

**Oracle® Fusion Middleware**  
User's Guide for Oracle Employee  
Onboarding Process Accelerator  
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# Oracle Employee Onboarding Process Accelerator

*Oracle Fusion Middleware User's Guide for Oracle Employee Onboarding Process Accelerator* describes how to administer and use this process accelerator.

## Audience

This document is intended for:

- Hiring managers who use Oracle Employee Onboarding to submit provisioning requirements for a new candidate or employee
- Human resource managers who submits any required screening services for the new candidate or employee
- New employees who verify they have received the provisions requested for them, and verify their personal information
- Administrators who maintain Oracle Employee Onboarding drop-down lists, business rules, and reports

## Related Documents

For more information, see the following Oracle resources:

Oracle Employee Onboarding

- *Oracle Fusion Middleware Installation Guide for Oracle Process Accelerator*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

Oracle Fusion Middleware

- *Oracle Fusion Middleware Administrator's Guide*

## Conventions

The following text conventions are used in this document:

- **boldface** - Boldface type indicates graphical user interface elements or terms defined in text.
- *italic* - Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

## Overview of Oracle Process Accelerators

### Introduction

Oracle Process Accelerators are process solutions, developed by Oracle, which address common business processes or high-value industry processes. Oracle Process Accelerators have been developed to simplify and improve the management of these processes. Many low-priority business processes, such as managing travel approvals, are managed manually or through email and can negatively impact organizations by contributing to inefficiency and reduced productivity. In addition, there are complex business processes, some common to all organizations, and others specific to a particular industry, which benefit from the process management approach which Oracle Business Process Management (BPM) provides. Automated process management solutions enable organizations to become more efficient, to meet business challenges rapidly and flexibly, and ultimately to improve customer satisfaction by supporting employees in fulfilling requirements in a timely fashion.

### Key Elements

Oracle Process Accelerators, developed with Oracle BPM Suite 11g, make the following capabilities available to organizations implementing automated solutions to improve process management:

- **Role-Based Employee Access** - Processes are performed by people in the organization who do the work. When the employees are assigned to roles in the Oracle Process Accelerator, they have access to only those tasks in a process for which they are responsible. Multiple employees can be assigned to a role. Any one of them can select a task to get the job done.
- **Sequenced Tasks** - The work to be done is defined as a sequence of tasks, each performed by a role. After a task is completed, the solution automatically moves on to the next task. This is referred to as *workflow*. The sequence of tasks can branch into two or more paths depending on the outcome of a previous task. Note that some tasks require employee or user interaction, while some are automated. User tasks can be as common as clicking a button to approve a request, or as specific as entering an order with multiple line items.
- **Automated Task Lists** - When an employee logs in to an Oracle Process Accelerator, he is presented with a task list containing the work assigned to all of the roles he is responsible for. By selecting a task, the employee is guided to the appropriate application form, which prompts for the correct actions to be performed. After the actions are complete, the task disappears from the task list, and a new task is created for the role responsible for the subsequent task.
- **Business Rules** - Oracle BPM provides flexible business rules which can be defined to meet organizational guidelines. These rules are defined to support a specific process, and govern the way the process is carried out. For example, in a specific process, a request for management approval might require two levels of approval if an employee is grade four or lower, but only one level if grade three or higher.
- **Process Dashboards** - A useful component of Oracle Process Accelerators is the process dashboard reporting developed with Oracle Business Activity Monitoring (BAM). These reports provide real time process analytics which can be used to observe key performance indicators, and to monitor the efficiency of the process itself.

### The Business Process Diagram

In the introduction to each Oracle Process Accelerator, a business process diagram shows the process being automated using the Business Process Modeling Notation (BPMN). For those unfamiliar with BPMN, the Sample Business Process Diagram provides an example.

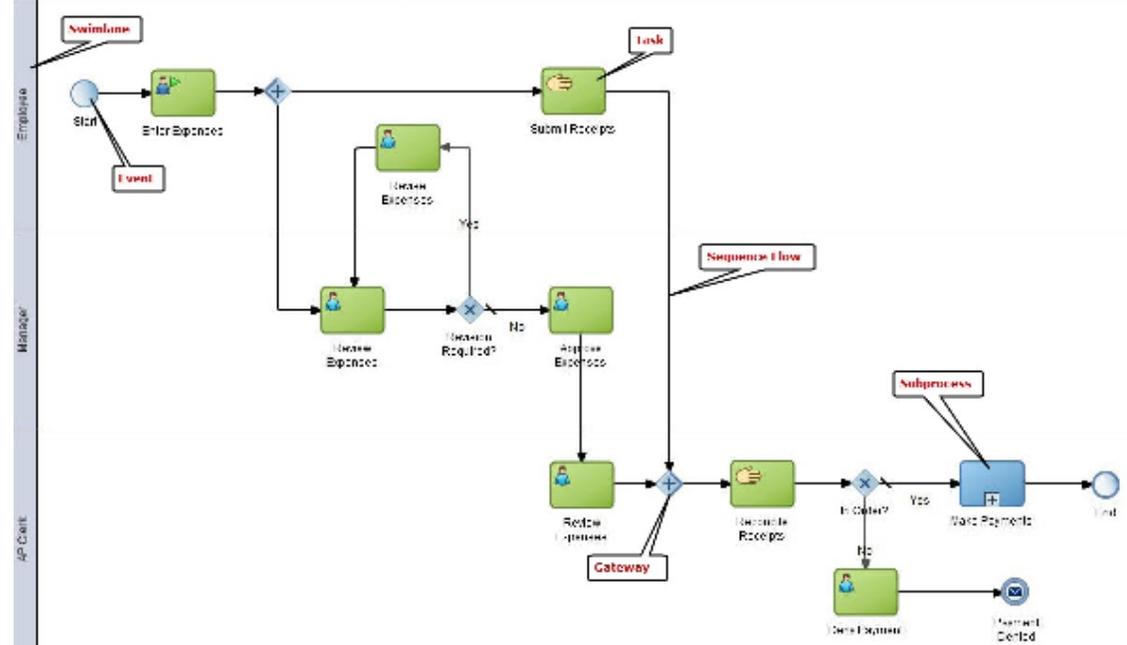
The process diagram contains the following elements. If you are not familiar with this type of diagram, study the elements and then follow the diagram to understand the process.

- **Swimlanes** (Employee, Manager, AP Clerk) - contain roles that indicate who is responsible for the tasks in the lanes.

- **Events** (Start, End) - show where the process begins and ends.
- **Tasks** (Enter Expenses, Deny Payment) - identify the action being taken.
- **Sequence flows or arrows** - show the path to the next task.
- **Gateways** (Revision Required, In Order) - are diamond shapes indicating a branch in the path. In the sample diagram a parallel gateway (a + in the diamond), shows that both branches must be taken, and an exclusive gateway (an X in the diamond), indicates that only one path can be taken.
- **Subprocesses** (Make Payments) - indicate that another set of tasks has been collapsed for clarity.

For more information about BPMN, see "Overview of Business Process Design," in *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

### Sample Business Process Diagram



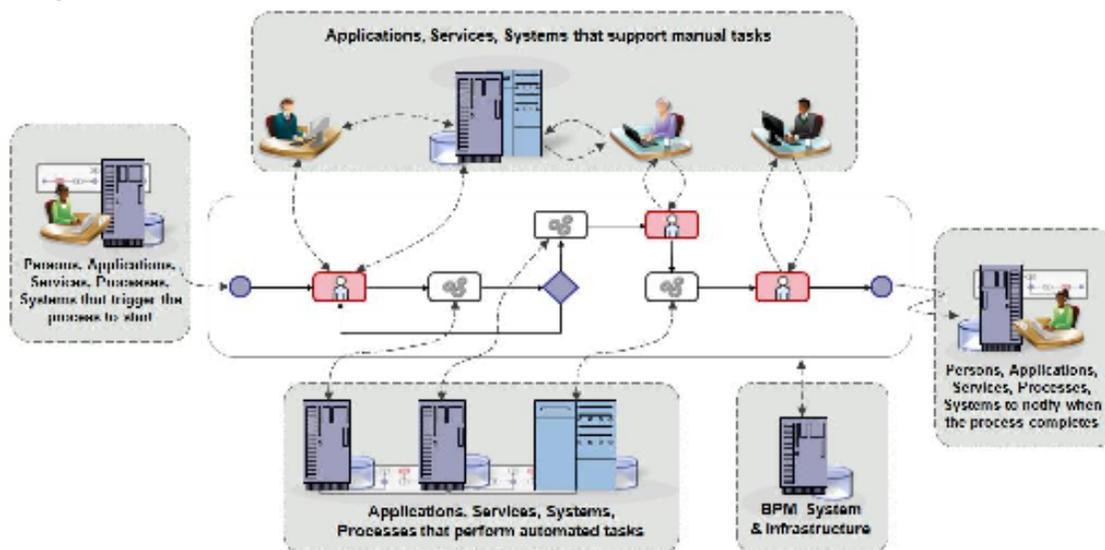
### Why Oracle Process Accelerators

An organization engaged in automating critical high-value processes with Oracle BPM Suite can benefit from the implementation of Oracle Process Accelerators. These pre-built solutions supplement the benefits of Oracle BPM Suite in these ways:

- **Consensus Building** - Using these pre-built processes, the IT organization can illustrate the advantages of process-driven applications, to show the value of process automation to the business community.
- **Best Practice** - A best practice guideline based on the accumulated experience and expertise of Oracle developers and implementers is provided with Oracle Process Accelerators. These best practices mitigate the risk associated with learning and deploying a new technology. The guide includes development methodologies, process modeling approaches, effective tool use techniques, and sample deployment plans. Oracle uses these best practices to build the Oracle Process Accelerators.
- **Rapid Deployment** - The Oracle Process Accelerators can be implemented as is or extended to meet specific requirements. In either scenario, there is a significant reduction of effort.

- **Build a Process Centric Organization** - Clearly, an organization will not be using Oracle BPM and Oracle Process Accelerators to computerize a small set of common business processes. It is highly likely that a critical value-add process that provides a market differentiation is being automated to improve customer satisfaction or reduce costs. While the more significant project is underway, the business community can start to learn how to use process driven applications to their benefit. By rolling out Oracle Process Accelerators, the organization gets a head start with the new paradigm. If multiple Oracle Process Accelerators are deployed, the management community begins to learn that process automation reduces the overhead associated with handling mundane tasks. The implementing organization has the opportunity to win a quick victory with the new technology, and the business users learn the value of managing tasks through accurately routed processes. The organization as a whole begins to appreciate the benefits of becoming process-centric. The Sample Functional Architecture for Oracle Process Accelerators diagram depicts how the Oracle Process Accelerators can be used in an organization.

**Sample Functional Architecture for Oracle Process Accelerators**



## Getting Started with Oracle Employee Onboarding

This section is intended for new Oracle Employee Onboarding (EOB) users who want a brief introduction.

Upon completion of this section, you will be able to:

- Describe the Oracle Employee Onboarding process lifecycle.
- Describe Oracle Employee Onboarding pages and related Oracle Business Process Management Workspace pages.
- Start Oracle Employee Onboarding.

### Overview of Oracle Employee Onboarding Process Lifecycle

Oracle Employee Onboarding (EOB) Process Accelerator is a process solution that enables organizations to submit and track onboarding activities for new hires. Oracle EOB provides dashboards to view process analytics and service request summary reports. Administrators can modify the business rules and the drop-down lists.

Oracle EOB is a role-based solution; your role determines the tasks you can perform. Oracle EOB delivers the following roles:

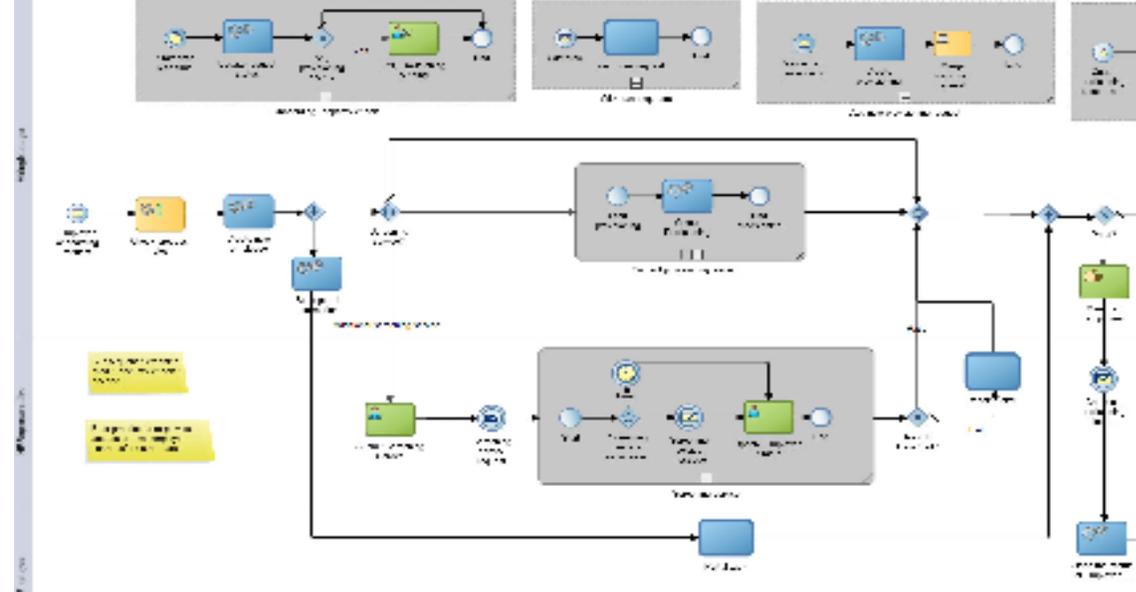
- The hiring manager submits the provisioning requirements for an employee, or a new candidate once they accept the offer.
- The human resource specialist submits a screening service for a new candidate.
- The employee verifies that he received the provisions.

EOB can be integrated with PeopleSoft Talent Acquisition Manager 9.2 Oracle E-Business Suite Human Capital Management Module 12.1.3. The posting of an offer acceptance in PeopleSoft or Oracle E-Business Suite initiates the EOB process. For those organizations not using PeopleSoft or Oracle E-Business Suite, the process is initiated via email, phone call, or other message.

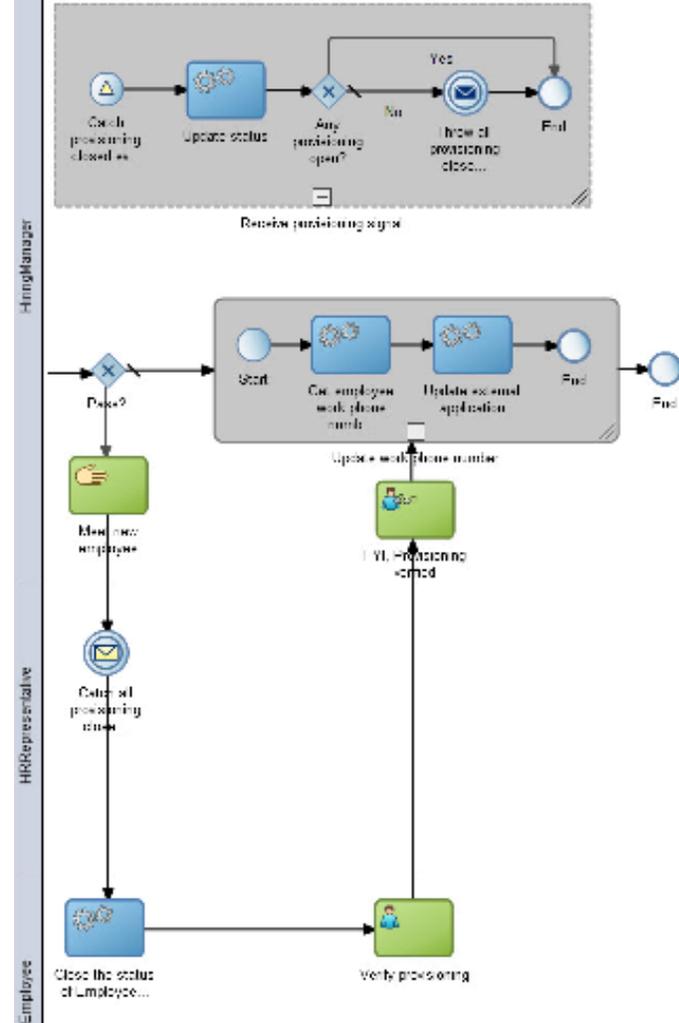
EOB integrates with Oracle Internal Service Request (ISR). The provision requirement options available to a hiring manager are those already defined in ISR. After a hiring manager submits the provisioning requirements in EOB, a new service request is created in ISR for each of the provisioning requirements. The fulfilling department then processes the ISR requests. The fulfilling department employee, in ISR, fulfills the requirements submitted by the hiring manager.

The Employee Onboarding process is the main business process for Oracle EOB, and the focus of this topic. Because Employee Onboarding is a top-level process, it consists of inline and callable subprocesses. The Employee Onboarding Process diagrams are depicted below, followed by an explanation of the process.

Employee Onboarding Process (1 of 2)



Employee Onboarding Process (2 of 2)



The Employee Onboarding process involves the following basic steps:

1. The hiring manager creates a record for the new candidate, sends the candidate the portal information, determines if any screening services are needed, and submits the candidate provisioning requirements after the candidate accepts the offer.
2. A call to Oracle Internal Service Request is made which creates a service request for the candidate's provisioning requirements. The fulfilling manager and fulfilling employee process the service requests.
3. The human resource specialist submits any required screening service for the candidate. The human resource specialist then reviews the status of the screening service and confirms to either extend or rescind the candidate's offer.
4. The candidate verifies his personal information and confirms receipt of the provisions.
5. The hiring manager acknowledges the candidate received the requested provisions.

There is an activity guide with milestones for tasks within the Employee Onboarding process. The activity guide milestones are:

#### Onboarding activities

- Submit screening service
- Update employee status

#### Postboarding activities

- Verify provisioning

#### Complete employee documents

- Review company welcome
- Verify personal information
- Sign compliance document
- Select compensation option
- Select benefits option
- Complete training

All the milestones are draft tasks except for Submit screening service, Update employee status, Verify provisioning, and Verify personal information.

### ***Overview of Oracle Employee Onboarding Process Lifecycle***

1. The hiring manager begins by navigating to the **New Employee Requirements** page.
2. The hiring manager uses the **New Employee Requirements** page to submit provisioning requirements for a new candidate or an employee.
3. The hiring manager completes all appropriate fields.
4. The hiring manager clicks the **Submit** button, to save and submit the requirements request.
5. The human resource specialist uses the **My Tasks** page to view all requests on which she has to act.

6. The human resource specialist double clicks the **Task** to open the screening service request.
7. The human resource specialist uses the **Submit Screening Service** page to initiate a screening service on the candidate.
8. The human resource specialist selects the screening service provider and checks the disclaimer.
9. The human resource specialist clicks **Submit**, which sends the candidate information to the screening service for processing.
10. The human resource specialist uses the **My Tasks** page to view all requests on which she has to act.
11. The human resource specialist double clicks the **Task** to open the screening service status request.
12. The human resource specialist uses the **Finalize Applicant Offer** page to review the status of the screening service and to determine if the candidate's provisioning request should be approved or rescinded.
13. The human resource specialist reviews the status of the screening service and determines if the candidate's provisioning request should be approved or rescinded.
14. The human resource specialist clicks **Approve** or **Rescind Offer** based on their determination. In this example, the applicants offer is approved.
15. The employee uses the **My Tasks** page to view all requests on which she has to act.
16. The employee double clicks the **Task** to open her personal information request.
17. The employee uses the **Verify Personal Info** page to review and edit her personal information.
18. The employee reviews and edits her personal information, as necessary.
19. The employee clicks **Submit**.
20. The employee uses the **My Tasks** page to view all requests on which she has to act.
21. The employee double clicks the **Task** to open the request.
22. The employee uses the **Provisioning Verification** page to confirm she has received the requested provisions.
23. The employee confirms she has received each provisioned item.
24. The employee clicks **Confirm**.
25. The hiring manager uses the **My Tasks** page to view all requests on which he has to act.
26. The hiring manager double clicks the **Task** to open the request.
27. The hiring manager uses the **For Your Information** page to acknowledge the employee received the requested provisioning.
28. The hiring manager clicks **Approve** acknowledging the employee received the requested

provisioning.

29. You have completed the **Overview of Oracle Employee Onboarding Process Lifecycle** topic.

## Understanding Oracle Employee Onboarding Pages

Oracle Employee Onboarding (EOB) runs on Oracle Business Process Management Workspace. Your role within Oracle EOB determines the tasks you can perform, and the pages you can access. Some of these pages are Oracle Business Process Management Workspace, others are Oracle EOB. Understanding the pages associated to a task or role makes you more effective in your use with Oracle EOB.

This topic addresses the various Oracle Business Process Management Workspace and Oracle EOB pages you use.

### *Understanding Oracle Employee Onboarding Pages*

1. The Oracle Business Process Workspace **Tasks** page appears after you log into Oracle Business Process Management Workspace. This is an Oracle Business Process Management Workspace page.

From here you can:

- Take action on an requirements request by executing the tasks assigned to you in **Views, My Tasks**
  - Access Oracle EOB from the **Applications** link
2. The **Start New Employee** link is visible if you are granted permissions in Oracle EOB. Use this link to access the **New Employee Requirements** page. This is an Oracle Business Process Management Workspace page.
  3. Use the **New Employee Requirements** page to submit provisioning requirements for a new candidate or an employee. This is an Oracle Employee Onboarding page.
  4. Use the **Submit Screening Service** page to initiate a screening service on the candidate. This is an Oracle Employee Onboarding page.
  5. Use the **Finalize Applicant Offer** page to review the status of the screening service and to determine if the candidate's provisioning request should be approved or rescinded. This is an Oracle Employee Onboarding page.
  6. Use the **Verify Personal Info** page to review and edit your personal information. This is an Oracle Employee Onboarding page.
  7. Use the **Provisioning Verification** page to confirm you have received the requested provisions. This is an Oracle Employee Onboarding page.
  8. Use the **For Your Information** page to acknowledge your employee received the requested provisioning. This is an Oracle Employee Onboarding page.
  9. Use the **Onboard Status Review** page to view, change, or withdraw pending and previous provisioning requests.
  10. The **Manage Employee Onboarding** link is available under **Links** if you are granted permissions in Oracle EOB. Use this link to access the administration pages.
  11. Use the **Manage Employees** page to modify the employees or candidates made available when submitting requirement requests. This is an Oracle Employee Onboarding page.

12. Use the **Maintain Lookup Type Codes** page to modify the lookup type codes made available when submitting requirement requests. This is an Oracle Employee Onboarding page.
13. Use the **Maintain Service Request Groups** page to modify the service groups made available when submitting requirement requests. This is an Oracle Employee Onboarding page.
14. Use the **Maintain Job Code Service Groups** page to modify the service groups for specific job codes. This is an Oracle Employee Onboarding page.
15. The Oracle Business Process Workspace **My Tasks** page displays the requirement request a hiring manager, human resource specialist, or employee must take action on. This is an Oracle Business Process Management Workspace page.
16. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see "Working on Tasks in Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
17. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see "Getting Started with Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
18. You have completed the **Understanding Oracle Employee Onboarding Pages** topic.

## Starting Oracle Employee Onboarding

Oracle EOB runs on Microsoft Internet Explorer 8.0 (or later), Chrome 11.x, or Mozilla Firefox 4.x (or later). You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle EOB. Contact your system administrator for the URL and your login credentials.

In this topic, you will log into Oracle Business Process Management Workspace and access Oracle Employee Onboarding.

### ***Procedure: Starting Oracle Employee Onboarding***

1. To begin, enter **http://server name:port/bpm/workspace** in your web browser.  
  
Replace server name and port with the server name and port number you received from your administrator.  
  
The Oracle Business Process Workspace **Sign In** page opens.
2. Enter your username and password in the respective fields, then click **Login**.
3. You are now logged into Oracle Business Process Management Workspace.
4. Click the **Applications** link to access any Oracle Process Accelerator, implemented by your organization and that you have permissions to.
5. Use the **Start New Employee** link to access Oracle Employee Onboarding.
6. You have completed the **Starting Oracle Employee Onboarding** topic.

## Using Oracle Employee Onboarding

This section is intended for hiring managers and human resource specialists submitting candidate or employee provisioning requests and screening services, and for employees confirming receipt of their provisions.

Upon completion of this section, you will be able to:

- Initiate Oracle EOB without a recruiting application.
- Initiate Oracle EOB from a recruiting application.
- Submit a provisioning request.
- Submit a screening service on the employee.
- Reviewing the Status of a Screening Service.
- Verify personal information.
- Verify provisioning.
- Acknowledge the employee received the requested provisioning.
- View a provisioning request.
- Revise a provisioning request.
- Withdraw a provisioning request.

### Initiating Oracle EOB without a Recruiting Application

Oracle EOB can be initiated in organizations which have not integrated with a recruiting application, see section "Submitting a Provisioning Request." This mode assumes that the hiring manager receives notification of a new hire start date from outside the system, through email or other message. The employee data must be setup in Oracle EOB before a provisioning request can be created, see section "Managing Employees."

### Initiating Oracle EOB from a Recruiting Application

Integrating Oracle EOB with PeopleSoft Talent Acquisition Manager 9.2 or Oracle E-Business Suite Human Capital Management 12.1.3 enables you to initiate the employee onboarding process from the respective recruiting application and passes employee data between the two applications. Contact your Oracle EOB administrator to understand if your organization has integrated Oracle EOB with either recruiting applications, and if so, how you initiate the employee onboarding process from PeopleSoft or Oracle E-Business Suite.

If Oracle EOB is integrated with one of the recruiting application, you initiate the employee onboarding process from PeopleSoft or Oracle E-Business Suite, and the respective application passes the employee data to Oracle EOB, and creates the start of a new provisioning request in Oracle EOB. From there, the Employee Onboarding process continues as documented in this guide.

### Submitting a Provisioning Request

Imagine you are a hiring manager and your new employee needs a cube on his first day of work. You can use Oracle EOB to submit this provisioning requirement to the appropriate fulfilling department.

In this topic, you will create and submit a provisioning request.

#### ***Procedure: Submitting a Provisioning Request***

1. Begin by navigating to the **New Employee Requirements** page.

Click the **Start New Employee** link.

- Use the **New Employee Requirements** page to submit provisioning requirements for a new candidate or an employee.

The screenshot shows the 'New Employee Requirements' form. At the top right, there are 'Actions' and 'Submit' buttons. The form is divided into several sections:

- Employee Information:** Employee (dropdown), Government Id, Organization (dropdown), Request Id (EOB000003), Start Date (calendar icon), Phone Number, Priority (dropdown), Birth, Submitted (0), Employee Type, Address 1, Completed (0), Employee Level, Home Address 1, Home Address 2, Home Address 3, Job Code, Home City, Home State, Home Postal Code, Hiring Manager (Jstein), Greeter, Employee Status.
- Submission:** Submit Date (11/5/2013), Comment (text area), Service Group (dropdown).
- Service Groups Table:**

| Department          | Service Type | Service Subtype | Priority | Due Date | Reason | Organization | Telephone Number |
|---------------------|--------------|-----------------|----------|----------|--------|--------------|------------------|
| No data to display. |              |                 |          |          |        |              |                  |

At the bottom of the form, there are 'Comments' and 'Attachments' sections.

- You can also access the New Employee Requirements page from the Onboard Status Review page.

- Click the **Employee** list.

- Click the **Amy Sanchez** list item.

- Click in the **Start Date** field.

- Enter the desired information into the **Start Date** field. Enter "**12/02/2013**".

- Click the **Priority** list.

- Click the **Low** list item.

- To add provisioning requirements you can use the predefined service groups or create them manually.

Service Groups are predefined groups of provisioning requirements. Use the **Service Group** field to select the service group, then click **Add Service Groups** or **Add Job Code Service Groups** to add the associated requirements.

If no service group is selected, when you click **Add Job Code Service Groups**, the default service group is added.

- Add requirements from a service group.

Click the **Service Group** list.

- Click the **Cube** list item.

13. Click the **Add Service Groups** button.
14. The provisioning requirements associated to the **Cube** service group are added.
15. A service request is created in Oracle Internal Service Request for each provisioning requirement.

The fulfilling manager and fulfilling employee receive service requests for these provisioning requirements. They disposition the requirements appropriately. See "Using Internal Service Request" in Oracle Fusion Middleware Internal Service Request Process Accelerator User's Guide.

16. Use the **Submit** button to save and submit the requirements request.

Click the **Submit** button.

17. After a request is submitted the following email notifications are sent to:

- The human resource specialist to submit a screening service for the candidate. The screening service is performed based on the Screening Service Required Ruleset.
- The employee to verify his personal information.
- The fulfilling manager and fulfilling employee to disposition the requirements. See "Using Internal Service Request" in *Oracle Fusion Middleware User's Guide for Oracle Internal Service Request Process*.

These are examples of each email notification.

The image displays three screenshots of email notifications:

- Top Left:** "Subject: Action Required: Submit Screening Request for Aaron Green". The email body contains a "Submit Screening Request for Aaron Green" button and details: Assigned To: Employee Onboarding HR Specialist, Created: Nov 18, 2013 1:24 AM, Priority: High, State: Assigned, Task Number: 000407, Updated: Nov 18, 2013 1:25 AM. Below this is a "Submit Screening Service" button and a table with columns: Hiring Manager (hrmgr1), Hiring Email, and Organization.
- Top Right:** "Subject: Confirmation Email for Aaron Green". The email body says "Dear Aaron Green", "Welcome to your new job! We look forward to working with you once you come on board.", and "Please plan to meet our greeter on your start date. The link below will guide you to our New Employee Portal which will provide additional information about our company and will require you to provide additional information needed to get you started." It includes "Login Details" with a URL, User Name: E000018, and Password: Use your configured password. It ends with "Sincerely, Your Hiring Manager".
- Bottom:** "Subject: Action Required: Approve Service Request 00000018". The email body says "Task Approval: Service Request 00000018 requires your attention. Access the link in the Worklist Application." It lists details: Service Request ID: 00000018, Submitted By: hrmgr1, Submit Date: 11/18/2013, Priority: High, Due Date: 11/21/2013, Department: HR Operations, Service Type: Request, Service Subtype: Time Card, Reason: Employee Onboarding for Aaron Green, Fulfilling Employee: hrmgr1. It also has a "Comments" section with "No data to display".

18. You have completed the **Submitting a Provisioning Request** topic.

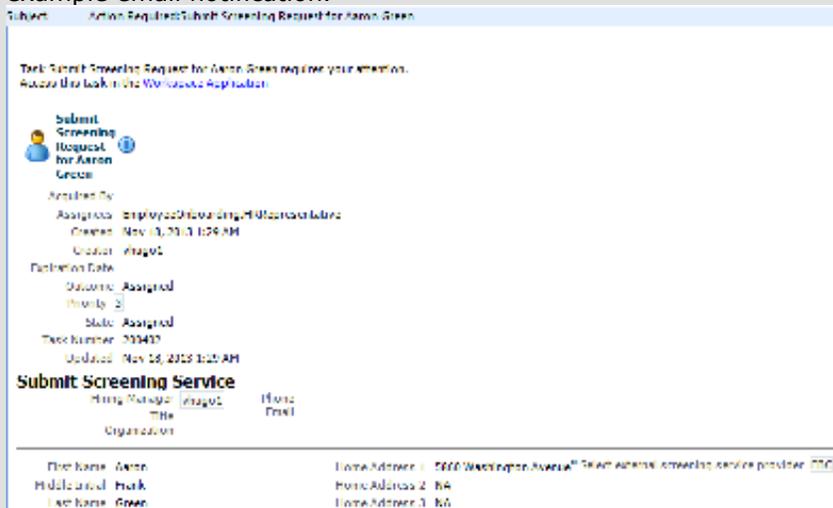
## Submitting a Screening Service

As a human resource specialist, you submit a screening service on the new candidate.

In this topic, you will submit a screening service for a new candidate.

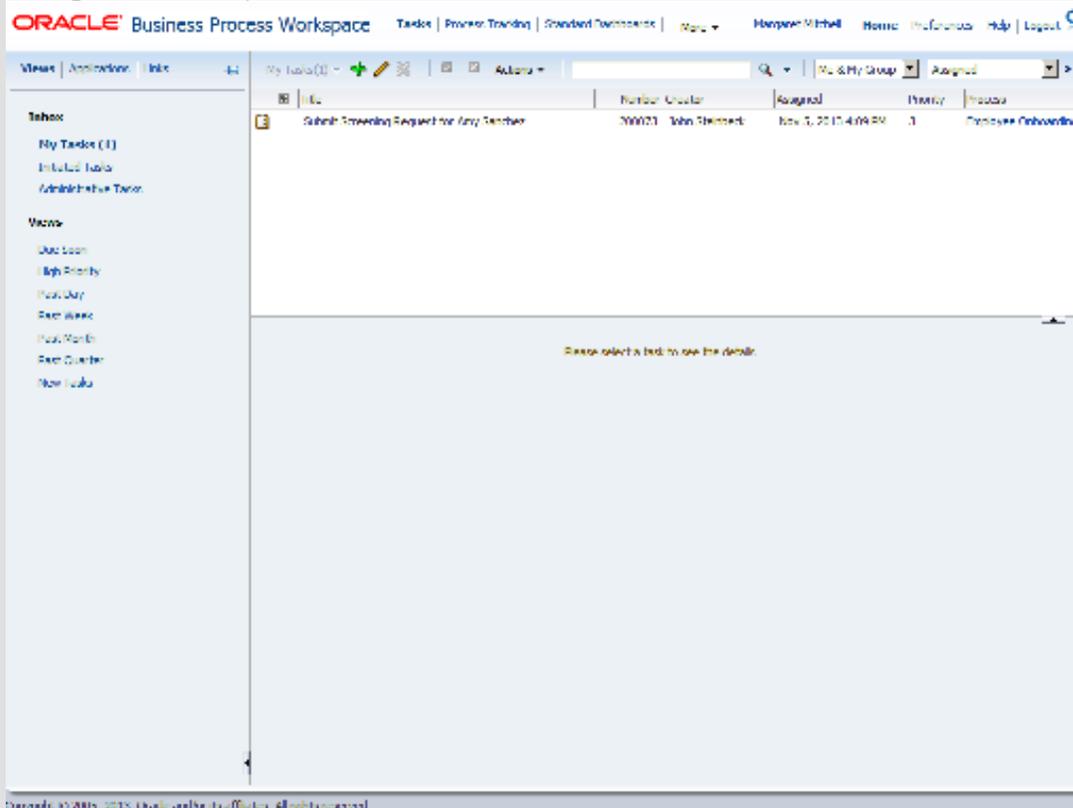
### Procedure: Submitting a Screening Service

1. You receive an email notification when you have screening services to submit. This is an example email notification.



2. Use the **My Tasks** page to view all requests on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the screening service task you want to submit.

Click the task to open it in the **Task Details** section. Double-click the task to open in a

new window. In this example, you will double-click the task.

Double-click the **Task** object.

- Use the **Submit Screening Service** page to initiate a screening service on the candidate.

**Submit Screening Service**

First Name Amy Home Address 1 3318 Adams Street \* Select external screening service provider  
 Middle Initial Linda Home Address 2  
 Last Name Sanchez Home Address 3  
 Government Id 987-65-4320 Home City Thornton  
 Date of Birth 10/16/1964 Home State CO  
 Home Phone Home Postal Code 80233  
 Mobile Phone Home Country USA  
 Personal Email Linda.Sanchez@example.com

Custom disclaimer to be added by customer.

**Comments**  
No data to display

**Attachments**  

| Name               | Updated By | Date Updated |
|--------------------|------------|--------------|
| No data to display |            |              |

- Use the **Claim** button to assign this task to yourself if multiple human resource specialists are presented with this task.
- Click the **Select external screening service provider** list.
- Select the screening service you want to run.  
Click the **Best Background Check** list item.
- Click the **Custom disclaimer to be added by customer** option.
- Click the **Submit** button.
- After you submit the screening service, you receive an email with the status of the screening.
- You have completed the **Submitting a Screening Service** topic.

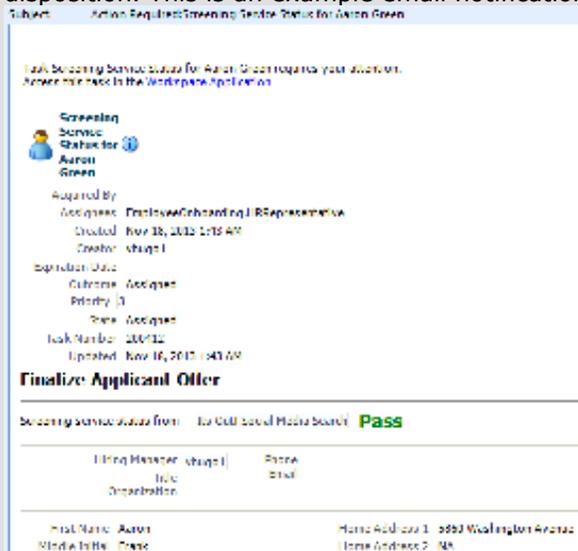
## Reviewing the Status of a Screening Service

As a human resource specialist, you review the status of a candidate's screening service and determine if the offer letter should remain or be rescinded.

In this topic, you will review the screening service status and approve.

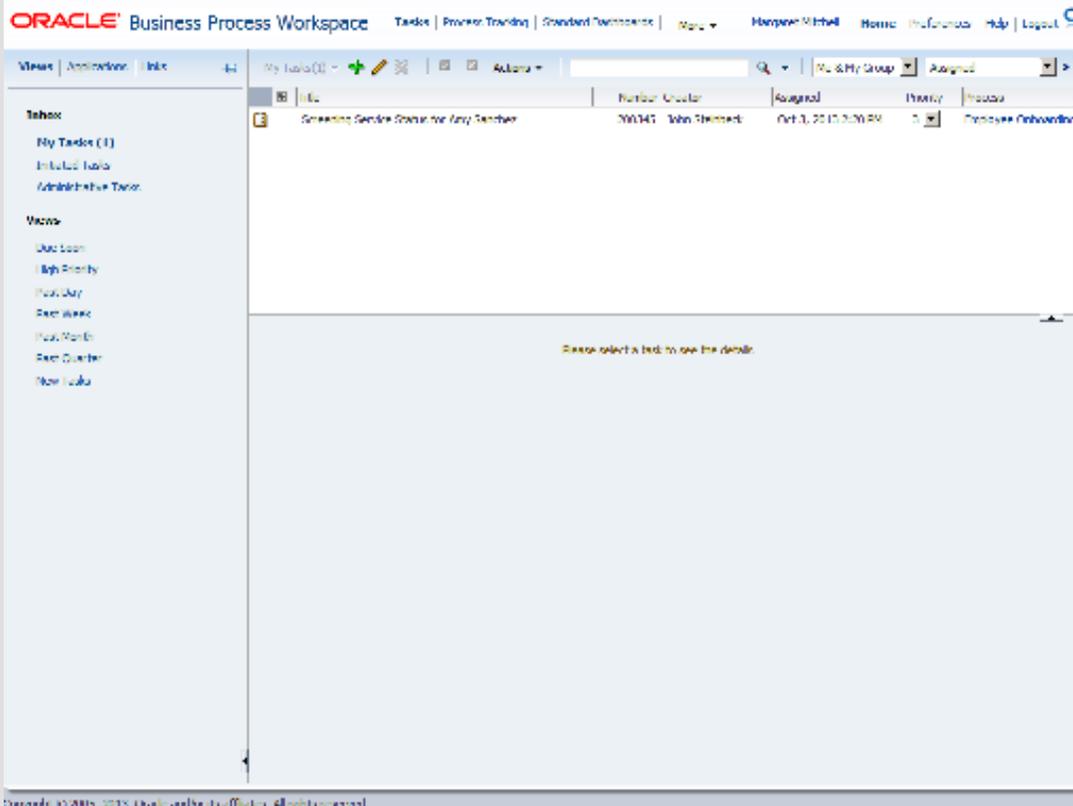
## Procedure: Reviewing the Status of a Screening Service

1. You receive an email notification when you have screening services to review and disposition. This is an example email notification.



2. Use the **My Tasks** page to view all requests on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the task you want to review.

Click the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

- Use the **Finalize Applicant Offer** page to review the status of the screening service and to determine if the candidate's provisioning request should be approved or rescinded.

**Finalize Applicant Offer**

Screening service status from Best Background Check: **Pass**

Hiring Manager John Steinbeck Phone 100000004  
 Title Manager 2 Email jstein@emailExample.com

Organization

First Name Amy Home Address 1 3318 Adams Street  
 Middle Initial Linda Home Address 2  
 Last Name Sanchez Home Address 3  
 Government Id 987-65-4320 Home City Thornton  
 Date of Birth 10/16/1964 Home State CO  
 Home Phone Home Postal Code 80233  
 Mobile Phone Home Country USA  
 Personal Email Linda.Sanchez@example.com

**Comments**  
 No data to display

**Attachments**  
 No data to display

- Use the **Claim** button to assign this task to yourself if multiple human resource specialists are presented with this task.
- Review the status of the screening service and approve the candidate's offer.

Click the **Approve** button.

- You have completed the **Reviewing the Status of a Screening Service** topic.

## Verifying Personal Information

As an employee, you must verify your personal information. You can also verify your personal information in Oracle WebCenter, if the organization is using Oracle WebCenter.

In this topic, you will verify your personal information.

### **Procedure: Verifying Personal Information**

- You receive two email notifications, one is a welcome email that contains a URL and login credentials for the location where you can verify your personal information. The other is a notification to verify your personal information.

This is an example of a welcome email notification.

Subject: Confirmation Email for Aaron Green

Dear Aaron Green

Welcome to your new job! We look forward to working with you once you come on board.

Please plan to meet our greeter on your start date. The link below will guide you to our New Employee Portal which will provide additional information about our company and will require you to provide additional information needed to get you started.

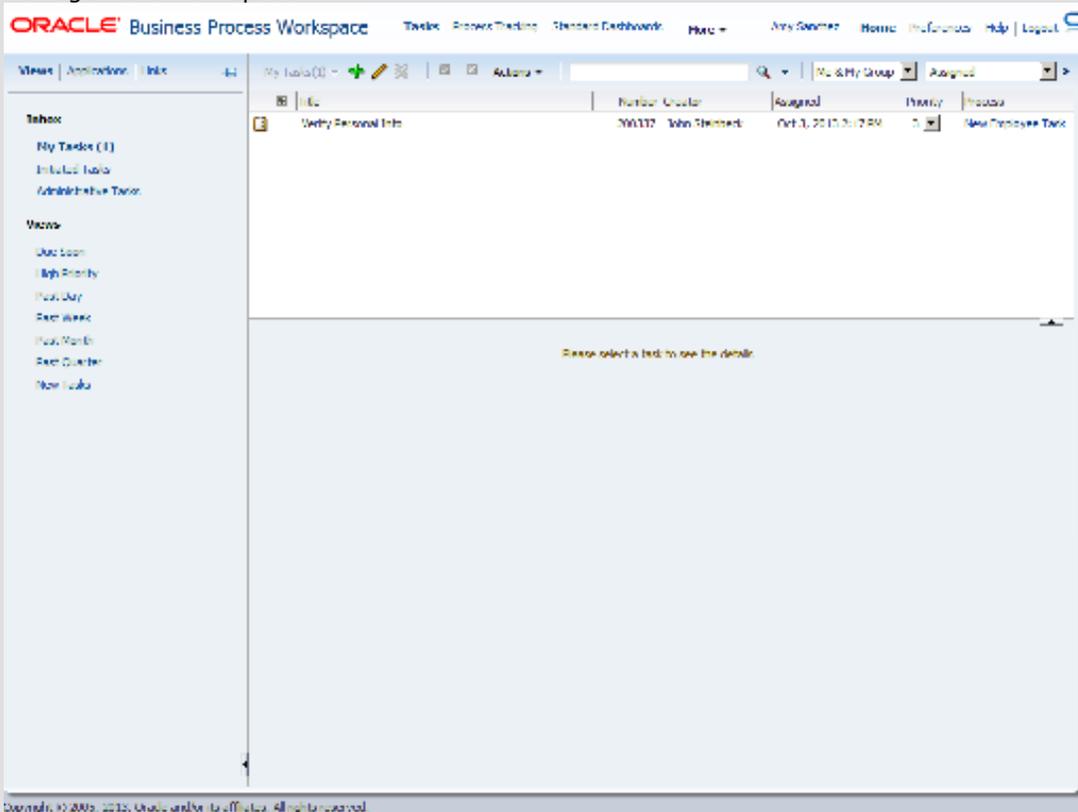
Login Details:

URL: [New Employee Portal](#)  
User Name: E000048  
Password: Use your configured password

Sincerely,  
Your Hiring Manager

2. Use the **My Tasks** page to view all requests on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the task you want to review.

Click the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

4. Use the **Verify Personal Info** page to review and edit your personal information.

5. Review your information and make changes as necessary. In this example, no changes are necessary.

6. Click the **Submit** button.

7. You have completed the **Verifying Personal Information** topic.

## Verifying Provisioning

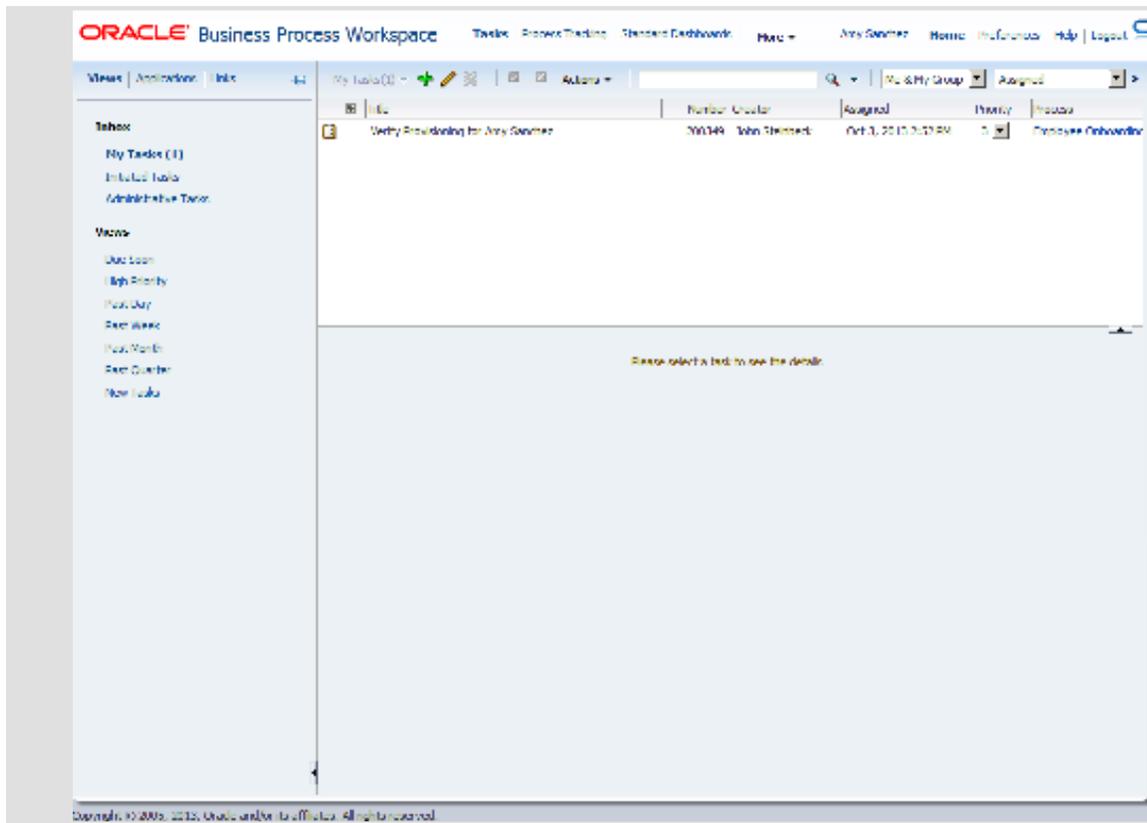
As an employee, you must verify that you have received the provisioning requested by your hiring manager.

In this topic, you will verify you have received the requested provisions.

### **Procedure: Verifying Provisioning**

1. After all the provisioning requirements are fulfilled, you receive an email notification to verify you have received them.
2. Use the **My Tasks** page to view all requests on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the task you want to review.

Click the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

4. Use the **Provisioning Verification** page to confirm you have received the requested provisions.

**Provisioning Verification**

|                |             |                    |                   |            |           |
|----------------|-------------|--------------------|-------------------|------------|-----------|
| Employee       | Amy Sanchez | Employee Candidate |                   | Request Id | EOB000012 |
| Start Date     | 11/2/2013   | Status             |                   | Request    |           |
| Priority       | 3           | Government Id      | 987-65-4320       | Status     |           |
| Employee Type  | Salaried    | Date of Birth      | 10/16/1964        | Submitted  | 1         |
| Employee Level | Staff       | Home Address       | 3318 Adams Street | Completed  | 1         |
| Job Code       |             |                    | 1                 |            |           |
| Hiring Manager | Jstein      | Home Address       | 3318 Adams Street |            |           |
| Greeter        |             |                    | 2                 |            |           |
| Submit Date    | 10/3/2013   | Home Address       | 3318 Adams Street |            |           |
| Comment        |             |                    | 3                 |            |           |
|                |             | Home City          | Thornton          |            |           |
|                |             | Home State         | CO                |            |           |
|                |             | Home Postal Code   | 80233             |            |           |
|                |             | Background Check   |                   |            |           |

| Department            | Service Type      | Service Subtype | Priority | Due Date  | Reason              | Organization | Telephone Number |
|-----------------------|-------------------|-----------------|----------|-----------|---------------------|--------------|------------------|
| Facilities Department | Office Assignment | Cube            | 3        | 10/8/2013 | Employee Onboarding |              |                  |

**Comments**  
No data to display

**Attachments**  
Name Updated By Date Updated  
No data to display

5. Click the **Horizontal** scrollbar.
6. For each provisioning request, confirm you have received the item.  
Click the **Confirm** option.
7. Click the **Confirm** button.
8. You have completed the **Verifying Provisioning** topic.

### Acknowledging the Employee Received the Requested Provisioning

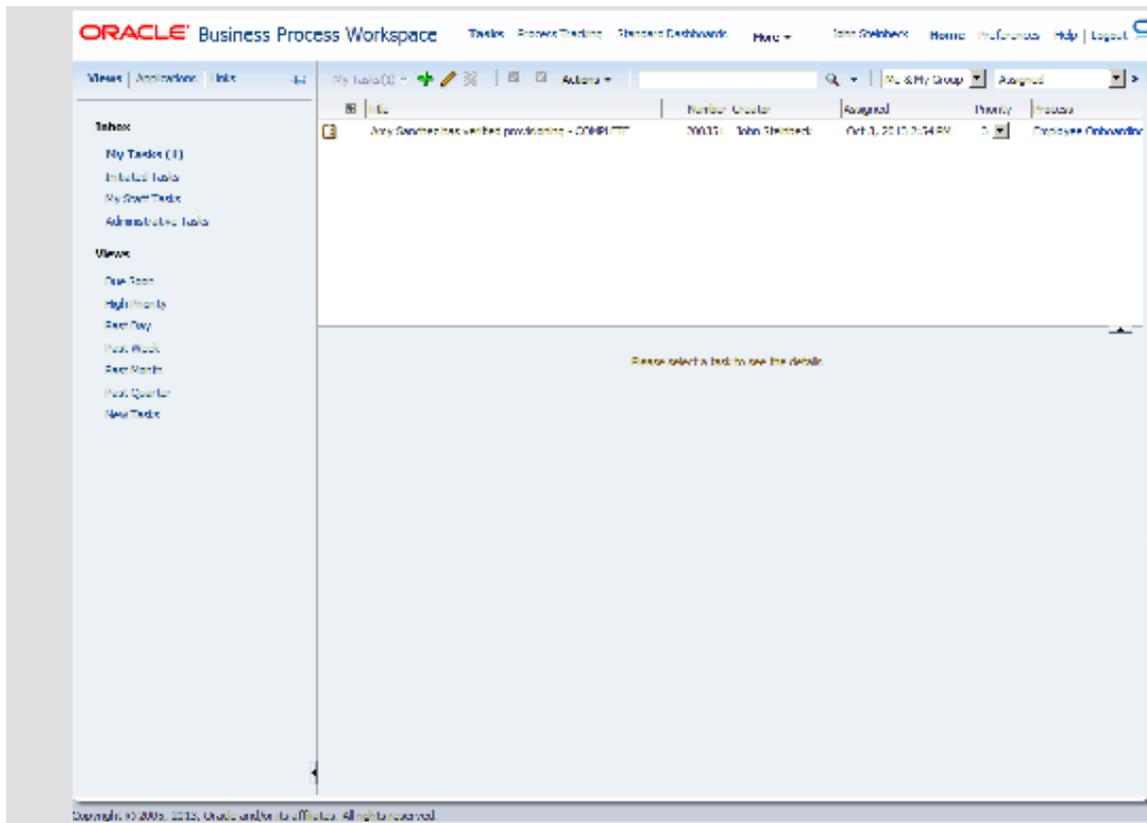
After the employee verifies they have received the requested provisions, you, as the hiring manager, must also acknowledge they have received the requested provisioning.

In this topic, you will acknowledge the employee received the requested provisioning.

#### **Procedure: Acknowledging the Employee Received the Requested Provisioning**

1. You receive an email notification to acknowledge your employee received the requested provisions.
2. Use the **My Tasks** page to view all requests on which you have to act.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the task you want to review.

Click the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

4. Use the **For Your Information** page to acknowledge your employee received the requested provisioning.

**For Your Information**

|                |             |                    |                   |            |           |
|----------------|-------------|--------------------|-------------------|------------|-----------|
| Employee       | Amy Sanchez | Employee Candidate |                   | Request Id | EOB000012 |
| Start Date     | 11/2/2013   | Status             |                   | Request    | Status    |
| Priority       | 3           | Government Id      | 987-65-4320       | Submitted  | 1         |
| Employee Type  | Salaried    | Date of Birth      | 10/16/1964        | Completed  | 1         |
| Employee Level | Staff       | Home Address       | 3318 Adams Street |            |           |
| Job Code       | 1           | Home Address       | 3318 Adams Street |            |           |
| Hiring Manager | Jstein      | Home Address       | 3318 Adams Street |            |           |
| Greeter        |             | Home City          | Thornton          |            |           |
| Submit Date    | 10/3/2013   | Home State         | CO                |            |           |
| Comment        |             | Home Postal Code   | 80233             |            |           |
|                |             | Background Check   |                   |            |           |

| Department            | Service Type      | Service Subtype | Priority | Due Date  | Reason              | Organization | Telephone Number |
|-----------------------|-------------------|-----------------|----------|-----------|---------------------|--------------|------------------|
| Facilities Department | Office Assignment | Cube            | 3        | 10/8/2013 | Employee Onboarding |              |                  |

**Comments**  
No data to display

**Attachments**  
Name Updated By Date Updated  
No data to display

5. Click the **Acknowledge** button.
6. You have completed the **Acknowledging the Employee Received the Requested Provisioning** topic.

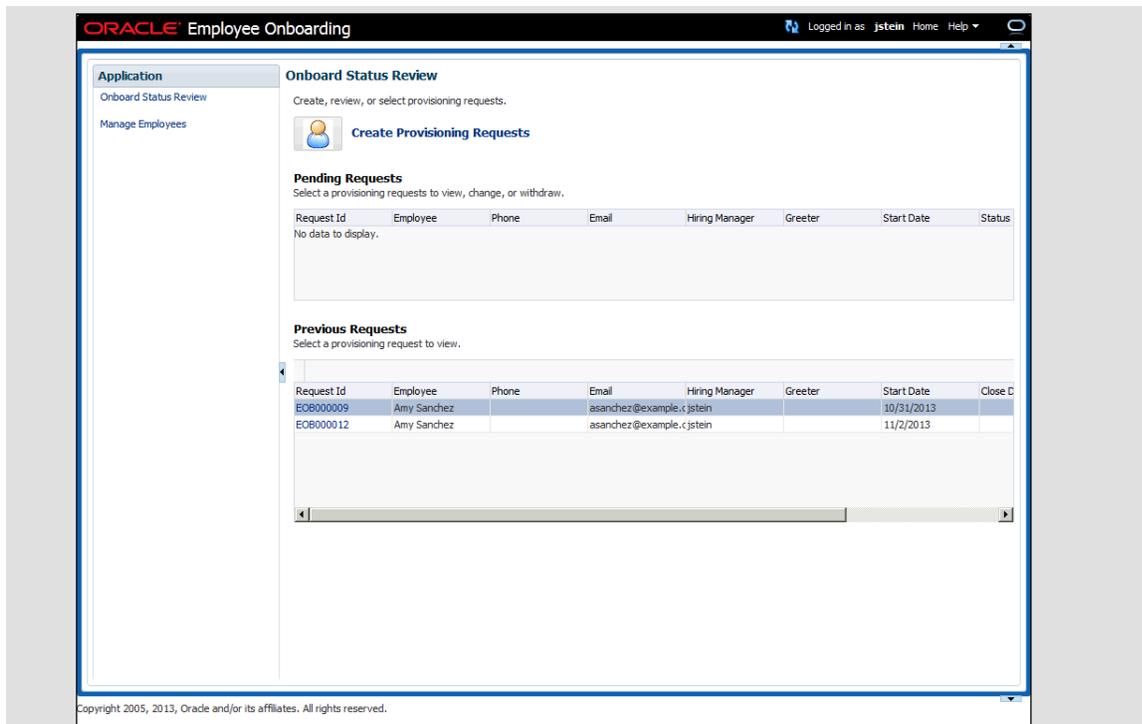
## Viewing a Provisioning Request

You can view a provisioning request after you submit it, or one already processed.

In this topic, you will view a provisioning request.

### Procedure: Viewing a Provisioning Request

1. Begin by navigating to the **Onboard Status Review** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.
3. Use the **Onboard Status Review** page to view the status of pending and previous provisioning requests.



4. Select the provisioning request you want to view.  
Click the **Request Id** link.
5. View the provisioning request.
6. Use the **Cancel** button to return to the previous page.  
Click the **Cancel** button.
7. You have completed the **Viewing a Provisioning Request** topic.

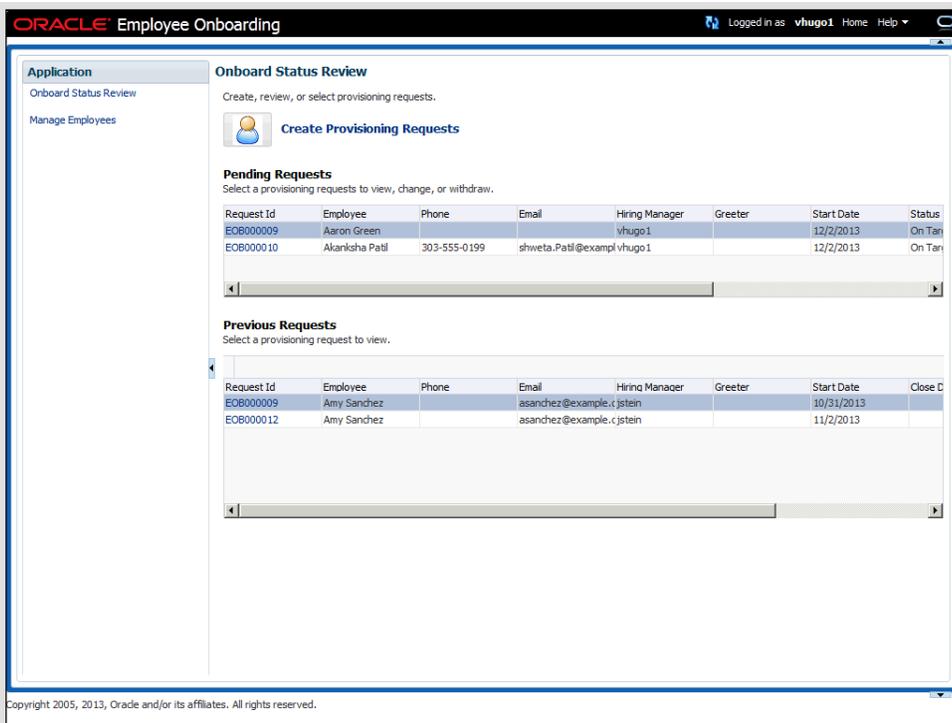
## Revising a Provisioning Request

You submit a provisioning requirements request, then realize you requested the wrong items. You can edit the request and resubmit.

In this topic, you will revise a provisioning requirements request.

### ***Procedure: Revising a Provisioning Request***

1. Begin by navigating to the **Onboard Status Review** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.
3. Use the **Onboard Status Review** page to revise provisioning requests.

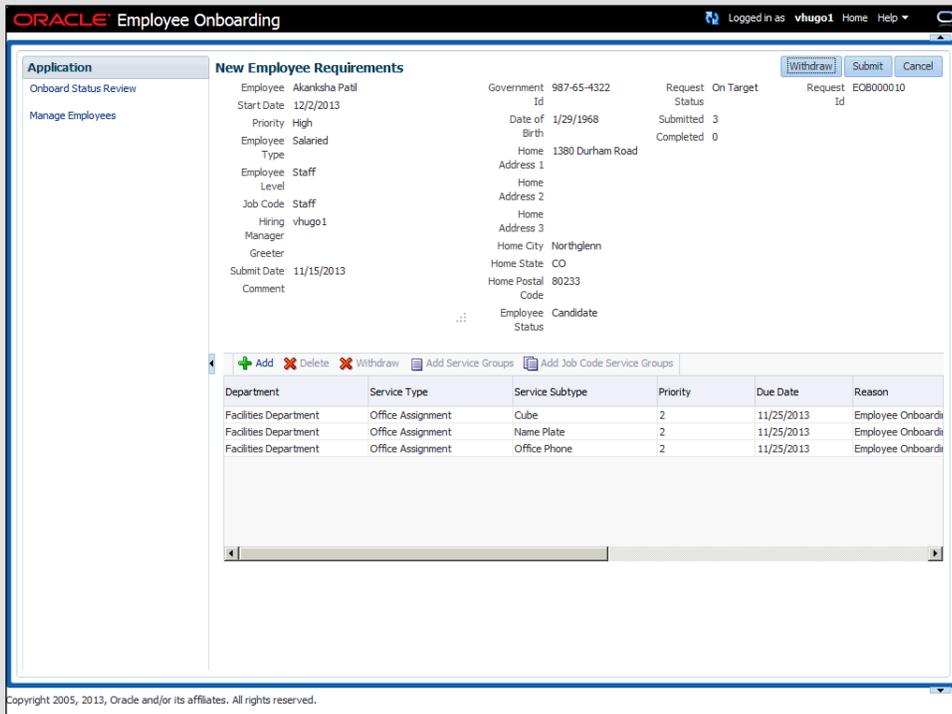


4. Select the provisioning request you want to revise.

Click the **Request Id** link.

5. First, add a new provisioning requirement.

Click the **Add** button.



6. Complete the line as necessary. In this example, the provisioning requirement was added for you.

- Next, withdraw a provisioning requirement.  
Click an entry in the row.
- Click the **Withdraw** button.
- Resubmit the requirements request for processing.  
Click the **Submit** button.
- You have completed the **Revising a Provisioning Request** topic.

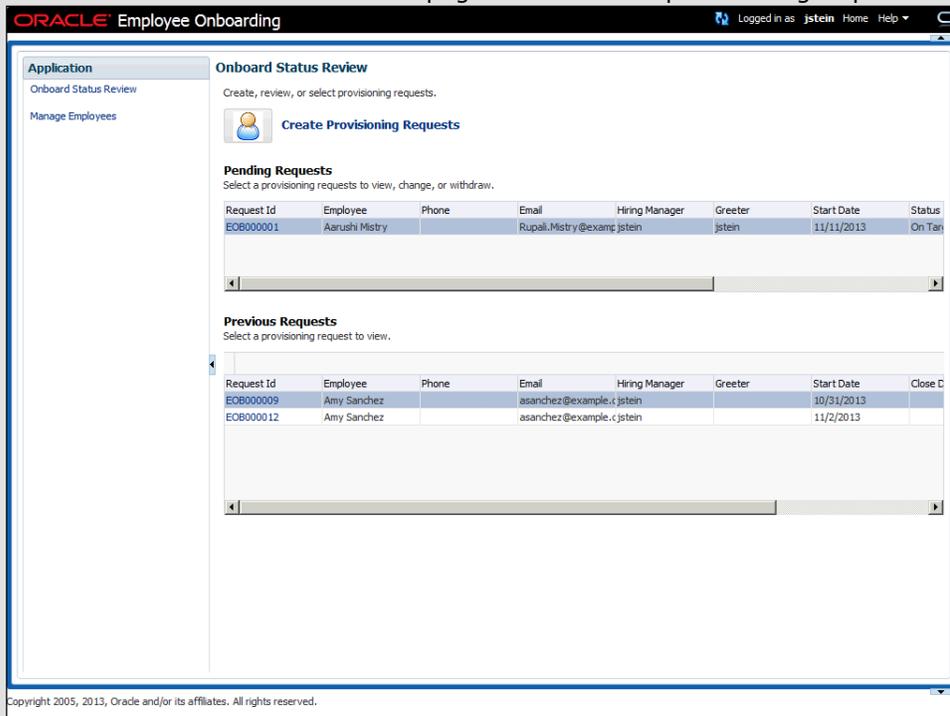
## Withdrawing a Provisioning Request

Any number of reasons may require you to withdraw a provisioning request such as the candidate declines the offer at the last minute, or he needs different provisions from what you submitted. Provisioning requests can be withdrawn after submission or prior to approval.

In this topic, you will withdraw a provisioning request.

### Procedure: Withdrawing a Provisioning Request

- Begin by navigating to the **Onboard Status Review** page.  
Click the **Links** link.
- Click the **Manage Employee Onboarding** link.
- Use the **Onboard Status Review** page to withdraw a provisioning request.



- Select the provisioning request you want to withdraw.  
Click the **Request Id** link.
- Click the **Withdraw** button.

6. Confirm that you want to withdraw this provisioning request.

Click the **OK** button.

7. The selected provisioning request status is now **Withdrawn**.

8. You have completed the **Withdrawing a Provisioning Request** topic.

## Administering Oracle Employee Onboarding

This section is intended for administrators who maintain Oracle Employee Onboarding (EOB).

As an administrator, you can install Oracle EOB and begin using the process accelerator as delivered. You can also modify Oracle EOB to fit the needs of your organization. This section covers the data elements you can modify.

Upon completion of this section, you will be able to:

- Maintain Oracle Employee Onboarding drop-down lists.
- Describe the Oracle Employee Onboarding business rules.
- Describe the Oracle Employee Onboarding reports.

## Maintaining Oracle Employee Onboarding Drop-Down Lists

This section is intended for administrators who maintain Oracle Employee Onboarding (EOB).

Oracle Employee Onboarding ships with seeded data for drop-down lists. This section covers the drop-down lists you can modify.

Upon completion of this section, you will be able to:

- Manage employees.
- Maintain lookup type codes.
- Maintain service request groups.
- Maintain service groups by job codes.

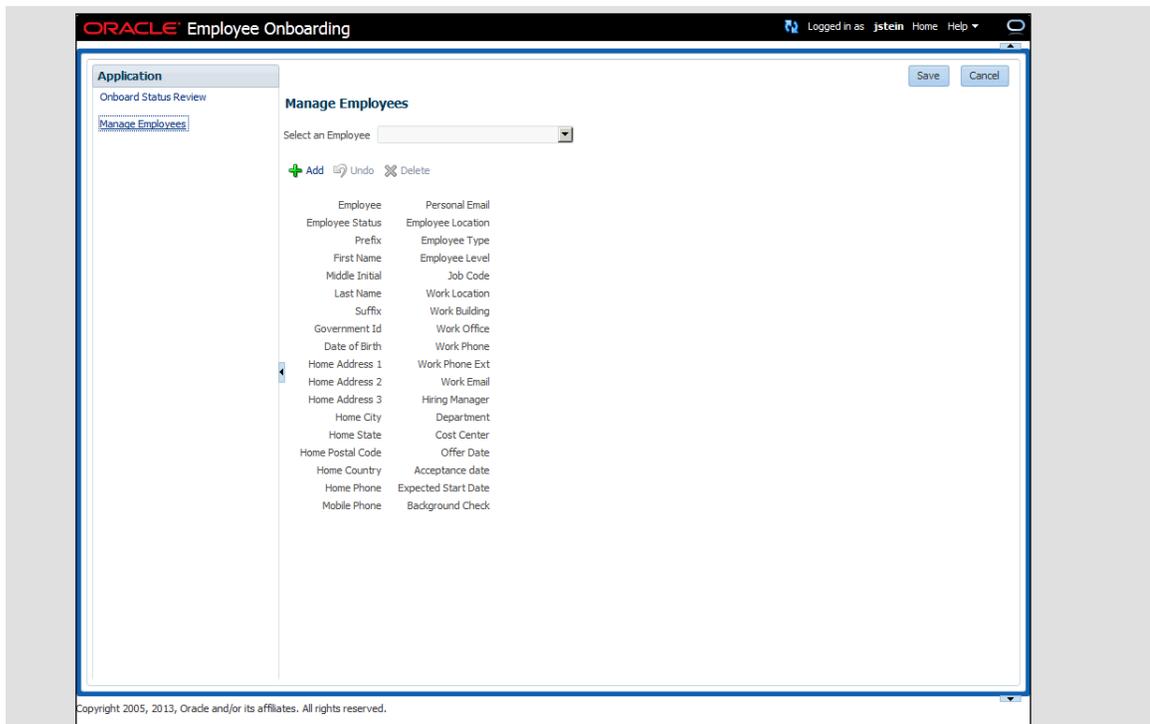
### ***Managing Employees***

You must add all employees or candidates to Oracle Employee Onboarding before a hiring manager can create provisioning requirement requests for the employee or candidate. If your organization is using Oracle EOB integrated with PeopleSoft or Oracle E-Business Suite, the employee data is passed from the recruiting application to Oracle EOB as part of the new hire notification message.

In this topic, you will modify an employee.

#### ***Procedure: Managing Employees***

1. Begin by navigating to the **Manage Employees** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.
3. Click the **Manage Employees** link.
4. Use the **Manage Employees** page to modify the employees or candidates made available when submitting requirement requests.



5. First, add an employee.  
Click the **Add** button.
6. Complete the fields as necessary. In this example, the fields have been completed for you.
7. Saving the employee record makes it available when you create a requirements request.  
Click the **Save** button.
8. Next, modify an employee record.  
Click the **Select an Employee** list.
9. The list of employees displays. You modify all employee records using the same steps. In this topic, you will modify **Layla Jones**.  
Click the **Vertical** scrollbar.
10. Click the **Layla Jones** list item.
11. Update Layla Jones' record as necessary. In this example, her record was updated with her work email and her hiring manager's name.
12. Click the **Save** button.
13. Next, delete an employee record.  
Click the **Select an Employee** list.
14. Click the **Layla Jones** list item.
15. Click the **Delete** button.

16. Confirm that you want to delete **Layla Jones** record.

Click the **Yes** button.

17. Click the **Save** button.

18. You have completed the **Managing Employees** topic.

### ***Maintaining Lookup Type Codes***

Lookup type codes specify values used in provisioning requirement requests. Oracle Employee Onboarding ships with seeded values for lookup type codes. The seeded values are:

#### Request Status

- New
- Save
- Submit
- Complete
- Target
- Jeopardy
- Withdrawn

#### Request Line Status

- New
- Save
- Submit
- In Process
- Completed
- Withdrawn

#### Employee Status

- Candidate
- Full Time
- Part Time

#### Employee Prefix

- Mr
- Mrs
- Jr
- I
- II
- III
- IV

- V

Employee Location

- Remote
- On-site

Employee Type

- Exception Hourly
- Hourly
- Salaried

Employee Level

- Executive
- Director
- Manager
- Staff
- Administrator

Job Code

- Account Manager
- Accountant
- Administrative Staff
- Administrator
- Administrator Customer Service
- Administrator-Human Resources
- Administrator-Licensing/Cert
- Administrator-Network Services
- Adviser
- Agent-HR Help Desk L1
- Agent-HR Help Desk L2
- Agent-HR Help Desk L3
- Analyst-Budget
- Analyst-Budget I
- Analyst-Budget II
- Analyst-Business
- Analyst-Business Development
- Analyst-Data
- Analyst-Financial

- Analyst-Financial Sr
- Analyst-Functional
- Analyst-Health Statistics
- Analyst-HR/Payroll
- Analyst-HRMS
- Analyst-Human Resources
- Analyst-Program
- Analyst-Systems
- Architect
- Area Manager
- Assembler
- Assembly Line Worker
- Assessor
- Assistant
- Assistant I
- Assistant II
- Assistant-Administrative
- Assistant-Administrative Sr
- Assistant-Community Relations
- Assistant-Executive
- Assistant-Junior
- Assistant-Management Staff
- Assistant-Marketing
- Assistant-Nursing
- Assistant-Office I
- Assistant-Office II
- Assistant-Office III
- Assistant-Office IV
- Assistant-Personnel
- Assistant-Personnel Clerical
- Assistant-Sales
- Assistant-Senior
- Assistant-Student Resident
- Assistant-Teaching
- Auditor
- Auditor-General
- Barkeeper
- Bartender

- Bookkeeper
- Bookkeeper-Sr
- Bricklayer
- Broker
- Bus Driver
- Bus Person
- Cabinet Head-Health/Mental Hyg
- Chief
- Chief Executive Officer
- Chief-Fire
- Chief-Group
- Chief-Personnel Operations
- Chief-Police
- Chief-Public Works
- Cleaner
- Clerk
- Clerk-Accounting
- Clerk-Accounts Payable
- Clerk-Accounts Payable Sr
- Clerk-Administrative I
- Clerk-Administrative II
- Clerk-Data Entry
- Clerk-File
- Clerk-Finance
- Clerk-General Ledger
- Clerk-General Ledger Sr
- Clerk-I
- Clerk-II
- Clerk-III
- Clerk-Inventory Control
- Clerk-Payroll
- Clerk-Payroll Sr
- Clerk-Pension
- Clerk-Shipping
- Clerk-Store
- Clerk-Student Office Support
- Clerk-Time and Labor
- Commissioner-Bus and Reg Svc

- Commissioner-Police and Fire
- Commissioner-State Operations
- Conservator
- Consultant
- Consultant - Junior
- Consultant - Senior
- Consultant-Pre Sales
- Cook
- Coordinator-Employment
- Coordinator-Environmental
- Coordinator-Fire Safety
- Coordinator-Project
- Coordinator-Staffing
- Counsel-General
- Country Manager
- Custodian
- Data Protection Officer
- Dean-School of Engineering
- Default Service Groups
- Deputy Director-Engineering
- Deputy Director-Maintenance
- Deputy Director-Water Prod
- Developer
- Director
- Director -Japan
- Director of Engineering
- Director-Administration
- Director-Asia Pacific
- Director-Canada
- Director-Community Relations
- Director-Customer Services
- Director-Department
- Director-Europe
- Director-Finance
- Director-Governmental Affairs
- Director-Human Resources
- Director-Information Systems
- Director-Licensing and Cert

- Director-Manufacturing
- Director-Marketing
- Director-Operations
- Director-Personnel
- Director-Planning
- Director-Policy and Health Stats
- Director-R and D
- Director-Sales
- Director-South America
- Dispatcher
- Distributor
- Doctor
- Drafter
- Dry-Cleaning Employee
- Employee
- Engineer
- Engineer-Building Maintenance
- Engineer-Public Works I
- Farmer
- Garbage Collector
- Guard
- Hairdresser
- Inspector of Goods
- Instructor
- Interior Designer
- Job1
- Job2
- Lawyer
- Legal Assistant
- Logistician
- Maintenance Staff
- Manager
- Manager Engineering
- Merchant
- Night Watch
- Operator
- Other Job1
- Other Job2

- Painter
- Policeman
- President
- Professional Sportsman
- Programmer
- Psychologist
- Purchasing Agent
- Researcher
- Restorer
- Sales Person
- Secretary
- Seller
- Senior Engineer
- Staff
- Strategist
- Tax Collector
- Teacher
- Technical Staff
- Telephone Helpline
- Trainer
- Vendor
- Vice President
- Vice President Engineering
- Warehouseman
- Worker

### Salary Range

- The salary ranges are \$000,000 to \$500,000 in \$10,000 increments

### Screening Service Web Service Logo

- EBC
- Best Background Check
- Acme Credit Report
- Acme SSN Tracing
- Fairview Civil Litigation Screening
- GSS Federal Records Search
- Its Out! Social Media Search
- Bethel Drug Testing Services

- We Check Workers Comp History Verification

#### Screening Service Web Service Info

- EBC
- Best Background Check
- Acme Credit Report
- Acme SSN Tracing
- Fairview Civil Litigation Screening
- GSS Federal Records Search
- Its Out! Social Media Search
- Bethel Drug Testing Services
- We Check Workers Comp History Verification

#### Background Check Status

- Pass
- Fail
- No response received

#### Request Template

- Local IT
- Remote IT
- Cube
- Office
- Sales
- Accounting
- Management

The Employee Suffix, Department Number, and Cost Center lookup types do not ship with defined lookup codes.

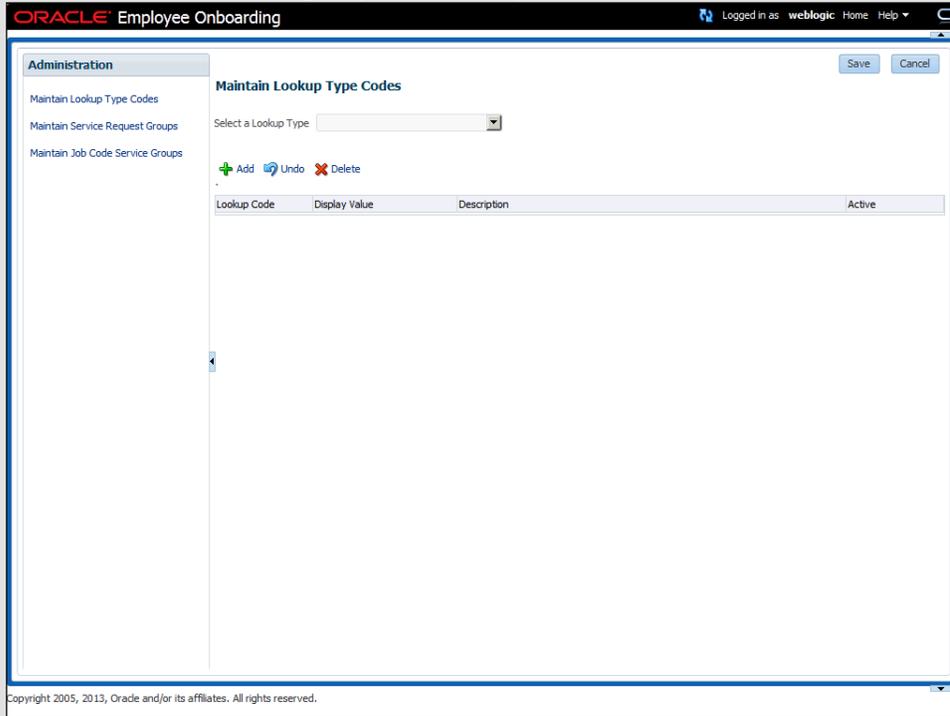
You can add additional lookup type codes to meet your organization's needs.

In this topic, you will modify lookup type code options.

#### ***Procedure: Maintaining Lookup Type Codes***

1. Begin by navigating to the **Maintain Lookup Type Codes** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.
3. Click the **Maintain Lookup Type Codes** link.
4. Use the **Maintain Lookup Type Codes** page to modify the lookup type codes made

available when submitting requirement requests.



5. Click the **Select a Lookup Type** list.
6. These are the lookup types shipped with Oracle EOB. You modify all lookup types using the same steps. In this topic, you will modify the **Request Status**.

Click the **Request Status** list item.

7. First, add a lookup type code.  
Click the **Add** button.
8. Click an entry in the row.
9. **Lookup Codes** are unique keys in the data tables and built into the logic of Oracle EOB.  
Click in the **Lookup Code** field.

10. A **Lookup Code** can be upper or lower case.

Enter the desired information into the **Lookup Code** field. Enter "**DELAYED**".

11. Next, specify a short display value. Display values appear when a requirement request is created or reviewed.

Click in the **Display Value** field.

12. Enter the desired information into the **Display Value** field. Enter "**Delayed**".

13. Use the **Description** field to add an optional description.

Click in the **Description** field.

14. Enter the desired information into the **Description** field. Enter "**Delay**".

15. Saving the lookup type code makes it available when you create requirement requests.  
Click the **Save** button.
16. The lookup type code **Delayed** is now added.
17. Next, modify the **Delayed** lookup type code by editing the description.  
Click in the **Description** field.
18. Enter the desired information into the **Description** field. Enter "**Delayed**".
19. You can reverse any modifications to a single selected row using the **Undo** button. To save the modification, you would click **Save** instead.  
Click the **Save** button.
20. There are two types of delete, a hard delete and soft delete.  
  
A hard delete removes the lookup type code from the database table, provided it is not used in a requirement request.  
  
First, perform a hard delete on the code **Delayed**.  
  
Click an entry in the row.
21. Click the **Delete** button.
22. Click the **Save** button.
23. The lookup type code **Delayed** is now deleted.
24. Click an entry in the row.
25. A soft delete inactivates a lookup type code already used in requirement requests. Inactivated codes are not displayed as options for creating or reviewing requirement requests.  
  
Next, perform a soft delete on the **Target** code.  
  
Click the **Active** option.
26. Click the **Save** button.
27. The lookup type code **Target** is now inactive.
28. You have completed the **Maintaining Lookup Type Codes** topic.

### ***Maintaining Service Request Groups***

Service request groups are predefined groups of provisioning requirements. Oracle Employee Onboarding ships with seeded values for service request groups. The seeded values are:

Accounting

- Accounting Subsystem

### Cube

- Cube
- Name Plate
- Office Phone

### Local IT

- Desktop Computer
- New Hire Portal
- Employee SSO
- Email Account

### Management

- BI Subsystem

### Office

- Office
- Name Plate
- Office Phone
- Assigned Garage Space

### Remote IT

- Laptop
- Printer
- Laptop Docking Station
- New Hire Portal
- Employee SSO
- Email Account

### Sales

- CRM System

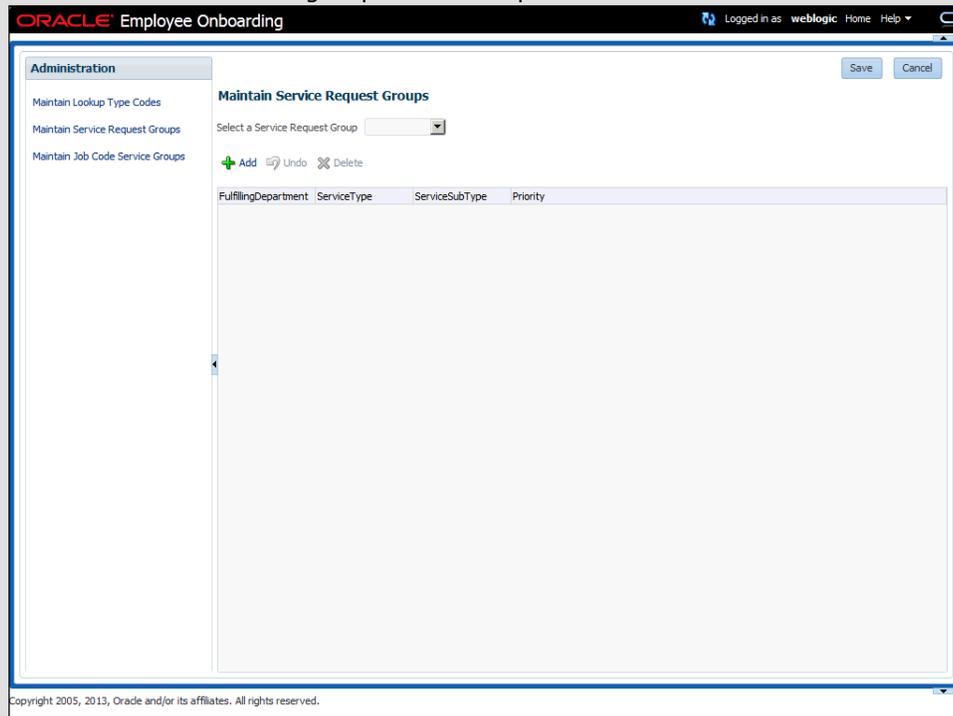
You can add additional service request groups to meet your organization's needs.

In this topic, you will modify service groups.

### ***Procedure: Maintaining Service Request Groups***

1. Begin by navigating to the **Maintain Service Request Groups** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.

3. Click the **Maintain Service Request Groups** link.
4. Use the **Maintain Service Request Groups** page to modify the service groups made available when submitting requirement requests.



5. Click the **Select a Service Request Group** list.
6. These are the service groups shipped with Oracle EOB. You modify all service groups using the same steps. In this topic, you will modify **Local IT**.  
Click the **Local IT** list item.
7. First, add a provisioning requirement to the Local IT service group.  
Click the **Add** button.
8. Click an entry in the row.
9. Click the **FulfillingDepartment** list.
10. Click the **IT Department** list item.
11. Complete the remaining fields as required. In this example, the fields have been completed for you.
12. Saving the provisioning requirement adds it to the service group and populates the requirements request with a line for the provisioning requirement if the associated service group is selected.  
Click the **Save** button.
13. The provisioning requirement **BI Subsystem** is now added.
14. Next, modify the **BI Subsystem** provisioning requirement by editing the priority.

Click in the **Priority** field.

15. Enter the desired information into the **Priority** field. Enter "4".

16. Click the **Save** button.

17. Next, delete the **BI Subsystem** provisioning requirement. Ensure the row you want to delete is selected.

Click the **Delete** button.

18. Confirm that you want to delete **BI Subsystem**.

Click the **Yes** button.

19. Click the **Save** button.

20. The provisioning requirement **BI Subsystem** is now deleted.

21. You have completed the **Maintaining Service Request Groups** topic.

### ***Maintaining Service Groups by Job Codes***

Service groups by job codes are predefined groups of provisioning requirements for specific job roles. Oracle Employee Onboarding ships with seeded job codes and some associated service groups. If a job role does not ship with service groups, you can add them. The seeded job codes and associated service groups are:

Account Manager

Accountant

- Local\_IT
- Cube
- Accounting

Administrative Staff

- Local\_IT
- Cube

Administrator

Administrator Customer Service

Administrator-Human Resources

Administrator-Licensing/Cert

Administrator-Network Services

Adviser

Agent-HR Help Desk L1

Agent-HR Help Desk L2

Agent-HR Help Desk L3

Analyst-Budget

Analyst-Budget I

Analyst-Budget II

Analyst-Business

Analyst-Business Development

Analyst-Data

Analyst-Financial

Analyst-Financial Sr  
Analyst-Functional  
Analyst-Health Statistics  
Analyst-HR/Payroll  
Analyst-HRMS  
Analyst-Human Resources  
Analyst-Program  
Analyst-Systems  
Architect  
Area Manager  
Assembler  
Assembly Line Worker  
Assessor  
Assistant  
Assistant I  
Assistant II  
Assistant-Administrative  
Assistant-Administrative Sr  
Assistant-Community Relations  
Assistant-Executive  
Assistant-Junior  
Assistant-Management Staff  
Assistant-Marketing  
Assistant-Nursing  
Assistant-Office I  
Assistant-Office II  
Assistant-Office III  
Assistant-Office IV  
Assistant-Personnel  
Assistant-Personnel Clerical  
Assistant-Sales  
Assistant-Senior  
Assistant-Student Resident  
Assistant-Teaching  
Auditor  
Auditor-General  
Barkeeper  
Bartender  
Bookkeeper  
Bookkeeper-Sr  
Bricklayer  
Broker  
Bus Driver  
Bus Person  
Cabinet Head-Health/Mental Hyg  
Chief

Chief Executive Officer

- Local\_IT
- Office
- Management

Chief-Fire  
Chief-Group  
Chief-Personnel Operations  
Chief-Police  
Chief-Public Works  
Cleaner

Clerk  
Clerk-Accounting  
Clerk-Accounts Payable  
Clerk-Accounts Payable Sr  
Clerk-Administrative I  
Clerk-Administrative II  
Clerk-Data Entry  
Clerk-File  
Clerk-Finance  
Clerk-General Ledger  
Clerk-General Ledger Sr  
Clerk-I  
Clerk-II  
Clerk-III  
Clerk-Inventory Control  
Clerk-Payroll  
Clerk-Payroll Sr  
Clerk-Pension  
Clerk-Shipping  
Clerk-Store  
Clerk-Student Office Support  
Clerk-Time and Labor  
Commissioner-Bus and Reg Svc  
Commissioner-Police and Fire  
Commissioner-State Operations  
Conservator  
Consultant  
Consultant - Junior  
Consultant - Senior  
Consultant-Pre Sales  
Cook  
Coordinator-Employment  
Coordinator-Environmental  
Coordinator-Fire Safety  
Coordinator-Project  
Coordinator-Staffing  
Counsel-General  
Country Manager  
Custodian  
Data Protection Officer  
Dean-School of Engineering

Default Service Groups

- Local\_IT
- Cube

Deputy Director-Engineering  
Deputy Director-Maintenance  
Deputy Director-Water Prod  
Developer

Director

- Local\_IT
- Office
- Management

Director -Japan  
Director of Engineering  
Director-Administration  
Director-Asia Pacific  
Director-Canada  
Director-Community Relations  
Director-Customer Services  
Director-Department  
Director-Europe  
Director-Finance  
Director-Governmental Affairs  
Director-Human Resources  
Director-Information Systems  
Director-Licensing and Cert  
Director-Manufacturing  
Director-Marketing  
Director-Operations  
Director-Personnel  
Director-Planning  
Director-Policy and Health Stats  
Director-R and D  
Director-Sales  
Director-South America  
Dispatcher  
Distributor  
Doctor  
Drafter  
Dry-Cleaning Employee  
Employee  
Engineer  
Engineer-Building Maintenance  
Engineer-Public Works I  
Farmer  
Garbage Collector  
Guard  
Hairdresser  
Inspector of Goods  
Instructor  
Interior Designer  
Job1  
Job2  
Lawyer  
Legal Assistant  
Logistician  
Maintenance Staff

Manager

- Local\_IT
- Office
- Management

Manager Engineering  
Merchant  
Night Watch  
Operator  
Other Job1  
Other Job2  
Painter

Policeman

President

- Local\_IT
- Office
- Management

Professional Sportsman  
Programmer  
Psychologist  
Purchasing Agent  
Researcher  
Restorer

Sales Person

- Local\_IT
- Cube
- Sales

Secretary  
Seller  
Senior Engineer

Staff

- Local\_IT
- Cube

Strategist  
Tax Collector  
Teacher

Technical Staff

- Local\_IT
- Cube

Telephone Helpline  
Trainer  
Vendor  
Vice President

Vice President Engineering

- Local\_IT
- Office
- Management

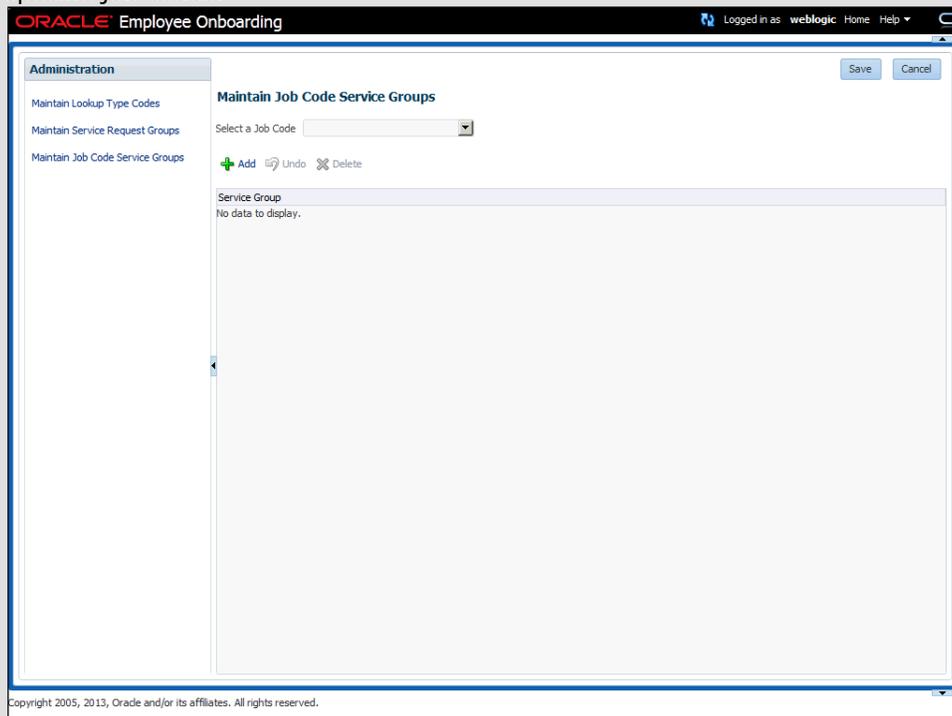
Warehouseman  
Worker

You can add additional service groups to job codes to meet your organization's needs.

In this topic, you will modify service groups for a specific job code.

### **Procedure: Maintaining Service Groups by Job Codes**

1. Begin by navigating to the **Maintain Job Code Service Groups** page.  
Click the **Links** link.
2. Click the **Manage Employee Onboarding** link.
3. Click the **Maintain Job Code Service Groups** link.
4. Use the **Maintain Job Code Service Groups** page to modify the service groups for specific job codes.



5. Click the **Select a Job Code** list.
6. These are the job codes shipped with Oracle EOB. You modify all service groups using the same steps. In this topic, you will modify **Employee**.  
Click the **Employee** list item.
7. First, add a service group to the **Employee** role.  
Click the **Add** button.
8. Click an entry in the row.
9. Click the **Service Group** list.
10. Click the **Cube** list item.

11. Saving the service group adds it to the role and populates the requirement request if the associated role is selected.  
Click the **Save** button.
12. The service group **Cube** is now added to the Employee role.
13. Next, modify the **Employee** role by adding additional service groups.  
Click the **Add** button.
14. In this example, additional service groups have been added for you.
15. Click the **Save** button.
16. Next, delete a service group. Ensure the row you want to delete is selected.  
Click in the **Local IT** field.
17. Click the **Delete** button.
18. Confirm that you want to delete service group.  
Click the **Yes** button.
19. Click the **Save** button.
20. The service group **Local IT** is now deleted.
21. You have completed the **Maintaining Service Groups by Job Codes** topic.

## Understanding Oracle Employee Onboarding Business Rules

This section is intended for administrators who maintain Oracle Employee Onboarding (EOB).

Oracle Employee Onboarding ships with seeded data for business rules. This section covers the business rules you can modify.

Upon completion of this section, you will be able to:

- Describe the Hiring Manager Notification Wait Time Ruleset.
- Describe the Screening Service Wait Time Ruleset.
- Describe the Is Screening Service Required Ruleset.
- Describe the New Employee Ruleset.

### ***Understanding the Hiring Manager Notification Wait Time Ruleset***

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Employee Onboarding uses Rule 1 in the Hiring Manager Notification Wait Time Ruleset. The rule includes a condition (IF) statement and an action (THEN) statement.

The condition of Rule 1 specifies that the request number is not null. The action sets the notification wait time to 10 days. You can modify the notification wait time value in the rule.

For example, assume the notification wait time is set to 10 days. The system waits until 10 days before the hire date, then sends an email notification with the open, unfulfilled requests to the hiring manager for him to take action.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Provisioning requirement request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

### **Understanding the Screening Service Wait Time Ruleset**

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Employee Onboarding uses Rule 1 in the Screening Service Wait Time Ruleset. The rule includes a condition (IF) statement and an action (THEN) statement.

The condition of Rule 1 specifies that the request number is not null. The action sets the background check wait time to 10. You can modify the background check wait time in the rule.

For example, assume the background check wait time is set to 10 days, and a screening service message is sent out and no response is received. The system waits for the message until 10 days before the employee start date, then stops waiting and moves the process forward.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Provisioning requirement request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

### **Understanding the Is Screening Service Required Ruleset**

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Employee Onboarding uses the Is Screening Service Required Decision Table, in the Is Screening Service Required Ruleset, to determine if any screening service is required. This decision table includes conditions and actions as its rows and rules as its columns. The rules test the values of the conditions and set corresponding values for the actions. The rules must account for all possible combinations of values of all conditions in the table. A value of otherwise means "all values not listed." Bucketsets and globals are used to set pre-defined values for certain rules.

Upon submission of a provisioning requirements request, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The Is Screening Service Required Decision Table provides the details for each condition, its rules, and the actions to execute. Following the table is an example scenario

explaining how a provisioning requirements request is processed based on the given condition.

### Is Screening Service Required Decision Table

|            | R1  | R2  |
|------------|---|---|
| Conditions | JobHeader.Data.type=employee&&Data.employeeLevel                  | otherwise; "Manager"; "Staff"; "Administrative" "Director"; "Executive" |
| Actions    | Modify eobBusinessRuleOutput<br>IsBackgroundCheckRequired:NoClean | ✓<br>false  |

A new employee is being hired for a management position; the human resources manager must perform a screening service for this employee.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Application processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

### Understanding the New Employee Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Employee Onboarding uses Rule 1 in the New Employee Ruleset. The rule includes a condition (IF) statement and an action (THEN) statement.

The condition of Rule 1 specifies that the request number is not null. The action sets the portal URL and employee group. You can modify the portal URL and employee group values in the rule.

For example, when a new employee is created, the new employee belongs to EmployeeGroup, as set in the globals. The employee receives a welcome email that contains the portal URL and his login credentials for Oracle WebCenter, so he can verify his personal information.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Provisioning requirement request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

### Understanding Oracle Employee Onboarding Reports

This section is intended for hiring managers and human resource specialists reviewing new hire reports.

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating or editing the Oracle Employee Onboarding (EOB) dashboards and reports. For information on creating and editing Oracle BAM reports, see "Creating and Managing Reports," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

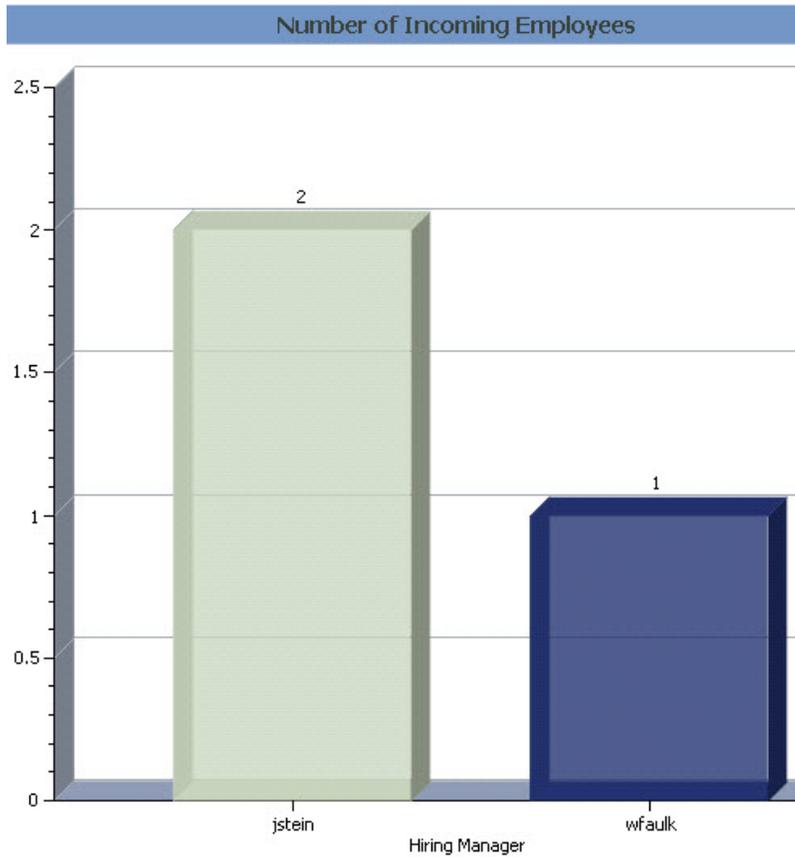
This section covers the Oracle BAM dashboard and reports delivered with Oracle EOB. Oracle Employee Onboarding includes three dashboards, Employee Onboarding Analysis, Employee Onboarding Status by Hiring Manager, and Provisioning Analysis, with ten views. These reports use information from the ISR request data that have EOB as an external source.

**Employee Onboarding Analysis Dashboard**

The Employee Onboarding Analysis dashboard includes three views pertaining to screening services and number of new hires. The following provides an explanation and sample image of each view.

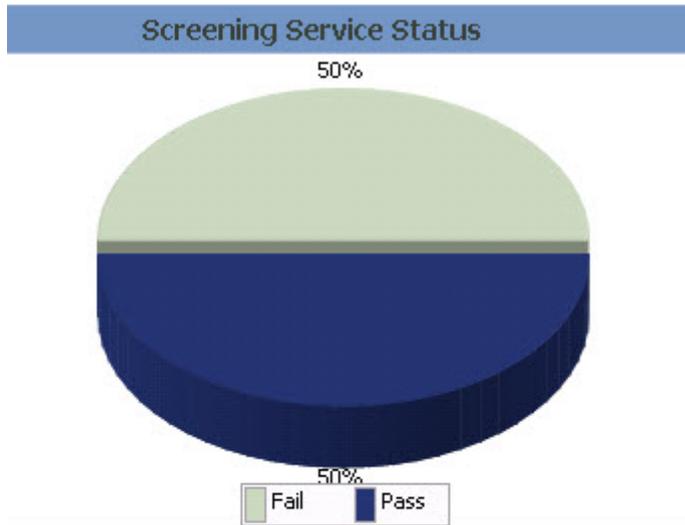
Number of Incoming Employees

The Number of Incoming Employees view is a 3D bar chart summarizing the total number of new hires by hiring manager. The X-axis displays the number of new hires per hiring manager, with the number of new hires listed on the top of the bar. The Y-axis displays the number of new hires ranging from 0 to infinity.



Screening Service Status

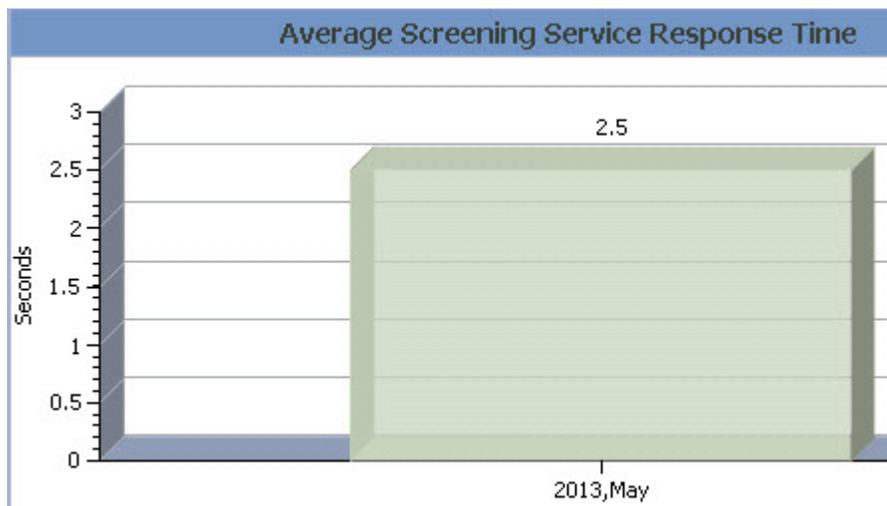
The Screening Service Status is a 3D pie chart view summarizing the percentage of screening services that have failed or passed. Each slice displays the percentage of that slice in relation to the whole pie.



### Average Screening Service Response Time

#### Average Screening Service Response Time

The Average Screening Service Response Time view is a 3D bar chart summarizing the total response time for screening checks. The X-axis displays the screening checks per month, with the number of screening checks performed listed on the top of the bar. The Y-axis shows the response time in seconds ranging from 0 to infinity.



#### **Employee Onboarding Status by Hiring Manager Dashboard**

The Employee Onboarding Status by Hiring Manager dashboard includes one view pertaining to request status by hiring manager. The following provides an explanation and sample image of the view.

#### Employee Onboarding Status by Hiring Manager

The Employee Onboarding Status by Hiring Manager view is a 3D stacked bar chart summarizing requests by hiring manager and status. The X-axis displays the late and on time requests, stacked top to bottom, for each hiring manager. The percentage of total requests for each status is displayed as a label in the center of each bar. The Y-axis displays the number of request from 0 to infinity. This view can be filtered to see the ISR service request or EOB request details. By default, if you click a bar the EOB details displays. If you right click a bar you get a choice of which details display.

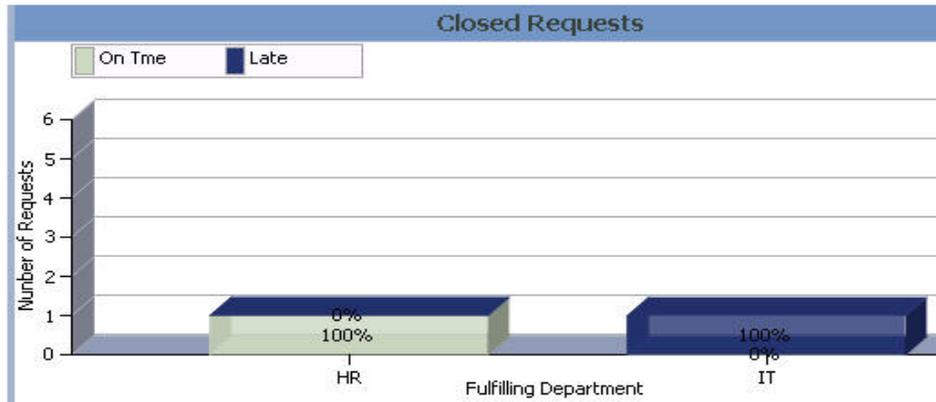


**Provisioning Analysis Dashboard**

The Provisioning Analysis dashboard includes four views pertaining to request status by fulfilling department on the Provisioning Analysis by Fulfilling Department tab, and one view on the Summarized Requests tab. The following provides an explanation and sample image of each view.

Closed Requests

The Closed Requests view is a 3D bar chart summarizing the closed requests by fulfilling department and status. The X-axis displays the late and on time closed requests, stacked top to bottom, by the fulfilling department. The percentage of opened requests for each status is displayed as a label in the center of each bar. The Y-axis displays the number of opened request from 0 to infinity.

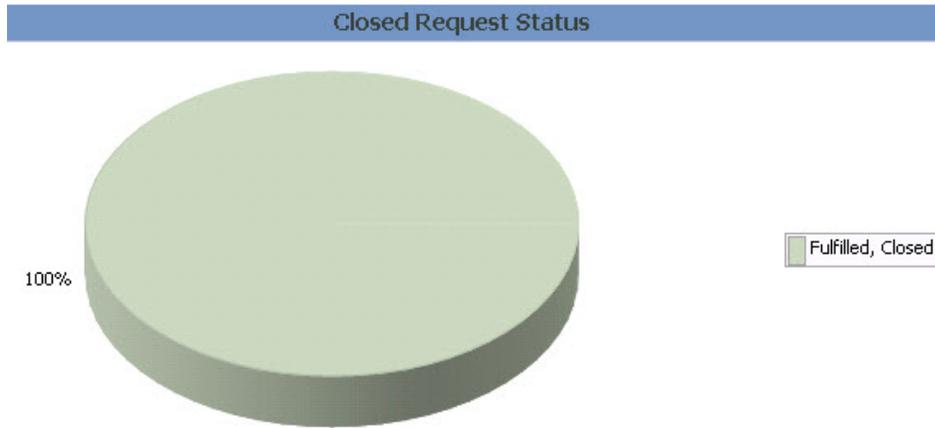


Closed Request Status

The Closed Request Status is a 3D pie chart summarizing the ISR closed fulfillment statuses. The statuses are:

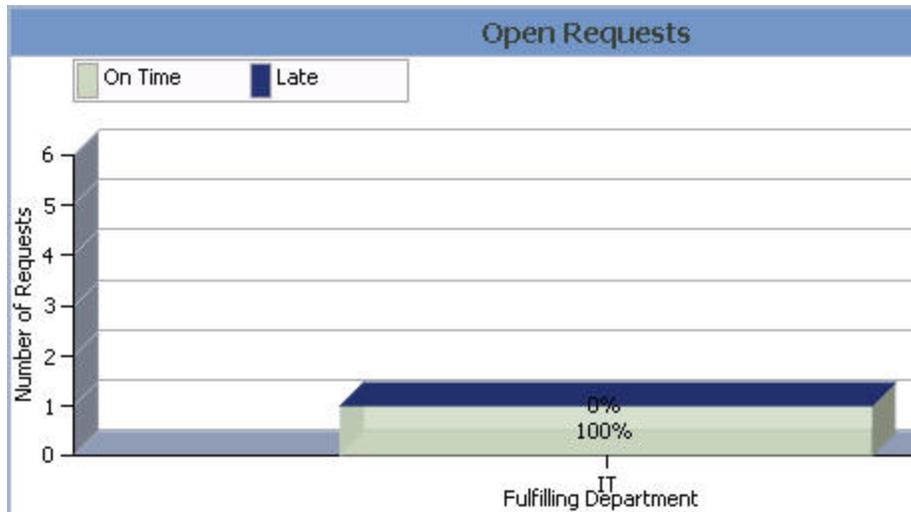
- Fulfilled, Closed
- Unable to Fulfill, Facilities Issue, Closed
- Unable to Fulfill, Vendor Issue, Closed
- Unable to Fulfill, Policy Issue, Closed

Each status is represented by a slice, and each slice displays the percentage of that slice in relation to the whole pie.



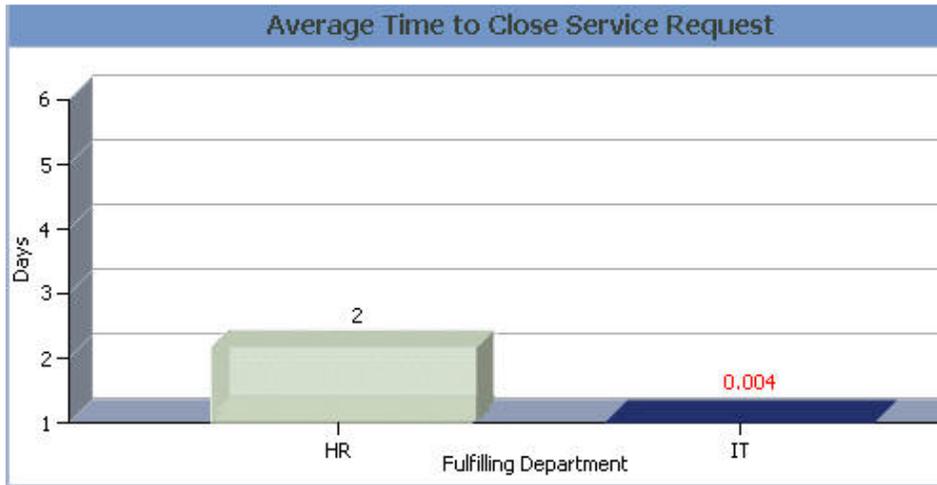
### Open Requests

The Open Requests view is a 3D bar chart summarizing the opened requests by fulfilling department and status. The X-axis displays the late and on time opened requests, stacked top to bottom, by the fulfilling department. The percentage of closed requests for each status is displayed as a label in the center of each bar. The Y-axis displays the number of closed request from 0 to infinity.



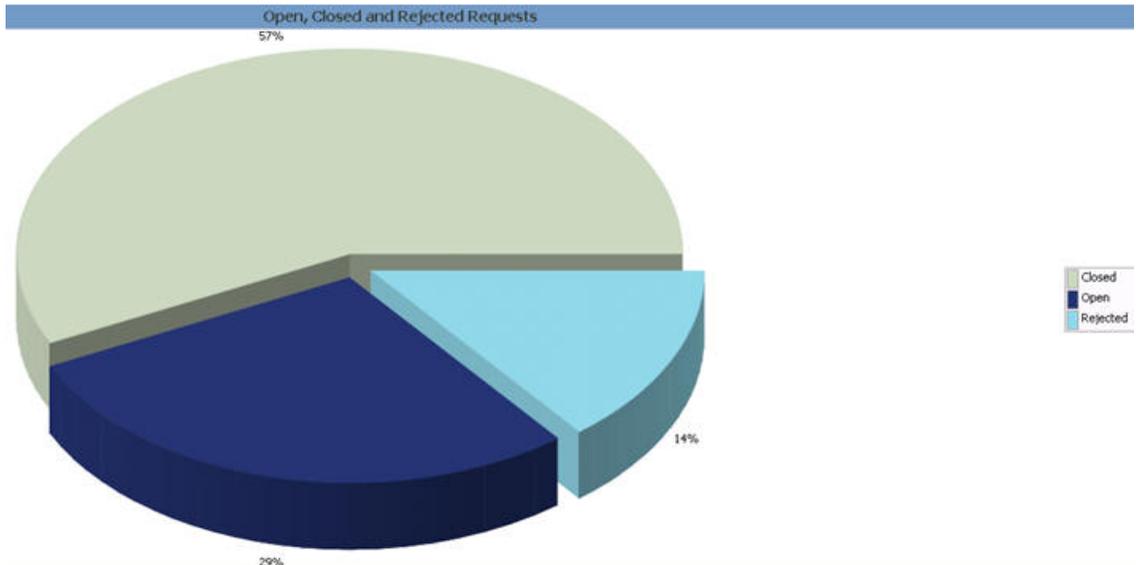
### Average Time to Close Service Request

The Average Time to Close Service Request view is a 3D bar chart summarizing the average time it takes to close a service request by fulfilling department. The X-axis displays the fulfilling departments, with the number of average days to close, listed on the top of the bar. The Y-axis displays the average response time in days from 0 to infinity.



**Open, Closed, and Rejected Requests**

The Open, Closed, and Rejected Requests view is a 3D pie chart summarizing the statuses of requests. The statuses are: Open, Closed, and Rejected. Each status is represented by a slice, and each slice displays the percentage of that slice in relation to the whole pie.



## Delivered Documentation

This section provides a complete list of the delivered documentation for Oracle Employee Onboarding (EOB).

The delivered documents are:

**Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators** - This content provides instructions for installing any Oracle Process Accelerator.

**Oracle Fusion Middleware Extensibility Guide for Oracle Process Accelerators** - This content provides information about customizing and extending Oracle Process Accelerators.

**Oracle Process Accelerators Known Issues** - This content provides information about the known issues with any Oracle Process Accelerator.

**Oracle Fusion Middleware User's Guide for Oracle Employee Onboarding Process Accelerator** - This content provides information on how to use and modify Oracle Employee Onboarding Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productivity Kit (UPK)
- demoUPK source content

**Process Accelerator Help System** - The Help system is available when you launch the  or the **User Productivity Kit** link from the process accelerator Help menu.

**UPK Demo** - You can use the User Productivity Kit (UPK) demo for training or presentation purposes while installing the process accelerator. To utilize the UPK demo, unzip the **PAacronymUPKDemo.zip** file and distribute the PlayerPackage directory and its contents to those who need training; or place the PlayerPackage directory and its contents on a web server and provide the URL to its location. The **play.exe** file launches the UPK Player.

**UPK Source Content** - If you have a licensed version of Oracle User Productivity Kit you can modify the UPK content using the **UPKSource.zip** file. Use the following steps to deploy your modified UPK content as the Help for the Process Accelerator.

1. Unzip **UPKSource.zip**.
2. In UPK Developer, import the **PAacronymUPKSourceContent.odarc** file you want to modify.
3. Modify and publish your updated content to the Player.
4. Rename the **PlayerPackage** directory to **PAacronymUPK**.
5. Convert the **PAacronymUPK** directory and its contents into a web application archive (war) file called **PAacronymUPK.war**.
6. On your Oracle WebLogic Server, navigate to **\$PA\_HOME/pa/src/PAacronym/UPKObjects**, rename **PAacronymUPK.war** to **PAacronymUPK.warORIG**.
7. Copy your new **PAacronymUPK.war** to **\$PA\_HOME/pa/src/PAacronym/UPKObjects**.
8. Navigate to **\$MW\_HOME/user\_projects/domains/soainfra/servers/AdminServer/upload/PAacronymUPK/app**, rename **PAacronymUPK.war** to **PAacronymUPK.warORIG**.
9. Copy your new **PAacronymUPK.war** to **\$MW\_HOME/user\_projects/domains/soainfra/servers/AdminServer/upload/PAacronymUPK/app**.

10. In Oracle WebLogic Server Administration Console, navigate to the **Domain Structure** navigation tree, click **Deployments**.
11. On the **Summary of Deployments** page, select the **PAacronymUPK** check box, and click **Update**.
12. On the **Update Application Assistant** page, change the **Source Path** to the location you extracted the **PAacronymUPK.war** file to.
13. Click **Next, Next**, then **Finish**.
14. Launch the Process Accelerator Help to view the updated documentation.