

Harmoniously implementing HRMS on top of existing Fin, CRM, SCM modules

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About Infosys Technologies Limited and the author

Infosys Technologies Ltd. (NASDAQ: INFY) provides consulting and IT services to clients globally - as partners to conceptualize and realize technology driven business transformation initiatives.

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Introduction

Complete HR module is neither mandatory nor a prerequisite to implement Financials, Supply Chain, CRM or Logistics modules. Hence majority of Oracle Application implementations around the globe don't have full HR implemented as the priority was given to other functional areas. However due to increased focus on 'Workforce Excellence' in last couple of years the Complete HR implementations are on the rise.

There is a big difference between implementing Complete HR and implementing any other non-HR module on top of other existing modules. This is because implementing Complete HR potentially might require many changes to the Core HR setup compared to adding/implementing non-HR module. The moment you modify Core HR setup there may be impact on other existing modules and business processes. Due to this fact it is imperative to do full analysis and investigation of impact areas before planning Complete HR implementation in the above mentioned scenario.

I am going to discuss few points that were compiled based on various HRMS implementation experiences. Audience who are embarking on HRMS implementation on top of non-HR modules would be able to take away the learning we have had as well as our recommendations for dos & don'ts. Also audience embarking on non-HR module implementation but have HRMS on the future wish list might find these points useful to keep in mind while making few key setup decisions in Core HR.

Oracle HR and its integration with other Oracle modules

As you might know even without full HR module you still would be able to define employees and use other basic HR functionalities because Core HR is installed as a part of initial installation. This can be looked at as an advantage however this can become a disadvantage if the initial HR setup in Core HR is not done carefully especially without keeping in mind the true HR needs. More often it is observed that Core HR setup is molded to cater to the other module's functionality and requirements at the time of the setup. Such short term approach has a potential to create hurdles while trying to extend Core HR to full HRMS functionality e.g. if positions are purely defined to setup Purchase Order approval hierarchy then it may not be useful in HR context.

Though below list is not exhaustive it lists some of the highly impacted modules and the functionalities:

Oracle Purchasing (PO)

Below listed HR setup/data is shared by PO:

- Locations (global and local)
- Employees (buyers, approvers and receivers)
- Position definition
- Position hierarchy
- Supervisor hierarchy
- Assignments

Key decisions that will impact PO are:

- Choosing between supervisor hierarchy and position hierarchy
- Designing Job and Position KFF
- In case of conflict of interest in using Position hierarchy a due diligence have to be made for resolution of the same – either through multiple hierarchy or through position redefinition.
- In case of multiple position hierarchies which will be primary and necessary modifications to related workflow
- Designing approval groups
- PO approval hierarchy uses a position associated with employee's primary assignment. In case you decide to use multiple assignments this factor needs to be considered
- Employee assignments to specific positions (to be in sync with HR requirements/ definitions)

Project Accounting (PA)

Below listed HR setup/data is shared by Projects:

- Employees (who are Project resources)
- Contingent workers
- Organization definition and Organization hierarchy
- Location
- Jobs and Job groups
- Competencies
- Business group definition (Projects uses only below listed information from BG definition):
- Short name
- Employee Number Generation
- Job Flexfield Structure
- Project Burdening Organization Hierarchy (Oracle Projects defaults the Project Burdening Organization Hierarchy to each burden schedule you define. The Organization Hierarchy/Version is used to determine the default burden multiplier when compiling a burden schedule)

Key decisions that will impact Projects are:

- Designing Job and Position KFF
- Designing Job groups (Additional job groups could be accessed and used in Projects)
- Competency design with respect to Job definition
- Project role competencies could be imported from Job definition
- The Alias field in Job competency definition can be used by Project users to enter a name or code to identify the competence in a different way
- Competency grouping and suitability matching
- Contingent workers also can appear in the matches
- In case of multiple position hierarchies a decision needs to be taken on primary hierarchy and necessary modifications to related workflow

Field Service (FS)

Below listed HR setup/data is shared by FS:

- Locations (global and local)
- Jobs
- Employees can be imported into field services as resources

Key decisions that will impact Field Service are:

- Designing Job
- Job or Organization definition might help in automatic import of employees as resources in Field Services
- Employee and assignment data synchronization requirements

Overall/General

- Key decision surrounding usage of person types in the company

- Apps Security setup (keep Oracle single sign-on in mind)
- Below points needs to be considered for employee conversion tasks
 - Employee numbering decision
 - Address style
 - Additional Assignment level details e.g. default expense account, etc.
 - FTE counts
 - Interfacing with other systems
 - dummy employee clean up (keep TCA in mind)

Note: Refer 'Appendix A' for module integration matrix.

Get ready for few rework tasks

Some of the below mentioned rework areas pertaining to Oracle shared data model are very common when one decides to implement HRMS suite on top of existing Oracle Financials.

Organizations: You may not be able to extend existing Project or PO specific Organization naming convention to HR organizations. Hence some kind of reconciliation would be required to have uniform Organization naming convention.

Locations: More locations would be required and appropriate locations needs to be assigned for employee's work place to use some of the built in HR functionality.

Organization Hierarchy: In case an Organization hierarchy is being used then it might be dedicated to Projects. As there could be only one primary hierarchy a decision needs to be taken in case multiple organization hierarchies are created.

Jobs: Re-design of Job title to suit HR department's requirements.

Positions: Re-design of Positions to suit HR department's requirements. PO approval hierarchy requirement will play a role in it.

Position Hierarchy: As you can have multiple position hierarchies the exiting position hierarchy typically used for PO approvals may not be an issue. But if you change the position design you will have to modify existing Position Hierarchy with new values.

Employees: You might need more person types to take care of non-employees like contractors and suppliers. Typically many fields which can be part of employee definition are not used appropriately. These fields need to be populated to use advanced HR functionalities.

Lessons Learned

iTime Card setup related to Oracle Projects:

If you split a single HR organizations into many HR organizations remember to add 'Project Expenditure/Event' classification to these organizations if employees associated with these organizations have to submit project time cards (see below screen shot). Also unless you add these organizations to Project Organization Hierarchy you might get 'Project Expenditure Organization Not Active' error.

The screenshot shows the Oracle Applications - DVL P Organization form. The form is titled "Organization" and has a menu bar with File, Edit, View, Folder, Tools, Window, and Help. The main form area contains the following fields and sections:

- Name:** Test
- Type:** Department
- Dates:** From 01-JAN-1950, To (empty)
- Location:** (empty)
- Internal or External:** Internal
- Location Address:** (empty)
- Internal Address:** (empty) [05]
- Organization Classifications:**
 - Name: HR Organization, Enabled:
 - Name: Project Expenditure/Event Organization, Enabled:
 - Name: (empty), Enabled:
 - Others button

Record: 1/?

Contingent Worker (CWK) functionality - Careful consideration needs to be given to the limitations and Oracle's future direction around CWK.

As of 11i9 HR_PF G below are the few issues we had to deal with:

- CWK who need to work with Projects module and on related functionality need a dummy Job assignment if they don't have a real one
- CWK can't be assigned to a project as a project administrator
- CWK can't be a buyer or use purchasing module
- CWK can't raise a requisition using iProc

Generic issues:

- Most of the conversion data issues were with respect to explosion and change to various values/common terms used across the systems. Some sort of automation would be a good time saver to cross verify any such data files, if excel macro could be useful.

- Late in the game we discovered bug with respect to termination functionality for CWKs. Luckily it wasn't an issue for go-live.
- Some of the drop down list boxes (LOVs) in Self Service screen doesn't show more than 100 entries/values. The workaround is type a search or entire value before opening the LOV.
- In spite of detailed testing around conversion of existing CWKs who were to be converted to employees by terminating the old records there was a last minute change around this topic. The fear of losing history due to termination of CWKs and their in process or recently closed transactions in iProc it was decided not to terminate CWKs. Hence the person record clean up couldn't happen as planned.

Conclusion

If you are planning to implement complete HR on top of other existing non-HR modules make sure you do a thorough impact analysis using above mentioned points and referring to more recent Oracle documentation on the problems published. Take appropriate actions with respect to impacted areas before you embark on the project. This step has a potential to save few ad-hoc costs and might help you to keep the project on track.

Appendix A

Below table is a view of the integration between various non-HRMS Oracle Application modules and Oracle HRMS suite.

	Assets	GL	Inventory	Payables	Projects	Purchasing	Time keeping
Locations	X		X	X	X	X	X
Organizations	X		X	X	X	X	X
Organization hierarchy			X	X	X	X	
Business group	X	X	X	X	X	X	X
Jobs			X	X	X	X	X
Positions			X	X	X	X	
Position Hierarchy				X	X	X	
Assignments			X	X	X	X	X
Employees	X		X	X	X	X	X
Cost Allocation		X	X				X