Attendance window, accessed from the People window, to enter attendance at an establishment.

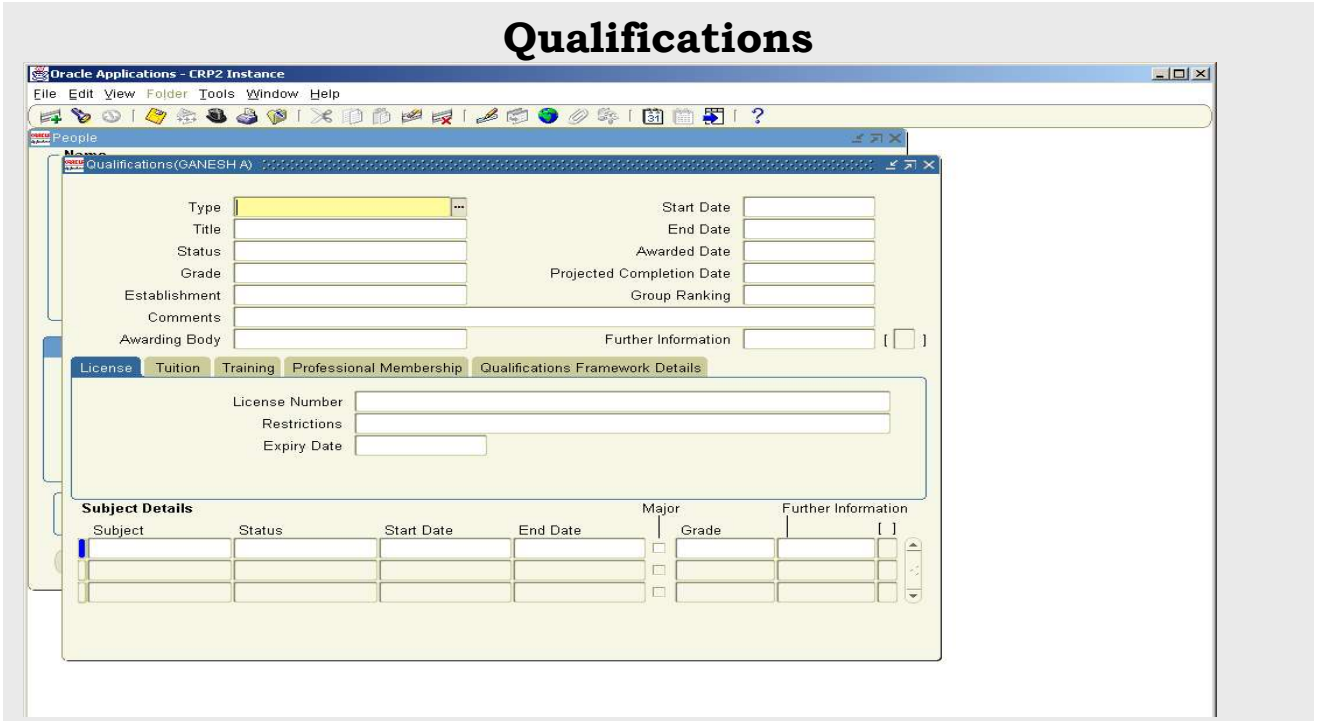
To enter schools and colleges attended:

1. Do one of the following:
 - Select the name of the school or college attended from the list of values provided.
 - If the school or college attended does not exist in the list of values, enter the information in the name field.

Note: If you enter an additional school or college, it will only be available for this person. If you want to create a school or college for other people to access you can use the Schools and Colleges window.

2. Enter the dates of the attendance. You must enter a Start date but you can leave the End date blank (if the attendance is ongoing).
3. If attendance is full time at the school or college, check the Full Time box.
4. Continue to enter schools or colleges, if required, then save your changes.

Qualifications



The screenshot shows the Oracle Applications Qualifications window. The window title is "Qualifications" and it displays a form for entering qualification details for a person named GANESH A. The form includes the following fields and sections:

- Qualification Details:** Type (dropdown), Title, Status, Grade, Establishment, Comments, Awarding Body, Start Date, End Date, Awarded Date, Projected Completion Date, Group Ranking, and Further Information (checkbox).
- License Details:** License Number, Restrictions, and Expiry Date.
- Subject Details Table:** A table with columns for Subject, Status, Start Date, End Date, Major (checkbox), Grade, and Further Information.

Entering Qualifications

Fastpath -> Qualifications

You can enter an employee's qualifications when they first join the enterprise, and then update them after periodic assessments or appraisals or after completion of a training course. Use the Qualifications window, accessed from the People window, to enter and update qualifications.

To enter qualifications:

1. Select the type of qualification this person possesses and the title of the qualification. If you need to set up additional qualification types create a new type by using *"Creating Qualification Types"*.
2. Select the status of the qualification, for example, whether training is ongoing or completed.
3. Enter the grade at which the person holds the qualification, if appropriate.
4. Select the establishment at which the person gained the qualification. If you need to set up additional establishments create a new establishment by using *"Entering Schools and Colleges Attended"*
5. Optionally, enter the awarding body that bestowed the qualification.
6. Enter the dates between which the qualification is gained. You must enter a Start date but you can leave the End date blank (if the qualification is still incomplete).



7. Optionally, enter the date the qualification was awarded.
8. Enter the projected completion date the qualification is awarded, if relevant.
9. Enter the ranked position within the class, if relevant.
10. Optionally, enter any comments, for example, what percentage of the award was course work or examination.
11. Save your work.

12. You can now:

- **Enter tuition fees**
- **Enter training details**
- **Enter license details**
- **Enter subjects**

To enter tuition fees for reimbursement:

1. In the Tuition Details tabbed region, enter the amount and select the currency to reimburse the person.
2. Select the method of tuition, for example, day release.
3. Enter the method of reimbursement, for example, bank transfer to be paid when qualification is awarded.
4. Save your changes.

To enter training details:

1. Choose the Training Details tabbed region.
2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification.
4. Enter the units in which the training is measured, for example, days.

To enter license details:

1. Choose the License Details tabbed region.
2. Enter the license number, for example, a driving license number.
3. Enter any restrictions, for example, license not valid in certain states.
4. Enter the license expiry date.

To enter subjects:

1. Enter the first subject the qualification comprises.
2. Select the status at which the subject is awarded, for example, whether training in the subject is ongoing.
3. Enter the dates between which the subject is studied. You must enter a Start date but you can leave the End date blank (if the subject is still incomplete).
4. If the subject forms a major part of the qualification, check the Major box.
5. Optionally, enter the grade at which the subject is studied.
6. Continue to enter further subjects until you have entered them all for the qualification, then save your changes.