
Oracle Self Service Human Resources- New Functions and Features

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Abstract: *Oracle® Self-Service Human Resources (HR)* is a powerful tool for optimising the use of the human assets of your company. Oracle Self-service HR allows line managers and employees to update and use people information through personalised access, to their roles, on-line experience, work content, language and information needs. Oracle Self-service HR is designed for the needs of the casual or untrained user, with simple, intuitive navigation and graphics as well as on-line help for each field. Oracle Self-service HR is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together. The presentation will overview and demonstrate the latest functions and features of Oracle Self-Service Human Resources. This paper will be useful for those considering Self Service HR technology as a tool to cut the costs out of HR transactions, increase the accuracy of HR transactional data and to enable your HR team to focus on HR programs, management and consultation.

Overview

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

What does self-service mean?

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

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

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

- easy-to-use user interfaces; easy access to functions via web browsers complex processes reduced to simple steps
- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrolment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure Self Service Human Resources web pages to suit user requirements.

What are the advantages to the HR Department?

Potential self-service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to Oracle Self-Service Human Resources (SSHR) extends the functionality of standard Oracle HRMS by enabling both employees and managers to participate in Human Resources management via a web browser. SSHR offers secure self-service business transactions and easy-to-use functionality driven by Oracle's proven web and workflow technologies. These technologies enable the data, views, stored procedures, validation routines, and APIs used in the standard Oracle Applications to be shared, thus providing seamless integration between more complex tasks, such as informing employees of their current holiday allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

Another key advantage to the HR department is the accuracy of employee-maintained information. Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay advice is mailed to the correct address. Accurate and timely data is also vital for HR reports. For example, you could use data on the skills of your employees to create a report showing how these skills could be better deployed throughout the enterprise.

Non-HR managers often have direct contact with employees and customers and can make informed, expert, and quick decisions. Using SSHR, a manager can now make HR decisions even quicker. This can help reduce the number of rejected offers caused by delays in the recruitment process, and minimize the number of unfilled, non-productive vacancies. Managers can also search for people with the right skills if they have an unfilled vacancy, or find new work for an employee. SSHR enables HR managers to publish information on job opportunities, company policies, and legislation advice to all employees. A new dialog can be created between management and employees, which results in increased employee applications for jobs or training and increased accuracy of personal information stored on employees. HR management can now be so easily accessible that a virtual HR manager is always at hand.

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

The security controls – responsibilities, menus, and security profiles – used in standard Oracle applications also apply to self-service users. The seeded SSHR menus (Employee Self Service V4.0 and Manager Self Service V4.0) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self-service user's record; the manager functions allow the user to select an employee from a list of available employees and carry out the required function.

The Personalization Framework and Workflow Builder tools offer considerable flexibility in controlling the user's access to specific functions and require that users' transactions are approved before they are committed to the database. You can also control the user's access by configuring the base products. For example, Benefits eligibility profiles and enrolment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

How can Oracle Self-Service Human Resources meet my enterprise's unique business processes?

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

New Features in Oracle Self-Service Human Resources

Technical Architecture

The Oracle Applications Framework (in particular the Configuration Framework component) is a flexible, standards based foundation on which the Oracle Self Service Web Applications are built.

What is the OA Framework?

The OA Framework is the development environment for the current generation of Oracle's Self-Service Applications. The purpose of the OA Framework is to provide developers of Oracle's Self-Service Applications with a set of common technologies, modules and standards.

The OA Framework moves the next generation of Self-Service Applications to a standard HTML development and deployment platform. The first generation of Oracle's Self-Service Applications were developed using the Oracle Application Server PL/SQL toolkit. This resulted in hand-coded, unstructured user interface modules. For those familiar with Oracle's Forms-based application development, the OA Framework is to the Self-Service Applications what Application Object Library (AOL) is to Forms based development.

Goals for the OA Framework

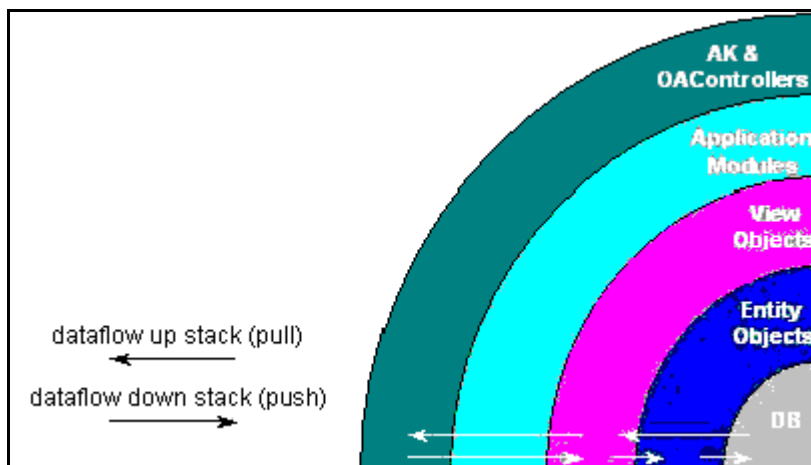
The basic aims of the OA Framework are to make Oracle's Self-Service Applications easy to use, build, deploy, maintain and customise, and to enforce the Oracle wide common look and feel.

The OA Framework facilitates rapid application development and tries to eliminate hand coded implementations that were a major part of previous development platforms. The OA Framework also aims to produce an Oracle-wide HTML common look and feel. This is enforced in such a way that it takes less effort for a developer to produce a screen that complies with these standards than it does to produce a page that does not.

The OA Framework also provides customisation tools that are simple to understand and use and that withstand upgrades. The OA Framework also ensures high performance and scalability at runtime for our customers and their users.

The image below shows a programmatic view of the OA Framework components and how they refer to each other. Applications are run in the OA Framework in such a way that the outer layers are aware of the inner object layers, however, the inner layers can only refer to outer layers in a generic way. For example, View Object can be aware of a specific Entity Object but an Entity Object should not deal with a specific View Object. This structure allows the OA Framework to reuse any of these layers in any other component, for example, if an Entity Object is developed within a specific View Object, that Entity Object would not be reusable by a different View Object, however, if an Entity Object only refers to things beneath it (in this case, the database) and not above it, the Entity Object can be referenced and reused by any component above it.

OA Framework components



Data Security

Data Security is a new mechanism in the Applications Object Library. SSHR uses the same security mechanisms as Oracle HRMS Applications. SSHR uses four types of menu: top-level menus, submenus, hidden submenus, and data security menus. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses SSHR, which information they can access, and how they access it. When a user selects a manager function directly from the menu, they are first presented with the Person Search page. From this page, they can select an employee for processing. The user is then taken to the corresponding web page for the function. Data security starts after the user has selected an employee. If the function is specific to legislation other than the legislation to which the selected employee belongs, an error message is displayed. When a user selects an employee function directly from the menu, they are taken directly to the corresponding web page for the function. Data security is checked after the user has selected a function. If the function is specific to legislation other than the legislation to which the user belongs, an error message is displayed.

Legislation-specific Functions

Most SSHR functions are global and can be used on employees in any legislation. However, some functions are legislation-specific and must be restricted to employees in the corresponding legislation. SSHR uses FND Data Security to enforce this restriction. A data security object has been defined on the combination of person and legislation and data security menus have been created for predefined functions. There is one data security menu

for global functions and one for each legislation code. The predefined functions are associated with either the global data security menu or with one or more of the country-specific data security menus as appropriate. Data Security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code. For example, a function on the global data security menu may be used with any employee but a function that is only on the US data security menu may be used only with employees in a US business group. In addition to the data security menus that are available for predefined functions, there is a similar set of data security menus to which you can attach your custom functions. The data security grants are already in place.

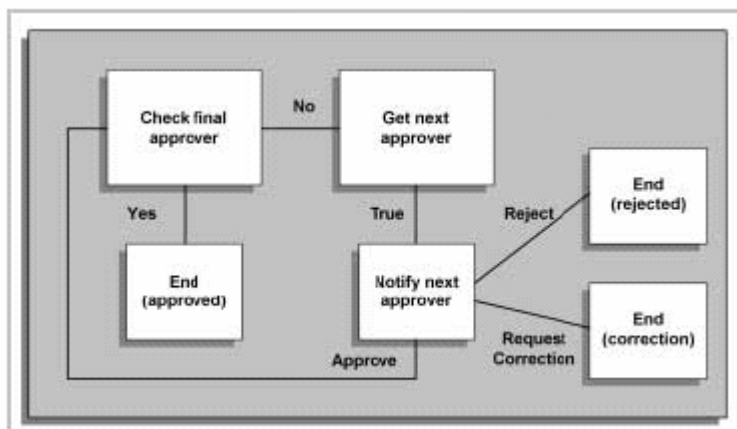
Oracle Approvals Management (OAM)

Oracle Approvals Management (OAM) is a web-based application, which is integrated with Oracle Workflow, and which enables you to define business rules to control your approvals processes. With OAM, you use the following components to define your approvals processes. They are associated with a transaction type for a particular application.

- Attribute – this is a business variable, for example, a salary amount, user ID, or workflow process name.
- Condition – a condition compares an attribute value with a set of allowed attribute values. For example, a condition could look at a salary amount. If the salary is greater than a specified value, a particular approver list is created.
- Approval type and approval specifications – these components define the type of approver list that is generated. For example, to generate a supervisor-based approver list with 5 levels, you use the 'supervisory level' approval type with the 'requires approval up to the first 5 approvers' approval specification.
- Rules – a rule links the other components together by associating one or more conditions with the approval type and approval rule.

From SSHR4.1 onwards, OAM is the default mechanism for determining the net approver in an SSHR approvals process. Customers can continue to use the customisable PL/SQL package method if they so wish. Approvals processes enable you to decide whether transactions carried out by SSHR users need approval before they are submitted to the HR tables. You can define different approval requirements for different transactions and vary the approval requirements as required. For example, you can configure the workflow processes so that the Address part of Personal Information requires approval but the Phone Numbers part does not. Alternatively, you can vary the Approvals requirements by responsibility so that records changed by employees would need approval but records changed by managers would not. All approvals mechanisms used in SSHR follow the basic approvals loop shown below. The logic checks whether the current approver is the final approver in the hierarchy. If the current approver is not the final approver, the application fetches the next approver who then receives the approval notification. The next approver can either reject the transaction, approve the transaction, or return the transaction for correction.

The Basic Approvals Loop



Approvals with correction

In addition to approve or reject, Approvers can now Return (at transaction to the initiator) for Correction. The initiator can then retrieve the transaction; make the changes suggested by the approver in the comments field, and resubmit. An approval with Correction V4.0 is the default behaviour for modules in SSHR 4.0 and above.

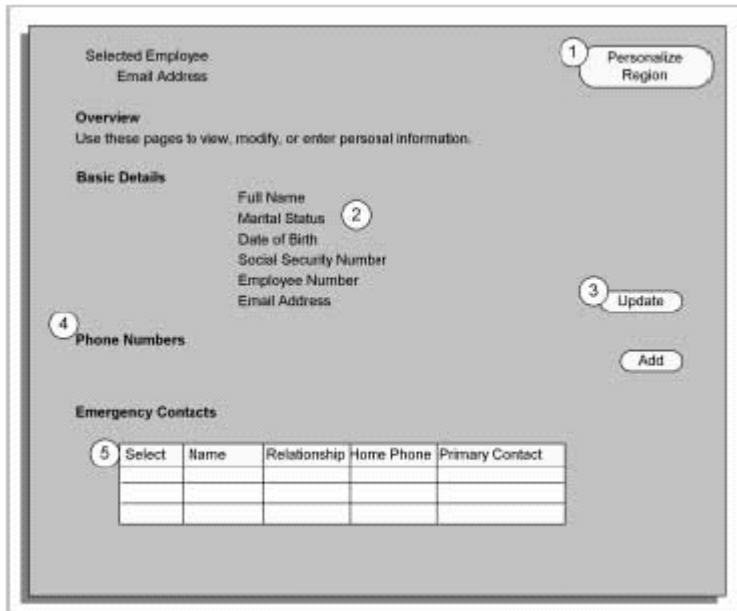
The Personalization Framework

The Personalization Framework, a component of the Oracle Applications (OA) Framework technology, enables you to modify many aspects of the appearance and behavior of self-service web pages which are defined in an active data dictionary: the Web Applications Dictionary. The Personalization Framework is a subset of the Web Applications Dictionary functionality and provides a user-friendly interface for making changes to the Web Applications Dictionary definitions where permitted.

The Personalization Framework allows you to configure the display of Oracle Self-Service Web Applications (OSSWA) without having to make any changes to the underlying code. Your configurations are stored in the Web Applications Dictionary and are preserved during upgrades. Note: This was previously known as Customization Framework and the *Personalise regions* links appeared within the *customise regions*.

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

Sample Web Page



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

1. Enable configuration
2. Change the sequence of fields
3. Enable the user to update fields
4. Rename region items
5. Configure table views

Actions Pages

The Actions page displays a context-sensitive list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected. The Actions page can be accessed in one of the following ways:

- Managers can select an employee using one of the employee selection methods and then choose the Actions tab to display the actions relevant to the employee

- Managers can select the Actions tab from the Hierarchy page and display their own personal actions
- Employees can select the Personal Actions menu option from the Employee menu and display their personal actions

New Functions in Oracle Self–Service Human Resources

Manager Actions

The Actions page displays a context–sensitive list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected. The Actions page can be accessed in one of the following ways:

- Managers can select an employee using one of the employee selection methods and then choose the Actions tab to display the actions relevant to the employee
- Managers can select the Actions tab from the Hierarchy page and display their own personal actions
- Employees can select the Personal Actions menu option from the Employee menu and display their personal actions

Personal Actions

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

All Actions Saved For Later

The Save for Later functionality enables a user to interrupt a transaction before the data is submitted. The transaction is saved in a transaction table from which it can be retrieved and continued at a later time. Users can select those transactions which they have explicitly saved for later, or which were partially saved at the time of a system failure or timeout, from the Actions Saved for Later list in the Actions page. The Save for Later functionality enables a user to interrupt transactions before they are complete and save them so that they can be completed at a later point. In addition, approvers can return transactions to the initiator for correction. In this case, the initiator can reopen the transaction, correct the information, and resubmit it for approval. The approvers can include informational notes to clarify the reason for returning the transaction. Both suspended transactions and returned transactions are displayed in the Actions Saved for Later table on the Actions page. Users can also access their saved functions using the All Actions Saved for Later menu option on the employee and manager menus.

Release employee Information

You can supplement the list of people who appear in a security profile by enabling the Release Employee Information function. With this function, users can allow other users (who are outside of the security profile) to access their records. Similarly, managers can use the Release Employee Information to allow a second manager (who is outside of the security profile) to access the records for one of their employees. To illustrate a typical use of this function, imagine that an employee wants to transfer to another organization. The new manager may need to review the employee’s absence history before the transfer can take place. However, this manager may be outside the employee’s current business group and would therefore, be restricted by HRMS security access. The manager cannot access the employee’s data from a Person Search because of the defined security profiles. With the Release

Employee Information function, the employee granting access can search for the manager’s name across all organizations and business groups and grant access to that person. This enables the manager to view the employee’s absence history. If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the “Allow Granted Access” option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers’ capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as Termination. To do this, disable the “Allow Granted Access” check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

New User Registration

New User Registration enables users to register their own details for SSHR and for benefits providers. You set up a generic name and password and you can either enable users to create their own user name or you can use user hooks to create the user name automatically. The New User Registration functions enable new users to register their own details and create their own users for SSHR. You can also add a user hook which generates the user name when the user clicks a button on the web page. You can enable the New User Registration functions for both employees and non-employees.

MEE Modules and Workflow

The Manage Employee Events module groups together workflow processes that relate to changes in an employee's assignment. The functions available enable you to control an employee from hire through to termination. You can build and configure these workflow processes to suit the requirements of your enterprise. The basic MEE modules are: Assignment, Location, Work Schedule, Change Manager, Termination, Pay Rate, Individual Compensation Distributions, Special Information Types, and Other Employment Information.

Individual Compensation Distributions (ICD)

The Individual Compensation Distributions (ICD) module enables managers to assign compensation distributions to employees. Use ICD for both one-time and recurring awards, such as bonuses or allowances to employees. You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan. The Benefits or Compensation administrator needs to define the individual compensation distribution plans using Oracle Advanced Benefits or Oracle Standard Benefits.

New Hire and Applicant Hire Processes

The New Hire and Applicant Hire processes delivered with SSHR enable you to enter information about new employees, and also hire those people for whom you already have applicant assignments with a status of Accepted. These processes provide you with the ability to hire employees into your enterprise, however should you want to change them to fit your particular business needs you can chain any of the following modules into the New Hire workflow process:

- Personal Information (including basic details, address, and phone numbers)
- Assignment
- Pay Rate
- Change Manager
- Special Information Types (SIT)
- Extra Information Types (EIT)
- Work Schedule
- Other Employment Information

When creating a chained process, the Hire Details and Applicant Search page is the first page, followed by the Personal Information page. Then you can add the Person EIT, Assignment EIT, or the Assignment pages. Following this, any of the remaining pages can be included.

Assigning and Changing a Salary Basis

Users can assign newly hired employees to a salary basis, or change the salary basis of an existing employee. If they change the salary basis mid-way through a payroll period, the application ends the existing salary element entry. This may not be desirable for payroll calculations; therefore if a user changes the salary basis of an employee assigned to a payroll on any effective date other than the first day of the employee's payroll period, the application sends a notification to a payroll contact as part of the approval process. The payroll contact can accept or reject the change, or return it to the originator requesting a change to the effective date (normally setting it to the first day of the next payroll period).

Multiple Assignment

The HR: Enable Multiple Assignments in SSHR system profile enables you to control whether a manager can view and update multiple assignments for an employee. If the HR: Enable Multiple Assignments in SSHR security profile is set to No, managers can only view and update primary assignments. If the HR: Enable Multiple Assignments in SSHR security profile is set to Yes, managers can view and update primary and secondary assignments for an employee. You can use the supervisor-based security profile with the HR: Enable Multiple Assignments in SSHR system profile to limit primary supervisors to perform any task on an employee's primary assignment, and non-primary supervisors to perform any task on any employee's assignment. You can also use the Primary Assignments Only checkbox to restrict managers to viewing and updating primary assignment information only.

Views

The HR Views module is intended to be used by HR Professionals. It offers a summarized view of different aspects of employee information: Personal Information, Assignment Details, Compensation Activity, and Termination History. Each area of information is displayed on separate pages. From each page, the user can simply click button and display different information. All information displayed in the HR Views is for viewing only. To modify the information displayed, the user would have to log on with the Manager Self Service V4.0 responsibility. The HR Views functionality is reached using the HR User Self Service responsibility and the HR Views function, which are displayed, on tabbed regions.

Employee Information View

The Employee Information view displays the details relevant to an employee. This information need not relate to their job or employment contract. The Employee Information page displays any specific fields, which you have defined as flexfields and can also display a country-specific section that will display localization fields, for example, the national identifier or visa information. All the information in the Employee Information view relates to the current record for the employee and no history is displayed. If the employee has been rehired, the SSHR application displays the last termination date.

Summary

Oracle HR: Self-Service is a powerful tool for optimising the use of the human assets of your company. Ease of use, combined with relevant and accurate content, is critical to creating an active on-line community. Oracle Self-Service Human Resources allows line managers and employees to update and use people information through interfaces personalized to their roles, on-line experience, work content, language and information needs.

They use a 'self-service' interface, designed for the needs of the casual or untrained user, with simple, intuitive navigation and graphics and on-line help for each field. Oracle Human Resources Self-Service is part of the Oracle E-Business Suite, an integrated set of applications, which is designed to transform your business to an **e-business**.

About the Author

Susan Hamilton is Principal Sales Consultant for the Human Resources Product Suite and iLearning for Oracle New Zealand. She commenced work with Oracle in 1998 in Australia and relocated to Oracle NZ in 2002. She has experience with a number of HRMS Software Vendors in Australia and on large and complex Human Resources Projects. Prior to joining Oracle, Susan spent 10 years consulting in various aspects of human resources in North and South America and Australia.

Susan holds a Graduate Diploma of Teaching from Sydney University, Australia, a Bachelor of Arts in Education from Macquarie University, Australia, and a Master of Science in HR from Barry University, USA.