

Oracle® Fusion Applications Workforce Development Implementation Guide

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Oracle® Fusion Applications Workforce Development Implementation Guide

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.



You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

Note

The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

Guide	Intended Audience	Purpose
Common User Guide	All users	Explains tasks performed by most users.
Common Implementation Guide	Implementors	Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.
Information Technology Management, Implement Applications Guide	Implementors	Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.
Technical Guides	System administrators, application developers, and technical members of implementation teams	Explain how to install, patch, administer, and customize Oracle Fusion Applications.

For guides that are not available from the Guides menu, go to Oracle Technology Network at <http://www.oracle.com/technetwork/indexes/documentation>.

Other Information Sources

My Oracle Support

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

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production,

and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications at <http://fusionappsoer.oracle.com> for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

Overview

Workforce Development Offering: Overview

Using the workforce development business process area, your enterprise can evaluate and develop its workforce based on organizational goals and critical skill gaps. As part of the process, you can set up goal management to assign to workers goals that support the organization business objectives, and that the workers can track and update throughout the review cycle. Use performance management to create performance documents to rate workers, track the evaluation process, analyze ratings of workers, and compare their potential. Set up talent reviews to compare worker performance with others and calibrate performance and potential ratings.

Before you begin, use the Getting Started page in the Setup and Maintenance work area to access reports for each offering, including full lists of setup tasks, descriptions of the options and features you can select when you configure the offering, and lists of business objects and enterprise applications associated with the offering.

The first implementation step is to configure the offerings in the Setup and Maintenance work area by selecting the offerings and options that you want to make available to implement. For the Workforce Development offering, you can select the following options:

- Worker Goal Setting
- Worker Performance
- Talent Review

Next, create one or more implementation projects for the offerings and options that you want to implement first, which generates task lists for each project. The application implementation manager can customize the task list and assign and track each task.

If you select all of the options, the generated task list for this offering contains the following groups of tasks:

- Define Common Applications Configuration for Human Capital Management
- Define Common HCM Configuration
- Define Worker Goal Setting
- Define Worker Performance
- Define Talent Review
- Define Transactional Business Intelligence Configuration
- Define Extensions for Workforce Development

Define Common Applications Configuration

Use this task list to manage definitions used across offerings, typically applying to multiple products and product families. These definitions include enterprise structures, workforce profiles, security, and approval rules, amongst others. In particular, you may want to implement workforce profiles, from the Define Common Applications Configuration task list, because workforce profiles integrate with worker performance, goal setting and reviewing talent.

You can find other information in support of common implementation in the Oracle Fusion Applications Concepts Guide.

Define Common HCM Configuration

Use this task list to set up objects that apply to multiple products within the HCM product family. These definitions include workforce records, extracts, and business processes and events.

Define Worker Goal Setting

Use this task list to manage performance and development goal plans, assign goals to workers using a mass process, administer worker goals, and manage the goal library. Set profile options to specify the Goal Management features that your organization will use.

Define Worker Performance

Use this task list to configure elements used to create performance document templates from which performance documents are created to rate workers.

Define Talent Review

Use this task list to create and manage templates used to create talent review meetings.

Define Transactional Business Intelligence Configuration

Use this task list to configure Oracle Transactional Business Intelligence for ad hoc reporting, including managing the repository, connections, presentation catalog, and currency type display.

Define Extensions for Workforce Development

Use this task list to customize and extend applications using various tools. For more information, see the Oracle Fusion Applications Extensibility Guide.

Common Implementation: Overview

Common implementation involves accessing tasks that are available in multiple offerings, or that apply to multiple products and product families. The Define Common Applications Configuration task list and other activities include these common setup and implementation tasks.

You can find other information in support of common implementation in the Oracle Fusion Applications Concepts Guide.

In addition, you can customize and extend applications using various tools. For more information, see the Oracle Fusion Applications Extensibility Guide.

Define Common Applications Configuration Task List

Use the Define Common Applications Configuration task list to set up and administer an implementation of behaviors across offerings.

Most Oracle Fusion Applications offerings include the Define Common Applications Configuration task list for implementing what is common in multiple or all Oracle Fusion applications. The task lists and tasks within Define Common Applications Configuration can be present in all offerings, some, or just a single offering.

Common implementation includes such tasks as setting up security, defining enterprise structures, configuring Oracle Fusion Applications Help, and setting options. Many of the common implementation tasks involve configuring reference objects provided by Oracle Fusion Middleware Extensions for Applications (Applications Core), such as messages, flexfields, document sequences, and profile options. Some common implementation tasks involve configuring features provided by Oracle Application Toolkit (ATK), such as the Watchlist. Other common implementation tasks involve Oracle Fusion Applications products such as the Assign Balancing Segment Values to Ledger task in Oracle Fusion General Ledger.

Other Common Setup and Maintenance Tasks

Other setup and maintenance tasks exist in multiple offerings but not in the Define Common Applications Configuration task list. Use these other task lists to define an Oracle Fusion Transactional Business Intelligence configuration, and to define extensions such as custom Oracle Enterprise Scheduler jobs.

You can access common implementation tasks and task lists by starting in the Setup and Maintenance Overview page and searching for task lists by name. Setup and Maintenance is available from the Administration menu to users provisioned with appropriate roles. The Administration menu provides access to other tasks, such as for customization.

Getting Started with an Implementation: Overview

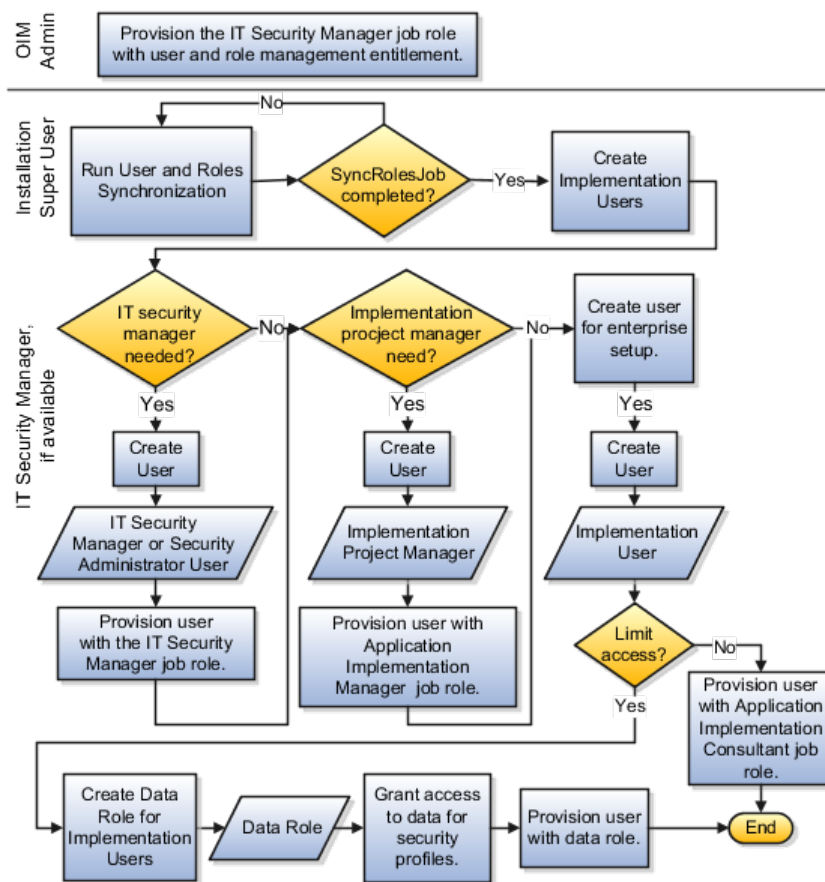
To start an Oracle Fusion Applications implementation, you must setup one or more initial users using the super user that was created during installation and provisioning of the Oracle Fusion Applications environment. Because Oracle Fusion Applications is secure as delivered, the process of enabling the necessary setup access for initial users requires several specialized steps when getting started with an implementation.

The following high level steps are required for starting an implementation.

1. As the Oracle Identity Management Administration user, provision the IT Security Manager job role with roles for user and role management.
This step enables the super user account, which is provisioned with the IT Security Manager job role, to create implementation users.
2. As the Oracle Fusion Applications installation super user, perform the following tasks once you have selected an offering to implement and generated the setup tasks needed to implement the offering.
 - a. Synchronize users and roles in the Lightweight Directory Access Protocol (LDAP) store with HCM user management by using the Run User and Roles Synchronization Process task.
 - b. Create an IT security manager user by using the Create Implementation Users task.
 - c. Provision the IT security manager with the IT Security Manager role by using the Provision Roles to Implementation Users task.
3. As the newly created IT security manager user, sign in to Oracle Fusion Applications and set up at least one implementation user for setting up enterprise structures.
 - a. Create an implementation user by using the Create Implementation Users task.

- b. Provision the implementation user with the Application Implementation Manager job role or the Application Implementation Consultant job role by using the Provision Roles to Implementation Users task. The Application Implementation Consultant job role inherits from all product-specific application administrators and entitles the necessary View All access to all secured object.
- c. Optionally, create a data role for an implementation user who needs only the limited access of a product-specific Application Administrator by using the Create Data Role for Implementation Users. Then assign the resulting data role to the implementation user by using the Provision Roles to Implementation Users task.

The figure shows the task flow from provisioning the IT Security Manager job role with the user and role management entitlement to creating and provisioning implementation users for enterprise setup.



Manage Application Implementation

Manage Application Implementation: Overview

The Manage Applications Implementation business process enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Fusion applications through self-service administration.

The Setup and Maintenance work area offers you the following benefits:

- Prepackaged lists of implementation tasks

Task lists can be easily configured and extended to better fit with business requirements. Auto-generated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Fusion applications.

- Rapid start

Specific implementations can become templates to facilitate reuse and rapid-start of consistent Oracle Fusion applications setup across many instances.

- Comprehensive reporting

A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Fusion applications.

With Oracle Fusion Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Fusion applications to match your business needs.
- Get complete visibility to setup requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Fusion applications through a standard and consistent process.

There are several documentation resources available for learning how to configure Oracle Fusion Applications.

- Functional Setup Manager Developer's Guide
- Common Implementation Guide
- Customer Data Management Implementation Guide
- Enterprise Contracts Implementation Guide
- Marketing Implementation Guide
- Sales Implementation Guide
- Fusion Accounting Hub Implementation Guide
- Financials Implementation Guide

- Compensation Management Implementation Guide
- Workforce Deployment Implementation Guide
- Workforce Development Implementation Guide
- Incentive Compensation Implementation Guide
- Procurement Implementation Guide
- P6 EPPM Administrator's Guide for an Oracle Database
- P6 EPPM Administrator's Guide for Microsoft SQL Server Database

Implementation Projects: Explained

An implementation project is the list of setup tasks you need to complete to implement selected offerings and options. You create a project by selecting the offerings and options you want to implement together. You manage the project as a unit throughout the implementation lifecycle. You can assign these tasks to users and track their completion using the included project management tools.

Maintaining Setup Data

You can also create an implementation project to maintain the setup of specific business processes and activities. In this case, you select specific setup task lists and tasks

Exporting and Importing

Implementation projects are also the foundation for setup export and import. You use them to identify which business objects, and consequently setup data, you will export or import and in which order.

Selecting Offerings

When creating an implementation project you see the list of offerings and options that are configured for implementation. Implementation managers specify which of those offerings and options to include in an implementation project. There are no hard and fast rules for how many offerings you should include in one implementation project. The implementation manager should decide based on how they plan to manage their implementations. For example, if you will implement and deploy different offerings at different times, then having separate implementation projects will make it easier to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list will be. This is because the implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage.

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit.

They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering may have one or more options or feature choices.

Implementation Task Lists

The configuration of the offerings will determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, options and features will be included in the task list, giving you a targeted, clutter-free task list necessary to meet your implementation requirements.

Enabling Offerings

Offerings and their options are presented in an expandable and collapsible hierarchy to facilitate progressive decision making when specifying whether or not an enterprise plans to implement them. An offering or its options can either be selected or not be selected for implementation. Implementation managers decide which offerings to enable.

Provisioning Offerings

The Provisioned column on the Configure Offerings page shows whether or not an offering is provisioned. While you are not prevented from configuring offerings that have not been provisioned, ultimately the users are not able to perform the tasks needed to enter setup data for those offerings until appropriate enterprise applications (Java EE applications) are provisioned and their location (end point URLs) is registered.

Options: Explained

Each offering in general includes a set of standard functionality and a set of optional modules, which are called options. For example, in addition to standard Opportunity Management, the Sales offering includes optional functionality such as Sales Catalog, Sales Forecasting, Sales Prediction Engine, and Outlook Integration. These optional functions may not be relevant to all application implementations. Because these are subprocesses within an offering, you do not always implement options that are not core to the standard transactions of the offering.

Feature Choices: Explained

Offerings include optional or alternative business rules or processes called feature choices. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and options have dependent features then those features are applicable when you implement the corresponding offering or option. In general, the features are set with a default configuration based on their typical usage in most implementations. However, you should always review the available feature choices for their selected offerings and options and configure them as appropriate for the implementation.

You can configure feature choices in three different ways:

Yes or No

If a feature can either be applicable or not be applicable to an implementation, a single checkbox is presented for selection. Check or uncheck to specify yes or no respectively.

Single Select

If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select

If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a checkbox. Select all that apply by checking the appropriate choices.

Common Applications Configuration: Define Synchronization of Users and Roles from LDAP

User and Role Synchronization: Explained

Oracle Identity Management (OIM) maintains Lightweight Directory Access Protocol (LDAP) user accounts for users of Oracle Fusion applications. OIM also stores the definitions of abstract, job, and data roles and holds information about roles provisioned to users. During implementation, any existing information about users, roles, and roles provisioned to users must be copied from the LDAP directory to the Oracle Fusion Applications tables. Once the Oracle Fusion Applications tables are initialized with this information, it is maintained automatically. To perform the initialization, you run the process Retrieve Latest LDAP Changes.

Note

For security and audit best practice, implementation users have person records and appropriate role-based security access. So that appropriate roles can be assigned to implementation users, you must run the process Retrieve Latest LDAP Changes before you create implementation users.

During initial implementation, the installation super user performs the task Run User and Role Synchronization Process to run the Retrieve Latest LDAP Changes process.

Tip

The user name and password of the installation super user are created during installation provisioning of Oracle Fusion Applications. For details of the user name and password, contact your system administrator or the person who installed Oracle Fusion Applications.

Common Applications Configuration: Define Implementation Users

Initial Security Administration: Critical Choices

After installation and provisioning, and before setting up enterprise structures and implementing projects, you must establish required entitlement for the super user account and at least one implementation user to proceed with the implementation. Once initial enterprise structure setup is complete, additional users may be created through processes available in Human Capital Management (HCM).

Initial security administration consists of the following.

- Preparing the IT Security Manager job role
- Synchronizing users and roles from Lightweight Directory Access Protocol (LDAP) with HCM
- Creating implementation users
- Optionally creating data roles for implementation users
- Provisioning implementation users with roles

Once the first implementation project begins and the enterprise work structure is set up, use standard user and security management processes such as the Manage Users task to create and manage additional users. Do not use the Create Implementation Users task after your enterprise has been set up.

Preparing the IT Security Manager Job Role

Initially the super user is not provisioned to manage users and roles.

You must add the following Oracle Identity Management (OIM) roles to the IT Security Manager job role's role hierarchy to enable the super user to create one or more initial implementation users.

- Identity User Administrators
- Role Administrators

Additionally, you must assign the Xellerate Users organization to the IT Security Manager role.

Synchronizing Users and Roles from LDAP

After configuring an offering and setting up the task lists for implementation, the Run User and Roles Synchronization Process task is available to the super user for synchronizing users and roles in the LDAP store with Oracle Fusion Human Capital Management (HCM).

Defining Initial Implementation Users

The super user is provisioned with roles that provide broad access to Oracle Fusion Middleware and Oracle Fusion Applications administration, and is not suitable as an implementation user in most enterprises. The super user should define at least one implementation user, which consists of creating the user account and provisioning it with at least the Application Implementation Consultant and Application Implementation Manager job roles.

As a security guideline, define an IT security manager user who in turn defines one or more implementation users to set up enterprise structures. The IT security manager users can provision the implementation user with the Application Implementation Consultant role, which entitles access to all enterprise structures. Or the IT security manager can create a data role that restricts access to enterprise structures of a specific product and provisioning that role.

Depending on the size of your implementation team, you may only need a single implementation user for security administration, implementation project management, enterprise structures setup, and application implementation. That single user must then be provisioned with all indicated roles, and therefore broad access.

Creating Implementation Users

The super user creates one or more implementation users by performing the Create Implementation Users task.

Note

This initial implementation user is a user account created in Oracle Identity Management only, specifically for setting up enterprise structures, and is not related to a real person or identity such as a user defined in HCM.

Creating Data Roles for Implementation Users

As an alternative to provisioning an implementation user with the Application Implementation Consultant role to access all enterprise structures, you may need implementation users with access restricted to enterprise structures for specific products. In this case, use the Create Data Roles for Implementation Users task to create a data role based on a job role with less broad access, such as the HCM Application Administrator job role.

Provisioning Roles to Implementation Users

After creating an implementation user, you must provision the user with one or more roles by performing the Provision Roles to Implementation Users task.

For example, assign a role to the implementation user that provides the access necessary for setting up the enterprise. Depending on need, provision to the implementation user the predefined Applications Implementation Consultant role or a product family-specific administrator data role, such as a data role based on the predefined Financials Applications Administrator.

Caution

The Application Implementation Consultant has broad access. It is a very useful role for experimentation or setting up a pilot environment, but may not be suitable for implementation users in a full implementation project.

Initial Security Administration: Worked Example

This example illustrates initial security administration after having installed and provisioned an Oracle Fusion Applications environment.

In Oracle Fusion Applications, you manage users and security through Oracle Fusion Human Capital Management (HCM) user management flows, which are included in each of the offering task lists. However, the HCM task flows require that enterprise structures have been set up, and yet to add users who can set up enterprise structures you need to have set up HCM. Therefore, you need to create one or more initial implementation users who are responsible for providing the following.

- Users and their applications security management
- Implementation project management
- Initial enterprise structures management

The following table summarizes key decisions for this scenario.

Decision	In this Example
How to sign in to Oracle Fusion Applications for the first time	Use the super user account that was created when installing and provisioning Oracle Fusion Applications (for example, FAADMIN).
How to ensure that the roles and users in the Lightweight Directory Access Protocol (LDAP) store match what is available for selection when defining implementation users	Perform the Run User and Roles Synchronization Process task.
How to create a first implementation user	Prepare the IT Security Manager job role for user and role management so the super user and any other user provisioned with the IT Security Manager job role can manage users and roles.
How to establish security administration users	Define an IT security manager user provisioned with the IT Security Manager job role.
How to establish an implementation user with access to set up enterprise structures	Define an implementation user provisioned with the Application Implementation Consultant job role.

You create an initial implementation user by performing the following tasks.

1. The Oracle Identity Management System Administrator user provisions the IT Security Manager job role with roles for user and role management.

2. The Oracle Fusion Applications super user synchronizes LDAP users with HCM user management so that users can be provisioned with roles through HCM.
3. The Oracle Fusion Applications super user performs the Create Implementation Users task to create one or more IT security manager and administrator users provisioned with security administrative entitlement.
4. The IT Security Manager user signs in to Oracle Fusion Applications and performs the Create Implementation Users task to create implementation managers and users.
5. The IT Security Manager user provisions implementation users for enterprise structure setup.

Note

The following tasks assume that the super user has configured an offering and set up task lists. When not following a task flow within an activity, you can find tasks in **Navigator > Tools > Setup and Maintenance > All Tasks**. Search for the task and click its **Go to Task** icon in the search results.

Preparing the IT Security Manager Role

The super user that was created when installing and provisioning Oracle Fusion Applications (for example, FAADMIN) has all necessary access for implementing Oracle Fusion Applications and administering security. This access is provided by the following roles:

- Application Implementation Consultant
- IT Security Manager

Neither of these roles provides access needed for creating and managing Oracle Fusion Applications users. Therefore, you must add the following two OIM roles to the IT Security Manager role:

- Identity User Administrators
- Role Administrators

The following procedure is prerequisite to an IT security manager or administrator creating an initial one or more implementation users.

1. While signed into Oracle Identity Manager as the OIM System Administrator user, click the **Administration** link in the upper right of the Oracle Identity Manager.

This accesses the Welcome to Identity Manager Delegated Administration menu.

2. In the Roles list of tasks, click **Advanced Search - Roles**. Search for the Identity Users Administrators role by entering the role name in **Display Name** and clicking **Search**.

In the Search Results, click the role's Display Name.

3. On the Hierarchy tab, select **Inherits From** and click **Add**.

4. In the Add Parent Role to: IDENTITY USER ADMINISTRATORS window, select the role category: Common - Job Roles and add the IT Security Manager.

Click the arrow icon to show the list of available roles. Select IT Security Manager and move it to the **Roles to Add** list. Click **Save**.

5. Search for the Role Administrators role, and repeat steps 1 to 4 to add that role to the IT Security Manager role's role inheritance.
6. Assign the IT Security Manager role to the Xellerate Users organization.
 - a. In the Welcome to Identity Manager Delegated Administration menu (see step 1, above), in the Organizations list of tasks, click **Advanced Search - Organizations**.
 - b. Search for the Xellerate Users organization by entering Xellerate Users in **Display Name** and clicking **Search**.
 - c. In the Search Results, click the organization's Display Name. The Xellerate Users page appears.
 - d. Click the **Administrative Roles** link in the row of links above the Xellerate Users.
 - e. In **Filter By Role Name** of the Details window, enter the following string:

`*IT_SECURITY_MANAGER*`

Click **Find**.
 - f. Enable Read, Write, Delete, and Assign.
 - g. Click **Assign**.
 - h. Click **Confirm**.

Synchronizing Users and Roles from LDAP

Lightweight Directory Access Protocol (LDAP) must be synchronized with HCM user management so that users can be provisioned with roles through HCM.

1. Sign in to Oracle Fusion Applications using the super user's user name (for example FAADMIN) and password.

If you do not know the super user name and password, check with your system administrator or the person who installed Oracle Fusion Applications. For more information about account creation in Oracle Fusion Applications provisioning, see the Oracle Fusion Applications Installation Guide.

2. Perform the Run User and Roles Synchronization Process task by clicking **Submit** in the Process Details page.

The SyncRolesJob process takes some time to complete the first time it is run.

3. Monitor completion of the SyncRolesJob process from **Navigator > Tools > Scheduled Processes** before continuing with creating implementation users.

Defining an IT Security Manager User

The super user has broad access to Oracle Fusion Middleware and Oracle Fusion Applications administration. Due to this broad access, your enterprise needs users dedicated to managing users and applications security, such as an IT security manager user.

1. While signed in as the Oracle Fusion Applications super user, access the Create Implementation Users task and create an IT security manager.

The Oracle Identity Manager appears.

2. Click **Create User**.

For details, see the Creating Users section in the Oracle Fusion Middleware User's Guide for Oracle Identity Manager.

3. Provide the following attributes:

Attribute	Value	Example
Last name	<any valid string>	Smith
Organization	Xellerate Users	N/A
User type	Non Worker	N/A
User login	<any valid string>	IT_SECURITY_MANAGER
Login password	<any valid string>	SeKur1TyPa\$\$w0Rd

Note

In Oracle Fusion Applications, an implementation user is a user account created in OIM only, specifically for implementation tasks, and is not related to a real person or identity such as a user defined in HCM.

4. Click **Save**.
5. On the Roles tab in the IT_SECURITY_MANAGER user creation task flow, click **Assign**.
6. In the Add Role window, search for the IT Security Manager role and click **Add**.

Defining an Implementation User for Enterprise Structures Setup

1. Sign in to Oracle Fusion Applications using the IT security manager user's name and password.
2. Create and provision an implementation user using the same task flow as for creating the IT security manager user in the previous section, except provision the following roles.
 - Application Implementation Manager
 - Application Implementation Consultant

Note

For an implementation to begin, at least one user must be provisioned with the Application Implementation Manager role, and another or the same user must be provisioned with the Application Implementation Consultant role. The Application Implementation Consultant has broad access too set up all enterprise structures.

Common Applications Configuration: Define Geographies for Human Capital Management

Defining Address Cleansing: Explained

Address cleansing provides a way to validate, correct, and standardize addresses that are entered in a user interface. Geography validation only validates the geography attributes of an address, for example, State, City, and Postal codes; address cleansing validates both the geography attributes and the address line attributes.

Address cleansing can only be used through the Oracle Fusion Trading Community Data Quality product, because the feature is delivered using Data Quality integration. You need to ensure that you have a license for the countries that will use Trading Community Data Quality data cleansing.

You can specify the real time address cleansing level for each country by choosing either **None**, meaning that there is no real time address cleansing, or by choosing **Optional**, meaning that you will have the choice to cleanse addresses. Once you have enabled address cleansing for a country a **Verify Address** icon appears at address entry points in the application. You can then click the icon to perform address cleansing and receive a corrected, standardized address. If Trading Community Data Quality does not find a matching address the application will alert you.

Geography Structure, Hierarchy, and Validation: How They Fit Together

There are three components that are dependent on each other when defining a country: geography structure, geography hierarchy, and geography validation. Every country has to have the geography structure defined first before the hierarchy can be defined, and the geography hierarchy has to be defined before the validation can be defined.

Geography Structure

Firstly, you need to create a geography structure for each country to define which geography types are part of the country structure, and how the geography

types are hierarchically related within the country structure. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure. Geography structure can be defined using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

Geography Hierarchy

Once the geography structure is defined, the geographies for each geography type can be added to the hierarchy. For example, below the United States you can create a geography called California using a State geography type.

As part of managing the geography hierarchy you can view, create, edit, and delete the geographies for each geography type in the country structure. You can also add a primary and alternate name and code for each geography. A geography hierarchy can be created using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

Geography Validation

After defining the geography hierarchy, you need to specify the geography validations for the country. You can choose which address style formats you would like to use for the country, and for each selected address style format you can map geography types to address attributes. You can also select which geography types should be included in geography or tax validation, and which geography types will display in a list of values during address entry in other user interfaces. The geography validation level for the country, such as error or warning, can also be selected.

Geography Structures: Explained

A geography structure is a hierarchical grouping of geography types for a country. For example, the geography structure for the United States is the geography type of State at the top, then followed by the County, then the City, and finally the Postal Code.

You can use the geography structure to establish:

- How geographies can be related
- The types of geographies you can define for the country

How Geographies Can Be Related

You can determine how a country's geographies are hierarchically related by creating the hierarchy of the geography types in the geography structure. When you define a country's structure the country geography type is implicitly at the top of the geography structure, and the numbering of the subsequent levels start with 1 as the next geography level after country.

You must add a geography type as a level in the country structure before you can define a geography for that geography type in a country. For example, before defining the state of California, the State geography type must be added to the United States country structure. Only one geography type can be used for each level, you cannot define more than one geography type at the same level.

Note

After you first define a country structure you can only add geography types below the current lowest level, and delete geography types without defined geographies.

To simplify the creation of a country structure you can copy a structure from another country, and then amend the geography type hierarchy for the country.

The Types of Geographies You Can Define for the Country

The application provides you with a set of available master reference geography types. If required, you can create a geography type before adding it to the country structure. Each geography type is added below the current lowest level.

Note

If you want to delete a geography type that is not at the lowest level in the country structure, then you have to delete the geography type level and all the levels below it.

A geography type that you create within the country structure can be used for other country structures as well.

Geography Hierarchy: Explained

Geography hierarchy is a data model that lets you establish conceptual parent-child relationships between geographies. A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth. The application can extrapolate information based on this network of hierarchical geographical relationships.

For example, in the geography hierarchy the state of California is defined as the parent of San Mateo county, which is the parent of Redwood City, which is the parent of the postal code 94065. If you enter just 94065, the application can determine that the postal code is in California, or that the corresponding city is Redwood City.

The application leverages geography hierarchy information to facilitate business processes that rely on geography information, for example, tax calculation, order sourcing rules, sales territory definition. The geography hierarchy information is centrally located in the Trading Community Model and shared among other application offerings.

The top level of the geography hierarchy is Country, so the hierarchy essentially contains countries and their child geographies. Other aspects of the geography hierarchy include:

- Geography
- Geography type
- Geography usage
- Master reference geography hierarchy
- User defined zones

Geography

A geography is a boundary such as a country, state, province or city. It is a physical space with boundaries that is a defined instance of a geography type. For example, San Jose is a geography of the City geography type.

Geography Type

Geography types are a divisional grouping of geographies, which can be either geopolitical (for example, City, Province, and District) or user defined (for example, Continent, Country Regions, Tax Regions).

Geography Usage

Geography usage indicates how a geography type or geography is used in the application. A master reference geography always has the usage of Master Reference. User defined zones can have the usages of Tax, Shipping, or Territory, based on what is relevant for their purpose.

Master Reference Geography Hierarchy

The geography hierarchy data is considered to be the single source of truth for geographies. It is all the data, including geography types and geographies, that you define and maintain in the Trading Community Model tables.

The geography usage for the entire hierarchy is the master reference, and defined geography types and geographies are considered as master reference geography types and geographies. For example, Country is a universally recognized geography type, and United States is considered a master geography.

User Defined Zones

User defined zones are a collection of geographical data, created from master reference data for a specific purpose. For example, territory zones are collections of master reference geographies ordered in a hierarchy. Tax and shipping zones are collections of master reference geographies without a hierarchical grouping.

Geography Validation: Explained

Geography validation determines the geography mapping and validation for a country's address styles, as well as the overall geography validation control for a country.

The **No Styles Format** address style format is the default address style format for a country. By defining the mapping and validation for this format you will ensure that validations can be performed for any address in the country. After the **No Styles Format** is defined you can set up additional mapping for specific address styles.

For each address style format, you can define the following:

- Map to attribute
- Enable list of values
- Tax validation
- Geography validation

- Geography validation control

Map to Attribute

For every address style format, you can map each geography type to an address attribute. For example, you can map the **State** geography type to the **State** address attribute for the United States, or map the **State** geography type to the **County** address attribute for the United Kingdom. The geography types that appear are based on how the country structure is defined. The list of address attributes that appear are based on address formats delivered with the application, or your customer defined address formats.

Note

You only need to map geography types that you want to use for geography or tax validation purposes.

Enable List of Values

Once a geography type is mapped to an attribute, then you can specify whether the geography type will appear in a list of values during address entry in user interfaces. It is very important to review carefully if you want to enable a list of values. You should only enable a list of values if you have sufficient geography data imported or created for that geography. Once you have enabled a list of values for an address attribute, you can only select the geography data available for the geography type. This means that if a specific geography value is not available in the geography hierarchy, you cannot create an address with a different geography value.

Tax Validation

You can also specify whether a geography type will be included in tax validation. For example, for the United States North America address style format you specify that County, State, and City are used for tax validation. This will mean that when a transaction involves an address with the North America address style, the address must have the correct county, state, and city combination based on the geography hierarchy data, to be considered valid for tax calculation.

Geography Validation

You can specify whether a geography type will be included in geography validation. This will mean that, for example, when the user enters a United States address using the North America address style format, the address must have the correct country, state, and postal code combination based on geography hierarchy data to be considered geographically valid.

If an address element is mapped to a geography type, but not selected for geography validation usage, then during address entry suggested values will be provided for the address element, but the address element will not be validated.

Note

For either the tax or geography validation, do not skip more than one consecutive level unless you are certain that the selected geography types can uniquely identify geographies. For example, the United States country structure

is: State, County, City, and Postal Code, and you want to select just State and Postal Code for geography or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for geography or tax validation.

Geography Validation Control

You can select the geography validation level for a country. Validation will check if the entered address maps to the geography hierarchy data available for the country, and the geography validation control determines whether you can save an address that did not pass validation during address entry. For example, if the validation level is **Error**, then an address cannot be saved if the values do not match the geography hierarchy data.

These are the geography validation levels you can choose:

- **Error** - only completely valid addresses can be saved, with all mandatory address elements entered.
- **No Validation** - all addresses can be saved including incomplete and invalid addresses.

Regardless of the result of validation, the validation process will try to map any address attribute to a geography of the country, and store any mapping it could establish based on the available data. This is called **Geography Name Referencing** and it is executed as part of validation. The result of this referencing is used in several business processes in the application to map an address to a specific geography or zone.

Note

The Geography Dimension value in territories is derived from sell-to addresses of sales accounts. To use geography dimensions in territories, ensure that the geography elements in addresses, such as state, city, and postal code, are validated. You can do so by enabling geography validation for each country using the Manage Geographies task. While doing so, ensure that at least one level in the geography hierarchy is enabled for geography validation. It is recommended that you enable geography validation for all geography levels that you intend to use for territory definition for each country. You can enable a list of values containing specific geography elements. This will help users search and select appropriate geography values during addresses entry and eliminate all possibilities of wrong address entry. You can also set geography validation control to Error in the Manage Geography Validation page. This ensures that users can only use valid geography elements in addresses. If you have already created addresses before setting up geography validation for a country, you must execute the Run Maintain Geography Name Referencing task for that country after enabling geography validation to ensure that all your geography elements are validated.

Managing Geography Structures, Hierarchies, and Validation: Worked Example

This example shows how to start the configuration of the geography structure, hierarchy, and validation for the country geography of the United Kingdom.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Copy an existing country structure?	No, create a new country structure.
What is the structure of the geography types?	Create geography types with the following ranking structure: 1. County 2. Post Town
What is the geography hierarchy?	Create the following hierarchy: 1. Country of United Kingdom 2. County of Berkshire 3. Post Town of Reading
Which address style format will you use when mapping geography validations?	The default address style format, called the No Styles Format.
Are you using Oracle Fusion Tax for tax purposes?	No, do not select Tax Validation for the geography types.

Add the County and Post Town geography types to the geography structure. Then add the geographies for the County and Post Town geography types to define the geography hierarchy. Finally, specify the geography validations for the geography types you have added to the geography structure.

Defining the geography structure

You add the County and Post Town geography types to the United Kingdom geography structure.

1. On the Manage Geographies page, enter GB in the **Code** field. Click **Search**.
2. On the Manage Geographies page, click **Structure Defined**.
3. On the Manage Geography Structure page, click the **Create** button next to the **Copy Country Structure From** field.
4. In the Geography Structure section, select the County list item in the **Add Geography Type** field.
5. Click **Add**.
6. Select the Post Town list item in the **Add Geography Type** field.
7. Click **Add**.

Defining the geography hierarchy

You want to begin to create the geography hierarchy for the United Kingdom, so you add the geographies for the County and Post Town geography types using the geography hierarchy User Interfaces. You can also use the Manage File Import Activities task to import geography hierarchies using a csv or xml file.

1. On the Manage Geographies page, enter GB in the **Code** field. Click **Search**.

2. On the Manage Geographies page, click **Hierarchy Defined**.
3. On the Manage Geography Hierarchy page, Geography Hierarchy section, click the United Kingdom to highlight the table row.
4. Click the **Create** button.
5. In the **Create County** page, Primary and Alternate Names section, enter Berkshire in the **Name** field.
6. Click **Save and Close**.
7. On the Manage Geography Hierarchy page, Geography Hierarchy section, click Berkshire to highlight the table row.
8. Click the **Create** button.
9. In the **Create Post Town** page, Primary and Alternate Names section, enter Reading in the **Name** field.
10. Click **Save and Close**.

Defining the geography validations

Now you want to specify the geography validations for the geography types you have added to the United Kingdom. You define the geography mapping and validation for the United Kingdom default address style format. You map the geography types to attributes, enable the geography types for Lists of Values and Geography validation, and set the geography validation level.

1. On the Manage Geographies page, click **Validation Defined**.
2. On the Manage Geography Validation page, Address Style section, click **No Styles Format** to highlight the table row.
3. For the County geography type, click the **County** list item in the **Map to Attribute** field.
4. Click the **Enable List of Values** option for the County geography type.
5. Click the **Geography Validation** option for the County geography type.
6. For the Post Town geography type, click the **City** list item in the **Map to Attribute** field.
7. Click the **Geography Validation** option for the Post Town geography type.
8. In the Geography Validation Control section, click the **Error** list item in the **Geography Validation Level for Country** field.
9. Click **Save and Close**.

Importing Geographies: Explained

A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth. You can create new geographies by importing data through interface tables. There are two options for populating the interface tables: using the tool of your preference to load the data or using file-based data import. If you plan to provide the data details in a source file, use the file-based import feature. If you will populate the interface table directly, run the geography loader process

to import the data. Having a good understanding of the import entity, interface table, and destination table will help you prepare your import data.

Consider the following when importing geographies:

- File-based import option
- Geography loader process option
- Import object entity, interface table, and destination tables

File-Based Import Option

The file-based import process reads the data included in your XML or text file, populates the interface tables, and imports the data into the application destination tables. The **File-Based Data Import Setup and Maintenance** task list includes the tasks needed to configure the geography import object, create source file mappings, and schedule the import activities.

Geography Loader Process Option

Populate the interface table with your import data, then navigate to the **Run Geography Loader Setup and Maintenance** task to schedule the import of data from the interface table to the destination table.

Import Object Entity, Interface Table, and Destination Tables

The geography import object consists of one entity and interface table that forms the geography. If you are using file-based import, you can map your source file data to import entity attributes that correspond to the interface table columns. The import activity process populates the interface table based on the mapping and your source file. If using the geography loader scheduled process, populate the interface table directly using your preferred tool. If you need the unique IDs of existing application data for your import data, use the **Define Data Export Setup and Maintenance** task list to export the information.

Note

Spreadsheets containing detailed information about each interface table, including the import attributes, corresponding interface table columns, defaults, and validations, are available from the Oracle Enterprise Repository by searching on a specific interface table name or initiating a search using the **FusionApps: Interface Table** asset type.

The following lists the object entity, tables, and resulting application object:

File-Based Import Entities	Interface Tables	Destination Tables	Application Object
ImpGeography	HZ_IMP_GEOGRAPHIES	HZ_GEOGRAPHIES HZ_GEOGRAPHY_IDEN HZ_GEOGRAPHY_TYPE HZ_HIERARCHY_NODE	Geography

Importing Geographies Using File-based Data Import: Worked Example

This example demonstrates how to import data using the File-Based Data Import tool. In this particular example you have a source file containing geography data that you want to import into the application, so that the geography data can be used for uses related to locations, such as real time address validation and tax purposes.

The following table summarizes the key decisions for this scenario:

Decisions to Consider	In This Example
What type of object are you importing?	Geography
What file type are you using for your source data?	Text file
Where are you uploading your source data file from?	Your desktop
What data type is your source data file?	Comma separated
Which fields are you importing into Oracle Fusion applications?	All, except for the RecordTypeCode field
When do you want to process the import?	Immediately

Summary of the Tasks

These are the steps that are required to create an import activity and submit the import:

1. Determine what information is in the source file.
2. Create and schedule the import activity.
3. Monitor the import results.

Prerequisites when importing additional geography data after your initial import

1. You need to ensure that the combination of Source ID and Parent Source ID values are unique for each row of data within a single import. However, your source data files do not need to have the same Source ID and Parent Source ID values as your previously imported geography data. If the geography structure levels and the parents for each geography value are the same, the changed IDs will not affect the import.
2. Ensure that all of the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file needs to include US, CA, and San Jose.
3. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, your geography import will result

in two state records (CA and California) in the application data, with the US as the country parent.

Determine what information is in the source file

1. Your source geography data files should include a unique Source ID value for each row of data, and a Parent Source ID value which identifies the parent of that row of geography data. Source IDs, or Parent Source IDs, should not exceed 18 characters. An example of geography source data could be as follows:

Geography Level	Name	Source ID	Parent Source ID
1 (Country)	US	1	
2 (State)	CA	11	1
3 (County)	Alameda	111	11
4 (City)	Pleasanton	1111	111
4 (City)	Dublin	1112	111

Create and schedule the import activity

You create an import activity, enter the import details, and schedule the import. An import activity definition provides the instructions for the import processing - this includes selecting the source file, or file location; mapping fields from the source file to the Oracle Fusion object and attribute; and scheduling the import.

1. Navigate to Setup and Maintenance and search for the Manage File Import Activities task. Click **Go to Task**.
2. In the Manage Import Activities page, click the **Create** icon.
3. In the Create Import Activity: Set Up page, create an import activity for the Geography object type by completing the fields, as shown in this table:

Field	Value
Name	Master Reference Geographies
Object	Geography
File Type	Text File
File Selection	Specific file
Upload From	Desktop
File Name	Choose relevant file from desktop
Data Type	Comma separated

Note

Ensure that the file type that you select in the Create Import Activity: Set Up page matches the file type of the source data file.

4. Click **Next**.
5. On the Create Import Activity: Map Fields page, map each field from your source file to the Oracle Fusion object and attribute, as shown in this example:

Column Header	Example Value	Ignore	Object	Attribute
Primary Geography Name	Primary Geography Name	United States	Imp Geography	Primary Geography Name
Country Code	US	No	Imp Geography	Country Code
Record Type Code	0	Yes	Imp Geography	Record Type Code
Source ID	10265	No	Imp Geography	Source ID
Parent Source ID	1053	No	Imp Geography	Parent Source ID

If you do not want to import a column in the text file you can select **Ignore**.

Note

If you have any difficulties mapping the fields from your source file to the relevant Oracle Fusion applications object, you can use the import object spreadsheets for reference.

6. Click **Next**.
7. On the Create Import Activity: Create Schedule page, select Immediate in the Schedule field so that the import will start immediately.

Instead of immediately importing the data, you can choose a date and time to start the import. You can also specify if the import will be repeated, and the frequency of the repeated import.

8. Click **Next**.

Monitor the import results

You monitor the progress of the Import Activity processing, and view completion reports for both successful records and errors.

1. On the Create Import Activity: Review and Activate page, you verify your import details in the Import Details, File Details, Import Options, and Schedule sections.
2. Your import details are correct so you click **Activate** to submit the import.

Once the import activity has completed, the Status field value will change to Completed.

Importing and Exporting Territory Geography Zones: Explained

Territory geography zones are geographical boundaries that you can set up to replicate your organization's regions, such as a Pacific Northwest sales region. You can set up territory geography zones in one Oracle Fusion applications instance, and then after the territory geography zones are defined you can export the territory zones and import them into another Oracle Fusion applications instance.

To define your territory geography zones and then import your territory zones into another Oracle Fusion applications instance, you need to complete the following steps:

1. Import the master reference geography data into the Oracle Fusion application.
2. Define your territory geography zones using the Manage Territory Geographies task.
3. Export the territory geography zones.
4. Import the territory geography zones into another Oracle Fusion applications instance.

Import the master reference geography data

Firstly, you need to import the master reference geography data. Master reference geography data consists of geography elements such as country, state, and city, and is required for any geographical information you store in the application, such as address information used in customer and sales records. For more information, refer to the Geography Hierarchy: Explained topic listed in the related topics section. Master reference geography data can be imported into the application using the Manage File Import Activities task in Setup and Maintenance - refer to the Importing Master Reference Geography Data: Worked Example topic listed in the related topics section for more information.

Define your territory geography zones

Once the master reference geography data has been imported, you can then create your territory geography zones in the application using the Manage Territory Geographies task in Setup and Maintenance. For more information, refer to the Managing Territory Geographies: Worked Example topic listed in the related topics section.

Export the territory geography zones

Once you have completed importing the master reference geography data and defining your territory geography zone tasks, you can create a configuration package to export the territory zone data. For more information, refer to the Exporting Setup Data demo listed in the related topics section.

Import the territory geography zones

Once you have downloaded your configuration package for your territory geography zone setup, you can import the territory zones into another Oracle

Fusion application instance. For more information, refer to the Importing Setup Data listed in the related topics section.

Note

Ensure that you import your master reference geography data into the new Oracle Fusion instance before you import the configuration package.

FAQs for Define Geographies

When do I define address cleansing?

When address data entered into the application needs to conform to a particular format, in order to achieve consistency in the representation of addresses. For example, making sure that the incoming data is stored following the correct postal address format.

Why can't I update a geography structure by copying an existing country structure?

You can only update a geography structure by adding existing geography types, or by creating new geography types and then adding them to the geography structure. You can only copy an existing country structure when you are defining a new country structure.

Why can't I delete a level of the country geography structure?

If a geography exists for a country geography structure level then you cannot delete the level. For example, if a state geography has been created for the United States country geography structure, then the State level cannot be deleted in the country geography structure.

Can I add any geography to the geography hierarchy?

Yes. However, the geography type for the geography that you want to add must be already added to the country geography structure.

Can I edit a specific geography in the geography hierarchy?

Yes. In the Manage Geography Hierarchy page you can edit details such as the geography's date range, primary and alternate names and codes, and parent geographies.

How can I add a geography that is the level below another geography in a geography hierarchy?

Select the geography that you want your geography to be created below, and then click the **Create** icon. This will allow you to create a geography for a

geography type that is the level below the geography type you selected. The structure of the country's geography types are defined in the Manage Geography Structure page.

Common Applications Configuration: Define Currencies and Currency Rates

Manage Currencies

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes

You cannot change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges

Users can enter transactions denominated in the currency only for the dates within the specified range. If you do not enter a start date, then the currency is valid immediately. If you do not enter an end date, then the currency is valid indefinitely.

Symbols

Even if you enter a symbol for a currency, the symbol is not always displayed when an amount is displayed in this currency. Some applications use currency symbols when displaying amounts. Others, like Oracle Fusion General Ledger, do not.

Euro Currency Derivation: Explained

Use the Derivation Type, Derivation Factor, and Derivation Effective Date fields to define the relationship between the official currency (Euro) of the European Monetary Union (EMU) and the national currencies of EMU member states. For each EMU currency, you define its Euro-to-EMU fixed conversion rate and the effective starting date.

Note

If you need to use a different currency code for Euro, you can disable the predefined Euro currency and create a new one.

Derivation Type

The **Euro currency** derivation type is used only for the Euro, and the **Euro derived** derivation type identifies national currencies of EMU member states. All other currencies do not have derivation types.

Derivation Factor

The derivation factor is the fixed conversion rate by which you multiply one Euro to derive the equivalent EMU currency amount. The Euro currency itself should not have a derivation factor.

Derivation Effective Date

The derivation effective date is the date on which the relationship between the EMU currency and the Euro begins.

FAQs for Manage Currencies

When do I create or enable currencies?

Create currencies to use, for example for reporting purposes, if they are not already provided. All currencies from the International Organization for Standardization (ISO) 4217 standard are provided.

Enable any currency other than USD for use in Oracle Fusion Applications, for example for displaying monetary amounts, assigning to sets of books, entering transactions, and recording balances. Only USD is enabled by default.

What's the difference between precision, extended precision, and minimum accountable unit for a currency?

Precision is the number of digits to the right of the decimal point used in regular currency transactions. Extended precision is the number of digits to the right of the decimal point used in calculations for this currency, and it must be greater than or equal to the standard precision. For example, USD would have 2 for precision because amounts are transacted as such, for example \$1.00. For calculations, for example adding USD amounts, you might want the application to be more precise than two decimal digits, and would enter an extended precision accordingly.

Note

Some applications use extended precision. Others, such as Oracle Fusion General Ledger, do not.

Minimum accountable unit is the smallest denomination for the currency. For example, for USD that would be .01 for the cent. This unit does not necessarily correspond to the precision for all currencies.

What's a statistical unit currency type?

The statistical unit currency type is used only for the Statistical (STAT) currency. The Statistical currency is used to record statistics such as the number of items bought and sold. Statistical balances can be used directly in financial reports, allocation formulas, and other calculations.

Manage Conversion Rate Types

Creating Conversion Rate Types: Critical Choices

Maintain different conversion rates between currencies for the same period with the Oracle Fusion General Ledger conversion rate types functionality. Four predefined daily conversion rate types are seeded: Spot, Corporate, User, and Fixed, allowing you to use different rate types for different business needs. During journal entry, the conversion rate is provided automatically by the General Ledger based on the selected conversion rate type and currency, unless the rate type is user. For user rate types, you must enter the conversion rate. Define additional rate types as needed. Set your most frequently used rate type as the default. Conversion rate types cannot be deleted.

Assign conversion rate types to automatically populate the associated rate for your period average and period end rates for the ledger. For example, you can assign the predefined rate type **Spot** to populate your period average rates and the predefined rate type **Corporate** to populate your period end rates. Period average and period end rates are used in translation of account balances.

Conversion rate types are used to automatically assign a rate when you perform the following accounting functions:

- Convert foreign currency journal amounts to ledger currency equivalents
- Convert journal amounts from source ledgers to reporting currencies or secondary ledgers
- Run Revaluation or Translation processes

In creating new conversion rates, decide whether to do the following:

- Enforce inverse relationships
- Select pivot currencies
- Select contra currencies
- Enable cross rates and allow cross rate overrides
- Maintain cross rate rules

Enforce Inverse Relationships

Check the **Enforce Inverse Relationship** check box to specify whether or not to enforce the automatic calculation of inverse conversion rates when defining daily rates.

Action	Results
Checked	<p>When you enter a daily rate to convert currency A to currency B, General Ledger automatically calculates the inverse rate, currency B to A, and enters it in the adjacent column. If either rate is changed, the application automatically recalculates the other rate.</p> <p>You can update the application calculated inverse rate, but once you do, the related rate is updated. The check box enforces that the inverse relationship is maintained but does not prevent you from updating the rates.</p>
Unchecked	<p>General Ledger calculates the inverse rate but you can change the rate and update the daily rates table without the corresponding rate being updated.</p>

Select Pivot Currencies

Select a pivot currency that is commonly used in your currency conversions. A pivot currency is the central currency that interacts with contra currencies. For example, you set up a daily rate between the US dollar (USD) and the Euro currency (EUR) and another between the USD and the Canadian dollar (CAD). USD is the pivot currency in creating a rate between EUR and CAD. EUR and CAD are the contra currencies. Select the pivot currency from the list of values which contains those currencies that are enabled, effective, and not a statistical (STAT) currency. The description of the pivot currency is populated automatically based on the currency definition.

If you want the application to create cross rates against a base currency, define the base currency as the pivot currency. Selected pivot currencies can be changed in the Rate Types page.

Select Contra Currencies

Select currencies available on the list of values as contra currencies. The available currencies are those currencies which are enabled, effective, not STAT currency, and not the pivot currency selected earlier. The description of the contra currency is populated automatically based on the currency definition. Add or delete contra currencies in the Contra Currencies region of the Rate Types page.

Enable Cross Rates and Allow Cross Rate Overrides

Check the **Enable Cross Rates** check box to calculate conversion rates based on defined currency rate relationships. General Ledger calculates cross rates

based on your defined cross rate rules. Associate your cross rate rules with a conversion rate type, pivot currency, and contra currencies. Cross rates facilitate the creation of daily rates by automatically creating the rates between contra currencies based on their relationship to a pivot currency. If the **Enable Cross Rates** check box is changed to unchecked after entering contra currencies, the application stops calculating cross rates going forward for that particular rate type. All the earlier calculated cross rates for that rate type remain in the database unless you manually delete them.

For example, if you have daily rates defined for the pivot currency, USD to the contra currency, EUR, and USD to another contra currency, CAD, the application will automatically create the rates between EUR to CAD and CAD to EUR. This prevents the need to manually define the EUR to CAD and CAD to EUR rates.

Check the **Allow Cross Rates Override** check box to permit your users to override application generated cross rates. If you accept the default of unchecked, the application generated cross rates cannot be overridden

Maintain Cross Rate Rules

Define or update your cross rate rules at any time by adding or removing contra currency assignments. Add a contra currency to a cross rate rule and run the Daily Rates Import and Calculation process to generate the new rates. If you remove a cross rate rule or a contra currency from a rule, any cross rates generated previously for that contra currency remain unless you manually delete them. Changes to the rule are not retroactive and will not affect previously stored cross rates. The Cross Rate process generates as many rates as possible and skips currencies where one component of the set is missing.

Note

With a defined web service that extracts daily currency conversion rates from external services, for example Reuters, currency conversion rates are automatically updated for the daily rates and all cross currency relationships.

Using Rate Types: Examples

There are four seeded conversion rate types in Oracle Fusion applications:

- Spot
- Corporate
- User
- Fixed

Scenario

You are the general ledger accountant for InFusion America Inc. You are entering a journal entry to capture three transactions that were transacted in three different foreign currencies:

- Canadian dollar (CAD): A very stable currency
- Mexican Peso (MXP): A fluctuating currency
- Hong Kong dollar (HKD): An infrequently used currency

You enter two lines with accounts and amounts for each foreign currency transaction. Based on your company procedures, you select the appropriate rate type to populate the rate for **Corporate** and **Spot** rate types from your daily rates table. You manually enter the current rate for the **User** rate type.

Currency Selected	Rate Type Selected	Reason
CAD	Corporate	Entered a periodic type of transaction. Your company has established a daily rate to use for the entire month across divisions for all transactions in CAD. CAD is a stable currency that only fluctuations slightly over the month.
MXP	Spot	Entered a periodic type of transaction. Your company enters daily rates each day for MXP because this currency is unstable and fluctuates.
HKD	User	Entered a one time transaction. Your company does not maintain daily rates in HKD.

Note

Your company does not currently use the **Fixed** rate type. From January 1, 1999, the conversion rate of the French franc (FRF) against the euro currency (EUR) was set at a fixed rate of 1 EUR to 6.55957 FRF. Your French operations were started in 2007, so you maintain all your French business records in the EUR.

FAQs for Manage Conversion Rate Types

What's the difference between spot, corporate, user, and fixed rate types?

Spot, corporate, user, and fixed conversion rate types differ based on the fluctuations of your entered foreign currency and your company procedures for maintaining daily rates.

Rate Type	Usage
Spot	For currencies with fluctuating conversion rates or when exact currency conversion is needed.
Corporate	For establishment of a standard rate across your organization for a stable currency.
User	For infrequent entries where your daily rates for the entered foreign currency are not set up.

Fixed	For rates where the conversion is constant between two currencies.
-------	--

If you have infrequent foreign currency transactions, the user rate type can simplify your currency maintenance while providing an accurate conversion rate on the date of the transaction.

Manage Daily Rates

Entering Daily Rates Manually: Worked Example

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) each day for your company InFusion America Inc.

Oracle Application Development Framework (ADF) Desktop Integration is an Excel add-in that must be loaded onto each client. Because ADF Desktop Integration is an add-in to Microsoft Office products, you can use this feature only if they have Microsoft Excel 2007 or above, Internet Explorer 7 or above, and Microsoft Windows 7, XP Professional SP2, or Vista. Users must download the installation files from **Navigator - Tools - Download Desktop Integrator Installer**.

Entering Daily Rates

1. Navigate to the Period Close work area.
Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.
Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
Use the Daily Rates tab to review and enter currency rates.
4. Click the Create in Spreadsheet button.
Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.
5. Click in the From Currency field. Select the GBP - Pound Sterling list item.
6. Click in the To Currency field. Select the USD - US Dollar list item.
7. Click in the Conversion Rate field. Select the Spot list item
8. Click in the From Conversion field. Enter the desired information into the From Conversion field. Enter a valid value e.g. "8/1/2011".
9. Click in the To Conversion Date field. Enter the desired information into the To Conversion Date field. Enter a valid value e.g. "8/1/2011".

10. Click in the Conversion Rate field. Enter the desired information into the Conversion Rate field. Enter a valid value e.g. "1.33225".
11. Click the Submit button. Click the OK button twice.
12. Review the Record Status column to verify that all rows were loaded successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to either a local drive or a shared network drive.

Updating Currency Rates: Worked Example

You are required to change today's daily rates that were already entered. The rates you are changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America Inc.

Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

Updating Currency Rates

1. Navigate to the Period Close work area.

Use the Period Close work area to link to close processes and currency process.

2. Click the Manage Currency Rates link.

Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the Daily Rates tab.

Use the Daily Rates tab to review and enter currency rates.

4. Click the From Currency list. Select the GBP - Pound Sterling list item.

5. Click the To Currency list. Select the USD - US Dollar list item.

6. Enter the dates for the daily rates that you are changing. Enter today's date.

7. Click the Rate Type list. Select the Spot list item.

8. Click the Search button.

9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.

10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.

11. Click the Save button.

Common Applications Configuration: Define Enterprise Structures for Human Capital Management

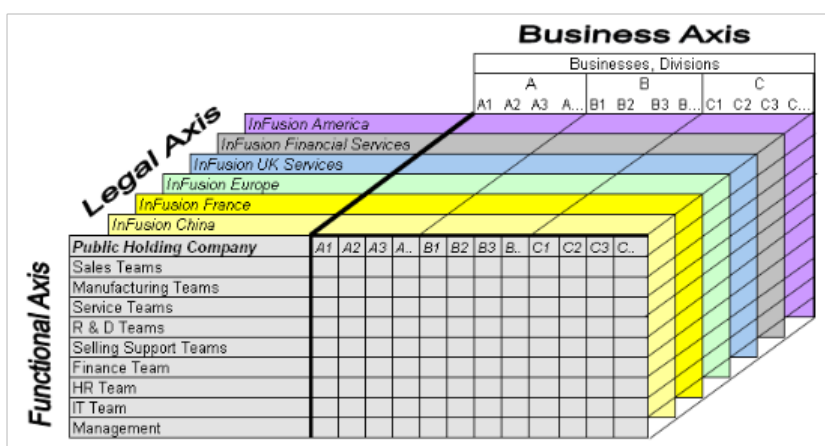
Define Initial Configuration

Enterprise Structures: Overview

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

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

Every enterprise has three fundamental structures, legal, managerial, and functional, that are used to describe its operations and provide a basis for reporting. In Oracle Fusion, these structures are implemented using the chart of accounts and organizations. Although many alternative hierarchies can be implemented and used for reporting, you are likely to have one primary structure that organizes your business into divisions, business units, and departments aligned by your strategic objectives.



Legal Structure

The figure above shows a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is a distinct legal entity from its owners and managers. The corporation is owned by its shareholders, who may be individuals or other corporations. There are many other kinds of legal entities, such as sole proprietorships, partnerships, and government agencies.

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

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

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

In the figure above, a separate card represents a series of registered companies. Each company, including the public holding company, InFusion America, must be registered in the countries where they do business. Each company consists of various divisions created for purposes of management reporting. These are shown as vertical columns on each card. For example, a group might have a separate company for each business in the United States (US), but have their United Kingdom (UK) legal entity represent all businesses in that country. The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis. Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

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

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional

structure is represented by the Functional Axis in the figure above. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development (R&D) and selling, general, and administrative (SG&A) expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Global Enterprise Configuration: Points to Consider

Start your global enterprise structure configuration by discussing what your organization's reporting needs are and how to represent those needs in the Oracle Fusion Applications. Consider deployment on a single instance, or at least, on as few instances as possible, to simplify reporting and consolidations for your global enterprises. The following are some questions and points to consider as you design your global enterprise structure in Oracle Fusion.

- Enterprise Configuration
- Business Unit Management
- Security Structure
- Compliance Requirements

Enterprise Configuration

What is the level of configuration needed to achieve the reporting and accounting requirements? What components of your enterprise do you need to report on separately? Which components can be represented by building a hierarchy of values to provide reporting at both detail and summary levels? Where are you on the spectrum of centralization versus decentralization?

Business Unit Management

What reporting do I need by business unit? How can you set up your departments or business unit accounts to achieve departmental hierarchies that report accurately on your lines of business? What reporting do you need to support the managers of your business units, and the executives who measure them? How often are business unit results aggregated? What level of reporting detail is required across business units?

Security Structure

What level of security and access is allowed? Are business unit managers and the people that report to them secured to transactions within their own business unit? Are the transactions for their business unit largely performed by a corporate department or shared service center?

Compliance Requirements

How do you comply with your corporate external reporting requirements and local statutory reporting requirements? Do you tend to prefer a corporate first or an autonomous local approach? Where are you on a spectrum of centralization, very centralized or decentralized?

Modeling Your Enterprise Management Structure in Oracle Fusion: Example

This example uses a fictitious global company to demonstrate the analysis that can occur during the enterprise structure configuration planning process.

Scenario

Your company, InFusion Corporation, is a multinational conglomerate that operates in the United States (US) and the United Kingdom (UK). InFusion has purchased an Oracle Fusion enterprise resource planning (ERP) solution including Oracle Fusion General Ledger and all of the Oracle Fusion subledgers. You are chairing a committee to discuss creation of a model for your global enterprise structure including both your US and UK operations.

InFusion Corporation

InFusion Corporation has 400 plus employees and revenue of \$120 million. Your product line includes all the components to build and maintain air quality monitoring (AQM) systems for homes and businesses. You have two distribution centers and three warehouses that share a common item master in the US and UK. Your financial services organization provides funding to your customers for the start up costs of these systems.

Analysis

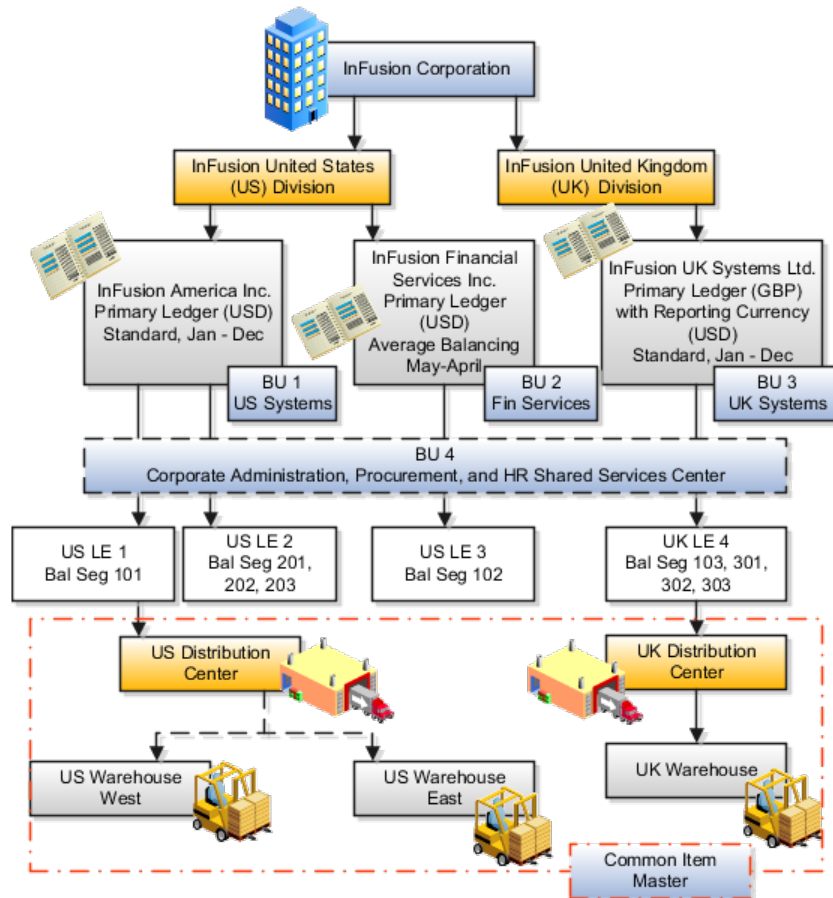
The following are elements you need to consider in creating your model for your global enterprise structure.

- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you need to achieve proper statutory reporting?
- Your managers need reports that show profit and loss (revenue and expenses) for their lines of business. Do you use business units and balancing segments to represent your divisions and businesses? Do you secure data by two segments in your chart of accounts which represents each department and legal entity or one segment that represents both to produce useful, but confidential management reports?
- Your corporate management requires reports showing total organizational performance with drill down capability to the supporting details. Do you need multiple balancing segment hierarchies to achieve proper rollup of balances for reporting requirements?
- Your company has all administrative, account payables, procurement, and human resources functions performed at their corporate headquarters. Do you need one or more business unit in which to perform all these functions? How will your shared service center be configured?

The following figure and table summarize the model that your committee has designed and uses numerical values to provide a sample representation of your structure. The model includes the following recommendations:

- Creation of three separate ledgers representing your separate legal entities:
 - InFusion America Inc.
 - InFusion Financial Services Inc.
 - InFusion UK Services Ltd.
- Consolidation of results for system components, installations, and maintenance product lines across the enterprise

- All UK general and administrative costs processed at the UK headquarters
- US Systems' general and administrative costs processed at US Corporate headquarters
- US Financial Services maintains its own payables and receivables departments



Real World Entity	Entity Name	Enterprise	Legal Entity	BSV	Ledger	BU	Cost Center	Dept	Item Master Org	Inventory Org
Enterprise	InFusion Group	M								
Company	US LE 1		M	O	O					
Company	US LE 2		M	O	O					
Company	US LE 3		M	O	O					
Company	UK LE 4		M	O	O					
Business Unit	US Systems BU 1					M				
Business Unit	FIN Services BU 2					M				
Business Unit	UK Systems BU 3					M				
Division	InFusion UK			O			O			
Division	InFusion US			O			O			
Headquarters	BU 4					M				
Shared Service Center	BU 4					M				
Department	AP Department						O	M		
List of Items	Common Item Master								O	
Distribution Center	US Distribution Center									O
Distribution Center	UK Distribution Center									O
Warehouse	US Warehouse West									O
Warehouse	US Warehouse East									O
Warehouse	UK Warehouse									O
BSV = Balancing Segment Value										
BU = Business Unit										
Dept = Department										
Org = Organization										
M = Mandatory Setup										
O = Optional Setup										

In this chart, the green globe stands for mandatory and gold globe stands for optional setup. The following statements expand on the data in the chart.

- The enterprise is mandatory because it serves as an umbrella for the entire implementation. All organizations are created within an enterprise.
- Legal entities are also mandatory. They can be optionally mapped to balancing segment values or represented by ledgers. Mapping balancing segment values to legal entities is mandatory if you plan to use the intercompany functionality.
- At least one ledger is mandatory in an implementation in which you record your accounting transactions.
- Business units are also mandatory because financial transactions are processed in business units.
- A shared service center is optional, but if used, must be a business unit.
- Divisions are optional and can be represented with a hierarchy of cost centers or by a second balancing segment value.
- Departments are mandatory because they track your employees.
- Optionally, add an item master organization and inventory organizations if you are tracking your inventory transactions in Oracle Fusion Applications.

Note

Some Oracle Fusion Human Capital Management and Customer Relationship Management implementations do not require recording of accounting transactions and therefore, do not require implementation of a ledger.

Note

The InFusion Corporation is a legal entity but is not discussed in this example.

Designing an Enterprise Configuration: Example

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

Scenario

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

Enterprise Details

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

Analysis

InFusion requires three divisions. The US division will cover the US locations. The Europe division will cover the UK and France. Saudi Arabia and the UAE will be covered by the Middle East division.

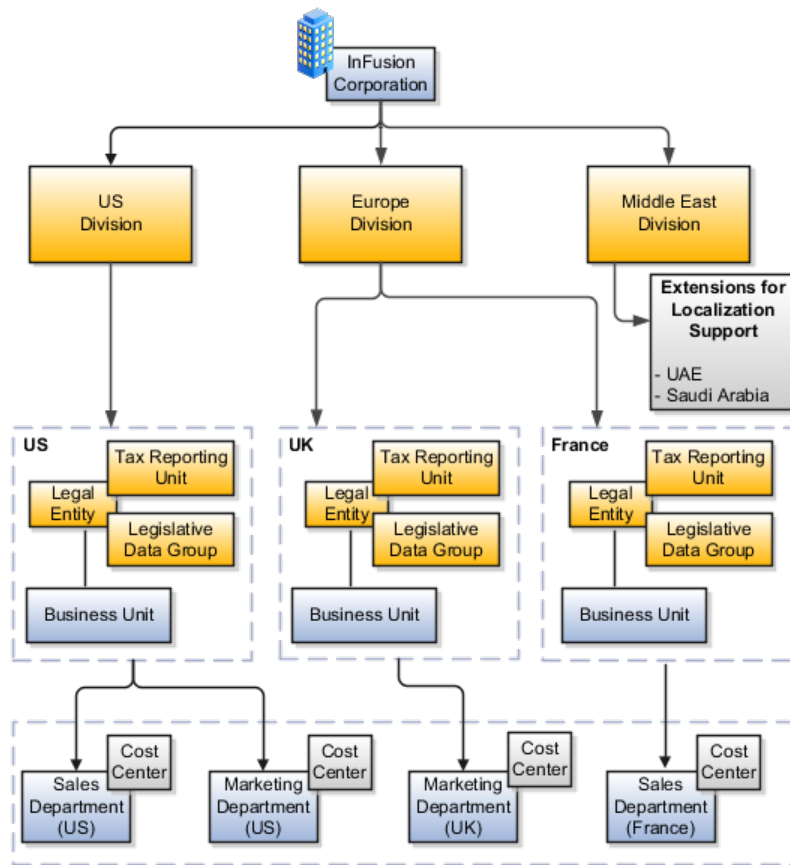
InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, in order to employ and pay its workers in those countries.

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

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

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

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

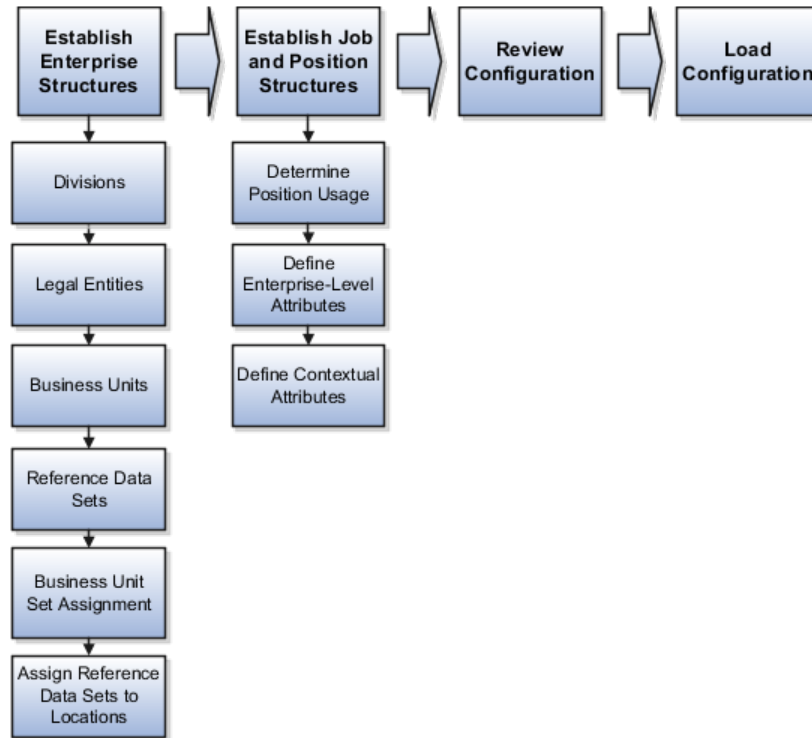


Establishing Enterprise Structures Using the Enterprise Structures Configurator: Explained

The Enterprise Structures Configurator is an interview-based tool that guides you through the process of setting up a basic enterprise structure. By answering questions about your enterprise, the tool creates a structure of divisions, legal entities, business units, and reference data sets that reflects your enterprise.

structure. After you create your enterprise structure, you also follow a guided process to determine whether or not to use positions, and whether to set up additional attributes for jobs and positions. After you define your enterprise structure and your job and position structures, you can review them, make any necessary changes, and then load the final configuration.

This figure illustrates the process to configure your enterprise using the Enterprise Structures Configurator.



To be able to use the Enterprise Structures Configurator, you must select the Enterprise Structures Guided Flow feature for your offerings on the Configure Offerings page in the Setup and Maintenance work area. If you do not select this feature, then you must set up your enterprise structure using individual tasks provided elsewhere in the offerings, and you cannot create multiple configurations to compare different scenarios.

Establish Enterprise Structures

To define your enterprise structures, you use the guided flow within the Establish Enterprise Structures task to enter basic information about your enterprise, such as the primary industry and the location of your headquarters. You then create divisions, legal entities, business units, and reference data sets. The Establish Enterprise Structures task enables you to create multiple enterprise configurations so that you can compare different scenarios. Until you load a configuration, you can continue to create and edit multiple configurations until you arrive at one that best suits your enterprise.

Establish Job and Position Structures

You also use a guided process to determine whether you want to use jobs only, or jobs and positions. The primary industry that you select in the Establish Enterprise Structures task provides the application with the information needed to make an initial recommendation. You can either accept the recommendation, or you can answer additional questions about how you manage people in your

enterprise, and then make a selection. After you select whether to use jobs or positions, the guided process prompts you to set up a descriptive flexfield structure for jobs, and for positions if you have chosen to use them. Descriptive flexfields enable you to capture additional information when you create jobs and positions.

Review Configuration

Finally, you can review a summary of the results of the two interview processes. For each configuration, the online summary lists the divisions, legal entities, business units, reference data sets, and job and position structures that the application will create when you load the configuration.

For a more detailed analysis of a configuration, you can access the Technical Summary Report. This report lists the same information as the online summary, but also lists the following information that will be created by the application when you load the configuration, based on your configuration:

- Legislative data groups (the application creates one legislative data group for each country that is identified in the configuration.)
- Name of the legislative data group that will be assigned to the payroll statutory unit that is generated for each legal entity.
- Organization hierarchy.

The Technical Summary report also lists the default settings that will be loaded for these fields, which you access from the Manage Enterprise HCM Information task: **Worker Number Generation**, **Employment Model** and **Allow Employment Terms Override**. You can print the Technical Summary Report for each of your configurations and compare each scenario.

Note

If your PDF viewer preferences are set to open PDFs in a browser window, the Technical Summary report replaces the Oracle Fusion application. Use your browser's Back button to return to the application.

Load Configuration

You can load only one configuration. When you load a configuration, the application creates the divisions, legal entities, business units, and so on. After you load the configuration, you then use individual tasks to edit, add, and delete enterprise structures.

Configuration Workbench: Explained

The Oracle Fusion Enterprise Structures Configurator (ESC) is an interview based tool to help you analyze how to represent your business in the Oracle Fusion Applications. The interview process poses questions about the name of your enterprise, legal structure, management reporting structure, and primary organizing principle for your business. Based on your answers, the applications suggest the best practices to use to implement business units in your enterprise. You can use or modify these answers to ensure that both your reporting and administrative goals are met in your Oracle Fusion deployment.

Division: Explained

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results. Responsibility to reach objectives can be delegated along the management structure. Although related to your legal

structure, the business organizational hierarchies do not need to reflect directly the legal structure of the enterprise. The management entities and structure can include divisions and subdivisions, lines of business, and other strategic business units, and include their own revenue and cost centers. These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

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

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

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

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

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

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

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

Adding a New Division After Acquiring a Company: Example

This example shows how to restructure your enterprise after acquiring a new division.

Scenario

You are part of a senior management team at InFusion Corporation. InFusion is a global company with organizations in the United States (US), the United Kingdom (UK), France, China, Saudi Arabia, and the United Arab Emirates (UAE). Its main area of business is in the high tech industry, and it has just acquired a new company. You must analyze their current enterprise structure and determine what new organizations you need to create to accommodate the new company.

Details of the Acquired Company

The acquired company is a financial services business based in Germany. Because the financial services business differs significantly from the high tech business, you want to keep the financial services company as a separate business with all the costs and reporting rolling up to the financial services division.

Analysis

The following table summarizes the key decisions that you must consider when determining what new organizations to set up and how to structure the enterprise.

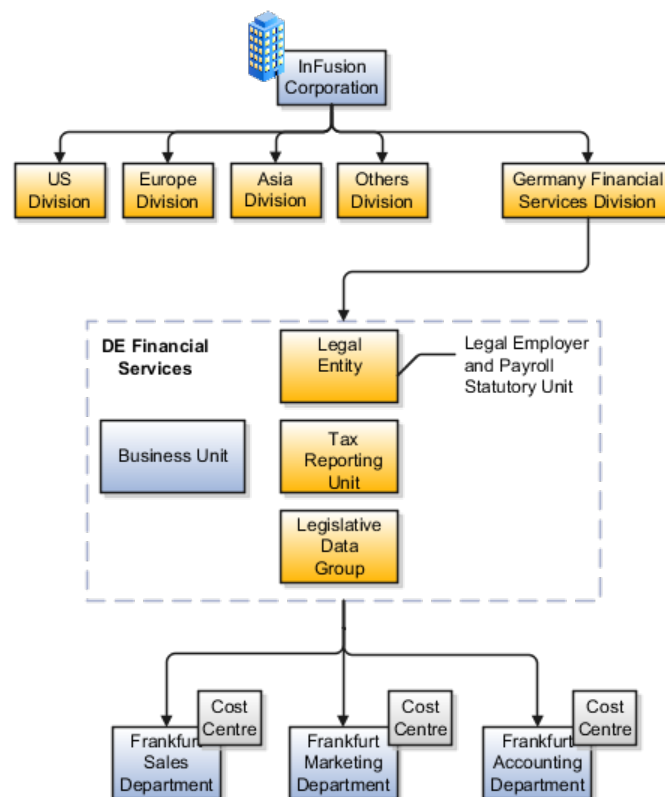
Decision to Consider	In This Example
Create location?	The financial services company is based in Frankfurt as are the departments, so you need to create only one location.
Create separate division?	Yes. Although the new division will exist within the current enterprise structure, you want to keep the financial services company as a separate line of business. Creating a separate division means you can manage the costs and reporting separately from the InFusion Corporation. It also means you do not have to modify any existing organizations in the enterprise setup.
Create business unit?	Yes. The financial services business requires you to create several jobs that do not exist in your high tech business. You can segregate the jobs that are specific to financial services in a new business unit.
How many departments?	The financial services company currently has three departments for sales, accounting, and marketing. As you have no plans to downsize or change the company, you can create three departments to reflect this structure.
How many cost centers?	Although you can have more than one cost center tracking the costs of a department, you decide to create one cost center for each department to track costs.
How many legal entities?	<p>Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, and income, pay transaction taxes, or perform intercompany trading. In this case, you need only one legal entity.</p> <p>You must define the legal entity as a legal employer and payroll statutory unit. As the new division operates in Germany only, you can configure the legal entity to suit Germany legal and statutory requirements.</p> <hr/> <p>Note</p> <p>When you identify the legal entity as a payroll statutory unit, the application transfers the legal reporting unit that is associated with that legal entity to Oracle Fusion HCM as a tax reporting unit.</p> <hr/>

Create legislative data group?	Yes. Because you currently do not employ or pay people in Germany, you must create one legislative data group to run payroll for the workers in Germany.
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Based on the analysis, you must create the following:

- One new division
- One new location
- Three new departments
- Three new cost centers
- One new legal entity
- One new legislative data group

The following figure illustrates the structure of InFusion Corporation after adding the new division and the other organizations.



Legal Entities: Explained

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

Legal entities have the right to own property, the right to trade, the responsibility to repay debt, and the responsibility to account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation. Their rights and responsibilities may be enforced through the

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

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

- Facilitating local compliance
- Taking advantage of lower corporation taxation in some jurisdictions
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, you need to understand that the contracting party on any transaction is always the legal entity. Individual legal entities own the assets of the enterprise, record sales and pay taxes on those sales, make purchases and incur expenses, and perform other transactions.

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

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

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

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

Creating Legal Entities in the Enterprise Structures Configurator: Points to Consider

Using the Enterprise Structures Configurator (ESC), you can create legal entities for your enterprise automatically, based on the countries in which divisions

of your business operate, or you can upload a list of legal entities from a spreadsheet.

Automatically Creating Legal Entities

If you are not certain of the number of legal entities that you need, you can create them automatically. To use this option, you first identify all of the countries in which your enterprise operates. The application opens the Map Divisions by Country page, which contains a matrix of the countries that you identified, your enterprise, and the divisions that you created. You select the check boxes where your enterprise and divisions intersect with the countries to identify the legal entities that you want the application to create. The enterprise is included for situations where your enterprise operates in a country and acts on behalf of several divisions within the enterprise and is a legal employer in a country. If you select the enterprise for a country, the application creates a country holding company.

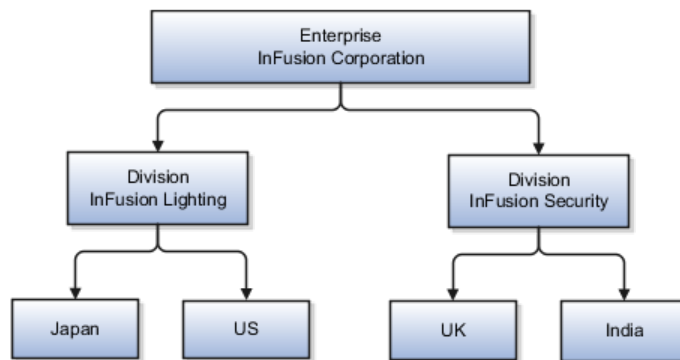
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically creates a legislative data group.

Any legal entities that you create automatically cannot be deleted from the Create Legal Entities page within the Enterprise Structures Configurator. You must return to the Map Divisions by Country page and deselect the legal entities that you no longer want.

Example: Creating Legal Entities Automatically

InFusion Corporation is using the ESC to set up their enterprise structure. They have identified two divisions, one for Lighting, and one for Security. The Lighting division operates in Japan and the US, and the Security division operates in the UK and India.

This figure illustrates InFusion Corporation's enterprise structure.



This table represents the selections that InFusion Corporation makes when specifying which legal entities to create on the Map Divisions by Country page.

Country	Enterprise	InFusion Lighting	InFusion Security
Japan	No	Yes	No

US	No	Yes	No
UK	No	No	Yes
India	No	No	Yes

Based on the selections made in the preceding table, the ESC creates the following four legal entities:

- InFusion Lighting Japan LE
- InFusion Lighting US LE
- InFusion Security UK LE
- InFusion Security India LE

Creating Legal Entities Using a Spreadsheet

If you have a list of legal entities already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, then add your legal entity information to the spreadsheet, and then upload directly to your enterprise configuration. You can export and import the spreadsheet multiple times to accommodate revisions.

Legal Entity in Oracle Fusion: Points to Consider

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers, which are part of the Oracle Fusion Trading Community Architecture. When your legal entities are trading with each other, you represent both of them as legal entities and also as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

There are several decisions that need to be considered in creating your legal entities.

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

- Legal entity and payroll reporting
- Legal reporting units

The Importance of Legal Entity in Transactions

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

For example, the creation of a sales order creates an obligation for the legal entity that books the order to deliver the goods on the acknowledged date, and an obligation of the purchaser to receive and pay for those goods. Under contract law in most countries, damages can be sought for both actual losses, putting the injured party in the same state as if they had not entered into the contract, and what is called loss of bargain, or the profit that would have made on a transaction.

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

Legal Entity and Its Relationship to Business Units

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

In some cases, your legal entity is inferred from your business unit that is processing the transaction. For example, your business unit A agrees on terms for the transfer of inventory to your business unit B. This transaction is binding on your default legal entities assigned to each business unit. Oracle Fusion Procurement, Oracle Fusion Projects, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.

Legal Entity and Its Relationship to Divisions

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

Legal Entity and Its Relationship to Ledgers

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

Legal Entity and Its Relationship to Balancing Segments

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

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

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

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

Note

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

To use this feature for disposal of a part of a legal entity, implement multiple balancing segments at the beginning of the legal entity's corporate life or on conversion to Oracle Fusion.

If you decided to account for each legal entity in a separate ledger, there is no requirement to identify the legal entity with a balancing segment value within the ledger.

Note

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

Legal Entity and Its Relationship to Consolidation Rules

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

Legal Entity and its Relationship to Intercompany Transactions

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

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

Note

In the Oracle Fusion Supply Chain applications, model intercompany relationships using business units, from which legal entities are inferred.

Legal Entity and Its Relationship to Worker Assignments and Legal Employer

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

Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance on behalf of many of your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of

work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Creating Business Units in the Enterprise Structures Configurator: Points to Consider

Business units are used within Oracle Fusion applications for management reporting, processing of transactions, and security of transactional data. Using the Enterprise Structures Configurator (ESC), you create business units for your enterprise either automatically or manually.

Automatically Creating Business Units

To create business units automatically, you must specify the level at which to create business units. Business units within your enterprise may be represented at the business function level, such as Sales, Consulting, Product Development, and so on, or they may be represented at a more detailed level, where a business unit exists for each combination of countries in which you operate and the functions in those countries.

You can automatically create business units at the following levels:

- Country
- Country and Division
- Country and business function
- Division
- Division and legal entity
- Division and business function
- Business function
- Legal entity
- Business function and legal entity

Select the option that best meets your business requirements, but consider the following:

- If you use Oracle Fusion Financials, the legal entity option is recommended because of the manner in which financial transactions are processed.
- The business unit level that you select determines how the application automatically creates reference data sets.

After you select a business unit level, the application generates a list of business units, and you select the ones you want the application to create. If you select a

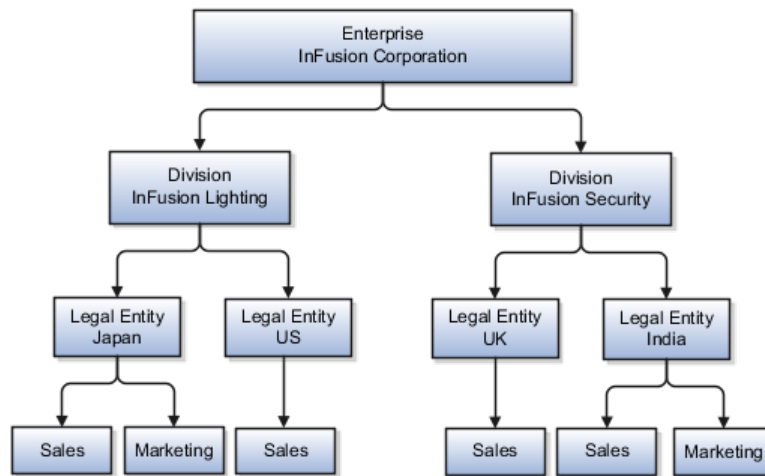
level that has two components, such as country and division, then the system displays a table listing both components, and you select the check boxes at the intersections of the components.

The business units listed by the application are suggestions only, and are meant to simplify the process to create business units. You are not required to select all of the business units suggested. When you navigate to the next page in the ESC guided flow, which is the Manage Business Units page, you cannot delete any of the business units that were created automatically. You must return to the Create Business Units page and deselect any business units that you no longer want.

Example: Selecting Business Unit Levels

InFusion Corporation is using the Enterprise Structures Configurator to set up their enterprise structure. They have identified two divisions, one for Lighting, and one for Security. They operate in four countries: US, UK, Japan, and India, and they have created a legal entity for each of the countries. The sales and marketing functions are based in both India and Japan, while the US and the UK have only the sales function.

This figure illustrates InFusion Corporation's enterprise structure.



The following table lists the options for business unit levels and the resulting business units that the application suggests for InFusion Corporation.

Business Unit Level	Suggested Business Units
Country	<ul style="list-style-type: none"> • US • UK • Japan • India
Country and Division	<ul style="list-style-type: none"> • InFusion Lighting: Japan • InFusion Lighting: US • InFusion Security: UK • InFusion Security: India

Country and business function	<ul style="list-style-type: none"> • Sales: Japan • Marketing: Japan • Sales: US • Sales: UK • Marketing: India • Sales: India
Division	<ul style="list-style-type: none"> • InFusion Lighting • InFusion Security
Division and Legal Entity	<ul style="list-style-type: none"> • InFusion Lighting: Japan • InFusion Lighting: US • InFusion Security: UK • InFusion Security: India
Division and Business Function	<ul style="list-style-type: none"> • InFusion Lighting, Sales • InFusion Lighting, Marketing • InFusion Security, Sales • InFusion Security, Marketing
Business Function	<ul style="list-style-type: none"> • Sales • Marketing
Legal Entity	<ul style="list-style-type: none"> • Legal Entity: Japan • Legal Entity: US • Legal Entity: UK • Legal Entity India
Legal Entity and Business Function	<ul style="list-style-type: none"> • Legal Entity: Japan, Sales • Legal Entity: Japan, Marketing • Legal Entity: US, Sales • Legal Entity: UK, Sales • Legal Entity India, Marketing • Legal Entity India, Sales

Manually Creating Business Units

If none of the levels for creating business units meets your business needs, you can create business units manually, and you create them on the Manage Business Units page. If you create business units manually, then no reference data sets are created automatically. You must create them manually as well.

Business Units: Explained

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can

process transactions on behalf of many legal entities. Normally, it will have a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy. In Oracle Fusion Applications, you assign your business units to one primary ledger. For example, if a business unit is processing payables invoices they will need to post to a particular ledger. This assignment is mandatory for your business units with business functions that produce financial transactions.

In Oracle Fusion Applications, use business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.

The Oracle Fusion Applications business unit model:

- Allows for flexible implementation
- Provides a consistent entity for controlling and reporting on transactions
- Anchors the sharing of sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can choose to share reference data, such as payment terms and transaction types, across business units, or you can choose to have each business unit manage its own set depending on the level at which you wish to enforce common policies.

In countries where gapless and chronological sequencing of documents is required for subledger transactions, define your business units in alignment with your ledger definition, because the uniqueness of sequencing is only ensured within a ledger. In these cases, define a single ledger and assign one legal entity and business unit.

In summary, use business units in the following ways:

- Management reporting
- Processing of transactions
- Security of transactional data
- Reference data definition and sharing

Brief Overview of Business Unit Security

Business units are used by a number of Oracle Fusion Applications to implement data security. You assign data roles to your users to give them access to data in business units and permit them to perform specific functions on this data. When a business function is enabled for a business unit, the application can trigger the creation of data roles for this business unit based on the business function's related job roles.

For example, if a payables invoicing business function is enabled, then it is clear that there are employees in this business unit that perform the function of payables invoicing, and need access to the payables invoicing functionality. Therefore, based on the correspondence between the business function and the

job roles, appropriate data roles are generated automatically. Use Human Capital Management (HCM) security profiles to administer security for employees in business units.

Creating Reference Data Sets in the Enterprise Structures Configurator: Explained

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically.

A standard set called the Enterprise set is predefined.

Common Set

The common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in both the common set and the set associated with the data type for the business unit on the transaction. For example, when you create an assignment, the list of values for grades will include both grades in the common set and in the set that is assigned to grades for the business unit in which you creating the assignment.

Reference Data Sets and Sharing Methods: Explained

Oracle Fusion Applications reference data sharing feature is also known as SetID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses, thereby reducing the administrative burden and decreasing the time needed to implement new business units. For example, you can share sales methods, transaction types, or payment terms across business units or selected other data across asset books, cost organizations, or project units.

The reference data sharing features use reference data sets to which reference data is assigned. The reference data sets group assigned reference data. The sets can be understood as buckets of reference data assigned to multiple business units or other application components.

Reference Data Sets

You begin this part of your implementation by creating and assigning reference data to sets. Make changes carefully as changes to a particular set will affect all business units or application components using that set. You can assign a separate set to each business unit for the type of object that is being shared. For example, assign separate sets for payment terms, transaction types, and sales methods to your business units.

Your enterprise can decide that some aspects of corporate policy should affect all business units and leave other aspects to the discretion of the business unit manager. This allows your enterprise to balance autonomy and control for each

business unit. For example, if your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level, you can let managers define their own sales methods, but define payment terms centrally. In this case, each business unit would have its own reference data set for sales methods, and there would be one central reference data set for payment terms assigned to all business units.

The reference data sharing is especially valuable for lowering the cost of setting up new business units. For example, your enterprise operates in the hospitality industry. You are adding a new business unit to track your new spa services. The hospitality divisional reference data set can be assigned to the new business unit to quickly setup data for this entity component. You can establish other business unit reference data in a business unit specific reference data set as needed

Reference Data Sharing Methods

There are variations in the methods used to share data in reference data sets across different types of objects. The following list identifies the methods:

- Assignment to one set only, no common values allowed. The simplest form of sharing reference data that allows assigning a reference data object instance to one and only one set. For example, Asset Prorate Conventions are defined and assigned to only one reference data set. This set can be shared across multiple asset books, but all the values are contained only in this one set.
- Assignment to one set only, with common values. The most commonly used method of sharing reference data that allows defining reference data object instance across all sets. For example, Receivables Transaction Types are assigned to a common set that is available to all the business units without the need to be explicitly assigned the transaction types to each business unit. In addition, you can assign a business unit specific set of transaction types. At transaction entry, the list of values for transaction types includes transaction types from the set assigned to the business unit, as well as transaction types assigned to the common set that is shared across all business units.
- Assignment to multiple sets, no common values allowed. The method of sharing reference data that allows a reference data object instance to be assigned to multiple sets. For instance, Payables Payment Terms use this method. It means that each payment term can be assigned to one or more than one set. For example, you assign the payment term Net 30 to several sets, but the payment term Net 15 is assigned to only your corporate business unit specific set. At transaction entry, the list of values for payment terms consists of only one set of data; the set that is assigned to the transaction's business unit.

Note: Oracle Fusion Applications contains a reference data set called Enterprise. Define any reference data that affects your entire enterprise in this set.

Business Units and Reference Data Sets: How They Work Together

Reference data sharing is a feature within Oracle Fusion that enables you to group set-enabled reference data such as jobs or grades so that the data can be

shared across different parts of the organization. Sets also enable you to filter reference data at the transaction level so that only data that has been assigned to certain sets is available to select. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

Common Set Versus Specific Sets

Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data that has been assigned to the Common Set will always be available, in addition to the reference data that has been assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data may be specific to certain business units, so you want to restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.

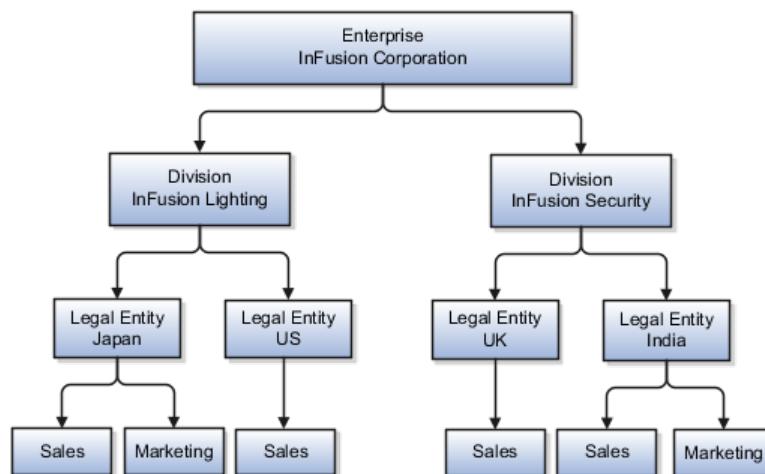
Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set that will be used for all reference data types for that business unit. You can override the set assignment for one or more data types.

Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.

The following figure illustrates the structure of InFusion Corporation.



When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales_Japan
- Marketing_Japan

- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They will create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs and they will override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales_Japan_Set
- Mktg_Japan_Set
- Sales_US_Set
- Sales_UK_Set
- Mktg_India_Set
- Sales_India_Set
- Grades_Set

InFusion assigns business units to sets as follows:

Business Unit	Default Set Assignment	Set Assignment Overrides
Sales_Japan	Sales_Japan_Set for grades, departments, and locations	Jobs set for jobs
Marketing_Japan	Mktg_Japan_Set for grades, departments, and locations	None
Sales_US	Sales_US_Set for grades, departments, and locations	Jobs set for jobs
Sales_UK	Sales_UK_Set for grades, departments, and locations	Jobs set for jobs
Marketing_India	Mktg_India_Set for grades, departments, and locations	None
Sales_India	Sales_India_Set for grades, departments, and locations	Jobs set for jobs

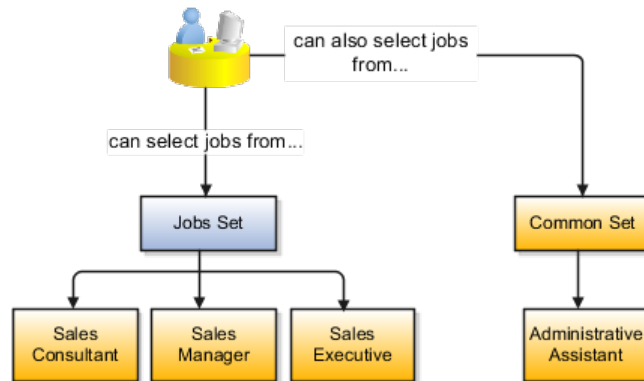
When setting up grades, departments, and locations for the business units, InFusion will assign the data to the default set for each business unit. When setting up jobs, they will assign the Jobs set and will assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users will be able to select data from the set that corresponds to the business unit that they enter on the transaction, and any data that was assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades,

locations, and departments from the Mktg_Japan_Set will be available to select, as well as from the Common Set.

When using jobs at the transaction level, users will be able to select jobs from the Jobs set and from the Common Set when they enter one of the Sales business units on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs will be filtered to show jobs from the Jobs set and from the Common Set.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.



Jobs and Positions: Critical Choices

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks. The key to whether to use jobs or positions is how each is used. Positions offer a well-defined space independent of the person performing the job. Jobs are a space defined by the person. A job can be defined globally in the Common Set, whereas a position is defined within one business unit.

You can update the job and department of a position at any time. This is useful if you hire someone into a new role and want to transfer the position to another department.

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

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

Primary Industry of Your Enterprise

Primary industries and how they usually set up their workforce are listed in the table below.

Primary Industry	Workforce Setup
Mining	Positions

Utilities	Positions
Manufacturing	Positions
Retail Trade	Positions
Transportation and Warehousing	Positions
Educational Services	Positions
Public Transportation	Positions
Agriculture, Forestry, Fishing, and Hunting	Jobs
Construction	Jobs
Wholesale Trade	Jobs
Information	Jobs
Finance and Insurance	Jobs
Professional, Scientific, and Technical Services	Jobs
Management of Companies and Enterprises	Jobs
Administrative and Support and Waste Management and Remediation Services	Jobs
Arts, Entertainment, and Recreation	Jobs
Accommodation and Food Services	Jobs
Other Services (Except Public Administration)	Jobs

Management of People

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

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

Other	Positions	Jobs	Jobs
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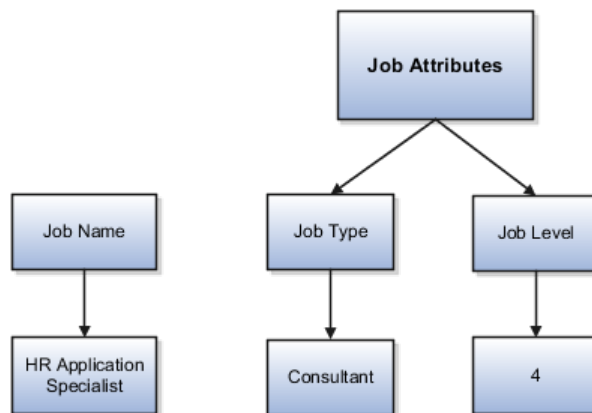
Job and Position Structures: Explained

Job and position structures identify the descriptive flexfield structure that enables you to specify additional attributes that you want to capture when you define jobs and positions. Job and position attributes provide further detail to make jobs and positions more specific. You also use attributes to define the structure of your jobs and positions. You can specify attributes at the enterprise level for jobs and positions, at the business unit level for positions, and at the reference data set level for jobs. Job and position structures are optional.

Enterprise-Level Job Attributes

When you define a job, you enter a value for the name of the job. To make job names more specific, set up attributes that enable you to identify additional details about the job, such as the nature of the work that is performed or the relative skill level required for the job. If these attributes apply to all jobs within your enterprise, set up enterprise-level job attributes. Standard capabilities mean that you can use the different segments of the name to identify common jobs or job holders for analysis or compensation, or for grouping records in reports, for example, to find all jobs of a specific job type. You should not use attributes with values that change regularly, for example, salary ranges or expense approval levels that change every year.

This figure illustrates how job type and job level provide further details for the HR Application Specialist job.

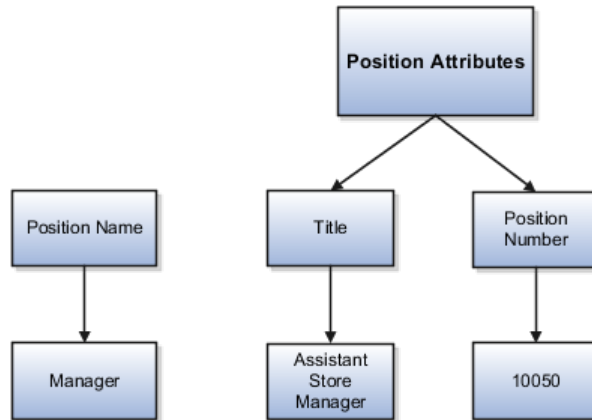


Enterprise-Level Position Attributes

Position attributes at the enterprise level are similar to those for jobs. Each position that you define identifies a specific role in the enterprise, which you can manage independently of the person in the position, and it will belong to one specific department or organization. The name of each position must be unique. To simplify the process of managing unique names for positions, set up enterprise-level attributes to identify separate components of the position name. For example, you can set up an attribute for position title and one for position number. When defining the attributes that make up the structure of a position

name you should also consider if any of your attributes are part of the definition of a common job type. Using job types for a position can help you manage common information that applies to many different positions. For example you can define a job type of Manager.Level 1 and use this for comparison of positions across departments or lines or business, or for setting common job requirements. You can then define multiple manager type positions in your HR department, each of which has responsibility for a different management function or group.

This figure illustrates how title and position number provide further details for the manager position.



Business Unit-Level Attributes for Positions

If you have information that you want to capture for positions that is specific to each business unit, then you can define attributes at the business unit level for positions. When you create positions, these attributes appear in addition to any enterprise-level attributes. For example, you may want to identify the sales region for all positions in the sales business unit. You can set up a text attribute called Sales Region and use it to enter the necessary information when creating positions for the sales business unit.

Reference Data Set-Level Attributes for Jobs

If you have information for jobs that applies to specific reference data sets, set up attributes for jobs at the reference data set level. When you create jobs, these attributes appear in addition to any enterprise-level attributes. For example, you may want to identify all information technology (IT) jobs within a specific set. You can set up a text attribute called Function and use it to enter IT in jobs that you create that perform an IT function within a specific set.

Jobs: Example

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

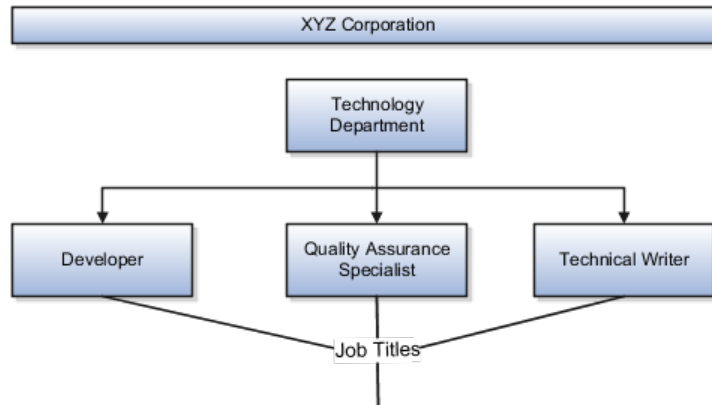
Software Industry

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

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

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

This figure illustrates the software industry job setup.



Positions: Examples

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

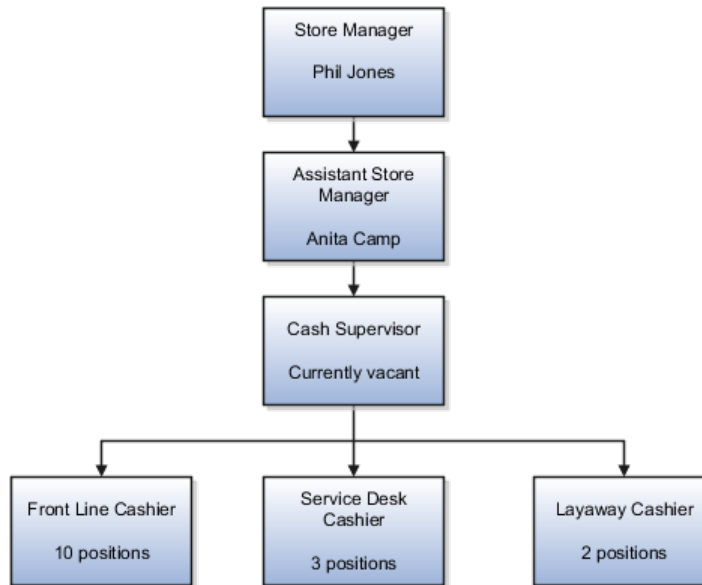
Retail Industry

ABC Corporation has high turnover. It loses approximately 5% of their cashiers monthly. The job of cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross trained to take over another cashier position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. . But to ensure short lines and customer satisfaction, ABC must replace each cashier lost to turnover.

Since turnover is high in retail it is better for this industry to use positions. There is an automatic vacancy when an employee terminates employment. The position exists even when there are no holders. This is important if the person who leaves the company is a manager or supervisor with direct reports. All direct reports continue reporting to the position even if it is empty. You do not need to reassign these employees to another manager or supervisor; the replacement manager is assigned to the existing position.

Also, an advantage to using positions is that when you hire somebody new many of the attributes are defaulted in from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.

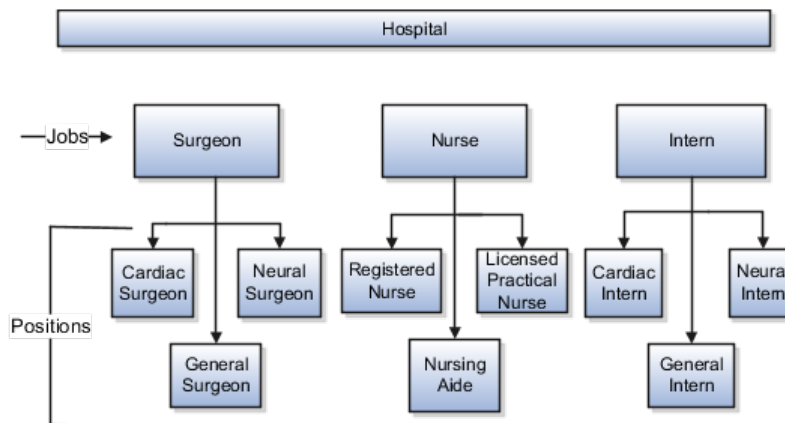


Health Care Industry

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

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

This figure illustrates the hospital position setup.



FAQs for Define Initial Configuration

What happens if I don't use the Enterprise Structures Configurator to set up my enterprise structures?

The Enterprise Structures Configurator is an interview-based tool that guides you through setting up divisions, legal entities, business units, and reference

data sets. The tool also enables you to assign reference data sets to business units and locations. You can set up multiple configurations to perform what-if scenarios, and then print each configuration to compare the resulting enterprise structure. If you do not use the Enterprise Structures Configurator, then you must set up your enterprise structure using the individual tasks that correspond to each enterprise component. In addition, you will not be able to set up multiple configurations and compare different scenarios. It is recommended that you use the Enterprise Structures Configurator.

What's an ultimate holding company?

The legal entity that represents the top level in your organization hierarchy, as defined by the legal name entered for the enterprise. This designation is used only to create an organization tree, with the ultimate holding company as the top level, divisions and country holding companies as the second level, and legal employers as the third level.

What happens if I override the set assignment?

For the selected business unit, you can override the default reference data set for one or more reference data groups. For example, assume you have three reference data groups: Vision 1 SET, Vision 2 SET, and Vision 3 SET, where Vision SET 1 is the default set for business unit United Kingdom Vision 1 BU. You can override the default so that grades are assigned to Vision 2 SET, departments are assigned to Vision 3 SET, and jobs are assigned to the default set, Vision 3 SET.

What's the default reference data set?

The reference data set that is assigned to a business unit for all reference data groups, such as grades, locations, departments, and jobs. You can override the default reference data set for any reference data group.

Define Reference Data Sharing

Reference Data Sharing: Explained

Reference data sharing facilitates sharing of configuration data such as jobs and payment terms, across organizational divisions or business units. You define reference data sets and determine how the data is shared or partitioned. Use reference data sets to reduce duplication and maintenance by sharing common data across business entities where appropriate. Depending on the requirement (specific or common), each business unit can maintain its data at a central location, using a set of values either specific to it or shared by other business units.

You can share reference data after it is filtered on the basis of sets. A common reference data set is available as the default set, which can be assigned to several business units sharing the same reference data. For commonly used data such as currencies, you can use the common reference data set and assign it to multiple business units in various countries that use the same currency. In cases where the default set cannot be assigned to an entity, you can create specific sets. The data set visible on the transactional page depends on the sharing method used to share reference data.

For example, XYZ Corporation uses the same grades throughout the entire organization. Instead of managers in different business units setting up the

same grades, XYZ Corporation decides to create a set called Grades and assign the grades reference data group for all business units in the organization to the Grades set, so that the grades can be shared.

Note

For specific information on configuring reference data sharing for a particular object or product, refer to its product documentation.

FAQs for Define Reference Data Sharing

What reference data objects can be shared across business units?

The following list contains the reference data objects for the Oracle Fusion Applications that can be shared across business units and the method in which the reference data for each is shared.

Application Name	Reference Data Object	Method of Sharing
Trading Community Model	Customer Account Relationship	Assignment to one set only, with common values
Trading Community Model	Customer Account Site	Assignment to one set only, with common values
Trading Community Model	Sales Person	Assignment to one set only, with common values
Opportunity Management	Sales Method Group	Assignment to one set only, with common values
Work Management	Assessment Templates	Assignment to one set only, with common values
Enterprise Contracts	Contract Types	Assignment to one set only, with common values
Sales	Sales Method	Assignment to one set only, with common values
Common Components	Activity Templates	Assignment to one set only, with common values
Payables	Payment Terms	Assignment to multiple sets, no common values allowed
Receivables	Accounting Rules	Assignment to one set only, with common values
Receivables	Aging Buckets	Assignment to one set only, with common values
Receivables	Auto Cash Rules	Assignment to one set only, with common values
Receivables	Collectors	Assignment to one set only, with common values
Receivables	Lockbox	Assignment to one set only, with common values
Receivables	Memo Lines	Assignment to one set only, with common values
Receivables	Payment Terms	Assignment to one set only, with common values

Receivables	Remit To Address	Assignment to one set only, with common values
Receivables	Revenue Contingencies	Assignment to one set only, with common values
Receivables	Transaction Source	Assignment to one set only, with common values
Receivables	Transaction Type	Assignment to one set only, with common values
Advanced Collections	Collections Setups	Assignment to one set only, with common values
Advanced Collections	Dunning Plans	Assignment to one set only, with common values
Tax	Tax Classification Codes	Assignment to one set only, with common values
Performance Management	Performance Templates	Assignment to one set only, with common values
Human Resources	Departments	Assignment to one set only, with common values
Human Resources	Jobs	Assignment to one set only, with common values
Human Resources	Locations	Assignment to one set only, with common values
Human Resources	Grades	Assignment to one set only, with common values
Project Billing	Project and Contract Billing	Assignment to multiple sets, common values not allowed
Project Foundation	Project Accounting Definition	Assignment to one set only, no common values allowed
Project Foundation	Project Rates	Assignment to one set only, with common values
Distributed Order Orchestration	Hold Codes	Assignment to one set only, with common values
Distributed Order Orchestration	Orchestration Process	Assignment to one set only, with common values

Define Legal Jurisdictions and Authorities for Human Capital Management

Jurisdictions and Legal Authorities: Explained

You are required to register your legal entities with legal authorities in the jurisdictions where you conduct business. Register your legal entities as required by local business requirements or other relevant laws. For example, register your legal entities for tax reporting to report sales taxes or value added taxes.

Legal Jurisdictions and Authorities

Define jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion

Payroll. When you first create a legal entity, the Oracle Fusion Legal Entity Configurator automatically creates one legal reporting unit for that legal entity with a registration.

Jurisdictions: Explained

Jurisdiction is a physical territory such as a group of countries, country, state, county, or parish where a particular piece of legislation applies. French Labor Law, Singapore Transactions Tax Law, and US Income Tax Laws are examples of particular legislation that apply to legal entities operating in different countries' jurisdictions. Judicial authority may be exercised within a jurisdiction.

Types of jurisdictions are:

- Identifying Jurisdiction
- Income Tax Jurisdiction
- Transaction Tax Jurisdiction

Identifying Jurisdiction

For each legal entity, select an identifying jurisdiction. An identifying jurisdiction is your first jurisdiction you must register with to be allowed to do business in a country. If there is more than one jurisdiction that a legal entity needs to register with to commence business, select one as the identifying jurisdiction. Typically the identifying jurisdiction is the one you use to uniquely identify your legal entity.

Income tax jurisdictions and transaction tax jurisdictions do not represent the same jurisdiction. Although in some countries, the two jurisdictions are defined at the same geopolitical level, such as a country, and share the same legal authority, they are two distinct jurisdictions.

Income Tax Jurisdiction

Create income tax jurisdictions to properly report and remit income taxes to the legal authority. Income tax jurisdictions by law impose taxes on your financial income generated by all your entities within their jurisdiction. Income tax is a key source of funding that the government uses to fund its activities and serve the public.

Transaction Tax Jurisdiction

Create transaction tax jurisdictions through Oracle Fusion Tax in a separate business flow, because of the specific needs and complexities of various taxes. Tax jurisdictions and their respective rates are provided by suppliers and require periodic maintenance. Use transaction tax jurisdiction for legal reporting of sales and value added taxes.

Legal Authorities: Explained

A legal authority is a government or legal body that is charged with powers to make laws, levy and collect fees and taxes, and remit financial appropriations for a given jurisdiction.

Legal Authorities

For example, the Internal Revenue Service is the authority for enforcing income tax laws in United States. In some countries, such as India and Brazil, you

are required to print legal authority information on your tax reports. Legal authorities are defined in the Oracle Fusion Legal Entity Configurator. Tax authorities are a subset of legal authorities and are defined using the same setup flow.

Legal authorities are not mandatory in Oracle Fusion Human Capital Management (HCM), but are recommended and are generally referenced on statutory reports.

Creating Legal Jurisdictions, Addresses and Authorities: Examples

Define legal jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll.

Legal Jurisdictions

Create a legal jurisdiction by following these steps:

1. Navigate to the **Manage Legal Jurisdictions** page from the **Setup and Maintenance** work area by querying on the **Manage Legal Jurisdictions** task and selecting **Go to Task**.
2. Select **Create**.
3. Enter a unique **Name**, United States Income Tax.
4. Select a **Territory**, United States.
5. Select a **Legislative Category**, Income tax.
6. Select **Identifying**, Yes. Identifying indicates the first jurisdiction a legal entity must register with to do business in a country.
7. Enter a **Start Date** if desired. You can also add an **End Date** to indicate a date that the jurisdiction may no longer be used.
8. Select a **Legal Entity Registration Code**, EIN or TIN.
9. Select a **Legal Reporting Unit Registration Code**, Legal Reporting Unit Registration Number.
10. Optionally enter one or more **Legal Functions**.
11. Select **Save and Close**.

Legal Addresses for Legal Entities and Reporting Units

Create a legal address for legal entities and reporting units by following these steps:

1. Navigate to the **Manage Legal Address** page from the **Setup and Maintenance** work area by querying on the **Manage Legal Address** task and selecting **Go to Task**.
2. Select **Create**.
3. Select **Country**.
4. Enter **Address Line 1**, Oracle Parkway.
5. Optionally enter **Address Line 2**, and **Address Line 3**.
6. Enter or Select **Zip Code**, 94065.

7. Select **Geography** 94065 and **Parent Geography** Redwood Shores, San Mateo, CA.
8. Optionally enter a **Time Zone**, US Pacific Time.
9. Select **OK**.
10. Select **Save and Close**.

Legal Authorities

Create a legal authority by following these steps:

1. Navigate to the **Manage Legal Authorities** page from the **Setup and Maintenance** work area by querying on the **Manage Legal Authorities** task and selecting **Go to Task**.
2. Enter the **Name**, California Franchise Tax Board.
3. Enter the **Tax Authority Type**, Reporting.

Note

Create an address for the legal authority.

-
4. Select **Create**.
 5. The **Site Number** is automatically assigned.
 6. Optionally enter a **Mail Stop**.
 7. Select **Country**, United States
 8. Enter **Address Line 1**, 121 Spear Street, Suite 400.
 9. Optionally enter **Address Line 2**, and **Address Line 3**.
 10. Enter or Select **Zip Code**, 94105.
 11. Select **Geography** 94105 and **Parent Geography** San Francisco, San Francisco, CA.
 12. Select **OK**.
 13. Optionally enter a **Time Zone**, US Pacific Time.
 14. Optionally click the **One-Time Address** check box.
 15. The **From Date** defaults to today's date. Update if necessary.
 16. Optionally enter a **To Date** to indicate the last day the address can be used.

Note

You can optionally enter **Address Purpose** details.

-
17. Select **Add Row**.
 18. Select **Purpose**.
 19. The **Purpose from Date** will default to today's date.
 20. Optionally enter a **Purpose to Date**.

21. Select **OK**.
22. Select **Save and Close**.

Creating Legal Entities, Registrations, and Reporting Units: Examples

Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, and income, pay transaction taxes, or perform intercompany trading.

Legal Entity

From within an implementation project, create a legal entity by following these steps:

Note

Working within an implementation project is required because you select a scope value within an implementation project. The scope value is the legal entity that you will create or select to work within for your implementation project.

-
1. Navigate to an implementation project that contains the **Define Legal Entities** task list from the **Setup and Maintenance** work area.
 2. Select **Go to Task** for the **Define Legal Entities** task list within the implementation project.

Note

The following message appears:

You must first select a scope value to perform the task.

- Select and add an existing scope value to the implementation project.
- Create a new scope value and then add it to the implementation project.

-
3. Select **Create New**.
 4. From the **Manage Legal Entities** page select **Create**.
 5. Accept the default **Country**, United States.
 6. Enter **Name**, InFusion USA West.
 7. Enter **Legal Entity Identifier**, US0033.
 8. Optionally enter **Start Date**. When the start date is blank the legal entity is effective from the creation date.
 9. Optionally enter an **End Date**.
 10. Optionally, if your legal entity should be registered to report payroll tax and social insurance, select the **Payroll statutory unit** check box.
 11. Optionally, if your legal entity has employees, select the **Legal employer** check box.

12. Optionally, if this legal entity is not a payroll statutory unit, select an existing payroll statutory unit to report payroll tax and social instance on behalf of this legal entity.

Note

Enter the **Registration Information**.

-
13. Accept the default **Identifying Jurisdiction**, United States Income Tax.
 14. Search for and select a **Legal Address**, 500 Oracle Parkway, Redwood Shores, CA 94065.

Note

The legal address must have been entered previously using the **Manage Legal Address** task.

-
15. Select **OK**.
 16. Optionally enter a **Place of Registration**.
 17. Enter the **EIN or TIN**.
 18. Enter the **Legal Reporting Unit Registration Number**.
 19. Select **Save and Close** to navigate back to the Manage Legal Entities page.
 20. Select **Done** to return to your implementation project. An issue with the done button has been fixed in 11g Release 1 (11.1.4).
 21. In the **Legal Entity** choice list in the implementation project (just below the implementation project name and code), click **Select and Add Legal Entity** to choose the legal entity that you just created, and set the scope for the remainder of your setup.
 22. Search for and select your legal entity from the **Manage Legal Entities** page.
 23. Select **Save and Close**.

This sets the scope for your task list to the selected legal entity, as indicated in the **Legal Entity** choice list above the **Tasks and Task Lists** table.

Legal Entity Registrations

A legal entity registration with the same name as that of the legal entity will be created by default. To verify this, locate the **Manage Legal Entity Registrations** task and then select **Go to Task**. To create another registration for the legal entity follow these steps:

1. Navigate to your implementation project from the **Setup and Maintenance** work area. Verify that the parent **Legal Entity** scope value is set correctly.
2. Expand the **Define Legal Entities** task list within the implementation project.
3. Select **Manage Legal Entity Registrations Go to Task**.

4. Select **Create**.
5. Enter **Jurisdiction**.
6. Enter **Registered Address**.
7. Enter **Registered Name**.
8. Optionally enter **Alternate Name**, **Registration Number**, **Place of Registration**, **Issuing Legal Authority**, and **Issuing Legal Authority Address**, **Start Date**, and **End Date**.
9. **Save and Close**.

Legal Reporting Unit

When a legal entity is created, a legal reporting unit with the same name as that of the entity is also automatically created. To create more legal reporting units or modify the settings follow these steps:

1. Navigate to your implementation project from the **Setup and Maintenance** work area. Verify that the parent **Legal Entity** scope value is set correctly.
2. Select **Go to Task** for the **Define Legal Entities** task list within the implementation project.
3. Select **Create**.
4. Enter **Territory**, United States.
5. Enter **Name**.
6. Optionally enter a **Start Date**.

Note

Enter **Registration Information**.

-
7. Search for and select **Jurisdiction**.

Note

Enter **Main Legal Reporting Unit** information.

-
8. Select the value Yes or No for the **Main Legal Reporting Unit**. Set value to yes only if you are creating a new main (primary) legal reporting unit.
 9. Enter the **Main Effective Start Date**, 1/1/11.
 10. **Save and Close**.

Define Legal Entities for Human Capital Management

HCM Organization Models: Examples

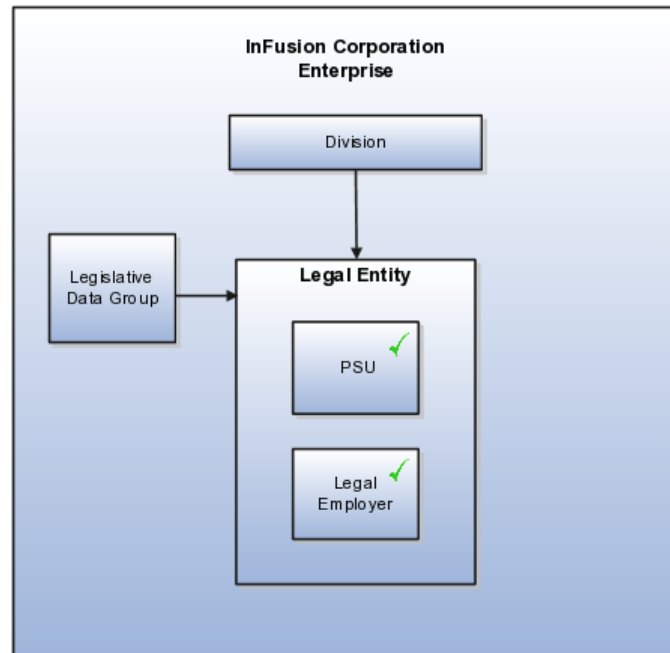
These examples illustrate different models for human capital management (HCM) organizations. Each example includes a legislative data group (LDG).

LDGs are not an organization classification, but they are included in the example to show how you associate them with a payroll statutory unit to partition payroll data.

Simple Configuration

This example illustrates a simple configuration that does not include any tax reporting units. The legal employer and payroll statutory units are the same, sharing the same boundaries. Reporting can only be done at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as reporting in these countries is done at the legal entity level.

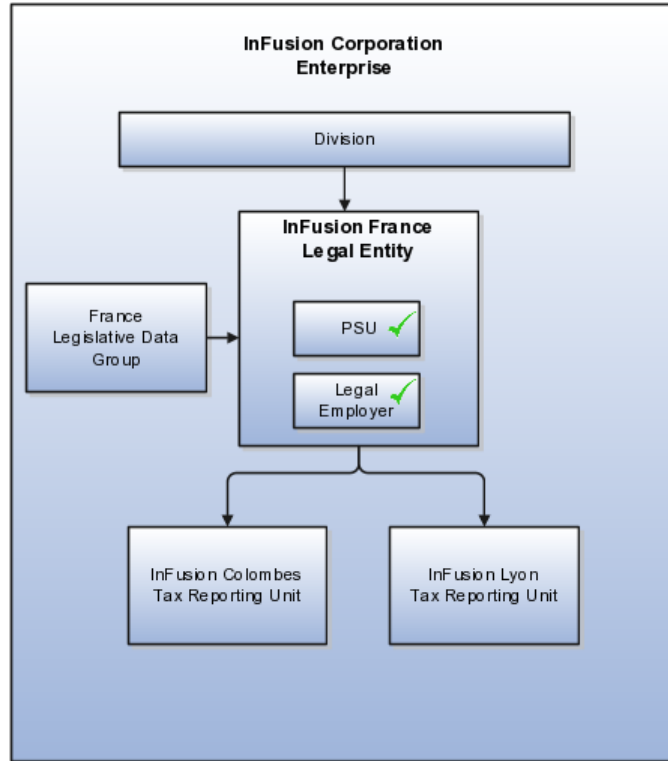
This figure illustrates a simple configuration where the enterprise has only one legal entity that is both a payroll statutory unit and a legal employer.



Multiple Legal Employers and Tax Reporting Units Under One Payroll Statutory Unit

This example illustrates a more complex configuration. In this enterprise, one legal entity, InFusion US, is defined as a payroll statutory unit and has two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit, and how tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit. The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and the balances can be categorized separately by either payroll statutory unit, legal employer, or tax reporting unit. This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US.

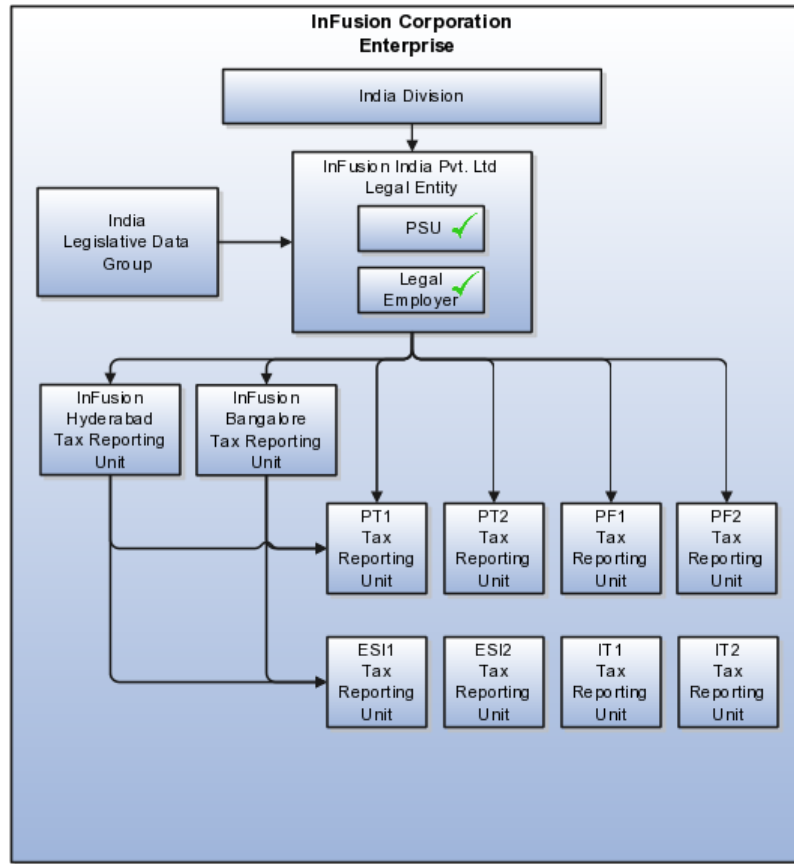
This figure illustrates an enterprise that has one payroll statutory unit and multiple legal employers and tax reporting units.



One Payroll Statutory Unit with Several Tax Reporting Units That Are Independent from the Legal Employer

In this model, the enterprise has one legal entity, and legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently. Using this model, you would not typically need to report on tax reporting unit balances within a legal employer, and balances can be categorized by either or both organizations, as required. An example of a country that might use this model is India.

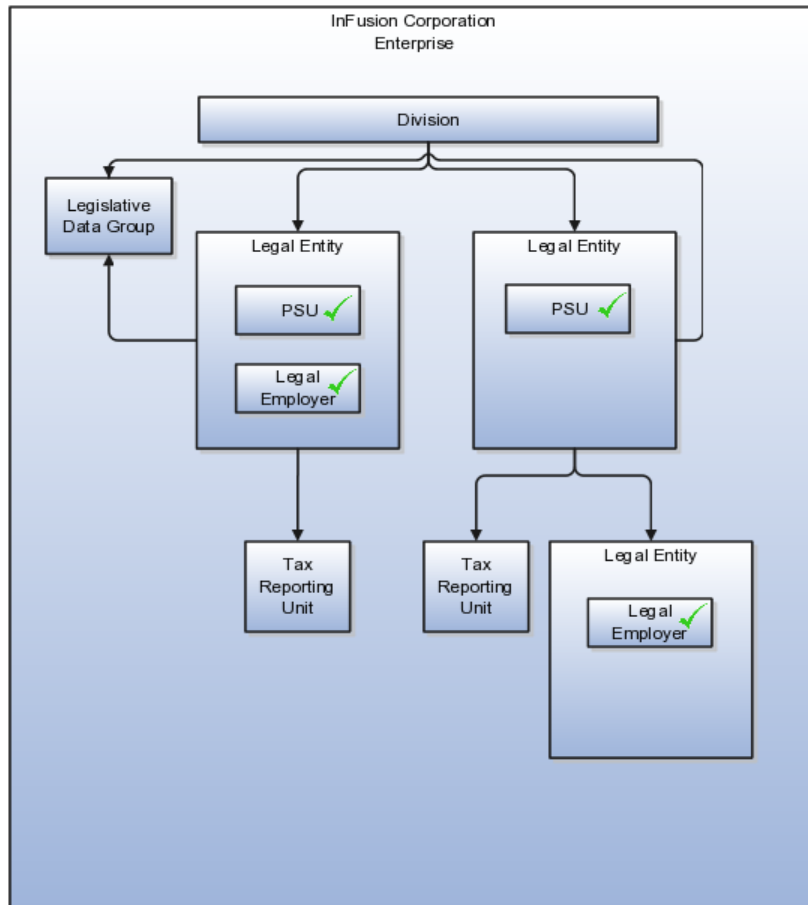
This figure illustrates an enterprise with one legal entity that is a payroll statutory unit and a legal employer, and the tax reporting units are independent from the legal employer.



Multiple Payroll Statutory Units with Several Tax Reporting Units that are Independent from the Legal Employer

In this model, the enterprise has two legal entities, and legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently. Using this model, you would not typically need to report on tax reporting unit balances within a legal employer, and balances can be categorized by either or both organizations, as required. An example of a country that might use this model is the United Kingdom (UK).

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



Legislative Data Groups: Explained

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

Legislative Data Groups

Oracle Fusion Payroll is organized by legislative data groups. Each legislative data group marks a legislation in which payroll is processed, and is associated with a legislative code, currency and its own cost key flexfield structure. A legislative data group is a boundary that can share the same set up and still comply with the local laws. It can span many jurisdictions as long as they are within one country, and contain many legal entities that act as payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

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

When you set up legal entities, you can identify them as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). A tax reporting unit is created

automatically when you add a legal entity and identify it as a payroll statutory unit. Depending on how your organization is structured, you may have only one legal entity that is also a payroll statutory unit and a legal employer, or you may have multiple legal entities, payroll statutory units, and legal employers.

Legal Employers and Payroll Statutory Unit

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

Payroll Statutory Units and Tax Reporting Units

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

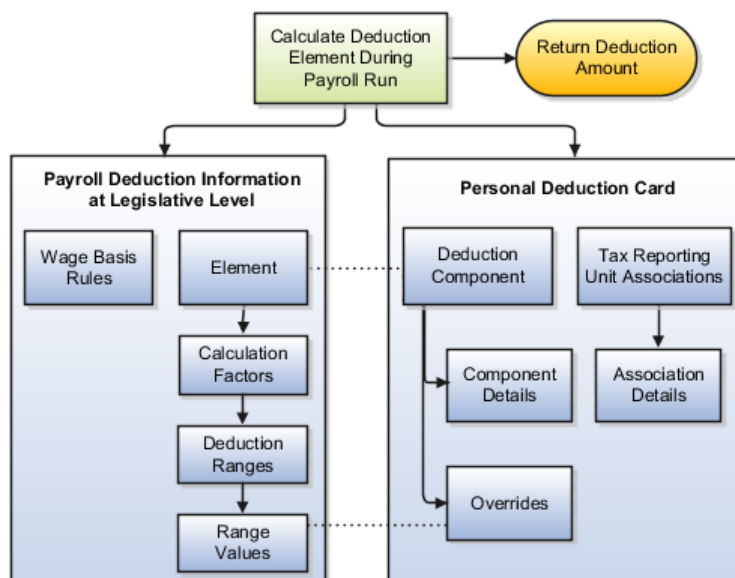
Tax Reporting Units and Legal Employers

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

Payroll Deductions, Elements, and Deduction Cards: How They Work Together

Payroll deductions comprise multiple components that are defined and managed at different levels. When a payroll run processes a payroll deduction element, it retrieves information stored at all applicable levels.

The following figure shows how deduction information at the legislative and personal levels feeds into the deduction calculation process.



Element Processing

The deduction element's status processing rule drives the calculation, accessing rates and rules defined for the related payroll deduction and values captured on a personal deduction card.

Use the Manage Elements task in the Payroll Calculation work area to view the deduction elements. If an element is associated with a payroll deduction, the deduction name is displayed in the Deductions section on the Manage Element Summary page.

Payroll Deduction

A payroll deduction comprises the rates and rules used to calculate the deduction amount.

- Wage basis rules define which classifications of earnings to consider when calculating the basis for the deduction element, based on criteria such as a worker's place of residence. The rule is defined at the legislative level, but the context value for the rule is captured on the deduction card.
- Calculation factors associated with the deduction element indicate which deduction range to use when calculating the deduction amount. For example, a calculation factor might identify which set of tax rates to use based on the employee's tax code, as specified on the deduction card. The calculated deductible amount would determine the specific rate to use from that range. A deduction range can also define a processing rule, such as a proration rule for calculating bankruptcy payments.

Use the Manage Deduction Group Rules task in the Payroll Calculation work area to view all wage basis rules, related elements, and calculation factors defined for a particular deduction group. Use the Manage Deduction Ranges task to view deduction ranges and range values.

Personal Deduction Card

A personal deduction card contains person-specific information used to calculate the deduction amount.

- A deduction component on a deduction card typically relates to a deduction element defined at the legislative level. Adding a deduction component to a deduction card creates an entry for the related element.
- Component details, such as tax filing status or social insurance contribution category, are used as input values in the element calculation.
- Rates and rules defined on a personal deduction card override values defined in deduction ranges at the legislative level. For example, a default tax rate may be defined at the legislative level, but an employee qualifies for a special reduced rate, which you enter as an override on their personal deduction card.

Note

For some localizations, you can create deduction cards for a specific tax reporting unit (TRU) or payroll statutory unit (PSU) to capture information such as an employer's contribution rate.

- Associations indicate which tax reporting unit is responsible for reporting the deductions. They define how deductions are aggregated and reported.

Use the Manage Personal Deductions task in the Payroll Administration or Payroll Calculation work area to create and edit personal deduction cards.

Note

Each legislation supports a predefined set of deduction card types, which typically includes a statutory deduction card and an involuntary deduction card. Additional cards may be supported to capture information for reporting purposes.

Defining Deduction Cards at Different Levels: Examples

You can create and manage deduction cards at several different levels to capture information specific to a person or entity, such as an employee's tax filing status or an employer's tax identification number. You can also enter values on a deduction card that override default values defined at other levels. The priority of deduction information, from highest to lowest, is as follows:

1. Personal deduction card (payroll relationship level)
2. Tax reporting unit deduction card
3. Payroll statutory unit deduction card
4. Payroll deduction range values (legislative data group level)

Note

The ability to create deduction cards at different levels and the allowable overrides at each level vary by legislation. The basic steps involved in creating and managing deduction cards is the same at all levels.

Use these examples to understand when you might define deduction cards with overrides at each level.

Personal Deduction Card

An employee qualifies for a special reduced tax rate. The payroll administrator enters the employee's reduced rate as an override on their personal deduction card, using the Manage Personal Deductions task in the Payroll Administration work area.

Tax Reporting Unit Card

The income tax exemption amount is set to \$2000 at the legislative level, but a tax reporting unit in a particular state or province uses an exemption amount of \$2500. The payroll manager enters the exemption amount as an override on the tax reporting unit deduction card, using the Manage Legal Reporting Unit Deduction Records task in the Setup and Maintenance work area. This override value becomes the default exemption amount for the tax reporting unit, but can be overridden by an exemption amount defined on a personal deduction card.

Payroll Statutory Unit Card

Calculation of the contribution base for pension insurance varies by legal employer. During application setup, the implementation team defines entity-specific contribution rates as overrides on the payroll statutory unit deduction

card, using the Manage Legal Entity Deduction Records task in the Setup and Maintenance work area. These override values become the default contribution rates for the payroll statutory unit, but can be overridden by values defined on a personal or tax reporting unit deduction card.

Payroll Deduction Range Values

The application provides a set of predefined income tax rates for the country in which an employer conducts business. The payroll manager may use the Manage Deduction Ranges task in the Payroll Calculation work area to view this information, but the application prohibits users from modifying the predefined values. If, for example, an employer qualifies for a special tax rate, the payroll manager enters the appropriate values as overrides on a deduction card at the appropriate level.

FAQs for Define Legal Entities for Human Capital Management

What's a legal employer?

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

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

What's a legal address?

A legal address is the mailing address of a legal entity or legal authority. You use legal addresses when you send correspondence such as invoices, bills, reports, and so on, to a legal entity or authority. A legal address is also the address a legal entity uses to register with a legal authority.

You must create legal addresses before creating legal entities. You create legal addresses for legal authorities at the same time as creating legal authorities.

What's a payroll statutory unit?

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

What's a tax reporting unit?

Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications. To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you

identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage TRU - HCM Information task.

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

Define Business Units for Human Capital Management

Business Units: Explained

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities. Normally, it will have a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy. In Oracle Fusion Applications, you assign your business units to one primary ledger. For example, if a business unit is processing payables invoices they will need to post to a particular ledger. This assignment is mandatory for your business units with business functions that produce financial transactions.

In Oracle Fusion Applications, use business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.

The Oracle Fusion Applications business unit model:

- Allows for flexible implementation
- Provides a consistent entity for controlling and reporting on transactions
- Anchors the sharing of sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can choose to share reference data, such as payment terms and transaction types, across business units, or you can choose to have each business unit manage its own set depending on the level at which you wish to enforce common policies.

In countries where gapless and chronological sequencing of documents is required for subledger transactions, define your business units in alignment with your ledger definition, because the uniqueness of sequencing is only ensured within a ledger. In these cases, define a single ledger and assign one legal entity and business unit.

In summary, use business units in the following ways:

- Management reporting
- Processing of transactions
- Security of transactional data

- Reference data definition and sharing

Brief Overview of Business Unit Security

Business units are used by a number of Oracle Fusion Applications to implement data security. You assign data roles to your users to give them access to data in business units and permit them to perform specific functions on this data. When a business function is enabled for a business unit, the application can trigger the creation of data roles for this business unit based on the business function's related job roles.

For example, if a payables invoicing business function is enabled, then it is clear that there are employees in this business unit that perform the function of payables invoicing, and need access to the payables invoicing functionality. Therefore, based on the correspondence between the business function and the job roles, appropriate data roles are generated automatically. Use Human Capital Management (HCM) security profiles to administer security for employees in business units.

Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects on the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

Determinant Types

The partitioned reference data is shared based on a business context setting called the determinant type. It is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

Type	Description
Asset Book	Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.
Business Unit	The departments or organizations within an enterprise.
Cost Organization	The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.
Project Unit	A logical organization within an enterprise that is responsible for enforcing consistent project management practices.
Reference Data Set	References to other shared reference data sets.

Determinant

The determinant or determinant value is the value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the

appropriate reference data set. For example, when managing set assignments for the set determinant type, Reference Data Set is the determinant type, and you would enter the corresponding set code value as the corresponding determinant value.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data) that are treated in the same manner because of commonness in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups, based on the functional area and the partitioning requirements that they have in common. For example, all tables and views that define Sales Order Type details might be part of the same reference group.

Note

The reference groups are predefined in the reference groups table and are available for selection and assignment.

Define Chart of Accounts and Accounting Configurations

Payroll and Financials Setup: Explained

Oracle Fusion Global Payroll integrates with Oracle Fusion Financials. You create components as part of your implementation such as chart of accounts, ledgers, and accounting calendars, which you use when creating payroll definitions and when distributing accounting for payroll costs.

Complete the following setup tasks in the Setup and Maintenance area for the chart of accounts and ledgers. If you integrate Global Payroll and Financials in a single system, assign an application implementation consultant role or appropriate duty role to a Financials or payroll manager.

Chart of Account Setup Tasks

Complete the following tasks to set up your chart of accounts information. Later, you associate the chart of accounts to a ledger.

Task	Action
Manage Chart of Accounts Value Sets	Create new or review existing value sets for association with a key flexfield segment.
Manage Chart of Accounts Structures	Create account structures that specify the segments to include, their order, and the value sets to validate the data entered in the segments. The key flexfield, Accounting Flexfield, is predefined for you in Oracle Fusion General Ledger.
Manage Chart of Accounts Structure Instances	Create account structure instances used to record transactions and maintain account balances.
Manage Chart of Accounts Value Set Values	Create groups of values assigned to a key flexfield segment.

Manage Account Hierarchies	Search, create, and edit hierarchical groupings of accounts.
Manage Accounting Calendars	Set up accounting calendar period details. Determine the total number, frequency, and duration of the accounting periods.
Manage Account Combinations	<p>If you do not select the option for your chart of accounts structure instance to allow account combinations to be dynamically created, you create account combinations. You create accounts for each account combination used in payroll, for example, for your payroll liability, cash, cash clearing, default, and suspense accounts. As a best practice, use the same account numbers in payroll and General Ledger.</p> <p>If you reconcile payments in Oracle Fusion Cash Management, create an account combination for reconciliation differences.</p>

Ledger Setup Tasks

You perform the following tasks as part of the accounting configuration setup for payroll.

Task	Action
Manage Primary Ledgers	<p>Create a ledger with a chart of accounts, accounting calendar, currency and subledger accounting method.</p> <p>If you are creating bank information, you must create a primary ledger.</p>
Assign Legal Entities	<p>Add the legal entities that use the ledger.</p> <p>When you create a payroll definition, you select a legislative data group. The list of available ledgers includes only ledgers assigned to legal entities associated with the legislative data group. (The Manage Legal Entity HCM Information task associates the payroll statutory units for legal entities to the legislative data group.)</p>
Specify Ledger Options	Complete the fields for the General Information, Accounting Calendar, and Subledger Accounting sections. In the Period Close section, select the Retained Earnings Account you will use for payroll. In the Journal Processing Intercompany subsection, select the option to launch AutoReverse after the open period.
Assign Balancing Segment Values to Legal Entities	Assign specific balancing segment values to each legal entity before assigning values to the ledgers. By specifying this information, you can more easily identify legal entities during transaction processing and reporting
Assign Balancing Segment Values to Ledger	Optionally, assign specific primary balancing segment values to the primary and secondary ledgers to represent transactions for nonlegal entities, such as adjustments.

Manage Reporting Currencies	Review and update reporting currencies. Reporting currencies maintain and record subledger and general ledger journal entries in additional currencies.
Review and Submit Accounting Configuration	Submit your configuration.
Open First Period	Open the first period when you are ready to process transactions for the ledger. the Open First Period Task is used initially to open the first period. Afterwards, you use the Manage Accounting Periods in General Ledger to open and close periods, and to specify the target period that concludes the series of calendar periods.

Define Workforce Structures: Define Organization Structures

Designing an Enterprise Configuration: Example

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

Scenario

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

Enterprise Details

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

Analysis

InFusion requires three divisions. The US division will cover the US locations. The Europe division will cover the UK and France. Saudi Arabia and the UAE will be covered by the Middle East division.

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

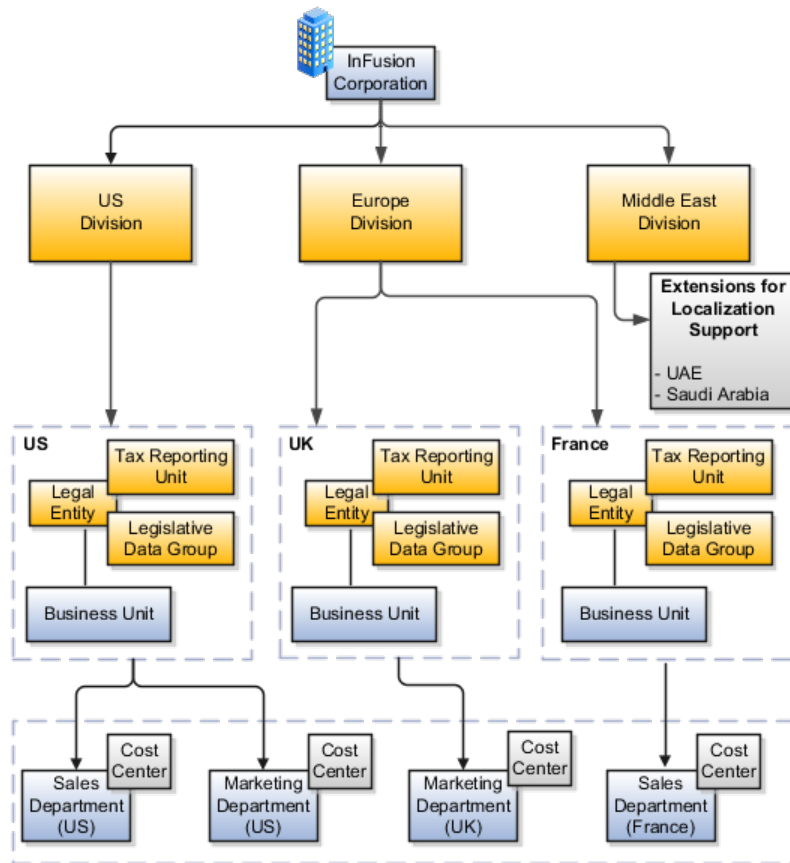
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

InFusion requires business units for human capital management (HCM) purposes. InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference

data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

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

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



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

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

Defining an Organization with One Classification

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

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, if you want to use an organization within the Oracle Fusion Customer Relationship Management applications as a department that employs sales people, you can classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, you can create a legal entity for each country using the Oracle Fusion Legal Entity Configurator and then use the Manage Departments task to classify them as a department as well.

Disability Organizations: Explained

Set up disability organizations to identify the external organizations with which workers with disabilities are registered. Disability organizations provide information and support to people with disabilities. The Royal National Institute of Blind People is an example of a disability organization. Disability organizations can also assess the degree to which a person is affected by the disability.

Disability Organizations and Person Records

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

Cost Centers and Departments: Explained

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

The following two components need to be considered in designing your enterprise structure:

- Cost centers

- Departments

Cost Centers

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

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

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach will require defining more cost center values.
- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values.

The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

Departments

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

A manager of a department is typically responsible for:

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

Note

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

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Applications, departments are defined

and classified as Department organizations. Oracle Fusion Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

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

Department Classifications: Points to Consider

A department can be classified as a project organization, sales and marketing organization, or cost organization.

Oracle Fusion Human Capital Management (HCM) uses trees to model organization hierarchies. It provides seeded tree structures for department and other organizational hierarchies that can include organizations with any classification.

Project Organization

Classify departments as a project owning organization to enable associating them with projects or tasks. The project association is one of the key drivers for project access security.

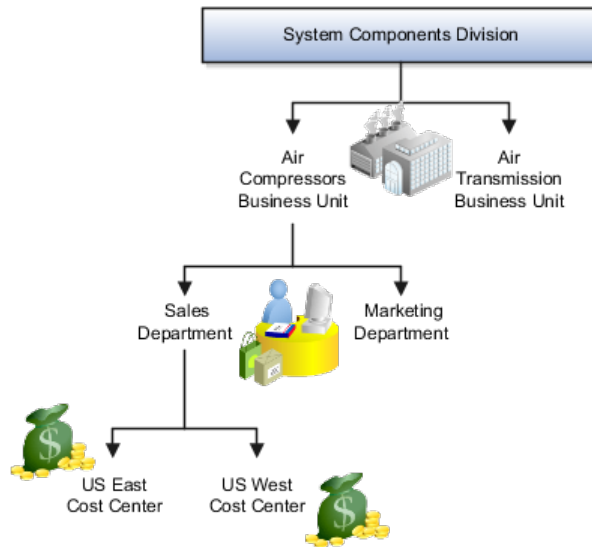
In addition, you must classify departments as project expenditure organizations to enable associating them to project expenditure items. Both project owning organizations and project expenditure organizations can be used by Oracle Fusion Subledger Accounting to derive accounts for posting Oracle Fusion Projects accounting entries to Oracle Fusion General Ledger.

Sales and Marketing Organization

In Oracle Fusion Customer Relationship Management (CRM), you can define sales and marketing organizations. Sales organization hierarchies are used to report and forecast sales results. Sales people are defined as resources assigned to these organizations.

In some enterprises, the HCM departments and hierarchies correspond to sales organizations and hierarchies. It is important to examine the decision on how to model sales hierarchies in relationship to department hierarchies when implementing customer relationship management to eliminate any possible redundancy in the definition of the organizations.

The following figure illustrates a management hierarchy, in which the System Components Division tracks its expenses in two cost centers, Air Compressors and Air Transmission. At the department level, two organizations with a classifications of Department are defined, the Marketing Department and Sales Department. These two departments can be also identified as a Resource Organizations, which will allow assigning resources, such as sales people, and other CRM specific information to them. Each department is represented in the chart of accounts by more than one cost center, allowing for granular as well as hierarchical reporting.



Cost Organization

Oracle Fusion Costing uses a cost organization to represent a single physical inventory facility or group of inventory storage centers, for example, inventory organizations. This cost organization can roll up to a manager with responsibility for the cost center in the financial reports.

A cost organization can represent a costing department. Consider this relationship when determining the setup of departments in HCM. There are no system dependencies requiring these two entities, cost organization and costing department, be set up in the same way.

Locations: Explained

A location identifies physical addresses of a workforce structure, such as a department or a job. You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

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

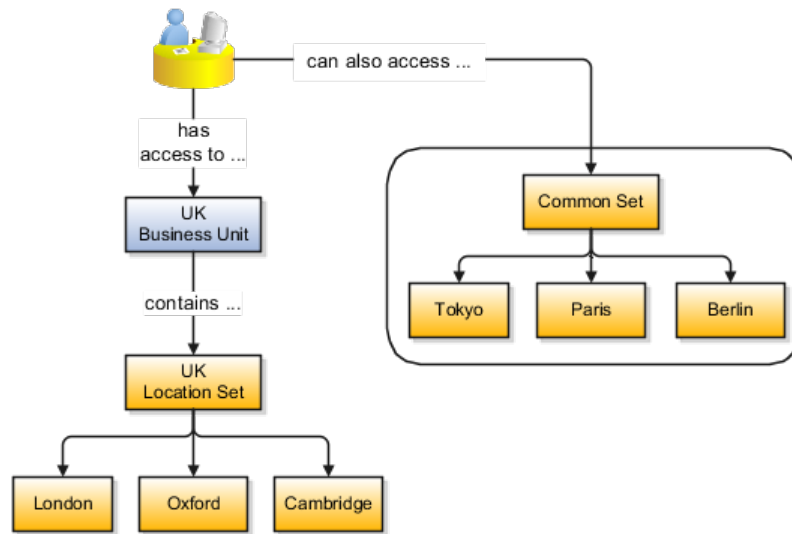
Location Sets

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

You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit. When users

search for locations, they can see the locations that they have access to along with the locations in the common set.

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



Creating Multiple Locations Simultaneously

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, then add your location information to the spreadsheet, and then upload directly to your enterprise configuration. You can upload the spreadsheet multiple times to accommodate revisions.

Action Components: How They Work Together

Actions track changes to Human Capital Management (HCM) records, for example, changes to employment and assignment records. When you create or update these records, the action identifies the cause of the creation or change.

Action

You can view a history of effective-dated changes (assignment history, for example), and the action and reason details are particularly useful. You sometimes use actions to categorize the type of change. Each predefined termination action is associated with a termination type (either voluntary or involuntary) to help categorize the termination. For example, the termination actions Death and Reduction in Force are categorized as voluntary and involuntary respectively. In certain cases, actions determine the business flow. For example, you can select from a list of employment-related actions, such as Assignment Change, Transfer, or Termination. The action you select determines the path you take through the current business flow. If you want to use your own action names to track changes, you can create new actions and associate them with the appropriate action types.

Note

If you are creating your own termination-related action, it is highly recommended that you specify the termination type for the action, whether it is voluntary or involuntary. This information is useful for analysis and reporting purposes.

Action Reason

You can optionally associate reasons with actions, for example, a generic action of termination could have reasons such as voluntary retirement or involuntary layoff. The primary reason for doing this is for analysis and reporting purposes. You can view the action and reason details in the Employee Termination Report. Line managers can view predictions about who is likely to leave voluntarily, which are based on existing and historical terminations data. The process that generates the predictions uses the action and reason data to identify whether a termination is voluntary or involuntary. When managers allocate compensation to their workers, they can select from a list of action reasons that help identify the type of or reason for the compensation allocation.

Action Type

Action type identifies the type of business process associated with the action and determines what happens when you select an action. An action type is associated with one or more predefined actions. You can create your own actions and associate them with the predefined action types. For example, the Hire an Employee action type is associated with the Hire action. You could create an action Hire Part-Time and associate it with the Hire an Employee action type. Your action appears in the Action list of values on the Hire an Employee page. To hire a part-time employee, you could select the Hire Part-Time action instead of the predefined Hire action.

The Three-Tier Employment Model: Explained

The three-tier employment model comprises three types of entities, which are work relationships, employment terms, and assignments. Users can include contract details in employment terms.

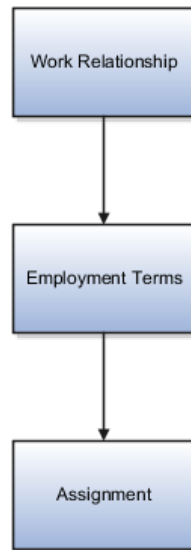
When you configure the employment model for the enterprise or legal employer (when you create or update the enterprise or legal employer), the following three-tier options are available:

- Single Employment Terms with Single Assignment
- Single Employment Terms with Multiple Assignments
- Multiple Employment Terms with Single Assignment
- Multiple Employment Terms with Multiple Assignments

Single Employment Terms with Single Assignment

Each work relationship contains one set of employment terms, and each set of employment terms contains one assignment.

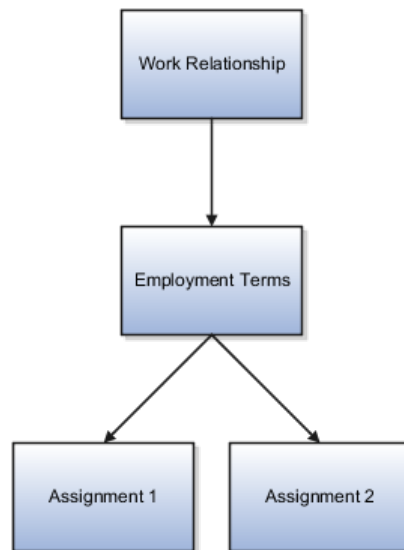
Both the employment terms and the assignment are created automatically.



Single Employment Terms with Multiple Assignments

Each work relationship contains one set of employment terms, and the employment terms can contain one or more assignments.

The employment terms and one assignment are created automatically when the work relationship is created; additional assignments are created manually. Additional assignments can belong to the employment terms or exist outside them.

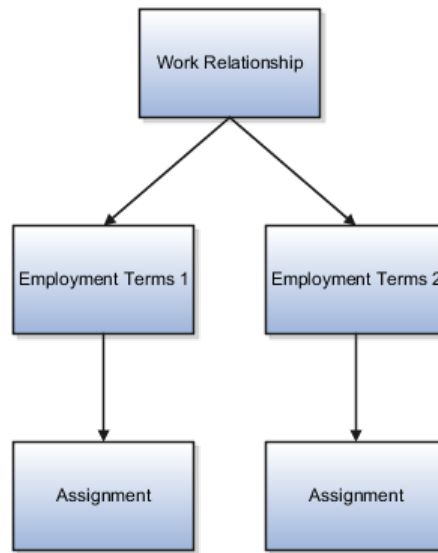


Multiple Employment Terms with Single Assignment

Each work relationship can contain one or more sets of employment terms, and each set of employment terms can contain a single assignment.

One set of employment terms and the associated assignment are created automatically when the work relationship is created; additional employment

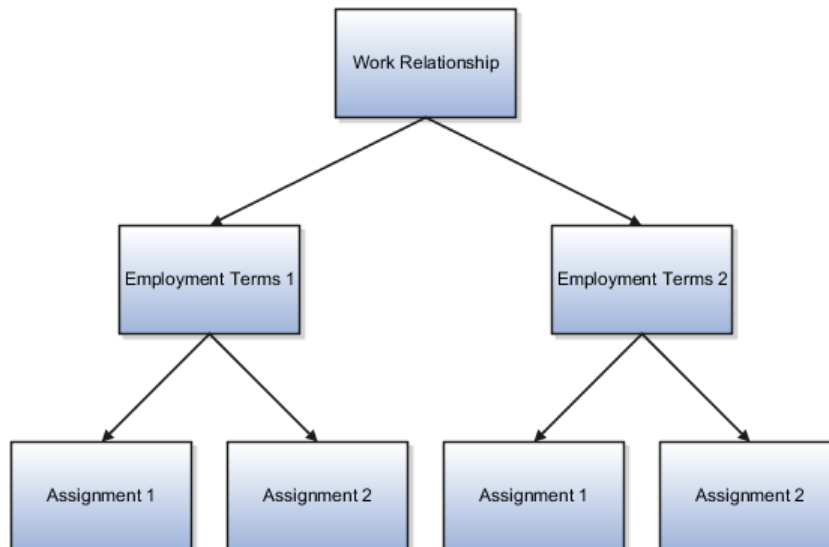
terms and assignments are created manually. Additional assignments can belong to employment terms or exist outside them.



Multiple Employment Terms with Multiple Assignments

Each work relationship can contain one or more sets of employment terms, and each set of employment terms can contain one or more assignments.

One set of employment terms and an associated assignment are created automatically when the work relationship is created; additional employment terms and assignments are created manually. Additional assignments can belong to employment terms or exist outside them.



The Two-Tier Employment Model: Explained

The two-tier employment model comprises two types of entities, which are work relationships and assignments. Employment terms occur in the three-tier employment model only.

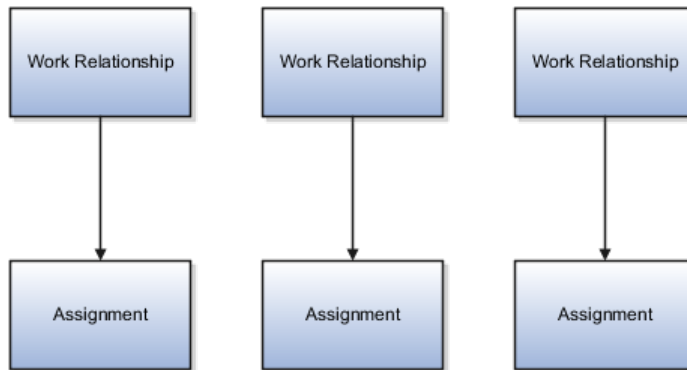
When you configure the employment model for the enterprise or legal employer (when you create or update the enterprise or legal employer), you can select from three two-tier options:

- Single Assignment
- Single Assignment with Contract
- Multiple Assignments

Single Assignment

If you select Single Assignment, each work relationship of any type has one assignment only.

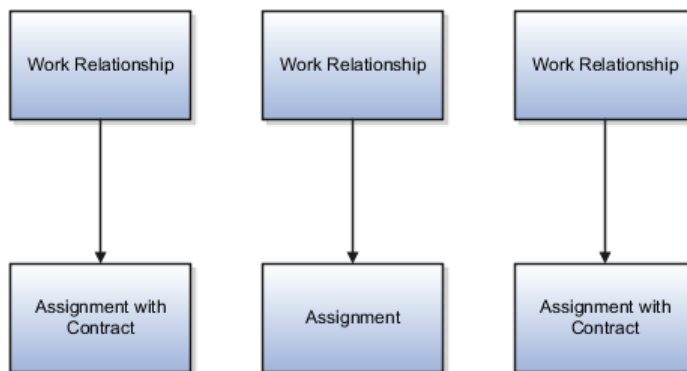
The assignment is created automatically when the work relationship is created.



Single Assignment with Contract

If you select Single Assignment with Contract, users can include contract information in the single assignment. This approach enables those legislations that require contract information in employment records to meet their obligations without having to use a three-tier employment model.

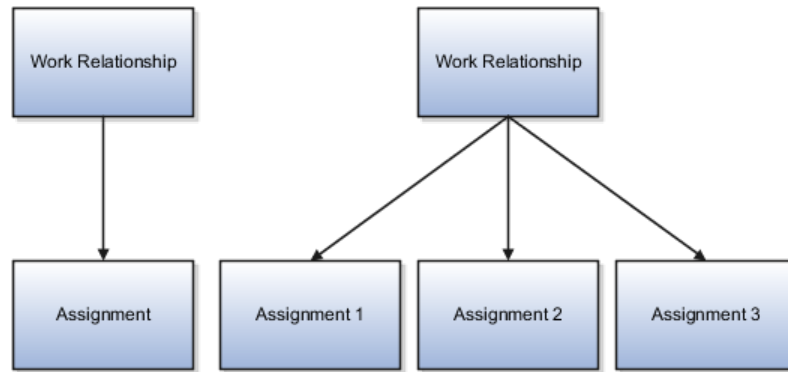
The assignment is created automatically when the work relationship is created. Including contract information in the assignment is optional.



Multiple Assignments

If you select Multiple Assignments, each work relationship of any type can include one or more assignments.

One assignment is created automatically when the work relationship is created. Additional assignments are optional and are created manually.



Selecting the Employment Model: Critical Choices

By default, every enterprise uses the two-tier single-assignment employment model. You can select a different employment model for the enterprise or for individual legal employers. This topic discusses the choices you can make and identifies any restrictions.

Using the Two-Tier Employment Model

If you select any of the two-tier employment models at the enterprise level:

- You can select a different employment model for individual legal employers.
- Employment terms cannot be used in any work relationship in the enterprise, unless you select a three-tier employment model for individual legal employers.

If you select:

- Single Assignment or Single Assignment with Contract, all work relationships in the enterprise or legal employer are restricted to a single assignment.
- Multiple Assignments, all work relationships in the enterprise or legal employer can include one or more assignments; therefore, work relationships can include a single assignment when appropriate.

Using the Three-Tier Employment Model

If you select any of the three-tier employment models at the enterprise level, you can select a different employment model for individual legal employers.

In legal employers where employment terms are used, employee and nonworker work relationships have at least one set of employment terms. Additional sets of employment terms, where supported, are optional.

Note that employment terms are not valid for contingent workers. If you select Single Employment Terms with Single Assignment, contingent workers have a single assignment in each work relationship; otherwise, contingent workers can have multiple assignments in each work relationship.

If you select a three-tier employment model that supports:

- A single assignment in a set of employment terms, then users cannot create multiple assignments in a set of employment terms
- Multiple assignments in a set of employment terms, then users can create one or more assignments in a set of employment terms; therefore, employment terms can include a single assignment when appropriate
- A single set of employment terms in a work relationship, then users cannot create multiple sets of employment terms in a work relationship
- Multiple sets of employment terms in a work relationship, then users can create one or more sets of employment terms in a work relationship; therefore, work relationships can include a single set of employment terms when appropriate

Changing the Employment Model for the Enterprise or Legal Employer

In general, you can change the employment model for the enterprise or legal employer both during initial implementation and later. However, there are some restrictions on switching to and from particular employment models.

The following table identifies whether you can switch from one two-tier employment model to a different two-tier employment model.

From	To Single Assignment	To Single Assignment with Contract	To Multiple Assignments
Single Assignment	N/A	See note	Yes
Single Assignment with Contract	See note	N/A	Yes
Multiple Assignments	See note	Yes	N/A

Note

Yes, provided that no work relationships exist in the enterprise or legal employer.

You can switch from a two-tier employment model to a three-tier employment model only if no work relationships exist in the enterprise or legal employer.

You can switch from a three-tier employment model to a two-tier employment model only if no work relationships exist in the enterprise or legal employer.

You can switch from one three-tier employment model to any other three-tier employment model at any time.

Employment Terms Override: Explained

If you use the three-tier employment model, assignments inherit most attribute values from the associated employment terms. For example, if you set the assignment category to full-time in the employment terms, then all assignments associated with those employment terms are full-time by default. For the enterprise or legal employer, you specify whether attribute values inherited from employment terms can be overridden at the assignment level.

Preventing Override at the Assignment Level

If you prevent override at the assignment level, then users cannot update assignment attribute values inherited from employment terms. This approach is recommended if you want to enforce particular assignment attribute values.

The restriction applies only to attribute values that users specify on the employment terms, and they can specify as many or as few attributes as required at that level. Any value that users omit from the employment terms can be updated without restriction at the assignment level.

Allowing Override at the Assignment Level

If you allow override at the assignment level, then users can update assignment attribute values inherited from employment terms. Using employment terms in this way can be efficient, particularly if workers in your enterprise have multiple assignments in a single set of employment terms: users enter attribute values once only in the employment terms, but can update individual attributes as necessary at the assignment level.

Deferring the Decision to the Employment Terms

If you have no compelling reason either to allow or to prevent override at the assignment level, you can defer the decision to each set of employment terms. That is, whenever a user creates a set of employment terms, that user can decide whether to allow or prevent override at the assignment level.

Work Day Information: Explained

Work day information defines the standard working hours for each worker assignment in the enterprise or legal employer.

Sources of Work Day Information

If a schedule has been assigned to the enterprise, legal employer, or department, work day information is taken automatically from that schedule. Otherwise, you can enter work day information for the enterprise, legal employer, and department.

Work day information can also be defined for positions. In any assignment, standard working hours are inherited from one of the following entities in this order of preference:

1. Position
2. Department
3. Legal employer
4. Enterprise

How Work Day Information Is Used

For assignment budgeting purposes, FTE is calculated automatically by dividing the assignment working hours by the standard working hours, which the assignment inherits from the position, department, legal employer, or enterprise. If standard working hours are not available for any of these entities, then FTE cannot be calculated. Although FTE can also be entered manually, automatic

calculation of FTE is efficient for FTE reporting and promotes consistency among the various uses of FTE information.

Using Worker Numbers: Points to Consider

Every person record in the enterprise has a person number. In addition, you can allocate worker numbers to employee and contingent worker work relationships. Worker numbers are optional: they are provided primarily for Oracle E-Business Suite customers who have used employee and contingent worker numbers and want to continue using them.

Enabling Worker Numbers for the Enterprise

By default, worker numbers are not used. If you enable worker numbers for the enterprise, then each employee and contingent worker work relationship in the enterprise must have a worker number. If you do not enable worker numbers for the enterprise, they cannot be used. The decision that you make for the enterprise cannot be overridden at the legal employer level.

Selecting the Number-Generation Method

Worker numbers can be generated either manually or automatically.

If you select manual generation, then you are recommended to define a numbering scheme to suit local requirements. For example, determine whether uniqueness within the enterprise or at the legal employer level is important, and define the numbering scheme accordingly.

If you select automatic worker-number generation, numbers can be allocated from either an enterprise sequence or a legal employer sequence. If you use a legal-employer sequence, worker numbers are not guaranteed to be unique in the enterprise. Also, they cannot be transferred outside the legal employer: if a worker leaves the enterprise and later starts a new work relationship of the same type but with a different legal employer, a new worker number is allocated to the work relationship.

Setting the Number-Generation Method for a Legal Employer

All legal employers automatically inherit the enterprise number-generation method. You can override the number-generation method at the legal employer level, as follows:

- You can select manual worker-number generation for a legal employer at any time.
- You can select automatic worker-number generation for a legal employer, provided that no employee or contingent worker work relationships exist for that legal employer.

Person Number Generation Methods: Explained

You can select one of the following person number generation methods for your enterprise:

- Manual
- Automatic prior to submission

- Automatic upon final save

The manual method of creating person numbers enables human resource (HR) specialists and line managers to enter a person number when they create person records. HR specialists can later correct the person numbers on the Manage Person page.

The automatic methods of generating person numbers use an enterprise number sequence that starts from 1 by default; however, the initial number can be changed. The person number increments by one for each new person record created.

The Automatic prior to submission method creates and displays person numbers when users navigate from the Identification page to the Person Information page, when adding person records. However, this method may create gaps in the sequence of person numbers if the transaction is canceled after the person number is generated. The Automatic prior to submission method is the default method of person number generation.

The Automatic upon final save method creates person numbers only after the Add Person transaction is approved. Users will not be able to see the person number on the Person Information page when adding person records; however, they will see the person number on the Manage Person page and elsewhere after the transaction is approved. This method enables generation of person numbers without gaps in the sequence.

You can change the person number generation method from automatic prior to submission to automatic upon final save and vice versa, any time. You can also change the method to manual any time. However, once you have set the person number generation method to manual and person records have been created, you cannot change the method to automatic.

Initial Person Number

You can specify the initial person number for your enterprise when person numbers are generated automatically. The application uses this number for the first person record created with the automatic person number setting and increments the person number by one for subsequent person records. The initial person number is 1 by default.

The initial person number option enables you to retain the legacy person numbers for the existing persons and automate the number generation for new persons, starting from the last legacy person number plus one. You can change the initial person number at any time.

Person Numbers for Contact Records

Person numbers for contacts are generated automatically through the Automatic prior to submission method, irrespective of the enterprise settings. HR specialists can correct the automatically generated person numbers for contacts on the Manage Person page. If contacts are later hired as workers, they retain their original person numbers.

User and Role-Provisioning Setup: Critical Choices

The user and role-provisioning attributes control whether users are given access to Oracle Fusion Applications, when they gain access, how user accounts are created and maintained, and who is notified when a user account is created.

These attributes are likely to be of interest if:

- Some workers in the enterprise will never need to access Oracle Fusion Applications.
- You want to delay user access until a specified stage in your implementation.
- Your existing provisioning infrastructure creates user accounts, and you plan to integrate it with Oracle Fusion Human Capital Management (HCM).

This topic describes the user and role-provisioning attributes that you can specify for the enterprise when you perform the task Manage Enterprise HCM Information. You can edit these values as often as needed and specify when new values take effect.

User Account Creation

By default, user accounts are created automatically in Oracle Identity Management (OIM) when you create a new person record, regardless of how you create the person record. You can prevent the automatic creation of user accounts in OIM by setting **User Account Creation** to **No**.

If you set **User Account Creation** to **No**, then no user accounts are created for the enterprise. If you need to create OIM user accounts for individual users, then you can do so using the Manage Users task. Alternatively, you can use a provisioning infrastructure other than OIM to create and manage user accounts. If you choose this approach, then you are responsible for enabling and managing the interface with Oracle Fusion HCM, including the management of any user-account-related updates.

User Account Role Provisioning

Once a user account exists, roles are provisioned automatically to users, or removed from them, in accordance with current role-provisioning rules. You can prevent this automatic role management by setting **User Account Role Provisioning** to **No**. In this case, role requests are held in the LDAP requests table, where they are identified as Suppressed and not passed to OIM. If you are managing role provisioning outside Oracle Fusion HCM, you may want to search for suppressed role requests in the LDAP requests table.

User Account Maintenance

By default, some person information is sent automatically from Oracle Fusion HCM to OIM both when a person record is created in HCM and when you update it subsequently. Information sent to OIM includes person name, work e-mail address, work location address, system person type from the primary assignment, and manager details. To prevent this data from being sent to OIM (for example, if you want to maintain user accounts in some other way), set **User Account Maintenance** to **No**.

Alternate Contact E-Mail Address

The alternate contact e-mail address is an enterprise-wide e-mail address to which user names and passwords are sent. This address is used only if you also set **User Account Creation** and **Send User Name and Password** to **Yes**.

Send User Name and Password

If both **User Account Creation** and **Send User Name and Password** are set to **Yes**, then user names and passwords for new OIM user accounts are sent automatically to the alternate contact e-mail address, if any, that you specify for the enterprise.

If you specify no alternate contact e-mail address, then the user name and password for a user are sent to:

- The user's primary work e-mail address, if available
- The primary work e-mail address of the user's line manager, if the user has no primary work e-mail address

If primary work e-mail addresses are not available for either the user or the user's line manager, then no notification is sent for that user.

If you set **Send User Name and Password** to **No**, then no e-mail notifications are sent to the alternate contact e-mail address, the user, or the user's line manager. You can:

- Override the enterprise setting of this option for individual users on the Create User page.

In this case, notification e-mails are sent to the user or the user's line manager; they are not sent to the alternate contact e-mail address.
- Notify users of their user names and passwords later by running the process Send User Name and Password E-Mail Notifications. This process issues e-mail notifications for users for whom such notifications have not yet been sent. The e-mail notifications are sent to users or their line managers; they are not sent to the alternate contact e-mail address.

Note

The OIM Reset Password notification template must include the user ID field if you plan to run the process Send User Name and Password E-Mail Notifications. For more information about OIM notification templates, see the section Modifying a Notification Template in the Oracle Fusion Middleware Administrator's Guide for Oracle Identity Manager.

FAQs for Define Organization Structures

What's a reporting establishment?

A reporting establishment is an organization that is used for statutory reporting other than tax and social insurance reporting. A reporting establishment has a parent-child relationship with a legal employer, with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments.

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

What's the difference between a job set and a job family?

A job family is a group of jobs that have different but related functions, qualifications, and titles. They are beneficial for reporting. You can define competencies for job families by associating them with model profiles.

A job set is an organizational partition of jobs. For example, a job set can be global and include jobs for use in all business units, or it can be restricted to jobs for a specific country or line of business. When you select a job, for a position or an assignment, the available jobs are those in the set associated with the business unit in which you are working, and also those in the Common set.

What's the purpose of the legislative action attributes?

The legislative attributes apply to the transfer and termination actions. You can indicate whether an action is transfer-related. You can specify the termination type for termination-related actions. For example, the termination-related action Resignation can have the termination type as voluntary and the action Reduction in Force can have the termination type as involuntary. You may enter this information typically to meet specific legislative requirements or for reporting purposes.

Can I delete an action or action reason?

No. If you no longer want users to select an action or action reason you can enter an end date, beyond which the action or reason will be unavailable.

Can I create additional action types?

No. Action types are predefined and can contain one or more actions. You may associate your actions with the predefined action types but not create your own action types.

Can I delete an organization?

No. However, you can disable an organization if it is no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.

How can I identify my organization in a report?

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

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

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

How can I associate a location with an inventory organization?

From the Manage Locations page in Oracle Fusion Global Human Resources.

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

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

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

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

The calendar events that were created for the geographical node start to apply for the location and may impact the availability of worker assignments at that location. The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

What happens if I inactivate a location?

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

How can I change the web mapping service for displaying contextual addresses?

Edit the Mapping Service for Contextual Addresses profile option value. A contextual address is marked with an orange square icon that can be clicked to display the address on a map. The profile option value represents the web mapping service used to display the map. To update this value, use the Manage Administrator Profile Values task in the Setup and Maintenance work area.

Define Workforce Structures: Define Grades

Grades: Explained

Create grades to record the level of compensation for workers. You can create grades for multiple pay components, such as salary, bonus, and overtime rates. You can define one or more grades that are applicable for jobs and positions. This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments or employment terms for a worker.

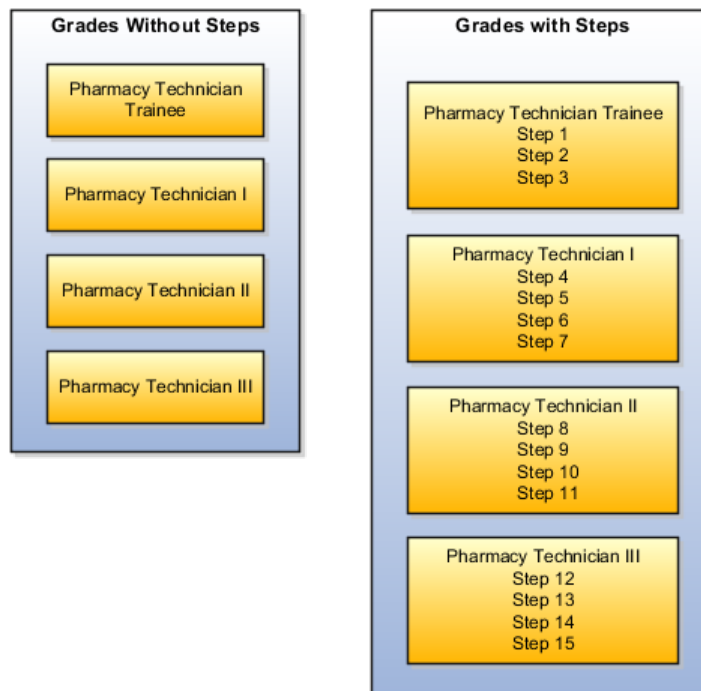
Grades and Sets

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

Grade Steps

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

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



Grade Rates

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades. For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

Grade Ladders

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

Lookup Types for Grades: Explained

This topic identifies the lookup type for managing grades that has an extensible customization level. Review these lookup values, and update them as appropriate to suit enterprise requirements.

Lookup Type for Grades

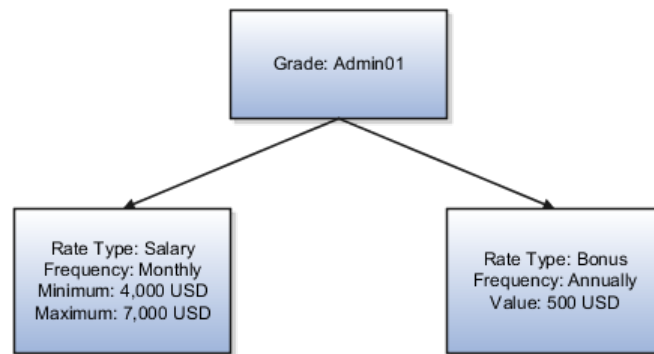
The GRADE_PAY_RATE_TYPE lookup type identifies the compensation components for which you want to set up grade rates. The predefined values are salary, bonus, and overtime.

Grade Rates: Explained

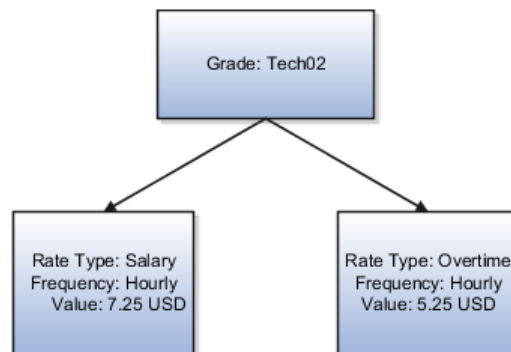
Grade rates contain the pay values that are related to each grade. Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay, such as salary, overtime, and bonuses.

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

This figure illustrates a grade that has two rate types associated with it. One is a salary rate type that has a range of values, and the other is a bonus rate type with a fixed amount.



This figure illustrates a different grade that has two rate types associated with it. One is a salary rate type that has a fixed amount, and the other is an overtime rate type that also has a fixed amount.



Rate Types

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

Grade Rates and Legislative Data Groups

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

Grade Rates and Grades

You can set up grade rates when you set up grades, or you can set them up independently from grades. For grades with steps, you enter rates when you attach the grades to a grade ladder.

Grade Ladders: Explained

Create grade ladders to group grades and grades with steps in the sequence in which your workers typically progress. Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You can set up separate grade ladders for different types of jobs or positions in your enterprise. For example, you may create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades

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

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

Ladders with Grade Steps

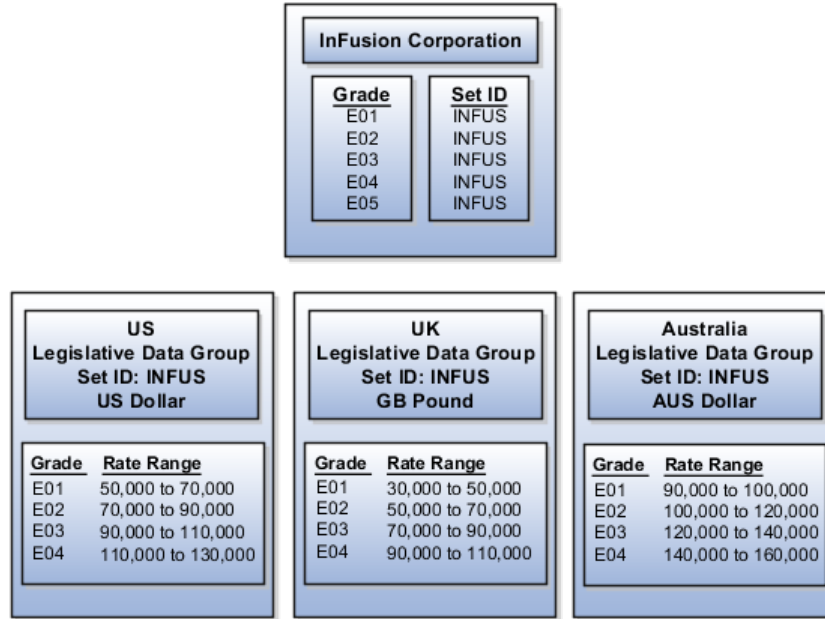
You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.

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

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

You assign grades to sets, and you assign grade rates to legislative data groups. If you have grades that are common across multiple business units, you can assign the grades to the set that is associated with the business units, and then set up grade rates that are specific to each legislative data group.

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



Grades and Sets

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

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people. For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that is shared between the countries, but set up different grade rates for each country in the applicable currency.

Setting Up Grade Ladders for Pay Scale Requirements: Worked Example

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

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

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

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Creating Grades

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

Field	Value
Grade Set	Common
Name	Technicians 03
Code	Tech03

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

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

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

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

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

Creating a Grade Ladder

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

Field	Value
Grade Set	Common
Name	Metal Technicians
Grade Type	Grade with steps

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

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

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

Grade Name	Step Name	Value
Technicians 03	Step 1	1,750.73
Technicians 03	Step 2	1,878.90
Technicians 03	Step 3	2,009.79
Technicians 03	Step 4	2,143.92
Technicians 04	Step 1	2,238.57
Technicians 04	Step 2	2,408.39
Technicians 04	Step 3	2,577.68
Technicians 04	Step 4	2,744.81
Technicians 05	Step 1	2,831.87
Technicians 05	Step 2	3,047.14
Technicians 05	Step 3	3,257.52
Technicians 05	Step 4	3,469.00
Technicians 06	Step 1	3,586.36
Technicians 06	Step 2	3,851.38
Technicians 06	Step 3	4,122.34
Technicians 06	Step 4	2,143.92

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

Setting Up Grade Ladders for Spine Point Requirements: Example

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points.

Scenario

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

Grade Structure

You can use grade ladders to meet the requirements of a grade structure with spine points. This example shows a grade structure with spine points that is similar to one for university workers in the UK.

The following figure illustrates an example of a grade structure with spine points.

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

Analysis

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

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

To create the grades needed for the grade structure with spine points, you must create three grades with steps. You can name the steps using the spine point numbers. The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

Grade Name	Steps	Ceiling Step
Grade 1	<ul style="list-style-type: none"> • Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6 	Spine Point 5

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

To create the grade ladder for the grade structure with spine points, you must create a ladder using grades with steps. When you create the rates, use annual salary amounts. The following table lists the grades, steps, and rates to add to the ladder.

Grade	Steps	Rates
Grade 1	<ul style="list-style-type: none"> • Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6 	<ul style="list-style-type: none"> • 25,674 • 26,631 • 27,068 • 27,796 • 30,394 • 31,778
Grade 2	<ul style="list-style-type: none"> • Spine Point 6 • Spine Point 7 • Spine Point 8 • Spine Point 9 • Spine Point 10 • Spine Point 11 • Spine Point 12 	<ul style="list-style-type: none"> • 31,778 • 32,648 • 33,542 • 34,466 • 35,425 • 38,441 • 39,510

Grade 3	• Spine Point 12	• 39,510
	• Spine Point 13	• 40,634
	• Spine Point 14	• 41,746
	• Spine Point 15	• 42,914
	• Spine Point 16	• 44,118
	• Spine Point 17	• 45,358

FAQs for Define Grades

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

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

How can I add rates to grade steps?

You add rates for a grade with steps when you add the grade to a grade ladder.

Define Workforce Structures: Define Jobs and Positions

Jobs: Explained

As part of your initial implementation, you specify whether to use jobs and positions, or only jobs. Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

Basic Details

Basic details for a job include an effective start date, a job set, a name, and a code.

A job code must be unique within a set. Therefore, you can create a job with the code DEV01 in the US set and another job with the same code in the UK set. However, if you create a job with the code DEV01 in the Common set, then you cannot create a job with the same code in any other set.

Benchmark Information

You can identify a job as being a benchmark job. A benchmark job represents other jobs in reports and salary surveys. You can also select the benchmark for jobs. Benchmark details are for informational purposes only. A progression job is the next job in a career ladder.

Progression Information

Progression jobs enable you to create a hierarchy of jobs and are used to provide the list of values for the Job field in the Promote Worker and Transfer Worker tasks. The list of values includes the next three jobs in the progression job hierarchy. For example, assume that you create a job called Junior Developer and select Developer as the progression job. In the Developer job, you select Senior Developer as the progression job. When you promote a junior developer, the list

of values for the new job will include Developer and Senior Developer. You can select one of these values, or select another one.

Jobs and Grades

You can assign grades that are valid for each job. If you are using positions, then the grades that you specify for the job become the default grades for the position.

Evaluation Criteria

You can define evaluation criteria for a job, including the evaluation system, a date, and the unit of measure for the system. One predefined evaluation system is available, and that is the Hay system. An additional value of Custom is included in the list of values for the Evaluation System field, but you must add your own criteria and values for this system.

Uploading Jobs Using a Spreadsheet

If you have a list of jobs already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, then add your job information to the spreadsheet, and then upload directly to your enterprise configuration. You can upload the spreadsheet multiple times to accommodate revisions.

Jobs: Example

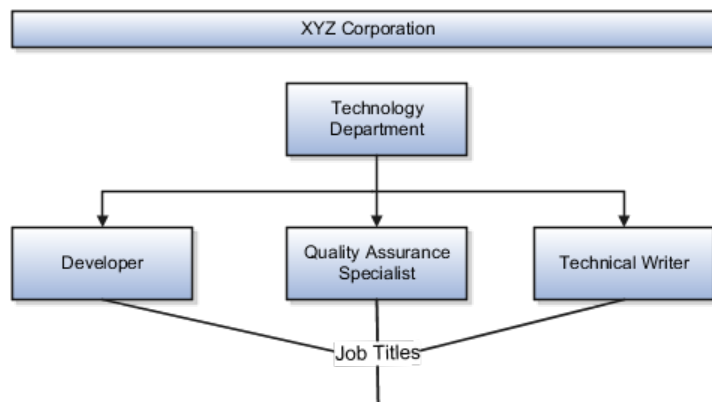
Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers. Recently, three developers have left the company. The director decides to redirect the head count to other areas. Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

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

This figure illustrates the software industry job setup.



Positions: Examples

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

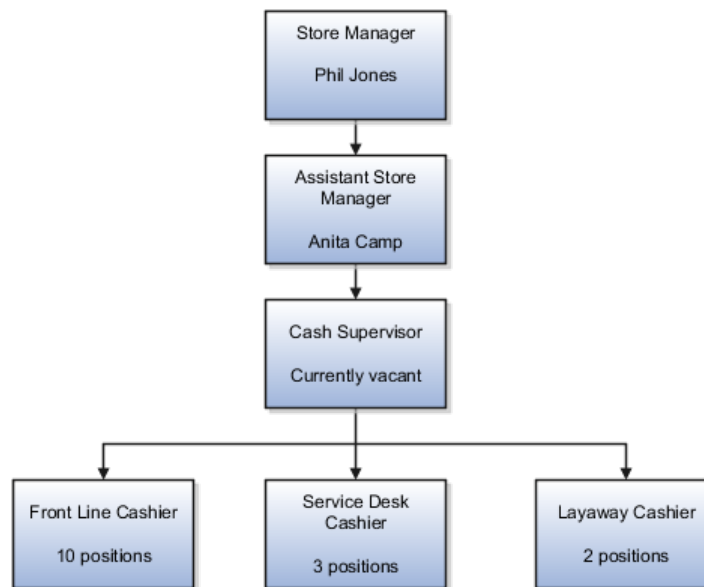
Retail Industry

ABC Corporation has high turnover. It loses approximately 5% of their cashiers monthly. The job of cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross trained to take over another cashier position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. . But to ensure short lines and customer satisfaction, ABC must replace each cashier lost to turnover.

Since turnover is high in retail it is better for this industry to use positions. There is an automatic vacancy when an employee terminates employment. The position exists even when there are no holders. This is important if the person who leaves the company is a manager or supervisor with direct reports. All direct reports continue reporting to the position even if it is empty. You do not need to reassign these employees to another manager or supervisor; the replacement manager is assigned to the existing position.

Also, an advantage to using positions is that when you hire somebody new many of the attributes are defaulted in from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.



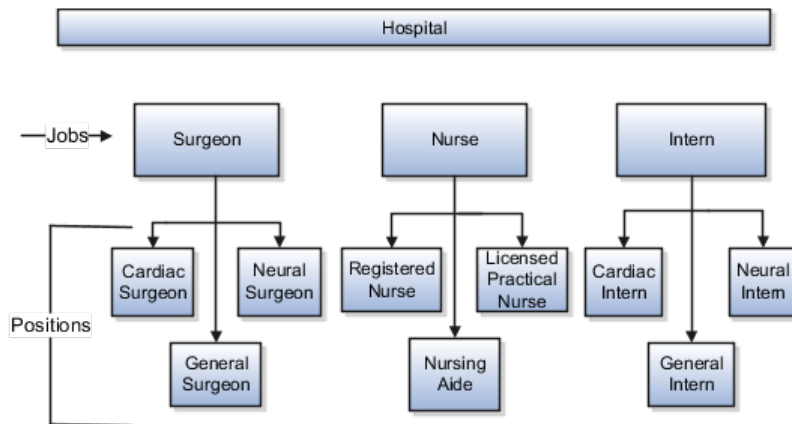
Health Care Industry

The hospital has a structured head count and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed.

These positions need to be filled in order for the hospital to run smoothly. Use jobs and positions if you need to apply detailed head count rules.

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

This figure illustrates the hospital position setup.



Job and Position Lookups: Explained

This topic identifies common lookups that are job and position-related and for which you can create new lookup values. Review these lookups, and update them as appropriate to suit enterprise requirements.

Job Lookups

Job lookups are described in the following table.

Lookup Type	Description
JOB_FUNCTION_CODE	Description of the primary function of a job. Used for grouping and reporting jobs of like functions.
MANAGER_LEVEL	Description of the seniority of a manager.
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.
EVAL_SYSTEM_MEAS	Measurement unit for the evaluation criteria.

Position Lookups

Position lookups are described in the following table.

Lookup Type	Description
SECURITY_CLEARANCE	Classifies if security clearance is needed.
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.
EVAL_SYSTEM_MEAS	Measurement unit for the evaluation criteria.

BARGAINING_UNIT_CODE	Identifies a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations.
PROBATION_PERIOD	Specifies the unit of measurement for the probation period of a position. For example, 365 "Day", 52 "Week", 12 "Month", or 1 "Year".

Uploading Workforce Structures Using a Spreadsheet Explained

You can upload multiple objects at one time using a spreadsheet, for the following workforce structures:

- Jobs
- Locations
- Departments

For each of the above workforce structures, you can download a predefined spreadsheet template from the application. You can work on the spreadsheet offline, and upload the spreadsheet back to the application once your changes are complete. You can upload the spreadsheet multiple times to accommodate revisions.

Effective Start Date

Ensure that the effective start date of the workforce structure is same as or earlier than the hire date of persons associated with the workforce structure; for example, enter a job start date earlier than the hire date of persons associated with the job. You may want to consider creating all objects as of a common early date, for example, create all locations with a start date 1-1-1950.

Entering Descriptive Flexfield Values

Use the Attribute columns in the main sheet to enter values for the descriptive flexfields, already defined for the object. Use the DFF Reference sheet to understand which attribute columns map to which existing descriptive flexfields, since this information is not displayed in the main sheet. Note that you cannot enter anything in the DFF Reference sheet, you can only view details of the existing descriptive flexfields.

Uploading Jobs Using a Spreadsheet

Note that you cannot create a new job profile when uploading jobs using a spreadsheet; you can only associate an existing job profile. You must enter the name of an existing job profile name in the spreadsheet.

Define Workforce Structures: Define Worker Directory

Search Relevance Profile Options: Explained

The strength of the relationship between the person performing a gallery search and each person whose assignment appears in the search results can determine

the order of the results: the stronger the relationship, the closer to the top of the results an assignment appears. The search relevance profile options control how the strength of the relationship between the searcher and the search result is calculated.

Weighting Profile Options

Using the following profile options, you can change the weighting applied to the relevant factors.

Profile Option	Description
HR: Organization Hierarchy Weight	Specifies the weighting applied to the relationship strength value for the organization hierarchy proximity factor.
HR: Position Hierarchy Weight	Specifies the weighting applied to the relationship strength value for the position hierarchy proximity factor.
HR: Manager Hierarchy Weight	Specifies the weighting applied to the relationship strength value for the manager hierarchy proximity factor.
HR: Location Proximity Weight	Specifies the weighting applied to the relationship strength value for the location proximity factor.
HR: Selection History Weight	Specifies the weighting applied to the relationship strength value for the selection history factor.
HR: Social Network Weight	Specifies the weighting applied to the relationship strength value for the social network factor.

The default value of each weighting profile option is 0.5. To increase the relevance of a factor relative to other factors, you increase its weighting; to decrease its relevance, you reduce its weighting.

HR: Selection History Timeout

The number of times the searcher selects a person's assignment from the search results during a specified period, which is 7 days by default, is recorded automatically. You can specify this period for the enterprise on the HR: Selection History Timeout profile option.

HR: Maximum Hierarchy Proximity

When the searcher's primary assignment is in the same organization, position, or manager hierarchy as a person's assignment, the strength of the relationship depends on their proximity to each other in the hierarchy. The maximum number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

HR: Relationship Priority Factor

The searcher can specify a rating for a search result, and each rating is associated with a multiplying factor. On this profile option, you can specify the highest possible multiplying factor that can be applied to a search result. By default, the multiplying factor is 2. If you increase its value, you increase the significance of the searcher's own ratings relative to other factors.

Define Workforce Structures: Manage Trees

Oracle Fusion HCM Trees: Explained

Oracle Fusion trees are graphical representations of hierarchical data such as the structure of your organization. Oracle Fusion Human Capital Management (HCM) provides predefined tree structures for department, organization, position, and geography trees. You cannot change the predefined HCM tree structures. With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree. For all HCM tree types, however, only one version of each tree can be active at one time.

Department Trees

Using the predefined tree structure for a department tree, you can create multiple department trees and then create multiple versions of each tree to build hierarchical representations of the departments within your organization. The top node of the tree is a department, and all of the child nodes are also departments. You can have only one top-level node for a department tree, and you cannot add a department as a node more than one time in the same tree version.

You can use department trees for the following purposes:

- Secure data by using a department tree in an organization security profile.
- Create custom gallery messages to appear in the portraits of workers assigned to departments within a department tree. For example, you may create a gallery message notifying workers of a server outage or a public holiday in a particular location.

Organization Trees

If you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise structure, a default organization tree is created automatically for you, with the ultimate holding company as the first node, divisions and country holding companies as the second level, and legal employers as the third level. You can modify the organization tree as needed, and you can create additional organization trees. If you do not use the Enterprise Structures Configurator, then you can create organization trees based on the predefined organization tree structure. In an organization tree, you can select any type of organization for the top node and for the child nodes, but you can have only one top-level node.

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

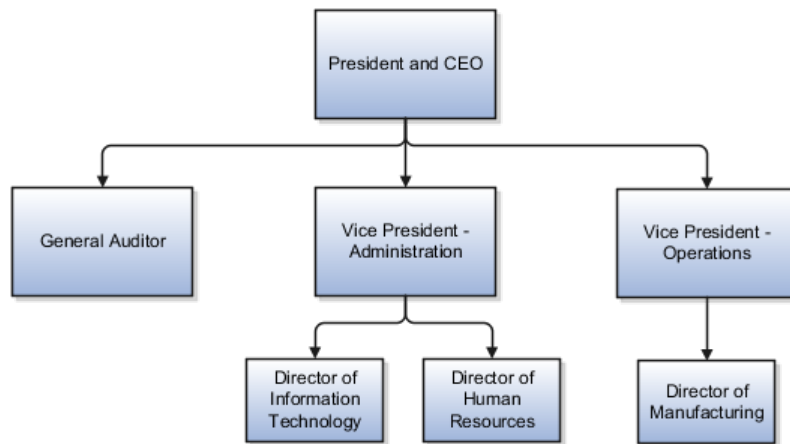
Position Trees

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

You can use position trees for the following purposes:

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

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

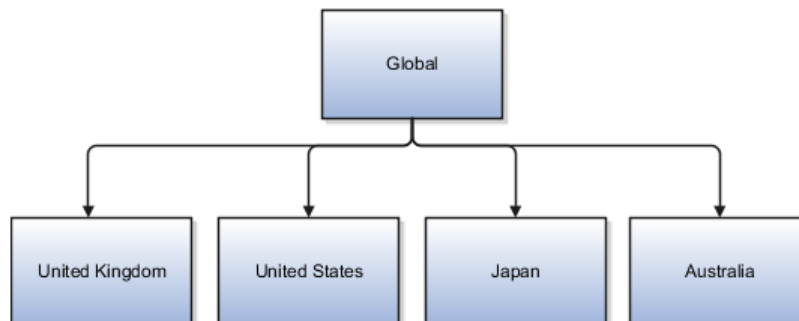


Geography Trees

Using the predefined tree structure for a geography tree, you create a version of a geography tree to represent the countries in which your organization operates. Although you can create multiple versions, you can create only one geography tree, and the tree can have only two levels in the hierarchy. You can have only one top-level node for a geography tree.

You can use the geography tree to specify the locations to which calendar events apply. If an event applies to your entire enterprise, then you can attach it to the top-level node in the tree. If an event applies only to specific countries or territories in your enterprise, then you can attach it to the nodes for those specific countries.

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



Common Applications Configuration: Define Batch Data Loads

The Load Batch Data Process: Explained

HCM Data Loader, which you invoke using the Load Batch Data task, is an open-interface process for loading volume data, for a specific subset of objects, into Oracle Fusion Human Capital Management (HCM).

As HCM Data Loader uses Oracle Fusion object and service interfaces to load the data, the following occur during the data load:

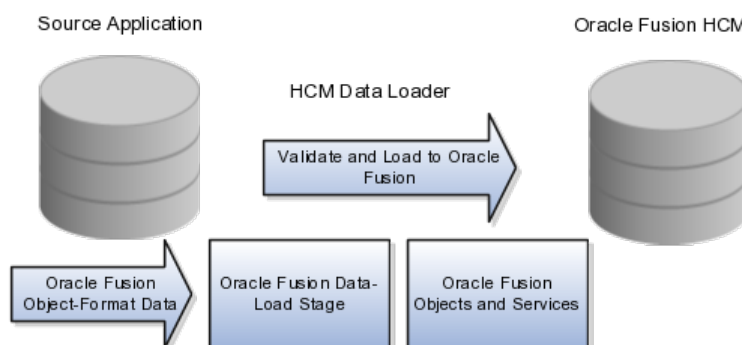
- Data is validated using business logic.
- Default values are used where necessary.
- Events are generated where applicable.
- Other post-processing logic is applied.

HCM Data Loader is used:

- By HCM coexistence, the packaged solution for integrating applications such as Oracle PeopleSoft HRMS and Oracle E-Business Suite HRMS with Oracle Fusion HCM
- By HCM Spreadsheet Data Loader, which generates spreadsheets from which you can load HCM business objects to Oracle Fusion HCM
- By Oracle Fusion configuration tools, such as the Enterprise Structures Configurator
- To import users

HCM Data Loader is also available for use by other source applications.

The following figure shows an overview of the data-load process.



To use the HCM Data Loader, you:

1. Map data between your source application and Oracle Fusion HCM.
2. Extract data from your source application and place it in the HCM Data Loader staging tables in the supported Oracle Fusion HCM object-data format.
3. Run the Load Batch Data process to load the data into Oracle Fusion HCM.

Loading Batch Data into Oracle Fusion: Explained

The Load Batch Data process, which you run from the Data Exchange work area, imports data into Oracle Fusion from external sources.

From the Load Batch Data page, you can:

- Load data to the Oracle Fusion application tables (for example, for HCM coexistence or HCM Spreadsheet Data Loader).
- Monitor data loads.
- Correct data errors.
- Rerun data loads.

Loading Data for HCM Coexistence

To load data for HCM coexistence, you run the HCM coexistence process Load HCM Data, which comprises two phases: Import and Load. If you select both phases of that process, then the Load Batch Data process runs automatically to complete the Load phase. If you select the Import phase only, then you must run the Load Batch Data process manually to complete the Load phase. In this case, when running Load Batch Data you select the batch name that you created for the HCM coexistence process Load HCM Data.

Monitoring Data Loads

You can monitor the status of a data load in the **Batch Status** column of the Search Results section of the Load Batch Data page. Detailed information about any data load that you select in the Search Results section appears in the Details section of the page.

Correcting Data Errors

On the Failed tab in the Details section for a batch data load, you can see the details of any errors.

To resolve the errors and complete the data load, you can:

- Change the status of objects with errors to **Ignore** to prevent them from being processed when you next run the data load.
- Select all objects with errors in the Details section and select **Create Batch**. The selected objects are removed from the original batch and added to a new batch, so that you can fix the problems later.

- View the details of objects with errors from the **Failed Objects** column of the Batch Summary tab in the Details section, and correct the data. These corrections are applied to the data in the stage table. This approach is helpful if you want to be sure that the correction has fixed the original error before applying it to the source data. However, when uploading HCM coexistence data you must still apply any corrections to the source data; otherwise, discrepancies between the source data and the data loaded into Oracle Fusion will cause errors when you next load the data.

Rerunning Data Loads

After correcting any errors, you can select the batch file in the Search Results section and click **Run**. Any object with the status **Error in Row** is reset to **Ready to Process** and included in the load. Objects with the status **Successful** or **Ignore** are not processed.

Load Batch Data Parameters

The Load Batch Data process imports batch data into the Oracle Fusion application tables from the HCM Data Loader's staging tables. You run Load Batch Data from the Data Exchange work area.

When you schedule the Load Batch Data process, you specify values for the following parameters.

Load Batch Data Parameters

Batch Name

The name of the batch file to be loaded.

Loader Chunk Size

The number of logical business objects that a single Load Batch Data thread processes in a single action.

Loader Maximum Errors Allowed

The maximum number of errors in a thread before processing terminates. If an error occurs during the processing of a complex logical business object (such as a person record), then all rows for that business object are rolled back and marked as Error in Row.

Loader Number of Processes

The number of Load Batch Data threads to run in parallel. If you are processing large amounts of data (for example, more than 1000 rows) or complex data (such as person and work relationship data) consider running 4 or 8 threads in parallel.

Data-Load Batch-Status Values: Explained

The Data Exchange work area displays batch-status values for the Load Batch Data and Load HCM Data for Coexistence tasks. This topic explains the batch-status values.

Batch Status	Description
New	The batch is new and has not been processed.
Processing	The data-load process for the batch is currently running.
Refresh AM	The data-load process for the batch is performing an internal refresh against the Application Module (clearing the loader cache).
Canceled	The data-load process for the batch has been canceled.
Complete with Errors	Data-load processing for the batch is complete; object instance errors exist.
System Error	The data-load process for the batch was terminated by a system error.
Complete	The data-load process for the batch completed successfully.

Data-Load Object-Status Values: Explained

From the Batch Summary and Failed tabs in the Details section of the Load Batch Data page, you can display information about the load status of individual business objects. This topic explains the object-status values.

Object Status	Description
New	The object is new and has not been processed.
Pending Action	During the import phase, a validation error occurred for the object instance. (Typically, this status is set by Oracle Data Integrator.)
Ready to Process	The object has not been processed but is ready for processing.
Error in Row	The object is in error. Either the object itself is in error or the complex business object to which it belongs is in error.
Ignore	The object is to be ignored during processing.
Successful	The object has been successfully processed.

Uploading Data Using HCM Spreadsheet Data Loader: Explained

HCM Spreadsheet Data Loader enables you to upload business objects to Oracle Fusion Human Capital Management (HCM) from a spreadsheet. Business objects that you can upload include person and assignment data, grades, jobs, benefit plan types, content items, performance templates, and rating models. You can view the complete list of supported business objects on the Initiate Data Load page, where objects appear in the recommended load order.

This topic describes:

- How data is uploaded using HCM Spreadsheet Data Loader

- How to correct upload and processing errors
- When to use HCM Spreadsheet Data Loader
- Who can use HCM Spreadsheet Data Loader
- Spreadsheet and batch names

How Data Is Uploaded Using HCM Spreadsheet Data Loader

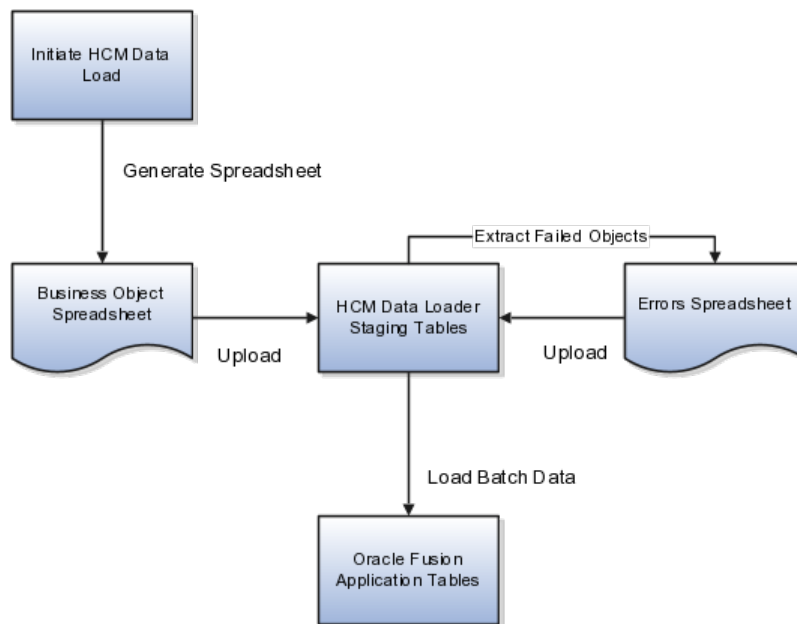
Uploading business objects using HCM Spreadsheet Data Loader is a two-stage process. You:

1. Generate a spreadsheet for a single HCM business object, enter data in the spreadsheet, and upload the data to a named batch in the HCM Data Loader staging tables.

HCM Data Loader is a generic process for loading data to Oracle Fusion HCM from external sources.

2. Run the Load Batch Data process to transfer data from the HCM Data Loader staging tables to the Oracle Fusion application tables.

The following figure, which also shows one approach to error correction, summarizes both stages of this process.



Correcting Upload Errors

When you upload data from a spreadsheet to a batch in the HCM Data Loader staging tables, the status of each spreadsheet row is updated to show whether the row was inserted successfully in the batch. If the row insertion fails, you can double-click the status value to display information about the error. After correcting the error, you upload the corrected data to the existing batch.

Correcting Load Batch Data Errors

When you run Load Batch Data to transfer data from the HCM Data Loader staging tables to the Oracle Fusion application tables, the data is validated.

If errors occur, you can:

- Download objects in error to an errors spreadsheet, correct the errors, and upload the corrected data to the existing batch.

Each time you download objects in error for a batch, a new spreadsheet is generated with the existing batch name. If you overwrite the existing batch name in the errors spreadsheet with a new batch name, then the existing batch in the HCM Data Loader staging tables is renamed using the new batch name.

Once the data is uploaded successfully, you run Load Batch Data again for the batch.

- Correct the errors in the HCM Data Loader staging tables and rerun the batch. Only corrected data is transferred to the Oracle Fusion application tables.

You may prefer this approach if there are very few errors or you do not need to maintain the source data.

When to Use HCM Spreadsheet Data Loader

You can use HCM Spreadsheet Data Loader to create any of the business objects that it supports and edit person and assignment data; however, you cannot use HCM Spreadsheet Data Loader to delete business objects. Supported actions for each business object appear on the Initiate Data Load page.

Each business object is represented as a single row in the spreadsheet. Any hierarchical data that you can upload with HCM Spreadsheet Data Loader has been flattened to accommodate single-row representation.

HCM Spreadsheet Data Loader is most efficient for uploading medium or large amounts of data. For example, if your enterprise has 100 job definitions or 60 performance templates, creating those business objects in a spreadsheet and uploading them to Oracle Fusion HCM is likely to be more efficient than creating them individually using the Create Job or Create Performance Template interfaces. However, if you need to create just a few business objects, it may be quicker to use the Oracle Fusion HCM interfaces.

Who Can Use HCM Spreadsheet Data Loader

To use HCM Spreadsheet Data Loader, you can:

- Perform the Initiate HCM Spreadsheet Load task from the Setup and Maintenance work area or an implementation project.
- Perform the Initiate Data Load task from the Data Exchange work area.

Users who have the Human Capital Management Application Administrator job role can perform the Initiate HCM Spreadsheet Load task. Users who have the Application Implementation Consultant job role can perform both tasks; both job roles inherit the HRC_SPREADSHEET_LOADING_DUTY duty role.

Spreadsheet and Batch Names

If you are uploading several types of business objects over a period of time, devise a naming scheme for the generated spreadsheets that enables you to

locate spreadsheets easily on your desktop. For example, you could include both the business-object type and the date in the spreadsheet names. If you upload several batches of data of a single type on one date, you can use a suffix value to differentiate spreadsheets.

Batch names are generated automatically but you can overwrite them. They identify batches submitted to the Load Batch Data process and must be unique. Using the same names for spreadsheets and batches will help you quickly to associate a spreadsheet with the batch to which you load it. For example, for uploading rating models on 01/08/13, you could use the spreadsheet name RatingModels010813.xlsx and the batch name RatingModels010813.

Uploading Data Using HCM Spreadsheet Data Loader: Worked Example

This example shows how to upload positions for the enterprise Sales Department.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which business objects will I load?	Positions
What are my spreadsheet names?	<ul style="list-style-type: none">SalesPositionsMMDDYYBatchnn.xlsxSalesPositionsMMDDYYBatchnnErrorsnn.xlsx
What is my batch name?	SalesPositionsMMDDYYBatchnn
Where will I fix Load Batch Data errors?	In the spreadsheet SalesPositionsMMDDYYBatchnnErrorsnn.xlsx

Summary of the Tasks

Upload the position data by:

1. Selecting the Initiate HCM Spreadsheet Load task
2. Creating the positions spreadsheet
3. Entering data in the positions spreadsheet
4. Uploading positions data to the HCM Data Loader staging tables
5. Loading positions data to the application tables from the HCM Data Loader staging tables
6. Reviewing the results of the Load Batch Data process and correcting errors

Prerequisites

Before you can complete this task, you must have:

1. Installed the desktop client Oracle ADF 11g Desktop Integration

2. Enabled the Trust Center setting **Trust access to the VBA project object** in Microsoft Excel

Selecting the Initiate HCM Spreadsheet Load Task

1. On the Overview page of the Setup and Maintenance work area, click the **All Tasks** tab.
2. In the Search region, complete the fields as shown in this table.

Field	Value
Search	Task
Name	Initiate HCM Spreadsheet Load

3. Click **Search**.
4. In the search results, click **Go to Task** for the Initiate HCM Spreadsheet Load task.

Alternatively, you can start the Initiate HCM Spreadsheet Load task from an implementation project or select the Initiate Data Load task in the Data Exchange work area.

Creating the Positions Spreadsheet

1. On the Initiate Data Load page, find the entry for Create Position in the list of business objects.

Notice that Create Position appears after other business objects such as departments, locations, and jobs, emphasizing that those business objects (regardless of how you create them) must be defined before positions.

2. Click **Create Spreadsheet** for the Create Position entry.
3. When prompted, save the spreadsheet locally using the name SalesPositions113012Batch01.xlsx.
4. When prompted, sign in to Oracle Fusion Applications using your Oracle Fusion user name and password.

Entering Data in the Positions Spreadsheet

1. In the **Batch Name** field of the spreadsheet SalesPositions113012Batch01.xlsx, replace the default batch name with the batch name SalesPositions113012Batch01.
2. Enter position data in the spreadsheet.

Ensure that you provide any required values and follow instructions in the spreadsheet for creating additional rows.

Uploading Positions Data to the HCM Data Loader Staging Tables

Use the default values except where indicated.

1. In the positions spreadsheet, click **Upload**.
2. In the Upload Options window, click **OK**.

As each row of data is uploaded to the HCM Data Loader staging tables, its status is updated.

3. When uploading completes, identify any spreadsheet rows with the status **Insert failed**, which indicates that the row failed to upload.
4. For any row that failed to upload, double-click the status value to display a description of the error.
5. When you have corrected any errors, click **Upload** again to load the remaining rows to the same batch.

Loading Positions Data to the Application Tables from the HCM Data Loader Staging Tables

Use the default values except where indicated.

1. In Oracle Fusion Applications, select **Navigator - Workforce Management - Data Exchange**.
2. In the Tasks pane of the Data Exchange work area, click **Load Batch Data**.
3. In the Search region of the Load Batch Data page, enter the batch name SalesPositions113012Batch01 in the **Batch Name** field.
4. Click **Search**.
5. In the Search Results region, select the batch SalesPositions113012Batch01 and click **Run**.
6. On the Schedule Request page, click **Submit**.

Reviewing the Results of the Load Batch Data Process and Correcting Errors

1. On the Load Batch Data page, search again for the batch SalesPositions113012Batch01 and review its status in the **Batch Status** column of the Search Results region.
2. If the batch status is Complete, click **Done** to close the Load Batch Data page; otherwise, continue with the next step.
3. If the batch completed with errors, select the batch in the Search Results.
4. On the Batch Summary tab of the Batch Details region, select **Action - Extract Failed Objects to Spreadsheet**.

An errors spreadsheet is created automatically.

5. Save the errors spreadsheet locally as SalesPositions113012Batch01Errors01.xlsx.
6. Leave the batch name in the errors spreadsheet as SalesPositions113012Batch01.
7. Review the error messages in the spreadsheet and correct the errors.

8. Repeat this process from the section Uploading Positions to the HCM Data Loader Staging Tables until all errors are fixed.

If further errors occur, increment the errors-spreadsheet suffix by 1 (for example, SalesPositions113012Batch01Errors02, SalesPositions113012Batch01Errors03, and so on.)

9. Click **Done** to close the Load Batch Data page.

To load a new batch of positions for the Sales Department on the same date, increment the batch number in the spreadsheet and batch names (for example, SalesPositions113012Batch02).

FAQs for Define Batch Data Loads

What happens if I cancel a Load Batch Data process?

The Load Batch Data process completes the processing of any business objects currently in progress, but does not process further objects.

Can I load date-effective data using HCM Spreadsheet Data Loader?

Yes. You can create date-effective business objects. You can also update date-effective person and assignment data using HCM Spreadsheet Data Loader.

You cannot delete or correct date-effective data using HCM Spreadsheet Loader.

How can I fix HCM Spreadsheet Data Loader errors?

Errors may occur when you run the Load Batch Data process to transfer data from the HCM Data Loader staging tables to the Oracle Fusion application tables. You can fix these errors in the staging tables by navigating to the object detail from the **Total Objects** column (click the number of objects) on the Failed tab in the Details section of the Load Batch Data page. This approach may be suitable if there are few errors or you do not need to correct the source data.

Alternatively, you can download error rows from the HCM Data Loader staging tables to a spreadsheet by selecting **Action - Extract Failed Objects to Spreadsheet** on the Batch Summary tab of the Details region on the Load Batch Data page. In this case, a spreadsheet containing the rows in error is generated automatically. After fixing the errors in the spreadsheet, you upload the corrected data to the staging tables and run Load Batch Data again. This solution is available only for data initially uploaded using HCM Spreadsheet Loader.

How can I manage dependencies between business objects when using HCM Spreadsheet Data Loader?

When you load business objects using HCM Spreadsheet Data Loader, you must take data dependencies into account. For example, any attempt to load positions will fail if the jobs that they reference do not exist. You can avoid data-

dependency errors by following the order in which business objects are listed on the Initiate Data Load page. For example, Create Location appears before Create Business Unit on the Initiate Data Load page, which indicates that you must create locations before you can create business units.

You can create business objects using any of the available methods. For example, you can create locations on the Create Location page before uploading business units using HCM Spreadsheet Data Loader.

Common Applications Configuration: Define Workforce Profiles and Social Networking

Profile Management: Explained

Profile management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. Profiles summarize the qualifications and skills of a person or a workforce structure such as a job or position. Profiles are valuable for tracking workers' skills, competencies, and accomplishments, and for various talent management activities, such as career planning, identifying training needs, performance management, and in the recruitment process for identifying job requirements and suitable applicants.

This topic discusses:

- Profile search
- Profile comparison
- Best-fit analysis

Profile Search

You can search profiles for workers, jobs, and positions with certain criteria. For example, an HR (Human Resources) specialist in London who is looking to fill an applications developer position from within the company can search for profiles of all workers who are based in London and have experience with Java and PL/SQL.

Profile Comparison

Using the comparison feature, you can compare profiles to determine next career moves or training needs for workers, and identify suitable candidates for jobs. For example, if John is looking for his next career move, he can compare his profile to that of a job to determine whether his competency ratings match the targeted competency ratings in a job profile. For example, if his Teamwork rating is 3 and the Product Strategy Teamwork requirement is 4, he has a deficiency of -1. John and his manager can use this gap to drive development plans and for other talent management-related functions.

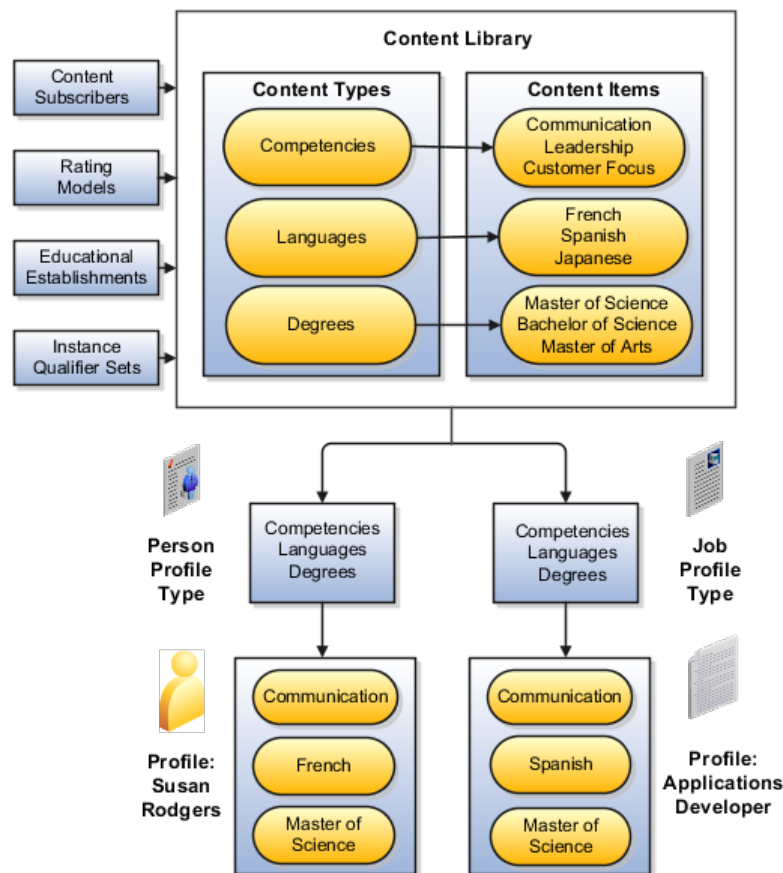
Best-Fit Analysis

Use the best-fit analysis to determine the person profile that most closely matches a job profile, or the job profile that is the best match for a person profile. For example, if you are trying to fill a Developer vacancy, and the job profile requires a B.S. degree in Computer Science, level 4 expertise coding Java, and a Teamwork rating of at least 3, you can review an automatically-generated list of workers who most closely match this set of requirements. You can also use the best-fit analysis to find workers who are similar to a selected worker, or jobs that are similar to a selected job.

Oracle Fusion Profile Management Components: How They Work Together

You can configure Oracle Fusion Profile Management to meet your business requirements using these components: the content library, profiles and profile types, content subscribers, educational establishments, instance qualifier sets, and rating models.

This figure illustrates how the components of Profile Management fit together.



Content Library

The content library provides the foundation for profiles as it stores both content types and content items.

Profile Types

Profile types are templates that you use to create profiles. Profile types determine whether the profile is for a person or for a workforce structure such as a job or a position, and the content of the profile. You select content types from the content library to create content sections for the profile type.

Profiles

You create person profiles for individual workers and model profiles for workforce structures, such as a jobs or positions. The information that you complete for the profile is determined by how the profile type has been set up. For example, a person profile might contain information about a person's education, language skills, competencies, and activities and interests. A job profile might contain information about the requirements for the job, such as competencies, language skills, degrees, or certifications.

Content Subscribers

Content subscribers are applications external to Oracle Fusion Profile Management that use content types.

Educational Establishments

You can define educational establishments for workers to use when they add education information, such as degrees, to their profile.

Instance Qualifier Sets

You assign instance qualifiers to content types. Instance qualifier sets uniquely identify multiple instances of a content item on a profile. For example, if multiple people update a performance rating for a competency on a worker's profile, instance qualifiers provide a unique identifier to each instance of the competency so that you can determine who provided each rating.

Rating Models

When you create content types in the content library, you can attach rating models to determine the scale for measuring performance and proficiency. You can also use rating models to measure the risk and impact of loss for workers, and to measure their potential.

Oracle Fusion Profile Management, Performance Management, Goal Management, and Talent Review: How They Work Together

Oracle Fusion Profile Management supports talent management business processes in these products:

- Oracle Fusion Performance Management
- Oracle Fusion Goal Management
- Oracle Fusion Talent Review

Oracle Fusion Performance Management

Oracle Fusion Performance Management uses the rating models that you define in Profile Management to rate workers on their performance. When you define a performance document template, you can specify whether the ratings and comments from managers and workers are uploaded automatically to workers' profiles when the performance document is finalized. Instance qualifier sets distinguish the manager ratings from the workers' self ratings. Performance Management also uses competencies from the content library in performance documents.

Oracle Fusion Goal Management

You can set up a content type relationship between the Goals content type and other content types, such as the Competencies content type and the Memberships content type. Using these relationships, you can then set up target outcomes for goals. Target outcomes are the content items within the content type that is related to the Goals content type. For example, if you set up a relationship between the Goals content type and the Competencies content type, workers can add a target outcome of a specific competency to their goals. In this case, the specific competency is the content item within the Competencies content type. When workers complete the goal, their profiles are updated to include the competency.

Oracle Fusion Talent Review

Oracle Fusion Talent Review uses information from the Performance and Potential and Risk of Loss sections within a worker's profile to build the analytics that are part of the talent review process. These sections are defined as content types within the content library and included in the person profile type. When a talent review is complete, workers' profiles are updated automatically with the performance and potential ratings given during calibration discussions. Instance qualifier sets enable you to distinguish the talent review rating from ratings given by the worker's manager, a peer, or perhaps the worker's self-evaluation.

Define Talent Profile Settings

Value Sets: Explained

A value set is a set of valid values that you assign to a flexfield segment.

An end user enters a value into a flexfield segment while using the application. The flexfield validates the segment against the set of valid values that you configured as a value set and assigned to the segment.

For example, you can define a required format, such as a five digit number, or a list of valid values, such as green, red, and blue.

Flexfield segments are usually validated, and typically each segment in a given flexfield uses a different value set. You can assign a single value set to more than one segment, and you can share value sets among different flexfields.

Caution

Be sure changes to a shared value set are compatible with all flexfields segments using the value set.

Defining value sets involves making decisions about the following.

- Validation
- Security
- Precision and scale
- Usage and deployment

Validation

The following types of validation are available for value sets.

- Format only, where end users enter data rather than selecting values from a list
- Independent, a list of values consisting of valid values you specify
- Dependent, a list of values where a valid value derives from the independent value of another segment
- Subset, where the list of values is a subset of the values in an existing independent value set
- Table, where the values derive from a column in an application table and the list of values is limited by a WHERE clause

A segment that uses a format only value set does not present a list of valid values to users.

You can build a tree structure from the values in an independent value set whose data type is character.

Note

Adding table validated value sets to the list of available value sets available for configuration is considered a custom task.

For more information, see the Oracle Fusion Applications Extensibility Guide.

Security

Value set security only works in conjunction with usage within flexfield segments. If a value set is used standalone, meaning outside a flexfield, value set security is not applied, but Oracle Fusion data security is enforced.

You can specify that data security be applied to the values in flexfield segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment end users can view or modify.

Value set security applies at the value set level. If a value set is secured, every usage of it in any flexfield is secured. It is not possible to disable security for individual usages of the same value set.

Value set security applies to independent, dependent, or table-validated value sets.

Value set security applies mainly when data is being created or updated, and to key flexfield combinations tables for query purposes. Value set security does not determine which descriptive flexfield data is shown upon querying.

Security conditions defined on value sets always use table aliases. When filters are used, table aliases are always used by default. When predicates are defined for data security conditions, make sure that the predicates also use table aliases.

For key flexfields, the attributes in the view object that correspond to the code combination ID (CCID), structure instance number (SIN), and data set number (DSN) cannot be transient. They must exist in the database table. For key flexfields, the SIN segment is the discriminator attribute, and the CCID segment is the common attribute.

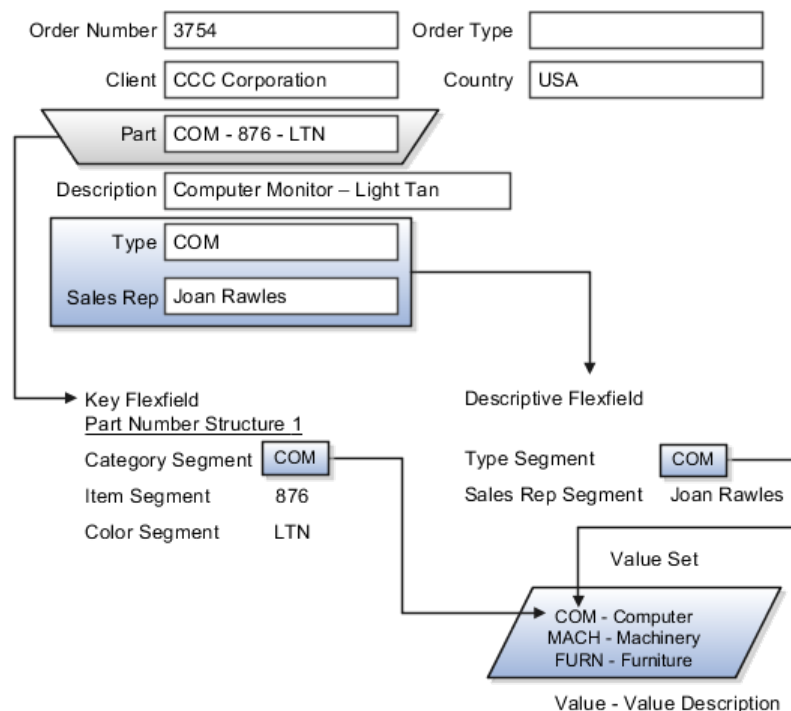
Precision and Scale

For a value set with the data type Number, you can specify the precision (maximum number of digits user can enter) or scale (maximum number of digits following the decimal point).

Usage and Deployment

The usage of a value set is the flexfields where that value set is used. The deployment status of flexfields in which the value set is used indicates the deployment status of the value set instance.

The figure shows a value set used by a segment in a key flexfield and the context segment of a descriptive flexfield.



For most value sets, when you enter values into a flexfield segment, you can enter only values that already exist in the value set assigned to that segment.

Global and context-sensitive segment require a value set. You can assign a value set to a descriptive flexfield context segment. If you specify only context values, not value sets for contexts, the set of valid values is equal to the set of context values.

Defining Value Sets: Critical Choices

Validation and usage of value sets determine where and how end users access valid values for attributes represented by flexfield segments.

Tip

As a flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield.

Value Sets for Context Segments

When assigning a value set to a context segment, you can only use table-validated or independent value sets. The data type must be character and the maximum length of the values being stored must not be larger than column length of the context.

Format Only Validation

The format only validation type enables end users to enter any value, as long as it meets your specified formatting rules. That is, the value must not exceed the maximum length you define for your value set, and it must meet any format requirements for that value set.

For example, if the value set allows only numeric characters, your user could enter the value 456 (for a value set with maximum length of three or more), but could not enter the value ABC. A format only value set does not otherwise restrict the range of different values that users can enter. For numeric values, you can also specify if a numeric value should be zero filled or how many digits should follow the radix separator.

Interdependent Value Sets

You cannot specify a dependent value set for a given segment without having first defined an independent value set that you apply to another segment in the same flexfield. You use a dependent value set to limit the list of values for a given segment based on the value that the end user has chosen for a related independent segment. The available values in a dependent list and the meaning of a given value depend on which value was selected for the independently validated segment.

For example, you could define an independent value set of U.S. states with values such as CA, NY, and so on. Then you define a dependent value set of U.S. cities, with values such as San Francisco and Los Angeles that are valid for the independent value CA, and New York City and Albany that are valid for the

independent value NY. In the UI, only the valid cities can be selected for a given state.

Because you define a subset value set from an existing independent value set, you must define the independent value set first. End users do not need to choose a value for another segment first to have access to the subset value set.

Table Validation

Typically, you use a table-validated set when the values you want to use are already maintained in an application table (for example, a table of vendor names). Table validation allows you to enable a segment to depend upon multiple prior segments in the same context or structure.

Table-validated value sets have unique values across the table, irrespective of bind variables. The WHERE clause fragment of the value set is considered if it does not have bind variables. If it has bind variables, the assumption is that the values are unique in the value set.

Range

In the case of format, independent, or dependent value sets, you can specify a range to further limit which values are valid. You can specify a range of values that are valid within a value set. You can also specify a range validated pair of segments where one segment represents the low end of the range and another segment represents the high end of the range

For example, you might specify a range for a format-only value set with format type Number where the user can enter only values between 0 and 100. If you use a table value set, you cannot reference flexfield segments in the WHERE clause of the value set . For example, the WHERE clause cannot reference a segment or a value set.

Security

In the case of independent and dependent values, you can specify that data security be applied to the values in segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment end users can view or modify.

When you enable security on a table-validated value sets, the security rule that is defined is absolute and not contingent upon the bind variables (if any) that may be used by the WHERE clause of the value set. For example, suppose a table-validated value set has a bind variable to further filter the value list to x, y and z from a list of x, y, z, xx, yy, zz. The data security rule or filter written against the value set should not assume anything about the bind variables; it must assume the whole list of values is available and write the rule, for example, to allow x, or to allow y and z. By default in data security all values are denied, and show only rows to which access has been provided.

Maintenance

There is no need to define or maintain values for a table-validated or subset value set, as the values are managed as part of the referenced table or independent value set, respectively.

If your application has more than one language installed, or there is any possibility that you might install one or more additional languages for your application in the future, select **Translatable**. This does not require you to provide translated values now, but you cannot change this option if you decide to provide them later.

For more information about defining value sets, see the Oracle Fusion Applications Extensibility Guide.

Define Talent Profile Content

Rating Models: Explained

Use rating models to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile. You can also use rating models to specify target proficiency levels for items on a model profile, so that the model profile can be compared to workers' profiles.

To rate workers on their performance and proficiency, you attach rating models to the content types that are included in the person profile, and then workers can be rated on the items within the type. For example, you can rate workers on the Communication content item within the Competencies content type.

For model profiles, you can specify target proficiency levels for items on the profile, so that the model profile can be compared to workers' profiles. Using the ratings, managers can compare a model profile to workers' profiles to determine the best person suited to fill a position. Workers can compare their profile to model profiles to identify other positions within the organization that they are suited for, or to identify gaps in skills that they need to fill before applying for other positions.

Rating models that measure workers' potential and the impact and risk of loss are also available.

Rating models can include some or all of the following components, depending on the use for the model:

- Rating levels
- Review points
- Rating categories
- Distributions

Rating Levels

Rating levels identify the qualitative values, such as 1, 2, 3, or 4, that you use to rate a worker.

For rating models that are used by Oracle Fusion Performance Management, the following applies:

- You must define numeric ratings for rating models that you use with performance documents that use calculated ratings.

- You must define rating levels using whole numbers, with the highest number indicating the best rating, for the Performance Management analytics to render correctly. Rating levels determine high and low ratings in the analytics.

Review Points

Define review points for rating models that you use with performance documents that use the sum or band calculation method. The review points and point ranges that you define for the rating model are used to calculate ratings.

Rating Categories

Rating categories enable you to group rating levels together for analysis tools used in the talent review process, such as the box chart that is used in the talent review process. You can group rating levels into categories such as low, medium, and high, and those categories then become the labels for the analytic. You should not change rating categories after setting them up, as the changes could affect the analytic.

Distributions

Oracle Fusion Compensation Management and Oracle Fusion Performance Management both use rating model distributions to determine the targeted minimum and maximum percentage of workers that should be given each rating level. Compensation Management uses the distribution values that you set up directly on rating models. However, you can set up distributions at the performance template level for rating models that are used in Performance Management.

Content Types: Explained

Content types are the skills, qualities, and qualifications that you want to track in talent profiles. The content library contains predefined content types such as competencies, languages, and degrees, but you can create new content types as needed. You can also create free-form content types.

Content types contain:

- Properties
- Relationships
- Subscribers

Note

Free-form content types do not contain relationships or properties. You add properties for free-form content types when you add them to a profile type.

Properties

For each content type, you define the properties that all content items of the content type can or must have. To define properties of the content type, you

select fields to be displayed when setting up the content items and the attributes of those fields. The attributes that you specify for each field are: field label, default value, whether the field is required, and whether the field is hidden, display-only, or editable. If the field is attached to a predefined list of values, you also specify the source of the list.

Relationships

Specify where one content type is a parent of another, or where one content type supports another. Content items of content types with relationships inherit the relationship. You cannot create two kinds of relationships between two types or create a relationship between a type and itself. For example, content type A cannot be both the parent and child of content type B. A content type cannot be related to itself.

Subscribers

Specify the subscriber codes of the applications or other Oracle Fusion products that use each content type. If you do not specify a subscriber code for the content type, you cannot view the content type in other applications. For example, if you add a new content type called Corporate Citizenship to the person profile type, you cannot view the content section for Corporate Citizenship in person profiles until you add the new content type to the HRMS content subscriber code.

Content Type Relationships: Examples

Content relationships enable you to associate content items of related content types with each other. The following scenarios illustrate the use of content type relationships.

Tracking Product Expertise

The Resource Manager component of Oracle Fusion Trading Community Model uses content type relationships to track the areas of expertise of workers. Using the predefined content type relationship where the Categories content type is a parent of Products, and Products is a parent of Components, resource managers can keep track of the categories, products, and components that are considered to be their areas of expertise for their resources.

Note

Because these content types and relationships are applicable only to the Resource Manager component of Oracle Fusion Trading Community Model, this product is the only predefined content subscriber to these content types.

Specifying Target Outcomes for Goals

To help your workers manage their goals, you want them to associate their goals with target outcomes, which are content types such as Competencies and Memberships. To accomplish this, you can set up a relationship on the Competencies content type where Competencies is supported by Goals. Workers can then set up goals that have a specific competency as a target outcome.

Content Items: Explained

Content items are the individual skills, qualities, and qualifications within the content types in the content library. For example, within the Competencies content type, communication is a content item. You can create content items to meet your business needs.

This topic discusses:

- Item properties
- Related content items
- Proficiency descriptions

Item Properties

Content items inherit the fields and field properties that you define for the content type to which the item belongs. For example, one of the fields defined for the Memberships content type is ITEM_DESCRIPTION field. The attributes of this field are set up so that the label is Description, the field is editable, and the field does not require an entry. When you set up a content item for the Memberships content type, you will see a field labeled Description, in which you can enter text to describe the agency, but the field will not be required.

Related Content Items

If the content type for which you are creating an item has related content types, then you can enter the related content items for the item. For example, if you have a content type relationship where the Competencies content type is supported by the Goals content type, then on the content items for competencies, you can enter the related goals.

Proficiency Descriptions

If the content item belongs to a content type that has a rating model defined for it, then you can either use the existing descriptions for the ratings within the model, or define descriptions for the ratings that are specific to the content item. When ratings are given for the content item, the descriptions defined for the item are used instead of those on the rating model.

Creating Content Types and Content Items: Worked Example

This example demonstrates how to set up a new content type and content items to track the corporate citizenship activities of your workers so that you can rate them on their involvement in the organization. This example also demonstrates how to set up a rating model to be used with the content type and add the new content type to the person profile.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Can a predefined rating model be used to rate corporate citizenship?	No. The predefined rating models do not have relevant rating descriptions.

Should the content type be a free-form content type?	No. Content items are needed, and the content should be stored in the content library.
What field and properties should the content type contain?	<p>Add two fields to the content type:</p> <ul style="list-style-type: none"> • ITEM_TEXT_20 • RATING_MODEL_ID <p>The ITEM_TEXT_20 field will have a label of Comments, and will be used to enter comments about the workers' corporate involvement. The RATING_MODEL_ID field will have a label of Company Contribution and will be used to attach the rating model for corporate citizenship to the content type.</p> <p>Both fields should require entry and should be editable.</p>
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
What content items are needed to track the required information?	<ul style="list-style-type: none"> • Corporate social responsibility • Corporate environmental responsibility • Corporate industrial citizenship • Corporate state citizenship • Corporate borough, council, or municipal citizenship
When the content type is added to the person profile as a content section, what properties should the fields contain?	Both the Comments field and the Company Contribution fields should display in the detail view of the content section, they should be required, and they should be included in search results.

To track corporate citizenship for your workers, complete the following tasks:

- Create a rating model.
- Create a content type.
- Create content items.
- Add the content type to the person profile type.

Creating a Rating Model

1. In the Setup and Maintenance work area, search for the **Manage Profile Rating Models** task and click **Go to Task**.
2. On the Manage Rating Models page, click **Create**.
3. On the Create Rating Model page, complete the following fields, as shown in this table. Use the default values except where indicated.

Field	Value
Code	Citizenship
Rating Name	Corporate Citizenship

Description	Rating model for corporate citizenship
--------------------	--

- On the Rating Levels tab, complete the following fields, as shown in this table.

Rating Level	Name	Short Description
1	Demonstrates limited or unused influence.	Limited
2	Demonstrates clear evidence of influence.	Clear Evidence
3	Provides a successful image of the company as socially responsible in limited environments.	Successful Image
4	Actively called upon to use influence as a corporate representative in selected environments.	Influential in Selected Environments
5	Demonstrates high level of influence and is able to operate effectively in all environments.	High Level of Influence

- Click **Save and Close**.

Creating a Content Type

- In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task**.
- On the Manage Content Types page, click **Create**.
- On the Create Content Type page, add a content type by completing the following fields, as shown in this table. Use the default values except where indicated.

Field	Value
Code	Citizenship
Name	Corporate Citizenship
Description	Ratings for corporate citizenship behaviors for workers.

- Set up the following field properties, as shown in this table. Use the default values except where indicated.

Field Name	Field Label	Required	Display Option
ITEM_TEXT_20	Comments	Selected	Editable
RATING_MODEL_	Company Contribution	Selected	Editable

5. Click **Save and Close**.
6. On the Manage Content Types page, select the **Corporate Citizenship** content type and click **Edit**.
7. On the Edit Content Type page, select the **Subscribers** tab.
8. On the Subscribers tab, click **Add**.
9. In the Subscriber Code field, select **HRMS**.
10. Click **Save and Close**.

Creating Content Items

1. In the Setup and Maintenance work area, search for the **Manage Profile Content Items** task and click **Go to Task**.
2. On the Manage Content Items page, click **Create**.
3. In the Create Content Item dialog box, complete the following fields, as shown in this table.

Field	Value
Content Type	Corporate Citizenship
Content Item	Corporate Social Responsibility

4. On the Create Content Item: Corporate Social Responsibility page, select the **Corporate Citizenship** rating model in the **Rating** field.
5. Click **Save and Close**.
6. Repeat steps 2 through 5 to add content items for Corporate Environmental Responsibility, Corporate Industrial Citizenship, Corporate State Citizenship, and Corporate Borough, Council, or Municipal Citizenship.

Adding the Corporate Citizenship Content Type to the Person Profile Type

1. In the Setup and Maintenance work area, search for the **Manage Profile Types** task and click **Go to Task**.
2. On the Manage Profile Types page, locate the Person profile type and click **Edit**.
3. On the Edit Profile Type: Person page, select the **Content Sections** tab.
4. In the Content Sections region, click **Add Content Section**.
5. In the Content Types dialog box, select **Citizenship**.
6. In the Content Sections region, click **Citizenship**.
7. On the Content Section page, set up the following field properties, as shown in this table. Use the default values except where indicated.

Column Name	Display Flag	Required	Searchable
ITEM_TEXT240_1	Detail	Selected	Selected
RATING_LEVEL_I	Detail	Selected	Selected

8. On the Edit Profile Type: Person page, click **Save and Close**.
9. In the Content Access Section region, click **Add**.
10. In the Role field, select **Employee**.
11. Select the **Update** check box.
12. Click **Add**.
13. In the Role field, select **Manager**.
14. Click **OK**.
15. Click **Add**.
16. In the Role field, select **HR Specialist**.
17. Click **OK**.
18. On the Edit Profile Type: Person page, click **Save and Close**.

Free-Form Content Types: Worked Example

This example demonstrates how to set up a free-form content type, add it to the HRMS content subscriber code, and then add the content type to the person profile type.

Your company wants to track the previous employment information for workers, including employer name, dates of employment, and job description. However, you do not want to set up and maintain content items for each employer, and this information applies only to person profiles. You decide to use a free-form content type for this information. You can set up the free-form content type with minimal information, and then when you add it to the person profile as a content section, you can define properties for employer name, dates of employment, and job description. Workers can complete their employment information on their profile based on how you set up the content section. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Should the content type be a free-form content type?	Yes. Content items are not needed, and the content should not be stored in the content library.
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
When the content type is added to the person profile as a content section, what fields are needed?	<p>To capture the previous employer, a text field is needed. To capture employment dates, two date fields are needed. To capture job description, another text field is needed. Therefore, the following fields must be added:</p> <ul style="list-style-type: none"> • ITEM_TEXT30_1 • ITEM_DATE_1 • ITEM_DATE_2 • ITEM_TEXT240_1

What properties are needed for the ITEM_TEXT30_1 field?	<p>The field should not be required and the information should not be available as search criteria, so you need only set up these field properties as follows:</p> <ul style="list-style-type: none"> • Label: Previous Employer • Display: Detail (section should appear in detail view of profile)
What properties are needed for the ITEM_DATE_1 field?	<p>The field should not be required and the information should not be available as search criteria, so you need only set up these field properties as follows:</p> <ul style="list-style-type: none"> • Label: From Date • Display: Detail
What properties are needed for the ITEM_DATE_2 field?	<p>The field should not be required and the information should not be available as search criteria, so you need only set up these field properties as follows:</p> <ul style="list-style-type: none"> • Label: To Date • Display: Detail
What properties are needed for the ITEM_TEXT240_1 field?	<p>The field should not be required and the information should not be available as search criteria, so you need only set up these field properties as follows:</p> <ul style="list-style-type: none"> • Label: Job Description • Display: Detail
What role access should be granted for the content section?	Employees, managers, and HR specialists should all have access to update the section.

To set up a free-form content type to track previous employment information for workers, you must:

- Set up a free-form content type
- Add the free-form content type to the person profile type

Setting Up a Free-Form Content Type

1. In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task**.
2. On the Manage Content Types page, click **Create**.
3. On the Create Content Type page, complete the following fields, as shown in this table.

Field	Value
Code	PREVEMP
Name	Previous Employment
Description	Track previous employment information for workers.

4. Select the **Free-Form Type** check box.

5. Click **Save and Close**.
6. On the Manage Content Types page, select the **Previous Employment** content type and click **Edit**.
7. On the Edit Content Type page, select the **Subscribers** tab.
8. On the Subscribers tab, select HRMS in the **Subscriber Code** field.
9. Click **Save and Close**.

Adding the Free-Form Content Type to the Person Profile Type

1. In the Setup and Maintenance work area, search for the **Manage Profile Types** task and click **Go to Task**.
2. On the Manage Profile Types page, select the **Person** profile type, and click **Edit**.
3. On the Edit Profile Type: Person page, select the **Content Sections** tab and click **Add Content Section**.
4. In the Content Types dialog box, select the **Previous Employment** content type.
5. In the Content Sections region, click the **Previous Employment** content type and enter the following properties on the Content Section page, as shown in this table.

Column Name	Label	Display
ITEM_TEXT30_1	Previous Employer	Detail
ITEM_DATE_1	From Date	Detail
ITEM_DATE_2	To Date	Detail
ITEM_TEXT240_1	Job Description	Detail

6. In the Content Access Section region, click **Add**.
7. In the Role field, select **Employee**.
8. Select the **Update** check box.
9. Click **Add**.
10. In the Role field, select **Manager**.
11. Click **OK**.
12. Click **Add**.
13. In the Role field, select **HR Specialist**.
14. Click **OK**.
15. On the Edit Profile Type: Person page, click **Save and Close**.

FAQs for Define Talent Profile Content

What's a rating category?

A label for a grouping of rating levels. Rating categories are used in talent management processes such as performance management and talent reviews to group ratings for analysis tools such as the performance and potential box chart.

Why are some content type relationships not editable?

You can edit any content type relationships that you define. However, the relationships that are predefined cannot be changed.

How can I define a relationship between the Goals content type and other content types?

Set up the relationship on the content type that you want to relate to goals using the relationship type: Is supported by. For example, if you want to define a relationship between the Goals content type and the Competencies content type, set up the relationship on the Competencies content type, instead of the Goals content type.

What's a free-form content type?

Free-form content types enable you to capture information in a profile that you do not need to store in the content library. For example, you can set up a free-form content type to store information about the previous employment information for your workers.

A free-form content type contains only a code, name, and a description, and does not have any properties defined for it until you add it to a profile type. Free-form content types do not include any content items.

Why can't I change the relationship type of a content item?

A content item's relationship type is derived from its content type, and you cannot change it. You can only change relationships at the content type level. You cannot change predefined relationships.

Define Talent Profiles

Profile Types: Explained

Profile types include person profile types and model profile types. The person profile type is the template that you use to create profiles of your workers. The person profile contains the skills, qualities, and qualifications that you want to track for your workers. The person profile type is predefined, and you can have only one. Model profile types are templates for workforce structures such as jobs and positions. Model profiles identify the targeted and required skills and qualifications for a job or position, and also identify work requirements, such as work schedule and travel frequency. You can set up multiple model profile types.

To define profile types, you first specify whether the profile type is a person or model profile. For model profiles, you also specify the workforce structures for which the model profile can be used. For example, if you specify that the model profile can be used for jobs and positions, then you can use the profile type to create both job and position profiles. To define the structure of the profile

type, you add one or more content sections using content types from the content library and free-form content types. Define the following for each content section:

- Instance qualifier sets
- Section properties
- Role access

Instance Qualifier Sets

If you have defined instance qualifier sets for the content type, you select the instance qualifier set to use for the sections.

Section Properties

The properties determine the fields and how they are displayed when you create profiles based on the type. For example, properties determine the label for the field, whether the field is required, and whether the field should be included in profile searches. For sections with content types from the content library, you can use the field properties as they have been defined in the content library, or add, remove, or change the properties to suit the content section. You define all of the properties for free-form content types.

Role Access

You can specify the user roles, such as Employee or Manager, that can view the content section, and which user roles have access to update the section.

Adding Common Lookup Types to a Content Section Property: Explained

When defining content sections for a profile type, you can associate common lookup types with a content section property, enabling you to provide a list of values for the content section property. For example, you can add a list of industries to a content section called Industry Expertise. You can use existing common lookup types, or create your own. Common lookups can be associated with these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.

Note

This functionality does not apply to these content section properties when they are associated with the following content sections: Career Preferences, Potential, Risk, Advancement Readiness, Career Statement, Talent Score, Performance Rating, and Work Requirements.

Adding a Common Lookup to a Content Section Property: Example

This example illustrates how to use common lookup types to create a list of values for a content section property.

Development Readiness

The Human Resources (HR) department at InFusion Corporation wants to track development readiness for employees using the person profile. They would also like to indicate whether a worker is a candidate for serving as a mentor to another worker.

Values for Development Readiness

The HR department has decided on three possible levels for a worker's development readiness:

- 1 to 2 years
- 3 to 5 years
- Ready Now

To indicate whether a worker is a candidate for being a mentor, they want three choices:

- Yes
- No
- Maybe

Analysis

InFusion analyzes the existing content types in the content library, and decides that none of the content types works. They will create a new content type called Development Readiness. This will be a free-form content type, as no content items are needed, and the information does not need to be stored in the content library.

Next, they analyze the existing common lookups, and determine that they can use an existing lookup type, HRT_READINESS but add new lookup codes and meanings to suit their needs. For the indicator for mentorship, they must create a new common lookup.

After creating the content type and lookup and changing the lookup codes for HRT_READINESS, they will add the content type as a content section to the person profile. Adding the content section to the person profile enables human resource specialists and managers to add the section to workers' profiles so that they can rate them on their readiness level and ability to be a mentor.

Note

You can attach lookup values to only these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.

To track development readiness for workers, InFusion must complete the following setup:

1. Using the Manage Common Lookups task in the Setup and Maintenance work area, locate the HRT_READINESS lookup type and add codes for **1 to 2 years**, **3 to 4 years**, and **Ready Now**.

2. Using the Manage Common Lookups task, create a new common lookup called HRT_MENTOR, and add the three values of **Yes**, **No**, and **Maybe**.
3. Using the Manage Content Types task in the Setup and Maintenance work area, create a new free-form content type called Development Readiness. Add HRMS and TM as the content subscribers.
4. Using the Manage Profile Types task in the Setup and Maintenance work area, select the Person profile type and add Development Readiness to it.
5. Using the Manage Profile Types task, select the Development Readiness content section to access the Content Section page.

Set up the content section by adding two properties as described in this table.

Property	Label	Display	Value Set Name
ITEM_TEXT30_6	Development Readiness	Summary	HRT_READINESS
ITEM_TEXT30_7	Potential Mentor	Summary	HRT_MENTOR

6. In the Content Section Access region on the Content Section page, add the HR Specialist and Manager roles and select the option for each role to be able to edit the content section. Do not add the Employee role.

Human resource specialists and managers can then access worker profiles and add the Development Readiness content section to the profiles.

Instance Qualifier Sets: Explained

An instance qualifier set is a group of codes that you use to uniquely identify different occurrences of the same profile item within the Competency content type. Instance qualifiers typically identify the role of the person who edited a competency. For example, if a worker, the worker's peer, and the worker's manager all enter a rating for a competency on the worker's profile, instance qualifier sets uniquely identify each instance, or, the rating given by each different role. Uniquely identifying different instances of competencies enables you to specify which instance is used when you view or compare profiles.

Each instance qualifier contains a code and a description, which indicate the role or the application that updated the competency. For example, P is the code that is used when an employee's peer rates the employee and T is used for the rating that results from the talent review meeting. You can use the predefined codes and descriptions, or you can create your own.

In addition to the code and description, each instance qualifier has the following properties:

- Priority
- Employer and manager views
- Search ability
- Default instance qualifier for employer and manager

Priority

Priority determines the order in which different instances of a competency are displayed, and also determines which instance to use when searching and comparing profiles. The lowest number indicates the highest priority.

Employer and Manager Views

Employer and manager views determine which instances are visible to employees and to managers.

Search Ability

You can specify whether items that have been assigned the instance qualifier code should be included in profile searches. For example, you might not want the ratings for competencies given by peers to display when other workers are searching person profiles.

Default Instance Qualifier for Employee and Manager

You can specify the default instance qualifier to use when managers and employees update a competency. Each time an employee or manager updates a competency, the record is assigned the instance qualifier code that is identified as the employee or manager default code.

Define Questionnaires

Questionnaires: Explained

You can create questionnaires to add to gather feedback from respondents using question and responses you configure.

Questionnaires enable you to:

- Capture information from respondents
- Use templates to maintain consistency and configure specific audiences
- Specify the questionnaire presentation
- Configure question and responses in the question library
- Control access

Capturing Information from Respondents

You can create questionnaires to gather information from, and about, employees in applications that are set up to accommodate questionnaires. For example, you can use questionnaires to collect participant feedback in a performance evaluation, or rate worker potential in an assessment for a talent review.

Using Templates to Maintain Consistency and Configuring for Specific Audiences

You must create templates to use as the basis for questionnaires. With templates, you can maintain consistency for questionnaires, and configure them for:

- Specific applications
- General audiences, such as an entire organization, or all internal customers
- Specific purposes, such as providing feedback for performance evaluation periods
- Targeted audiences, such as particular roles (managers or peers, for example) or organizations

Note

Questionnaires used for talent reviews, called potential assessments, are predefined and do not require a template.

Specifying the Questionnaire Presentation

You control how the questionnaire appears in the subscriber application. Specify whether the questionnaire appears on one page or across multiple pages, for example. You can add sections to separate questions by type or other classification and specify which questions are required to be answered.

Configuring Questions and Responses in the Question Library

You configure questions and responses in the question library to add to the questionnaire. You can create four types of questions: text field, single select choice, multiple select choice, and no response. For each question type you also configure specific responses, and select the presentation method to determine how the response appears. For example, for the single select question type, you can specify either that the possible responses appear in a single select choice list or as radio buttons.

Controlling Access

Set privacy options to control access to the questionnaire or template. You can permit either anyone with access to a questionnaire or template to edit it, or only the specified owner.

Creating a Questionnaire: Points to Consider

To create a questionnaire, you must first create the template. You can edit the configuration settings in the questionnaire that were inherited from the template.

When creating a questionnaire template or questionnaire:

- Determine the intended audience for the questionnaire
- Format basic information
- Add and format content

When you conclude setting up the questionnaire or template, use the **Preview** button on the Review page to view and confirm the configuration.

Determining the Intended Audience for the Questionnaire

You set up questionnaires to apply for particular subscriber applications, and you can target a general and widespread population, or specific audiences. For example, you can create questionnaires for:

- All participants who provide feedback for all performance documents, or to all performance documents for a specific evaluation period
- A more targeted audience, such as for a specific role like manager, peer, or internal customer

Formatting Basic Information

Specify the basic information for the questionnaire template or questionnaire, to make searching and categorization easier and control access.

ID and Folder

An ID containing only numbers is generated automatically for each questionnaire template and questionnaire. However, you can change it to any unique combination of numbers or characters you need to make it easier to search for or identify. You must also provide a name for the questionnaire or template.

Select the folder in which to store the questionnaires (not available for templates). You can create the folders to categorize questionnaires and to enhance searching for them.

Owner Name

To control access to the questionnaire or template, select the name of an owner whom you want to have access, and set the **Privacy** setting to **Private**. Only the owner can then edit the questionnaire or template. If you set the **Privacy** setting to **Public**, anyone with permission to access the questionnaire or template can edit it.

Subscriber

In the template, select the application that will use the questionnaire. For example, to add a questionnaire to performance documents, select **Performance 360**. The template can be used only for the subscriber you select.

Instruction Text and Attachments

Instruction text appears at the top of the first page of the questionnaire. You can add additional introductory text for each section you create. You can also add to a section a No Response question type that contains instruction text, and requires no response.

You can add file or URL attachments to a questionnaire. The attachment appears as a link at the top of the questionnaire, and below the instruction text if it is present.

Adding and Formatting Content

You control how the various sections in the template appear by specifying sequence, appearance, and formatting for questions and responses.

Questionnaire Content: Explained

You specify the content that is contained in a questionnaire and how to display it.

In the questionnaire template, and the questionnaires created from it, you can:

- Specify section order and presentation
- Specify question and response order
- Specify response types
- Add and format sections
- Add and format questions and responses

Specifying Section Order and Presentation

If you add multiple sections to the questionnaire, then you can specify the section order as **Sequential** so that the sections appear in the order you specify, or **Random** so that the order changes whenever the questionnaire is accessed.

This table lists how each section presentation selection affects a questionnaire.

Section Presentation	Effect
No sections	One required section appears that contains all questions.
Stack regions	Sections are arranged from top to bottom.

Specifying Question and Response Order

Select **Vertical** for the question and response order in the template to maintain the order you specify in the actual questionnaire. When you select **Random**, the order for the questions or responses changes whenever the questionnaire is accessed. This prevents respondents from using an answer key for the questions or responses. Responses can vary only for single and multiple choice question types.

For the template, you can also specify whether to allow changes to formatting options, sections, or questions and responses. If you select the check box for any of these, that aspect of a questionnaire created from the template can be edited.

Specifying Response Types

In the template, you select the response types that can appear in questionnaires created from the template. Only questions of the types associated with the response types you select are eligible to appear in the questionnaire.

For example, if you select options for multiple choice selection, such as **Check multiple choices** and **Multiple choices from list**, but do not select any for single select choices, such as **Single choice from list** or **Radio button list**, you can add multiple choice questions, but not single choice, to the questionnaire. If, however, you select **Check multiple choices** and **Single choice from list**, but not **Multiple choices from list** or **Radio button list**, you can add both multiple choice and single choice questions, but are restricted to the selected response types for each question type.

Adding and Formatting Sections

Add sections, and then add questions to the sections. At least one section is required for a questionnaire. You can use sections to group questions by type, category, or any other classification.

Select **Additional Questions** to create a section that will include only questions added in the subscriber application by people with the roles that have permission to edit questionnaires. For performance documents, for example, that could be managers or workers. For talent reviews, a human resource (HR) specialist who is a meeting facilitator has that role.

Select **Vertical** to display the questions within the section vertically in the order you specify, or **Random** to change the order whenever the questionnaire is accessed.

You also specify whether the questions in the section are required so that respondents must answer them.

Note

The requirement to answer all required questions is also determined by the subscriber application.

When you select **New Page**, the section appears on a separate page than the other sections. When the number of questions on a page or section exceeds the setting you specified in the **Maximum Number of Questions per Page** field, the questions that exceed the specified number appear on the next page. If you enter 6 as the maximum number, for example, but the section contains 10 questions, the section continues on a new page.

Adding, Creating, and Formatting Questions and Responses

You can add questions to the section from the question library, or create new questions. You can add or remove questions, and drag and drop them to the desired order in the section. The order is maintained in the questionnaire if the question order is set to **Vertical** for the section. If you create a new question, you specify the folder to store the question. Questions stored in question folders will be available to use in other questionnaires.

If you create new questions, you also configure the responses. Questions you add from the question library already have existing responses. However, you can change the response presentation. For example, if the question is a single select type associated with a single choice from list response type, you can change the

response type to radio buttons. You can add questions of any type to a section. If the section is not set to required, then you can specify which individual questions are required to be answered in the questionnaire by respondents.

Questionnaire Question and Response Types: Explained

You can create questions from any of four question types to add to the question library, and ultimately, to questionnaires. Along with the questions, you also specify the responses and how the responses are presented in the questionnaire. You can specify whether to allow respondents to add attachments to the response.

The available question types are:

- Text
- Single choice
- Multiple choice
- No response

Text

For the text question type, a respondent enters a response in a text field. Answers can be any text, such as single words or sentences, or characters. You specify a maximum number of characters the response can contain, and you can optionally specify a minimum number the respondent must enter.

For the response text field, you specify to utilize either plain text, or rich text, to let respondents format their responses using bold, underline, and other characteristics.

Single Choice

With the single choice question type, you create a question and respondents select one response from a list you provide. You select whether to display the responses as either a single select choice list, or radio buttons.

Respondents can select from either responses that you create, or from a rating model. When you associate a rating model with the response type, the possible responses are drawn automatically from the values of the rating model. For example, if the rating model contains five rating levels, the short description and the name associated with the level for all levels, are added directly as responses from which the respondent can choose.

Multiple Choice

Use the multiple choice question type to create a question and permit respondents to provide one or more answers. Create the responses and specify whether the responses are presented as check boxes or a choice list. You can optionally set both a minimum and maximum number of required responses.

No Response

Use the no response question type to add a question with no accompanying responses. You can use it to add additional instructions or information in the section, or let respondents add attachments as a response.

FAQs for Define Questionnaires

What happens if I edit a questionnaire that is in use?

You are prompted to either create a new version of the questionnaire, or update the existing questionnaire. When you create a new version of the questionnaire you can configure it as you would any newly-created questionnaire. When you update an existing questionnaire, the new version replaces the older one. Respondents will access the latest version wherever it appears.

If no one has submitted a response to the questionnaire yet, you can add new sections and questions, and specify those that are required. If at least one respondent has submitted a response, you can add new sections and questions, but you cannot specify that either are required.

FAQs for Define Social Networking

How can I enable social networking features?

Set the Social Networking Features Enabled profile option to "Y" on the Manage Social Networking Profile Option Values page. If you enable this profile option, users can access the following features:

- Kudos
- Message board
- Activity stream
- Connections
- Personal status

Note

If you disable social networking features, users can continue to access the bookmarks they created from the Bookmarks region in the Activities and Interests card on the My Portrait tab. Also, the spaces that users are a member of continue to appear in the Spaces region.

Common Applications Configuration: Define Security for Human Capital Management

Role Provisioning and Deprovisioning: Explained

A user's access to data and functions depends on the user's roles: users have one or more roles that enable them to perform the tasks required by their jobs or positions. Roles must be provisioned to users; otherwise, users have no access to data or functions.

Role Provisioning Methods

Roles can be provisioned to users:

- Automatically
- Manually, using delegated administration:
 - Users such as line managers and human resource specialists can provision roles manually to other users.
 - Users can request roles for themselves.

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

Oracle Identity Management (OIM) can be configured to notify users when their roles change; notifications are not issued by default.

Role Types

Data roles, abstract roles, and job roles can be provisioned to users. Roles available for provisioning include predefined roles, HCM data roles, and roles created using OIM.

Automatic Role Provisioning

A role is provisioned to a user automatically when at least one of the user's assignments satisfies the conditions specified in the relevant role-mapping

definition. The provisioning occurs when the assignment is either created or updated. For example, when a person is promoted to a management position, the line manager role is provisioned automatically to the person if an appropriate role mapping exists. Any change to a person's assignment causes the person's automatically provisioned roles to be reviewed and updated as necessary.

Role Deprovisioning

Automatically provisioned roles are deprovisioned automatically as soon as a user no longer satisfies the role-mapping conditions. For example, a line manager role that is provisioned to a user automatically is deprovisioned automatically when the user ceases to be a line manager.

Automatically provisioned roles can be deprovisioned manually at any time.

Manually provisioned roles are deprovisioned automatically only when all of the user's work relationships are terminated; in all other circumstances, users retain manually provisioned roles until they are deprovisioned manually.

Changes to Assignment Managers

When a person's line manager is changed, the roles of both new and previous line managers are updated as necessary. For example, if the person's new line manager now satisfies the conditions in the role mapping for the line manager role, and the role is one that is eligible for autoprovisioning, then that role is provisioned automatically to the new line manager. Similarly, if the previous line manager no longer satisfies the conditions for the line manager role, then that role is deprovisioned automatically.

Roles at Termination

When a work relationship is terminated, all automatically provisioned roles for which the user does not qualify in other work relationships are deprovisioned automatically. Manually provisioned roles are deprovisioned automatically only if the user has no other work relationships; otherwise, the user retains all manually provisioned roles until they are deprovisioned manually.

Automatic deprovisioning can occur either as soon as the termination is submitted or approved or on the day after the termination date. The user who is terminating the work relationship selects the appropriate deprovisioning date.

Role mappings can provision roles to users automatically at termination. For example, the locally defined roles Retiree and Beneficiary could be provisioned to users at termination based on assignment status and person type values.

If a termination is later reversed, roles that were deprovisioned automatically at termination are reinstated and post-termination roles are deprovisioned automatically.

Date-Effective Changes to Assignments

Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role changes are identified and role provisioning occurs on the day the changes take effect, not when the change is entered. The process Send Pending LDAP Requests identifies future-

dated transactions and manages role provisioning and deprovisioning at the appropriate time. Note that such role-provisioning changes are effective as of the system date; therefore, a delay of up to 24 hours may occur before users in other time zones acquire the access for which they now qualify.

Role Mappings: Explained

User access to data and functions is determined by abstract, job, and data roles, which are provisioned to users either automatically or manually. To enable a role to be provisioned to users, you define a relationship, known as a mapping, between the role and a set of conditions, typically assignment attributes such as department, job, and system person type. In a role mapping, you can select any role stored in the Lightweight Directory Access Protocol (LDAP) directory, including Oracle Fusion Applications predefined roles, roles created in Oracle Identity Management (OIM), and HCM data roles.

The role mapping can support:

- Automatic provisioning of roles to users
- Manual provisioning of roles to users
- Role requests from users
- Immediate provisioning of roles

Automatic Provisioning of Roles to Users

A role is provisioned to a user automatically if:

- At least one of the user's assignments satisfies all conditions associated with the role in the role mapping.
- You select the **Autoprovision** option for the role in the role mapping.

For example, for the HCM data role Sales Manager Finance Department, you could select the **Autoprovision** option and specify the following conditions.

Attribute	Value
Department	Finance Department
Job	Sales Manager
Assignment Status	Active

The HCM data role Sales Manager Finance Department is provisioned automatically to users with at least one assignment that satisfies all of these conditions.

Automatic role provisioning occurs as soon as the user is confirmed to satisfy the role-mapping conditions, which can be when the user's assignment is either created or updated. The provisioning process also removes automatically provisioned roles from users who no longer satisfy the role-mapping conditions.

Note

The automatic provisioning of roles to users is effectively a request to OIM to provision the role. OIM may reject the request if it violates segregation-of-duties rules or fails a custom OIM approval process.

Manual Provisioning of Roles to Users

Users such as human resource (HR) specialists and line managers can provision roles manually to other users; you create a role mapping to identify roles that can be provisioned in this way.

Users can provision a role to other users if:

- At least one of the assignments of the user who is provisioning the role (for example, the line manager) satisfies all conditions associated with the role mapping.
- You select the **Requestable** option for the role in the role mapping.

For example, for the HCM data role Quality Assurance Team Leader, you could select the **Requestable** option and specify the following conditions.

Attribute	Value
Manager with Reports	Yes
Assignment Status	Active

Any user with at least one assignment that satisfies both of these conditions can provision the role Quality Assurance Team Leader manually to other users, who are typically direct and indirect reports.

If the user's assignment subsequently changes, there is no automatic effect on roles provisioned by this user to others; they retain manually provisioned roles until either all of their work relationships are terminated or the roles are manually deprovisioned.

Role Requests from Users

Users can request roles when reviewing their own account information; you create a role mapping to identify roles that users can request for themselves.

Users can request a role if:

- At least one of their own assignments satisfies all conditions associated with the role mapping.
- You select the **Self-requestable** option for the role in the role mapping.

For example, for the Expenses Reporting role you could select the **Self-requestable** option and specify the following conditions.

Attribute	Value
Department	ABC Department
System Person Type	Employee
Assignment Status	Active

Any user with at least one assignment that satisfies all of these conditions can request the role. The user acquires the role either immediately or, if approval is required, once the request is approved. Self-requested roles are classified as manually provisioned.

If the user's assignment subsequently changes, there is no automatic effect on self-requested roles. Users retain manually provisioned roles until either all of their work relationships are terminated or the roles are manually deprovisioned.

Immediate Provisioning of Roles

When you create a role mapping, you can apply autoprovisioning from the role mapping itself.

In this case, all assignments and role mappings in the enterprise are reviewed. Roles are:

- Provisioned immediately to all users who do not currently have roles for which they are eligible
- Deprovisioned immediately from users who are no longer eligible for roles that they currently have

Immediate autoprovisioning from the role mapping enables bulk automatic provisioning of roles to a group of users who are identified by the role-mapping conditions. For example, if you create a new department after a merger, you can provision relevant roles to all users in the new department by applying autoprovisioning immediately.

To provision roles immediately to a single user, the user's line manager or an HR specialist can autoprovision roles from that user's account.

Role-Mapping Names

The names of role mappings must be unique in the enterprise. You are recommended to devise a naming scheme that reveals the scope of each role mapping. For example:

Name	Description
Autoprovisioned Roles Sales Department	Mapping includes all roles provisioned automatically to anyone in the sales department
Benefits Specialist Autoprovisioned	Mapping defines the conditions for autoprovisioning the Benefits Specialist role
Line Manager Requestable Roles	Mapping includes all roles that a line manager can provision manually to direct and indirect reports

Role Mappings: Examples

Roles must be provisioned to users explicitly, either automatically or manually; no role is provisioned to a user by default. This topic provides some examples of typical role mappings to support automatic and manual role provisioning.

Creating a Role Mapping for Employees

You want all employees in your enterprise to have the Employee role automatically when they are hired. In addition, employees must be able to request the Expenses Reporting role when they need to claim expenses. Few employees will need this role, so you decide not to provision it automatically to all employees.

You create a role mapping called All Employees and enter the following conditions.

Attribute	Value
System Person Type	Employee
Assignment Status	Active

In the role mapping you include the:

- Employee role, and select the **Autoprovision** option
- Expenses Reporting role, and select the **Self-requestable** option

You could create a similar role mapping for contingent workers called All Contingent Workers, where you would set the system person type to contingent worker.

Note

If the Employee and Contingent Worker roles are provisioned automatically, pending workers acquire them when their periods of employment or placements start. If they need roles before then, you create a separate role mapping for the pending worker system person type.

Creating a Role Mapping for Line Managers

Any type of worker can be a line manager in the sales business unit. You create a role mapping called Line Manager Sales BU and enter the following conditions.

Attribute	Value
Business Unit	Sales
Assignment Status	Active
Manager with Reports	Yes

You include the Line Manager role and select the **Autoprovision** option. This role mapping ensures that the Line Manager role is provisioned automatically to any worker with at least one assignment that matches the role-mapping conditions.

In the same role mapping, you could include roles that line managers in this business unit can provision manually to other users by selecting the roles and marking them as requestable. Similarly, if line managers can request roles for themselves, you could include those in the same role mapping and mark them as self-requestable.

Creating a Role Mapping for Retirees

Retirees in your enterprise need a limited amount of system access to manage their retirement accounts. You create a role mapping called All Retirees and enter the following conditions.

Attribute	Value
System Person Type	Retiree
Assignment Status	Inactive

You include the locally defined role Retiree in the role mapping and select the **Autoprovision** option. When at least one of a worker's assignments satisfies the role-mapping conditions, the Retiree role is provisioned to that worker automatically.

Creating a Role Mapping for Sales Managers

Grade 6 sales managers in the sales department need the Sales Manager role. In addition, sales managers need to be able to provision the Sales Associate role to other workers. You create a role mapping called Sales Managers Sales Department and enter the following conditions.

Attribute	Value
Department	Sales
Job	Sales manager
Grade	6
Assignment Status	Active

In the role mapping, you include the:

- Sales Manager role, and select the **Autoprovision** option
- Sales Associate role, and select the **Requestable** option

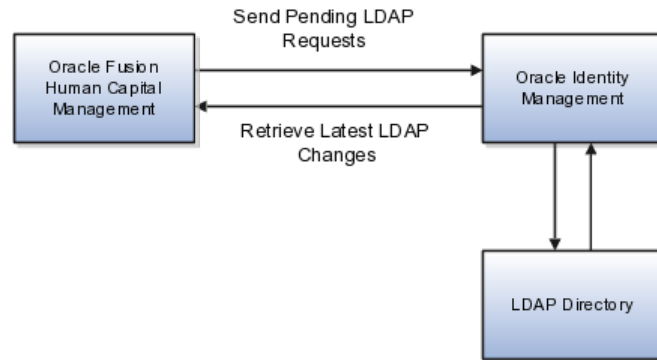
Synchronization of User and Role Information with Oracle Identity Management: How It Is Processed

Oracle Identity Management (OIM) maintains Lightweight Directory Access Protocol (LDAP) user accounts for users of Oracle Fusion Applications. OIM also stores the definitions of abstract, job, and data roles, and holds information about roles provisioned to users.

Most changes to user and role information are shared automatically and instantly by Oracle Fusion Human Capital Management (HCM) and OIM. In addition, two scheduled processes, Send Pending LDAP Requests and Retrieve Latest LDAP Changes, manage information exchange between Oracle Fusion HCM and OIM in some circumstances.

- Send Pending LDAP Requests sends to OIM bulk requests and future-dated requests that are now active.

- Retrieve Latest LDAP Changes requests from OIM changes that may not have arrived because of a failure or error, for example.



Settings That Affect Synchronization of User and Role Information

You are recommended to run the Send Pending LDAP Requests process at least daily to ensure that future-dated changes are identified and processed as soon as they take effect. Retrieve Latest LDAP Changes can also run daily, or less frequently if you prefer. For example, if you know that a failure has occurred between OIM and Oracle Fusion HCM, then you can run Retrieve Latest LDAP Changes to ensure that user and role information is synchronized.

When processing bulk requests, the batch size that you specify for the Send Pending LDAP Requests process is the number of requests to be processed in a single batch. For example, if 400 requests are to be processed and you specify a batch size of 25, then 16 batches of requests will be created and processed in parallel.

How Synchronization of User and Role Information Is Managed

Synchronization of most user and role information between Oracle Fusion HCM and OIM occurs automatically. However, when you run Send Pending LDAP Requests to process future-dated or bulk requests, it sends to OIM:

- Requests to create, suspend, and re-enable user accounts.

When a person record is created in Oracle Fusion HCM, OIM creates a user account automatically.

When all of a person's work relationships are terminated and the person has no roles, the person's user account is suspended automatically. If the person is subsequently rehired, the suspended account is automatically re-enabled.

- Role provisioning and role deprovisioning changes for individual users.
- Changes to relevant person attributes for individual users.
- New and updated information about HCM data roles, which are created in Oracle Fusion HCM.

Note

It is possible to disable, for the enterprise, most default processing of Send Pending LDAP Requests. In particular, you can prevent the:

- Default creation of user accounts
- Automatic provisioning and deprovisioning of roles
- Automatic sharing of changes to person attributes

To control the processing of Send Pending LDAP Requests, you perform the task Manage Enterprise HCM Information.

The process Retrieve Latest LDAP Changes sends to Oracle Fusion HCM:

- Names of new user accounts.

When a person record is created in Oracle Fusion HCM, OIM creates a user account automatically and returns:

- The user account name and password. If the user's primary work e-mail address was entered when the person record was created, then the user account name and password are returned to the user; otherwise, this information is returned to the primary work e-mail address of the user's line manager. (No notification is sent if the user has no line manager or the line manager has no primary work e-mail address.)
- The globally unique identifier (GUID) associated with the LDAP directory user account, which is added automatically to the person record.
- Latest information about abstract, job, and data roles.

OIM stores latest information about all abstract, job, and data roles, including HCM data roles. Oracle Fusion HCM maintains a local copy of all role names and types so that lists of roles presented in role mappings and elsewhere are up to date.

Note

New HCM data roles are available only when OIM has returned information about those roles to Oracle Fusion HCM.

- Work e-mail addresses, if OIM owns the work e-mail address.

If automatic maintenance of user accounts is enabled for the enterprise (which it is by default), then the values of the following person attributes are sent to OIM automatically whenever a person record is created and whenever any of these attributes is subsequently updated.

- Person number
- System person type from the person's primary assignment
- The GUID of the manager of the person's primary assignment
- Work e-mail address, if Oracle Fusion HCM owns the work e-mail address
- Work phone number

- Work FAX number
- Both local and global versions of the person's display name
- Global versions of the following name components:
 - First name
 - Middle name
 - Last name
 - Name suffix
- Both the formatted work-location address and the following components of the work-location address from the person's primary assignment:
 - Address line 1
 - City
 - State
 - Postal code
 - Country code
- The person's preferred language
- The person's user name, if this value itself has changed

Equivalent information for trading community parties is also shared with OIM.

No personally identifiable information (PII) is sent from Oracle Fusion HCM to OIM.

Defining Security After Enterprise Setup: Points to Consider

After the implementation user has set up the enterprise, further security administration depends on the requirements of your enterprise.

The Define Security activity within the Information Technology (IT) Management business process includes the following tasks.

- Import Worker Users
- Import Partner Users
- Manage Job Roles
- Manage Duties
- Manage Application Access Controls

If no legacy users, user accounts, roles, and role memberships are available in the Lightweight Directory Access Protocol (LDAP) store, and no legacy workers are available in Human Resources (HR), the implementation user sets up new users and user accounts and provisions them with roles available in the Oracle Fusion Applications reference implementation.

If no legacy identities (workers, suppliers, customers) exist to represent people in your enterprise, implementation users can create new identities in Human Capital Management (HCM), Supplier Portal, and Customer Relationship Management (CRM) Self Service, respectively, and associate them with users.

Before Importing Users

Oracle Identity Management (OIM) handles importing users.

If legacy employees, contingent workers, and their assignments exist, the HCM Application Administrator imports these definitions by performing the Load Batch Data task. If user and role provisioning rules have been defined, the Load Batch Data process automatically creates user and role provisioning requests as the workers are created.

Once the enterprise is set up, performing the Load Batch Data task populates the enterprise with HR workers in records linked by global user ID (GUID) to corresponding user accounts in the LDAP store. If no user accounts exist in the LDAP store, the Load Batch Data task results in new user accounts being created. Worker email addresses as an alternate input for the Load Batch Data task triggers a search of the LDAP for user GUIDs, which may perform more slowly than entering user names.

In the security reference implementation, the HCM Application Administrator job role hierarchy includes the HCM Batch Data Loading Duty role, which is entitled to import worker identities. This entitlement provides the access necessary to perform the Load Batch Data task in HCM.

Note

The Import Person and Organization task in the Define Trading Community Import activity imports the following resources, creates users, and links the resources to users for use in CRM.

- Internal employees
- Contingent workers
- External partner contacts
- Partner companies
- Legal entities
- Customers
- Consumers

If role provisioning rules have been defined, the Import Person and Organization task automatically provisions role requests as the users are created.

Import Users

If legacy users (identities) and user accounts exist outside the LDAP store that is being used by the Oracle Fusion Applications installation, the IT security manager has the option to import these definitions to the LDAP store by performing the Import Worker Users and Import Partner Users tasks.

If no legacy users or user accounts can be imported or exist in an LDAP repository accessible to Oracle Identity Management (OIM), the IT security manager creates users manually in OIM or uses the Load Batch Data task to create users from imported HR workers.

Once users exist, their access to Oracle Fusion Applications is dependent on the roles provisioned to them in OIM or Human Capital Management. Use the Manage HCM Role Provisioning Rules task to define rules that determine what roles are provisioned to users.

Importing user identities from other applications, including other Oracle Applications product lines, is either a data migration or manual task. Migrating data from other Oracle Applications includes user data. For more information about importing users, see the Oracle Fusion Middleware Developer's Guide for Oracle Identity Manager.

In the security reference implementation, the IT Security Manager job role hierarchy includes the HCM Batch Data Loading Duty and the Partner Account Administration Duty. These duty roles provide entitlement to import or create users. The entitlement Load Batch Data provides the access necessary to perform the Import Worker Users task in OIM. The entitlement Import Partner entitlement provides the access necessary to perform the Import Partner Users task in OIM.

Manage Job Roles

Job and abstract roles are managed in OIM. This task includes creating and modifying job and abstract roles, but not managing role hierarchies of duties for the jobs.

Note

Manage Job Roles does not include provisioning job roles to users. Provisioning users is done in OIM, HCM, CRM or Oracle Fusion Supplier Portal.

Roles control access to application functions and data. Various types of roles identify the functions performed by users.

The Oracle Fusion Applications security reference implementation provides predefined job and abstract roles. In some cases, the jobs defined in your enterprise may differ from the predefined job roles in the security reference implementation. The predefined roles and role hierarchies in Oracle Fusion may require changes or your enterprise may require you to create new roles. For example, you need a job role for a petty cash administrator, in addition to an accounts payable manager. The security reference implementation includes a predefined Accounts Payable Manager, and you can create a petty cash administrator role to extend the reference implementation.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Enterprise Role Management Duty role, which is entitled to manage job and abstract roles (the entitlement is Manage Enterprise Role). This entitlement provides the access necessary to perform the Manage Job Roles task in OIM.

Manage Duties

A person with a job role must be able to perform certain duties. In the Oracle Fusion Applications security reference implementation, enterprise roles inherit duties through a role hierarchy. Each duty corresponds to a duty role. Duty roles specify the duties performed within applications and define the function and data access granted to the enterprise roles that inherit the duty roles.

Managing duties includes assigning duties to job and abstract roles in a role hierarchy using Authorization Policy Manager (APM). If your enterprise needs users to perform some actions in applications coexistent with Oracle Fusion applications, you may wish to remove the duty roles that enable those actions. For details about which duty roles are specific to the products in an offering, see the Oracle Fusion Applications Security Reference Manual for each offering.

OIM stores the role hierarchy and the spanning of roles across multiple pillars or logical partitions of applications.

In cases where your enterprise needs to provide access to custom functions, it may be necessary to create or modify the duty roles of the reference implementation.

Tip

As a security guideline, use only the predefined duty roles, unless you have added new applications functions. The predefined duty roles fully represent the functions and data that must be accessed by application users and contain all appropriate entitlement. The predefined duty roles are inherently without segregation of duty violations of the constraints used by the Application Access Controls Governor.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Application Role Management Duty role, which is entitled to manage duty roles (the entitlement is Manage Application Role). This entitlement provides the access necessary to perform the Manage Duties task in APM.

Note

Product family administrators are not entitled to create role hierarchies or manage duty roles and must work with the IT security manager to make changes such as localizing a duty role to change a role hierarchy. Setup for localizations is documented in HCM documentation.

Manage Application Access Controls

Prevent or limit the business activities that a single person may initiate or validate by managing segregation of duties policies in the Application Access Controls Governor (AACG) .

Note

In AACG, segregation of duties policies are called access controls or segregation of duties controls.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Segregation of Duties Policy Management Duty role, which is entitled to manage segregation of duties policies (the entitlement is Manage Segregation of Duties Policy). This entitlement provides the access necessary to perform the Manage Application Access Controls task in AACG.

Defining Data Security After Enterprise Setup: Points to Consider

After the implementation user has set up the enterprise, further security administration depends on the requirements of your enterprise.

The Define Data Security activity within the Information Technology (IT) Management business process includes the following tasks.

- Manage Data Access Sets
- Manage Segment Security
- Manage Role Templates
- Manage Data Security Policies
- Manage Encryption Keys

These tasks address data security administration. For information on using the user interface pages for setting up and managing data security, see the Oracle Fusion Middleware Administrator's Guide for Authorization Policy Manager (Oracle Fusion Applications edition).

Note

The Manage Data Role and Security Profiles task, and all other HCM security profile setup tasks are documented in Human Capital Management (HCM) documentation.

Manage Data Access Sets

Data access sets define a set of access privileges to one or more ledgers or ledger sets.

The information on ledgers that are attached to data access sets are secured by function security. Users must have access to the segment values associated with the data access sets to access the corresponding GL account.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Data Access Administration Duty role, which is entitled to manage data access sets (the entitlement is Define General Ledger Data Access Set). This entitlement provides the access necessary to perform the Manage Data Access Sets task in General Ledger.

Manage Segment Security

Balancing or management segment values can secure data within a ledger.

Segment values are stored in GL_ACCESS_SET_ASSIGNMENTS and secured by restrictions, such as Exclude, on parameters that control the set of values that a user can use during data entry.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Application Key Flexfield Administration Duty role, which is entitled to manage application key flexfields (the entitlement is Manage Application Key Flexfield). This entitlement provides the access necessary to perform the Manage Segment Security task in General Ledger.

Manage Role Templates

Data role templates automatically create or update data roles based on dimensions such as business unit. As an enterprise expands, data role templates trigger replication of roles for added dimensions. For example, when creating a new business unit, a data role template generates a new Accounts Payables Manager data role based on the Financials Common Module Template for Business Unit Security data role template.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Application Role Management Duty role, which is entitled to manage data role templates (the entitlement is Manage Role Template). This entitlement provides the access necessary to perform the Manage Role Templates task in APM.

Manage Data Security Policies

Data security grants provisioned to roles are data security policies. The security reference implementation provides a comprehensive set of predefined data security policies and predetermined data security policies based on data role templates.

Data security policies are available for review in Authorization Policy Manager (APM). Data security policies are implemented by grants stored in Oracle Fusion Data Security (FND_GRANTS).

Data security policies secure the database resources of an enterprise. Database resources are predefined applications data objects and should not be changed. However, for cases where custom database resources must be secured objects, the IT security manager is entitled to manage database resources and create new data security policies.

Warning

Review but do not modify HCM data security policies in APM except as a custom implementation. Use the HCM Manage Data Role And Security Profiles task to generate the necessary data security policies and data roles.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Application Role Management Duty role, which is entitled to manage data security policies (the entitlement is Manage Data Security Policy). This entitlement provides the access necessary to perform the Manage Data Security Policies task in APM.

Manage Encryption Keys

Create or edit encryption keys held in Oracle Wallet to secure Personally Identifiable Information (PII) attributes. This task is only available when Payments is implemented.

In the security reference implementation, the IT Security Manager job role hierarchy includes the Payments Data Security Administration Duty role, which is entitled to manage encryption keys that secure PII (the entitlement is Manage Wallet). This entitlement provides the access necessary to perform the Manage Encryptions Keys task in Payments.

Securing Identities and Users: Points To Consider

Identity covers all aspects of an entity's existence within the contexts in which it is used. The identity of an enterprise user consists of HR attributes, roles, resources, and relationships.

HR attributes include identifying information about a user that is relatively static and well understood, such as first and last name, title, and job function.

Roles are part of a user's identity and define the user's purpose and responsibilities.

Within identity management, resources define what a user can and does do. In an enterprise, this typically translates into what resources a user has access to, what privileges they have on that resource, and what they have been doing on that resource. Resources can be application accounts or physical devices such as laptops or access cards. The enterprise owns the resources, secures them, and manages access to the resources by managing the user's identity and access.

Relationships establish the portion of user identities that involve organizational transactions such as approvals.

An Oracle Fusion Applications user and corresponding identity are usually created in a single transaction, such as when a worker is created in Human Resources (HR). That transaction automatically triggers provisioning requests for the user based on role provisioning rules.

User accounts for some identities that are not employees, such as partner contacts, may be created in a later transaction using an identity that is already created in the identity store. Supplier contacts are created in the Supplier Model, not HR.

Stores

Various locations store identity and user data.

Identity data consists of the following.

- HR person records
- Oracle Fusion Trading Community Model party records

In Oracle Fusion Applications, identities and users correspond one to one, but not all identities correspond to a user, and not all users are provisioned with an identity. Some identities stored in HR and Trading Community Model may not be provisioned to user accounts and therefore are not synchronized with Oracle Identity Management (OIM). For example, a contact for a prospective customer is an identity in Trading Community Model but may not be provisioned with a user account in OIM. Some users stored in the Lightweight Directory Access Protocol (LDAP) store may not be provisioned with identities. For example, system user accounts used to run Web services to integrate third party services with Oracle Fusion Applications are not associated with a person record in HR or Trading Community Model. Some identifying credentials such as name, department, e-mail address, manager, and location are stored with user data in the LDAP store.

Importing Users

You can import users or user attributes in bulk from existing legacy identity and user stores.

Your tasks may include the following.

- Create users in bulk
- Update specific attributes for all users, such as postal code
- Link users to HR or Trading Community Model persons
- Monitor progress of the import process
- Correct errors & re-import
- Export users in bulk
- Import and export users using a standard plain text data interchange format like Lightweight Data Interchange Format (LDIF)

You can reserve a specific user name not currently in use for use in the future, or release a reserved username from the reservation list and make it available for use. Between a user registration request and approved registration, Oracle Fusion Applications holds the requested user name on the reservation list, and releases the name if an error occurs in the self-registration process or the request is rejected. Self-registration processes check the reservation list for user name availability and suggest alternative names.

Provisioning Events

New identities, such as new hires, trigger user and role provisioning events. In addition to user creation tasks, other tasks, such as Promote Worker or Transfer Worker, result in role provisioning and recalculation based on role provisioning rules.

When an identity's attributes change, you may need to provision the user with different roles. Role assignments may be based on job codes, and a promotion triggers role provisioning changes. Even if the change in the identities attributes requires no role assignment change, such as with a name change, OIM synchronizes the corresponding user information in the LDAP store.

Deactivating or terminating an identity triggers revocation of some roles to end all assignments, but may provision new roles needed for activities, such as a pay stub review. If the corresponding user for the identity was provisioned with a buyer role, terminating the identity causes the user's buyer record in Procurement to be disabled, just as the record was created when the user was first provisioned with the buyer role.

Notifications and Audits

Oracle Fusion Applications provides mechanisms for notifying and auditing requests or changes affecting identities and users.

Oracle Fusion Applications notifies requestors, approvers, and beneficiaries when a user account or role is provisioned. For example, when an anonymous user registers as a business-to-customer (B2C) user, the B2C user must be notified of the registration activation steps, user account, password and so on once the approver (if applicable) has approved the request and the user is registered in the system.

User ID and GUID attributes are available in Oracle Fusion Applications session information for retrieving authenticated user and identity data.

End user auditing data is stored in database WHO columns and used for the following activities.

- Setting up sign-in audit
- Using the application monitor
- Notifying of unsuccessful sign ins
- Sign-in audit reports

You can conduct real time audits that instantiate a runtime session and impersonate the target user (with the proxy feature) to test what a user has access to under various conditions such as inside or outside firewall and authentication level.

For information on configuring audit policies and the audit store, see the Oracle Fusion Applications Administrator's Guide.

Delegated Administration

You can designate local administrators as delegated administrators to manage a subset of users and roles.

Delegated administrators can be internal or external persons who are provisioned with a role that authorizes them to handle provisioning events for a subset of users and roles.

For example, internal delegated administrators could be designated to manage users and roles at the division or department level. External delegated administrators could be designated to manage users and roles in an external organization such as a primary supplier contact managing secondary users within that supplier organization.

You can also define delegated administration policies based on roles. You authorize users provisioned with specific roles named in the policy to request a

subset of roles for themselves if needed, such as authorizing a subset of roles for a subset of people. For example, the policy permits a manager of an Accounts Payables department to approve a check run administrator role for one of their subordinates, but prohibits the delegated administrator from provisioning a budget approver role to the subordinate.

Credentials

You activate or change credentials on users by managing them in Oracle Identity Management (OIM)

Applications themselves must be credentialed to access one another.

Oracle Fusion Applications distinguishes between user identities and application identities (APPID). Predefined application identities serve to authorize jobs and transactions that require higher privileges than users.

For example, a payroll manager may submit a payroll run. The payroll application may need access to the employee's taxpayer ID to print the payslip. However, the payroll manager is not authorized to view taxpayer IDs in the user interface as they are considered personally identifiable information (PII).

Calling applications use application identities (APPID) to enable the flow of transaction control as it moves across trust boundaries. For example, a user in the Distributed Order Orchestration product may release an order for shipping. The code that runs the Pick Notes is in a different policy store than the code that releases the product for shipment. When the pick note printing program is invoked it is the Oracle Fusion Distributed Order Orchestration Application Development Framework (ADF) that is invoking the program and not the end user.

Define Data Security for Human Capital Management

HCM Data Roles: Explained

HCM data roles, like all Oracle Fusion Applications data roles, define data security policies: they enable users to perform a set of tasks, using identified menus, menu items, and pages in application user interfaces, on a specified set of data within those user interfaces. Because data roles are specific to the enterprise, no predefined HCM data roles exist.

How HCM Data Roles Differ from Other Data Roles

HCM data roles differ from other data roles in the following ways:

- You create and maintain HCM data roles outside Oracle Identity Management (OIM) and the Oracle Fusion Middleware Authorization Policy Manager (APM), and they are not based on data role templates.

Although HCM data roles are visible in the Oracle Fusion Middleware APM, they must not be maintained there.

- A single HCM data role can enable access to data of multiple types.

You identify the data that users can access in HCM security profiles. You can create security profiles for the person, organization, position, country, legislative data group (LDG), document type, payroll, payroll flow, and workforce business process objects.

Selecting the Job Role

Each HCM data role is associated with a single job role, which you select from the list of enterprise roles. The HCM securing objects that the selected role needs to access are identified automatically, and the appropriate types of security profile are displayed. For example, if you select the job role human resource analyst, users with that job role need to access managed person, public person, organization, position, LDG, and document type data; therefore, security profiles for those object types must be included in the HCM data role. The security profile types that appear in the HCM data role vary according to the data requirements of the selected job role.

If you select a job role that requires no access to HCM data secured by security profiles, you cannot create an HCM data role.

Note

If you create custom job roles in OIM, you must add them to a locally defined role category that ends with "Job Roles"; otherwise, they do not appear in the list of job roles when you create an HCM data role. Do not add custom job roles to the predefined role category HCM - Job Roles.

Creating or Selecting the Security Profiles

You can either create new security profiles or use existing security profiles. For each object type, you can include only one security profile in an HCM data role.

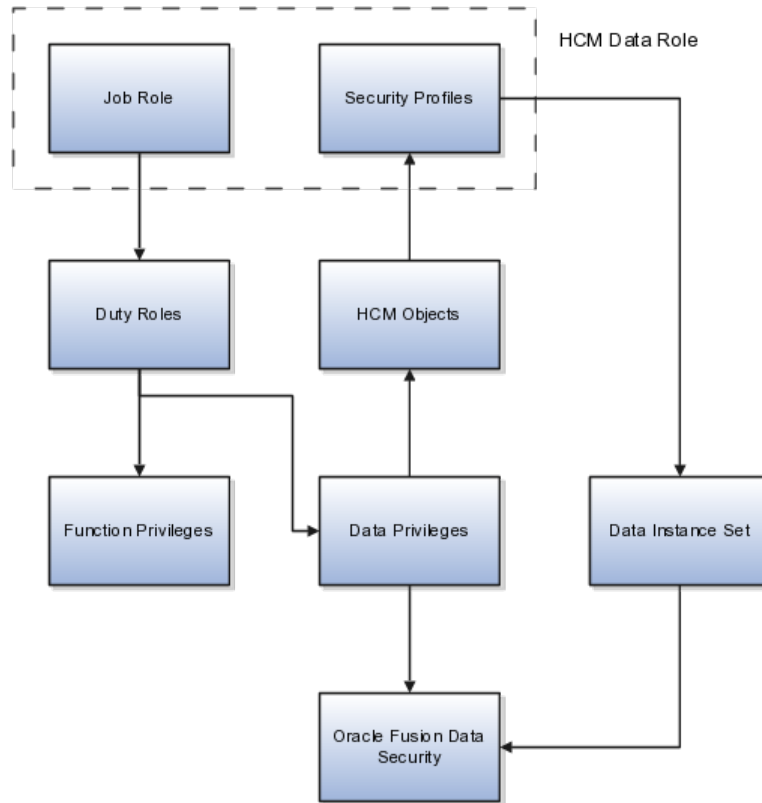
Users with Multiple HCM Data Roles

When users have multiple HCM data roles, the data security policies arising from each role remain separate. For example, being able to promote or terminate workers in the purchasing department in one HCM data role and view contact details of all workers in the sales department in another HCM data role does not enable a user to promote or terminate workers in the sales department.

Components of the HCM Data Role

The following figure summarizes how the components of the HCM data role contribute to Oracle Fusion Data Security for the data role. Oracle Fusion Data Security comprises the data security policies for data roles that are generated automatically when data roles are created.

The job role that you select in the HCM data role inherits multiple duty roles. Each duty role has one or more function privileges and related data privileges, from which the relevant HCM objects are identified. The specific instances of the objects required by this HCM data role are identified in security profiles and stored in a data instance set. Data security policy data is created automatically in Oracle Fusion Data Security when you create the data role.



For example, the human resource specialist job role inherits the employee hire and worker promotion duty roles, among many others. The inherited duty roles provide both function privileges, such as Hire Employee, Rehire Employee, and Promote Workers, and data privileges to HCM objects, such as person and assignment. The specific instances of those objects required by this HCM data role, such as people with assignments in a specified legal employer and department, are identified in security profiles.

HCM Securing and Secured Objects: Explained

Human capital management (HCM) objects to which access is secured by HCM data roles are identified as either securing objects or secured objects.

HCM Securing Objects

The person, organization, position, country, legislative data group (LDG), document type, payroll, payroll flow, and workforce business process objects are referred to as HCM securing objects. An HCM securing object secures access to both its own data and data in child or related objects. For example, access to a specified organization can also allow access to associated model profiles. Instances of HCM securing objects that users can access are identified in security profiles. The type of security profile that you use to identify instances of an HCM securing object is fixed; for example, you identify person records in a person security profile and position records in a position security profile.

Whether a particular user can access all of the secured data in practice is controlled by data security policies: for example, a compensation manager

may be able to enter salary details for a specified set of person records, while a benefits manager may be able only to view salary details in the same set of person records.

HCM Secured Objects

An HCM secured object is a business object to which access is controlled by its relationship with a securing object. For example, salary details are secured objects that are secured by the person securing object.

Securing objects can also be secured objects. For example, access to person records can be controlled by person data, such as person type or name range, or by other securing objects, such as organization or position, or both.

HCM Security Profiles: Explained

A security profile defines the criteria that identify instances of a human capital management (HCM) object. For example, a person security profile defines the criteria that identify one or more person records, and a position security profile defines the criteria that identify one or more positions. When you include a security profile in an HCM data role and provision the data role to a user, that user can access the data instances identified in the security profile. The type of access available to the user (for example whether the user can edit or simply view the data) depends on the job role identified in the HCM data role.

HCM Object Types

You can create security profiles for the following HCM object types:

- Person
 - Managed person
 - Public person
- Organization
- Position
- Legislative data group (LDG)
- Country
- Document type
- Payroll
- Payroll flow
- Workforce business process

All security profile definitions for these HCM objects are eventually visible in the Oracle Fusion Middleware Authorization Policy Manager (APM). The name of the security profile's data instance set in the Oracle Fusion Middleware APM is derived from the name of the security profile and the relevant object type. For example, if the security profile name is Manager Hierarchy, then the data instance set for the object PER_ALL_PEOPLE_F is HCM:PER:PER_ALL_PEOPLE_F:Manager Hierarchy.

You must use the Oracle Fusion Human Capital Management interfaces, which are designed for ease of use and access, to create and maintain security profiles; do not use the Oracle Fusion Middleware APM to maintain security profiles for these HCM objects.

Security Criteria in HCM Security Profiles

In any HCM security profile, you specify the criteria that identify data instances of the relevant type. For example, in an organization security profile, you can identify organizations by organization hierarchy, by organization classification, or by listing organizations to include in or exclude from the security profile. All of the criteria in an HCM security profile apply when the data instance set is defined; for example, if you identify organizations by both organization hierarchy and organization classification, then both sets of criteria apply, and only those organizations that satisfy all criteria belong to the data instance set.

Predefined HCM Security Profiles

The following HCM security profiles are predefined:

Security Profile Name	HCM Security Profile Type	Description
View All People	Person	Identifies all person records in the enterprise
View Own Record	Person	Identifies the signed-on user's own person record and the person records of that user's contacts
View Manager Hierarchy	Person	Identifies the signed-on user's line manager hierarchy
View All Workers	Person	Identifies the person records of all people who have a work relationship in the enterprise
View All Organizations	Organization	Identifies all organizations in the enterprise
View All Positions	Position	Identifies all positions in the enterprise
View All Legislative Data Groups	LDG	Identifies all LDGs in the enterprise
View All Countries	Country	Identifies all countries in the FND_TERRITORIES table
View All Document Types	Document Type	Identifies all document types in the enterprise
View All Payrolls	Payroll	Identifies all payrolls in the enterprise
View All Flows	Payroll Flow	Identifies all payroll flows in the enterprise
View All Workforce Business Processes	Workforce Business Process	Identifies all registered workforce business processes in the enterprise

You can include the predefined security profiles in any HCM data role, but you cannot edit them. Note also that the **View all** option is disabled in any security profile that you create; this restriction exists because predefined security profiles exist for this requirement.

Creating Security Profiles

You can create security profiles either individually or as part of the process of creating an HCM data role. If you have standard requirements, it may be more efficient to create the security profiles individually and include them in appropriate HCM data roles.

Reusability and Inheritance of Security Profiles

Regardless of how you create them, all security profiles are reusable; they do not belong to particular HCM data roles, and you can include them in any HCM data role for which they define an appropriate data instance set.

You can include security profiles in other security profiles. For example, you can include an organization security profile:

- In a person security profile, to secure person records by department, business unit, or legal employer
- In a position security profile, to secure positions by department or business unit

Therefore, one security profile can inherit the data instance set defined by another.

Creating HCM Data Roles and Security Profiles: Points to Consider

Planning your use of HCM data roles and security profiles before you start creating them will enable you to minimize maintenance and ease the introduction of HCM data roles and security profiles in your enterprise.

Identifying Standard Requirements

In any enterprise, standard requirements for data access are likely to exist. For example, multiple HCM data roles may need access to all person records in a specific legal employer. If you create a person security profile that includes all person records in that legal employer, then you can include the security profile in as many HCM data roles as necessary. This approach simplifies the management of HCM data roles and security profiles, and may also prevent duplicate security profiles being created unnecessarily.

Naming HCM Data Roles and Security Profiles

You are recommended to define and use a naming scheme for HCM data roles and security profiles.

Ideally, a security profile name identifies clearly the scope of the resulting data instance set so that, when creating or updating an HCM data role, users can confidently select an appropriate HCM security profile. For example, the person security profile name All Employees Sales Department conveys clearly that the security profile identifies all employees in the sales department.

The name of an HCM data role usefully includes both the name of the inherited job role and the data role scope. For example, the HCM data role Human Resource Analyst Finance Division identifies both the job role and the

organization within which the role operates. HCM data role names must be less than 55 characters.

Planning Data Access for Each HCM Data Role

An HCM data role can include only one security profile of each type. For example, you can include one organization security profile, one managed person security profile, and one public person security profile. Therefore, you must plan the data-access requirements of any HCM data role to ensure that each security profile identifies all required data instances. For example, if a user needs to select legal employers, business units, and departments, then organizations of all three types must be identified by the organization security profile that you include in the HCM data role.

Providing Access to All Instances of an Object

To provide access to all instances of an HCM object, use the appropriate predefined security profile. For example, to provide access to all person records in the enterprise, use the predefined security profile View All People.

Creating Organization Security Profiles: Examples

An organization security profile identifies organizations by at least one of organization hierarchy, organization classification, and organization list.

These examples show some typical requirements for organization security profiles.

HR IT Administrator Who Maintains Organizations

The HR IT administrator maintains the definitions of all types of organizations for the enterprise. You want the HR IT administrator's access to reflect any changes to the hierarchy without needing to update the security profile. Therefore, you:

- Secure by organization hierarchy.
- Select a generic organization hierarchy, so that the security profile data instance set includes organizations of all classifications.
- Identify by name the top organization in the hierarchy that will be included in the data instance set of organizations. The HR IT administrator's needs are fixed; therefore, the top organization is unlikely to vary with the user's assignment.

If you secured by organization classification, you would need to update the security profile if organizations of different classifications were added to the user's responsibilities. Similarly, if you listed organizations to include in or exclude from the instance set, you would need to maintain the list as the enterprise's organization hierarchy evolved.

Human Resource Specialist Who Manages Person and Assignment Records in a Legal Employer

The human resource (HR) specialist needs access to lists of legal employers, business units, departments, reporting establishments, and disability

organizations while creating and updating person records and assignments. To identify the organizations that the user can see in such lists, you:

- Secure by organization hierarchy.
- Select a generic organization hierarchy, because the HR specialist needs access to more than one type of organization.
- Allow the top organization in the hierarchy to be the department from the user's assignment. This selection allows you to provision the HCM data role in which this organization security profile is included to multiple HR specialists who may be employed in different parts of the enterprise.

If the generic hierarchy contains organizations of types that the HR specialist does not need to access, you can additionally identify the classifications to be included. If additional organizations of the included classifications are later added to the hierarchy, you do not need to update the security profile. You would need to update the security profile only if the user became responsible for organizations of other classifications in the same HCM data role.

The HR specialist also needs access to person records, and one of the ways in which those records can be secured is by organization. If the set of organizations is the same, you can reuse this organization security profile to secure the person records in a person security profile.

Creating Person Security Profiles: Examples

A person security profile identifies person and assignment records by at least one of the following types of criteria: person type, manager hierarchy, workforce structure, global name range, and custom criteria.

These examples show typical requirements for person security profiles.

Human Resource Specialists for a Legal Employer

Human resource (HR) specialists for the ABC legal employer need access to the person and assignment records of anyone who has a work relationship with the legal employer. You create a person security profile named All ABC Workers. In the security profile, you:

- Secure by person type and select the system person types employee, contingent worker, nonworker, and pending worker.
- Set the access level to restricted for the selected person types.
- Secure by legal employer, and select an existing organization security profile that identifies legal employer ABC and any subordinate organizations. The person security profile All ABC Workers inherits the organization security profile's data instance set.

The data instance set from the person security profile All ABC Workers comprises all employees, contingent workers, nonworkers, and pending workers in legal employer ABC.

Note

The data instance set from a person security profile also includes any person who has shared his or her information with the signed-on user. The only

exception to this rule occurs for person security profiles in which **Access to Own Record** is the only security criterion.

If you do not:

- Secure by person type, then the data instance set includes all person types, including those without work relationships, such as emergency contacts
- Set the access level for these person types to restricted, then other criteria in the security profile are ignored; therefore, the data instance set includes all workers in the enterprise rather than in legal employer ABC

As you set the access level separately for each person type, you could set it to restricted for some person types and unrestricted for others. The other criteria in the security profile would apply only to the person types with restricted access.

You can include the security profile All ABC Workers in an HCM data role and provision the data role to any HR specialist in legal employer ABC.

Enterprise Line Managers

You want to enable line managers in your enterprise to access the person and assignment records of people who report to them directly from at least one assignment. You also want line managers to have access to the person and assignment records of people who report to the assignments that they manage directly. Your management hierarchy comprises eight management levels, and you want to limit the number of levels of the hierarchy that each manager can access.

You create a person security profile named Line Manager Three Levels. In the security profile, you:

- Secure by manager hierarchy, and set the **Person or Assignment Level** option to **Assignment**.
- Set **Maximum Levels in Hierarchy** to 3, to ensure that the data instance set for any line manager comprises no more than 3 levels of the manager hierarchy.
- Set **Manager Type** to **Line Manager**.

You can include this security profile in an HCM data role and provision that data role to any line manager in the enterprise.

Payroll Administrators for a Subset of Employees

Payroll administrators in Ireland need to be able to access the person and assignment records of employees. In Ireland, your enterprise has a large number of employees and several payroll administrators. You decide that some payroll administrators will manage the records of people whose names are in the range A through M and some will manage those in the range N through Z. Therefore, you create two person security profiles, Ireland Employees A to M and Ireland Employees N to Z.

- In both security profiles, you
 - Secure by person type, select the employee system person type, and set the access level to restricted.

- Secure by legal employer and select an existing organization security profile that identifies legal employers in Ireland.
- In the person security profile Ireland Employees A to M, you secure by global name range and set the range to A through M.
- In the person security profile Ireland Employees N to Z, you secure by global name range and set the range to N through Z.

You include each person security profile in a separate HCM data role, which you provision to appropriate payroll administrators. If necessary, you can provision both HCM data roles to a single payroll administrator. In this case, the payroll administrator would have access to employees in Ireland whose names are in the range A through Z.

Creating Position Security Profiles: Examples

Some users need to maintain position definitions for part or all of the enterprise. Other users need to access lists of positions when creating user assignments, for example. The users' access requirements vary, but in both cases you identify the positions that users can access in a position security profile.

These scenarios show typical uses of position security profiles.

Human Resource Specialist Managing Position Definitions

The human resource (HR) specialist creates and maintains position definitions for the enterprise, with a few exceptions. To identify the set of positions that HR specialists can manage, you:

- Secure by position hierarchy, select the enterprise position hierarchy tree, and identify the top position for which the HR specialist is responsible. You include the top position in the hierarchy.
- Secure by position list, and identify by name the few positions for which the HR specialist is not responsible. You exclude these positions from the position security profile data instance set.

You can include this security profile in the relevant HCM data role and provision it to any HR specialist in the enterprise who has responsibility for these position definitions.

Line Manager Hiring Workers

Line managers in your business unit can hire employees or add contingent workers when the positions of those new workers are below the managers' own positions in the position hierarchy. To identify the set of positions that line managers can allocate to new workers, you secure by position hierarchy, select the relevant position tree, and use the position from the user's assignment as the top position. You do not include the top position in the hierarchy.

You can include this position security profile in the relevant HCM data role and provision it to any line manager in your business unit.

Securing Person Records by Position

Some senior managers in your enterprise can access the person records of workers who occupy positions below them in the position hierarchy; therefore,

you secure access to those person records by position in the person security profile. To identify the relevant positions, you create a position security profile in which you secure by position hierarchy, identify the senior manager position as the top position, and do not include it in the hierarchy. This selection ensures that senior managers do not have access to the person records of other senior managers.

Creating Document Type Security Profiles: Examples

Some users need to manage document types for the enterprise. Others need to be able to manage the documents associated with the person records to which they have access. For example, workers need to be able to manage their own documents. The users' access requirements vary, but in both cases you identify the document types that users can access in a document type security profile.

Note

Document type security profiles secure access to locally defined document types only. They do not secure access to standard predefined document types, such as visas, work permits, and driver's licenses. Access to person records provides access to the standard predefined document types.

These scenarios show typical uses of document type security profiles.

Workers Managing Their Own Documents

Workers can manage their own documents from their portraits. If you create an HCM data role for a worker's job role, for example, you can include the predefined document type security profile View All Document Types, which includes all locally defined document types. Alternatively, you can create a document type security profile that includes specified document types only. In the document type security profile, you list document types either to include in the profile or to exclude from it. For example, if you have defined the document type Medical Record that you want only human resource (HR) specialists to manage, you could create a document type security profile for workers that excludes medical records. Workers would continue to have access to all other document types in the enterprise.

HR Specialists Managing Document Types

HR specialists who are responsible for managing the enterprise document types need to access all document types. You can provide this access by including the predefined document type security profile View All Document Types in the HCM data role that you provision to HR specialists who have this responsibility. This security profile also ensures that HR specialists can view and update all document information in the person records that they manage.

Securing Organizations: Points to Consider

Some users maintain organization definitions for part or all of the enterprise, and some users need to access lists of organizations while performing other tasks, such as creating assignments. While the access requirements in each case are very different (and depend on the job role inherited by the user's HCM data role)

for both types of user you identify relevant organizations in an organization security profile.

Organizations With Multiple Classifications

Organizations may have more than one classification. For example, a department may also be classified as a legal employer. An organization is included in an organization security profile data instance set if it satisfies any one of the security profile's classification criteria. For example, if you secure by department hierarchy only, a department that is also a legal employer appears in the organization security profile data instance set because it is a department. However, users of this organization security profile will not be able to access the organization as a legal employer.

Selecting the Top Organization in an Organization Hierarchy

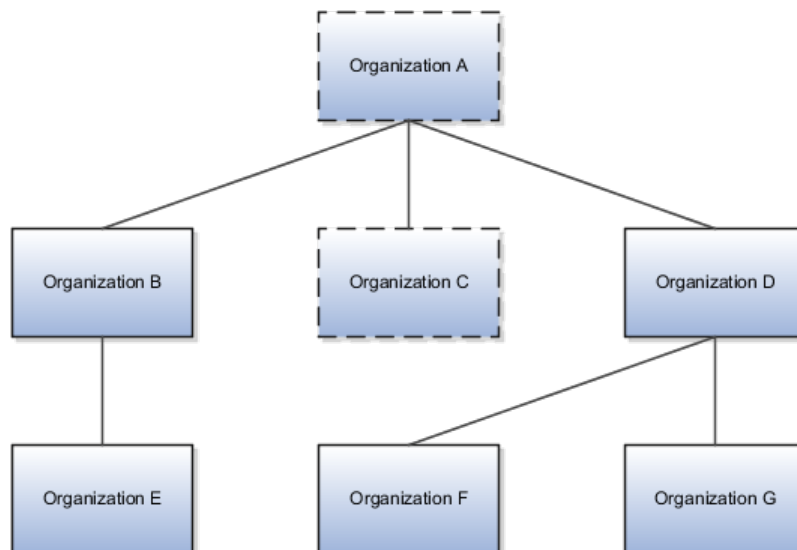
If you select a named organization as the top organization in an organization hierarchy, you must ensure that the organization is and remains valid. No validation of the selection occurs, because changes to the organization hierarchy occur independently of the organization security profile.

Users With Multiple Assignments

When you select the department from the user's assignment as the top organization in an organization hierarchy, multiple top organizations may exist when the user has multiple assignments. In this case, all organizations from the relevant subhierarchies of the selected organization hierarchy belong to the organization security profile data instance set.

The following figure illustrates the effects of this option when the user has multiple assignments.

The user has two assignments, one in organization B and one in organization D, which belong to the same organization hierarchy. The top organizations are organizations B and D, and the user's data instance set of organizations therefore includes organizations B, E, D, F, and G.



Securing Person Records Using Custom Criteria: Examples

You can secure person records by person type, manager hierarchy, workforce structures, and global name range. You can also specify custom criteria, in the form of SQL statements, in addition to or in place of the standard criteria. The custom criteria can include any statement where the predicate restricts by PERSON_ID or ASSIGNMENT_ID: the custom predicate must include either &TABLE_ALIAS.PERSON_ID OR &TABLE_ALIAS.ASSIGNMENT_ID as a restricting column in the custom criteria.

The following scenario illustrates how to use custom criteria in a person security profile.

Identifying Persons Born Before a Specified Date

The person security profile data instance set must include employees in a single legal employer who were born before 01 January, 1990. You secure person records by:

- Person type, where you select the employee system person type and set the access level to restricted
- Legal employer, where you select an organization security profile that identifies the relevant legal employer and its subordinate organizations

You also secure by custom criteria, and enter the following statement:

```
&TABLE_ALIAS.PERSON_ID IN (SELECT PERSON_ID FROM PER_PERSONS  
WHERE DATE_OF_BIRTH < TO_DATE('01-JAN-1990', 'DD-MON-YYYY'))
```

Securing Person Records by Manager Hierarchy: Points to Consider

When you identify a set of person records by manager hierarchy, the person records that occur in the data instance set for the signed-on manager depend on how you specify the manager hierarchy in the person security profile.

You can select one of:

- Person-level manager hierarchy
- Assignment-level manager hierarchy

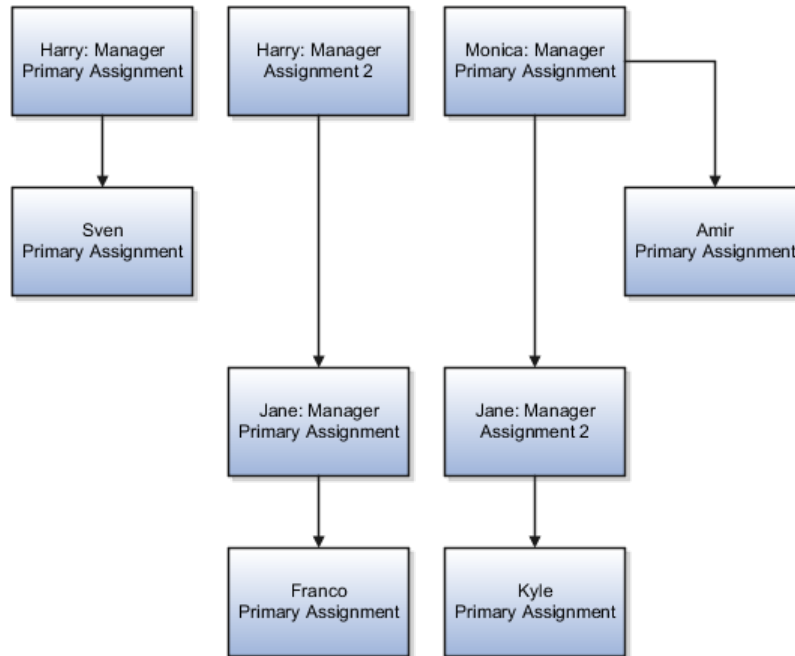
In both cases, the selection controls access to person records. Having access to a person's record enables the manager to access all of the person's assignments: you cannot enable the manager to access particular assignments.

Note

Managers other than line managers can access person records secured by manager hierarchy only if their roles have the appropriate function- and data-security access. Providing this access to managers other than line managers is a security-setup task.

Consider the following example manager hierarchy.

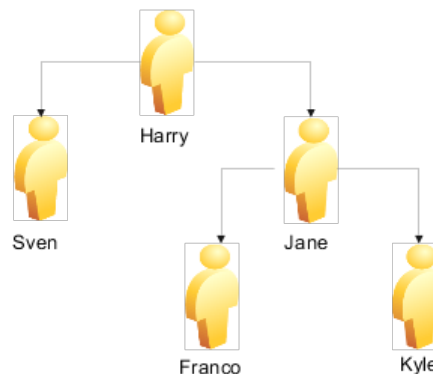
Harry is a line manager with two assignments. In his primary assignment, he manages Sven's primary assignment. In his assignment 2, Harry manages Jane's primary assignment. Monica is a line manager with one assignment. She manages Jane's assignment 2 and Amir's primary assignment. In her primary assignment, Jane manages Franco's primary assignment. In her assignment 2, Jane manages Kyle's primary assignment.



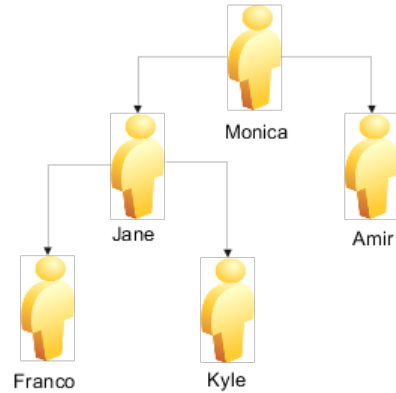
Person-Level Manager Hierarchy

In a person-level manager hierarchy, the data instance set includes the person records of any person who is in a reporting line, directly or indirectly, to any of the signed-on manager's own assignments.

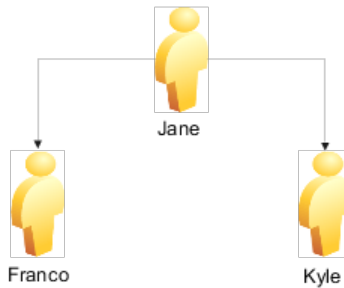
In a person-level manager hierarchy, Harry's data instance set includes the person records for Sven, Jane, Franco, and Kyle.



In a person-level manager hierarchy, Monica's data instance set includes the person records for Jane, Franco, Kyle, and Amir.



In a person-level manager hierarchy, Jane's data instance set includes the person records for Franco and Kyle.



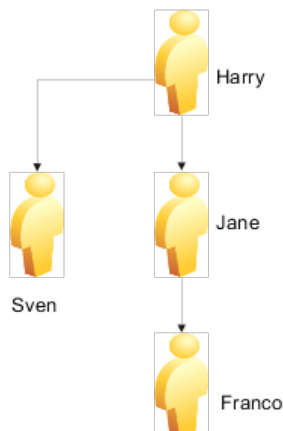
When you include the person security profile in an HCM data role and assign the data role to a manager, the person-level hierarchy ensures that the signed-on manager can access the person record and all assignment records of every person in his or her manager hierarchy (subject to any other criteria in the security profile).

Assignment-Level Manager Hierarchy

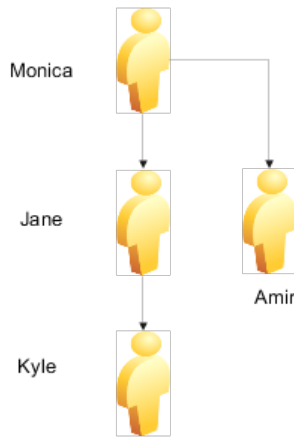
In an assignment-level manager hierarchy, managers see the person records of:

- People who report to them directly from one or more assignments
- People who report to the assignments that they manage

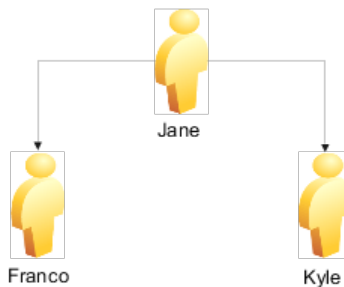
In an assignment-level manager hierarchy, Harry's data instance set includes Sven, Jane, and Franco. It does not include Kyle, because Kyle reports to an assignment that Monica manages.



In an assignment-level manager hierarchy, Monica's data instance set includes Jane, Kyle, and Amir. It does not include Franco, because Franco reports to an assignment that Harry manages.



In an assignment-level manager hierarchy, Jane's data instance set includes Franco and Kyle.



An assignment-level manager hierarchy is not the same as assignment-level security, which would secure access to individual assignments: you cannot secure access to individual assignments.

Specifying the Manager Type: Explained

When you secure person records by manager hierarchy, the data instance set comprises person records from manager hierarchies of the specified types.

If you set **Manager Type** to:

- **All**, the security profile includes all types of manager hierarchies
- **Line Manager**, the security profile includes only the line manager hierarchy
- **Selected**, the security profile includes only the specified type of manager hierarchy

Typically, you select **Line Manager** to identify the data instance set for line managers, **Project Manager** to identify the data instance set for project managers, and so on. If you select **All**, then users with the line manager job role (for example) will have line-manager access to person records in all of their manager hierarchies, which may not be what is required.

Manager Job Roles

Manager job roles other than line manager are not predefined. Creating job roles for managers such as project managers and resource managers is a security-customization task. Once those roles exist, you can assign security profiles to them (either directly or by creating a separate HCM data role) to enable users with those roles to access their manager hierarchies in the Manager Resources Dashboard and elsewhere.

Securing Person Records by Workforce Structures: Points to Consider

In a person security profile, you can identify a set of person records by one or more of the department, business unit, legal employer, position, payroll, and legislative data group (LDG) workforce structures. For example, the data instance set from a person security profile could include all workers who occupy a particular position at a specified legal employer.

Identifying the Work Structures

You identify each of the work structures using a security profile of the relevant type.

To identify:

- Departments, business units, and legal employers, you use organization security profiles
- Positions, you use a position security profile
- LDGs, you use an LDG security profile
- Payrolls, you use a payroll security profile

These security profiles are reusable: you can include them in any person security profile where they can identify the relevant data instance set of person records. The person security profile inherits the data instance set of any security profile that you include.

Using Assignment-Level Attributes

Although the department, business unit, payroll, and position values are assignment attributes, you cannot secure access to individual assignments. Therefore, if one of a person's assignments satisfies the criteria in a person security profile, then all of the person's assignments belong to the person security profile's data instance set.

Securing Person Records by LDG

When you secure person records by LDG, a person's record and all assignments belong to the person security profile's data instance set if the LDG is associated with the payroll statutory unit of the person's legal employer.

Securing Person Records by Payroll

When you secure person records by payroll, a person's record and all assignments belong to the person security profile's data instance set if at least one of the person's assignments includes the payroll.

Securing Person Records by Legal Employer

If you secure person records by legal employer, then the person records and all assignments of workers with at least one work relationship of any type with the specified legal employer belong to the person security profile's data instance set. For such workers, assignments belonging to work relationships with other legal employers also belong to the data instance set.

Other criteria in the person security profile may limit the effects of securing by legal employer. For example, if you also secure person records by person type, select the employee system person type, and specify restricted access, then only persons who have employee work relationships with the specified legal employer belong to the security profile's data instance set. All other person records are excluded.

Creating an HCM Data Role: Worked Example

This example shows how to create an HCM data role.

The legal employer ABC Industrial comprises sales, development, and manufacturing departments. This example shows how to create an HCM data role for a human resource (HR) specialist in the sales department of ABC Industrial that will secure access to person and assignment records, organizations, positions, countries, legislative data groups (LDGs), document types, payrolls, and payroll flows.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What is the name of the HCM data role?	HR Specialist ABC Industrial - Sales Department
Which job role will the HCM data role include?	Human Resource Specialist
Which person records do users need to access?	Users need to access the managed person records of: <ul style="list-style-type: none">• All workers in the sales department of ABC Industrial• The emergency contacts, beneficiaries, and dependents of all workers in the sales department of ABC Industrial
Which public person records do users need to access?	All
Which organizations do users need to access?	All organizations of all types in ABC Industrial
Which positions do users need to access?	Vice President of Sales and all subordinate positions in the position hierarchy of ABC Industrial
Which countries do users need to see in lists of countries?	All

Which LDGs do users need to access?	The LDG for the legal employer ABC Industrial. This LDG is identified in an existing LDG security profile.
Which document types do users need to access?	All
Which payrolls do users need to access?	Payrolls for the legal employer ABC Industrial. These payrolls are identified in an existing payroll security profile.
Which payroll flows do users need to access?	Payroll flows for the legal employer ABC Industrial. These payroll flows are identified in an existing payroll flow security profile.

Create the HCM data role by:

1. Naming the HCM data role and selecting the associated job role
2. Specifying the security criteria for each HCM object type
3. Creating new security profiles
4. Reviewing and submitting the new HCM data role

Naming the HCM Data Role and Selecting the Job Role

1. In the Search Results region of the Manage HCM Data Roles page, click **Create**.
2. On the Create Data Role: Select Role page, complete the fields as shown in this table.

Field	Value
Data Role	HR Specialist ABC Industrial - Sales Department
Job Role	Human Resource Specialist

3. Click **Next**.

Specifying Security Criteria for Each HCM Object Type

1. In the Organization region of the Create Data Role: Security Criteria page, complete the fields as shown in the table.

Field	Value
Organization Security Profile	Create New
Name	ABC Industrial - All Organizations
Secure by organization hierarchy	Yes

2. In the Position region, complete the fields as shown in the table

Field	Value
Position Security Profile	Create New
Name	ABC Industrial Positions - Top Position Vice President of Sales
Secure by position hierarchy	Yes

3. In the Countries region, select the predefined country security profile View All Countries.
4. In the Legislative Data Group region, select the existing LDG security profile ABC Industrial LDGs.
5. In the Person region, complete the fields as shown in the table.

Field	Value
Person Security Profile	Create New
Name	ABC Industrial Sales Department - All Workers and Worker Contacts
Include related contacts	Yes
Secure by person type	Yes
Secure by department	Yes

6. In the Public Person region, select the predefined person security profile View All People.
7. In the Document Type region, select the predefined document type security profile View All Document Types.
8. In the Payroll region, select the existing payroll security profile ABC Industrial Payrolls.
9. In the Payroll Flow region, select the existing payroll flow security profile ABC Industrial Payroll Flows.
10. Click **Next**.

Creating the Organization Security Profile

1. In the Organization Hierarchy region of the Assign Security Profiles to Role: Organization Security Profile page, ensure that the **Secure by organization hierarchy** option is selected.
2. Complete the fields in the Organization Hierarchy region as shown in the table.

Field	Value
Tree Structure	Generic organization hierarchy
Organization Tree	ABC Industrial Organization Tree
Top Organization Selection	Use the assignment department
Include top organization	Yes

3. Click **Next**.

Creating the Position Security Profile

1. In the Position Hierarchy region of the Assign Security Profiles to Role: Position Security Profile page, ensure that the **Secure by position hierarchy** option is selected.

2. Complete the fields in the Position Hierarchy region as shown in the table.

Field	Value
Position Tree	ABC Industrial Positions
Top Position Selection	Specify top position
Position	Vice President of Sales
Include top position	Yes

3. Navigate to the Assign Security Profile to Role: Person Security Profile page.

Creating the Person Security Profile

1. In the Basic Details region of the Assign Security Profiles to Role: Person Security Profile page, ensure that the option **Include related contacts** is selected.
2. In the Person Types region, ensure that the **Secure by person type** option is selected, and complete the fields as shown in the table.

Type	System Person Type	Access
System	Employee	Restricted
System	Contingent worker	Restricted
System	Nonworker	Restricted
System	Pending worker	Restricted

3. In the Workforce Structures region, ensure that the option **Secure by department** is selected, and select the existing organization security profile ABC Industrial - Sales Department.
4. Click **Review**.

Review and Submit the HCM Data Role

1. On the Create Data Role: Review page, review the new HCM data role.
2. Click **Submit**.
3. On the Manage HCM Data Roles page, search for the new HCM data role. In the search results, confirm that the role status is Requested. Once the role status is Request Complete, the role can be provisioned to users.

Assigning Security Profiles to Abstract Roles: Explained

Abstract roles define a worker's role in the enterprise independently of the job that the worker is hired to do.

These abstract roles are predefined in Oracle Fusion Human Capital Management:

- Line manager
- Employee

- Contingent worker

Enabling Data Access for Abstract Roles

Typically, you create role mappings during implementation to provision abstract roles automatically to eligible workers. Although users with these roles may be able to sign in to Oracle Fusion Applications and navigate to tasks of interest, they have no automatic access to data. For example, employees can navigate to the Person Gallery but cannot view portraits or see lists of person names in product interfaces, and line managers can navigate to the Manager Resources Dashboard but can see no data for their organizations. To enable users with abstract roles to access relevant HCM data, you must assign security profiles to those abstract roles.

Predefined Security Profiles to Assign to Abstract Roles

To enable users with abstract roles to access relevant data, you assign the following predefined security profiles directly to the employee, contingent worker, and line manager abstract roles.

Security Profile Type	Employee	Contingent Worker	Line Manager
Person	View Own Record	View Own Record	View Manager Hierarchy
Public person	View All Workers	View All Workers	View All Workers
Organization	View All Organizations	View All Organizations	View All Organizations
Position	View All Positions	View All Positions	View All Positions
Legislative data group	View All Legislative Data Groups	View All Legislative Data Groups	View All Legislative Data Groups
Country	View All Countries	View All Countries	View All Countries
Document type	View All Document Types	View All Document Types	View All Document Types
Payroll Flow	Not applicable	Not applicable	View All Flows
Workforce Business Process	Not applicable	Not applicable	View All Workforce Business Processes

After implementation, you may want to change aspects of this data access. For example, you may want to create your own security profiles and assign those directly to abstract roles; however, you must remember that such changes apply to all users who have the abstract role.

HCM Data Roles

Users who have abstract roles are likely to gain additional data access by means of HCM data roles that you define for their job roles. For example, you may create an HCM data role for human resource specialists to enable them to access the person records of all workers in a legal employer. Such data access is in addition to any data access provided by abstract roles.

Assigning Security Profiles to Abstract Roles: Worked Example

This example shows how to assign predefined security profiles to the employee, contingent worker, and line manager abstract roles.

Searching for the Employee Abstract Role

1. On the All Tasks tab of the Overview page of the Setup and Maintenance work area, search for the task Manage Data Role and Security Profiles.
2. In the Search Results region, click **Go to Task**.
3. On the Manage Data Roles and Security Profiles page, enter the abstract-role name Employee in the **Role** field. Click **Search**.
4. In the Search Results region, highlight the entry for the predefined Employee role and click **Assign**.

Assigning Security Profiles to the Employee Abstract Role

1. On the Assign Data Role: Security Criteria page, select the security-profile values shown in the following table. These are the security profiles that are typically assigned to the employee role. You may see a subset of these security profiles, depending on the combination of product offerings that you are implementing.

Field	Value
Organization Security Profile	View All Organizations
Position Security Profile	View All Positions
Country Security Profile	View All Countries
LDG Security Profile	View All Legislative Data Groups
Person Security Profile (Person section)	View Own Record
Person Security Profile (Public Person section)	View All Workers
Document Type Security Profile	View All Document Types

2. Click **Review**.
3. On the Assign Data Role: Review page, click **Submit**.
4. On the Manage Data Roles and Security Profiles page, search again for the predefined Employee role.
5. In the Search Results region, confirm that a green check mark appears in the **Security Profiles** column for the Employee role. The check mark confirms that security profiles are assigned to the role.

Repeat the steps in Searching for the Employee Abstract Role and Assigning Security Profiles to the Employee Abstract Role for the predefined Contingent Worker role.

Searching for the Line Manager Abstract Role

1. On the Manage Data Roles and Security Profiles page, enter the abstract-role name Line Manager in the **Role** field. Click **Search**.
2. In the Search Results region, highlight the entry for the predefined Line Manager role and click **Assign**.

Assigning Security Profiles to the Line Manager Abstract Role

1. On the Assign Data Role: Security Criteria page, select the security-profile values shown in the following table. These are the security profiles that are typically assigned to the line manager role. You may see a subset of these security profiles, depending on the combination of product offerings that you are implementing.

Field	Value
Organization Security Profile	View All Organizations
Position Security Profile	View All Positions
LDG Security Profile	View All Legislative Data Groups
Person Security Profile (Person section)	View Manager Hierarchy
Person Security Profile (Public Person section)	View All Workers
Document Type Security Profile	View All Document Types
Payroll Flow	View All Flows
Workforce Business Process	View All Workforce Business Processes

2. Click **Review**.
3. On the Assign Data Role: Review page, click **Submit**
4. On the Manage Data Roles and Security Profiles page, search again for the predefined Line Manager role.
5. In the search results, confirm that a green check mark appears in the **Security Profiles** column for the Line Manager role. The check mark confirms that security profiles are assigned to the role.

HCM Data Roles Configuration Diagnostic Test

The HCM Data Roles Configuration diagnostic test verifies that the Manage HCM Data Roles task flow is configured successfully for a specified user.

You run the HCM Data Roles Configuration diagnostic test from the **Help - Troubleshooting - Run Diagnostic Tests** menu.

Diagnostic Test Parameters

User Name

The test is performed for the specified user. The user does not need to be signed-in while the test is running; however, the user must have signed in at least once, because the test uses details from the user's current or latest session.

HCM Security Profile Configuration Diagnostic Test

The HCM Security Profile Configuration diagnostic test verifies that the Manage Security Profiles task flows are configured successfully for a specified user.

You run the HCM Security Profile Configuration diagnostic test from the **Help - Troubleshooting - Run Diagnostic Tests** menu.

Diagnostic Test Parameters

User Name

The test is performed for the specified user. The user does not need to be signed-in while the test is running; however, the user must have signed in at least once, because the test uses details from the user's current or latest session.

HCM Securing Objects Metadata Diagnostic Test

The HCM Securing Objects Metadata diagnostic test validates securing-object metadata for the HCM securing objects.

You run the HCM Securing Objects Metadata diagnostic test from the **Help - Troubleshooting - Run Diagnostic Tests** menu.

Diagnostic Test Parameters

Securing Object

Enter the name of an HCM securing object from the following table.

Securing Object Name	Description
PERSON	Person
LDG	Legislative data group
POSITION	Position
ORGANIZATION	Organization
PAYROLL	Payroll
FLOWPATTERN	Payroll flow
DOR	Document type
COUNTRY	Country

If you do not enter the name of a securing object, the test is performed for all securing objects.

FAQs for Define Data Security for Human Capital Management

Can users access the contact records of the people they can access?

Having access to a person's record does not automatically provide access to the records of that person's emergency contacts, dependents, or beneficiaries. However, you can include the person records of a person's contacts in the person security profile's data instance set by selecting the **Include related contacts** option.

Note

If a person's contact is also a worker, the contact's person record is excluded from the person security profile's data instance set, even when **Include related**

contacts is selected, unless the contact's person record satisfies all other criteria in the security profile.

What happens if a person has multiple assignments or person types?

A user who has access to a person record also has access to all of the person's assignments; only one of the assignments has to satisfy any assignment-related criteria in the person security profile. For example, if a user can access the records of contingent workers in a particular legal employer and department, then the user can access all assignments belonging to those contingent workers, even if some are employee or nonworker assignments with different legal employers.

What happens if a person has no assignments?

Some person records, such as those of emergency contacts, have no assignments. The person records of people who have no assignments do not need to satisfy any assignment-related criteria, such as department and position, in the person security profile. Person records without assignments belong to the person security profile data instance set, provided that they satisfy any person-related criteria (person type, global name range, or custom criteria) in the person security profile. Such records are an exception to the general rule that all of the criteria in a security profile must be satisfied.

What's the difference between a generic organization hierarchy and a department hierarchy?

A generic organization hierarchy is a single hierarchy that includes organizations of all classifications, such as division, legal entity, department, and tax reporting unit.

A department hierarchy includes only those organizations that are classified as departments.

What happens if I select an organization security profile for a generic organization hierarchy?

If you secure by department, for example, only those organizations in the generic organization hierarchy that are classified as departments have an effect in the security profile. Other types of organizations in the generic organization hierarchy, such as business units and legal employers, are disregarded.

If you secure by more than one workforce structure, you can select the same organization security profile for each type of work structure. In each case, only organizations of the relevant organization classification have an effect.

What happens if I use the department or position from the user's assignment as the top department or position?

The access that each user has to the organization or position hierarchy depends on the user's assignments. Consequently, the data instance set from a single security profile can be different for each user.

If the user has multiple assignments in the selected organization or position hierarchy, then multiple top organizations or positions may exist. In this case, all organizations or positions from the relevant subhierarchies belong to the security profile's data instance set.

When do I need a country security profile?

Country security profiles identify one or more countries to appear in lists of countries. For example, a user who is creating a legislative data group must associate it with a country; the list of countries that the user sees is determined by the country security profile included in the user's HCM data role. The predefined country security profile View All Countries meets most needs and can be included in any HCM data role. However, you can limit the country list available to a particular HCM data role by creating a country security profile for that data role. The countries that you can include in the country security profile are those defined in the table FND_TERRITORIES.

When do I need a legislative data group security profile?

You need a legislative data group (LDG) security profile to identify one or more LDGs to which you want to secure access. If the responsibility for managing all LDGs in your enterprise belongs to a particular HCM data role, include the predefined LDG security profile View All Legislative Data Groups in the data role. If responsibility for particular LDGs belongs to various HCM data roles, you can create an appropriate LDG security profile for each data role. For example, if European and American LDGs are the responsibility of different HCM data roles, you need one LDG security profile for European LDGs and one for American LDGs.

You can use an LDG security profile to secure access to person records. In this case, if the LDG is associated with the payroll statutory unit of a person's legal employer, then that person's record belongs to the person security profile data instance set.

When do I need a workforce business process security profile?

Workforce business process security profiles identify the workforce business processes that a user can start from the **Start Process** menu in the Workforce Processes work area. The predefined security profile View All Workforce Business Processes includes all registered workforce business processes. To enable users to start all workforce business processes, you include the predefined security profile in relevant HCM data roles; you do not need to create a workforce business process security profile to provide this access.

To enable users to start some but not all workforce business processes, you must:

- Create a workforce business process security profile that identifies the workforce business processes that the user can start.
- Include the new workforce business process security profile in relevant HCM data roles.

What happens if I edit a security profile that's enabled?

If the security profile is included in an HCM data role, then the data instance set for the security profile is updated automatically when you save your changes.

For example, if you remove a position from a position security profile, the position is removed from the data instance set of the relevant position security profile. At the next attempt to access the data identified in the security profile, the user finds the updated data instance set.

What happens if I disable a security profile?

When the security profile is included in an HCM data role, users continue to access the tasks associated with their job roles or abstract roles because security profiles have no effect on function security privileges. However, no data is returned from the disabled security profile. For example, an administrator authorized to update organization definitions would continue to access organization-related tasks, but would not be able to access the organizations identified in a disabled organization security profile.

You cannot disable a security profile that is included in another security profile.

How do I provision HCM data roles to users?

You can map any role, including HCM data roles, to one or more assignment attributes. For example, you can map a role to a particular legal employer, department, and job. This mapping indicates that the role is relevant to users whose assignment attributes match those specified.

If the role mapping for a role has the **Autoprovision** option selected, then the role is provisioned automatically to any user with at least one assignment that matches all specified attributes.

If the role mapping for a role has the **Requestable** option selected, then any human resource specialist or line manager with at least one assignment that matches all specified attributes can provision the role manually to other users.

If the role mapping for a role has the **Self-requestable** option selected, then any user with at least one assignment that matches all specified attributes can request the role.

What happens if I edit an HCM data role?

You can edit or replace the existing security profiles in an HCM data role. When you save your changes, the relevant data instance sets are updated. Users with this HCM data role find the revised data instance sets when they next sign in.

You cannot change the HCM data role name nor select a different job role. If you need to make such changes, you must create a new HCM data role and disable this HCM data role, if appropriate.

How can I diagnose any issues with HCM data roles and security profiles?

After creating HCM data roles and security profiles, you can run diagnostic tests from the **Help - Troubleshooting - Run Diagnostic Tests** menu to diagnose any issues.

The following diagnostic tests are available:

Diagnostic Test Name	Description
HCM Data Roles Configuration	Verifies that the Manage HCM Data Roles task flow is configured successfully for a specified user.
HCM Data Role Detailed Information	Identifies any potential issues with a specified HCM data role.
HCM Security Profile Configuration	Verifies that the Manage Security Profiles task flows are configured successfully for a specified user.
HCM Security Profiles Detailed Information	Identifies any potential issues with one or all security profiles of a specified type.
HCM Securing Objects Metadata	Validates securing-object metadata for the HCM securing objects.

Common Applications Configuration: Define Automated Governance, Risk, and Performance Controls

Segregation of Duties: Explained

Segregation of duties (SOD) separates activities such as approving, recording, processing, and reconciling results so an enterprise can more easily prevent or detect unintentional errors and willful fraud. SOD policies, called access control policies in Application Access Controls Governor (AACG), exert both preventive and detective effects.

SOD policies constrain duties across roles so that unethical, illegal, or damaging activities are less likely. SOD policies express constraints among roles. Duty role definitions respect segregation of duties policies.

Application Access Controls Governor

You manage, remediate, and enforce access controls to ensure effective SOD using the Application Access Controls Governor (AACG) product in the Oracle Governance, Risk and Compliance Controls (GRCC) suite.

AACG applies the SOD policies of the Oracle Fusion Applications security reference implementation using the AACG Oracle Fusion Adapter.

AACG is integrated with Oracle Identity Management (OIM) in Oracle Fusion Applications to prevent SOD control violations before they occur by ensuring SOD compliant user access provisioning. SOD constraints respect provisioning workflows. For example, when provisioning a Payables role to a user, the SOD policy that ensures no user is entitled to create both an invoice and a payment prevents the conflicting roles from being provisioned. AACG validates the request to provision a user with roles against SOD policies and provides a remediating response such as approval or rejections if a violation is raised.

Use AACG to for the following.

- Define SOD controls at any level of access such as in the definition of an entitlement or role.
- Simulate what-if SOD scenarios to understand the effect of proposed SOD control changes.

- Use the library of built-in SOD controls provided as a security guideline.

Managing Segregation of Duties

SOD policies express incompatible entitlement or incompatible access points into an application. In GRCC, an access point is the lowest level access for a particular application. In GRCC, entitlement is a grouping of access points. As a security guideline, group the lowest level access points or define the SOD policy at the access level causing the least amount of change. Business activities are enabled at access points. In Oracle Fusion Applications, the hierarchy of access points in descending levels is users, roles, and entitlement.

Note

AACG entitlements are logical groupings of security objects that represent Oracle Fusion Application access points such as roles or entitlement.

Note

In AACG, segregation of duties policies are called access controls.

Oracle Fusion Applications does not predefine business logic for dealing with SOD conflicts. Oracle Fusion Applications does define a set of states where role requests are suspended pending resolution of SOD violations the role request introduces. In most cases, Oracle Fusion Applications invokes OIM to handle role requests. Enterprises define SOD resolution rules when defining SOD policy.

Remediating Segregation of Duties Policy Violations

The risk tolerance of your enterprise determines what duties must be segregated and how to address violations.

AACG assists in remediation of violations with a guided simulation that identifies corrective action. You determine the exact effects of role and entitlement changes prior to putting them into production, and adjust controls as needed.

For information on managing segregation of duties, see the Oracle Application Access Controls Governor Implementation Guide and Oracle Application Access Controls Governor User's Guide.

Segregation of Duties in the Security Reference Implementation: Explained

Segregation of duties (SOD) is a special case of function security enforcement. A segregation of duties conflict occurs when a single user is provisioned with a role or role hierarchy that authorizes transactions or operations resulting in the possibility of intentional or inadvertent fraud.

The predefined SOD policies result in duty separation with no inherent violations. For example, an SOD policy prevents a user from entitlement to create both payables invoices and payables payments.

However, the most common duties associated with some job and abstract roles could conflict with the predefined segregation of duties. A predefined role hierarchy or job or abstract role may include such common duties that are incompatible according to a segregation of duties policy. For example, the predefined Accounts Payable Supervisor job role includes the incompatible duties: Payables Invoice Creation Duty and Payables Payment Creation Duty.

Every single predefined duty role is free from an inherent segregation of duties violation. For example, no duty role violates the SOD policy that prevents a user from entitlement to both create payables invoices and payables payments.

Jobs in the reference implementation may contain violations against the implemented policies and require intervention depending on your risk tolerance, even if you define no additional jobs or SOD policies.

Provisioning enforces segregation of duties policies. For example, provisioning a role to a user that inherits a duty role with entitlement to create payables invoices enforces the segregation of duties policy applied to that duty role and ensures the user is not also entitled to create a payables payment. When a role inherits several duty rules that together introduce a conflict, the role is provisioned with a violation being raised in the Application Access Controls Governor (AACG). If two roles are provisioned to a user and introduce a segregation of duties violation, the violation is raised in AACG.

Note

SOD policies are not enforced at the time of role definition.

Aspects of segregation of duties policies in the security reference implementation involve the following.

- Application Access Controls Governor (AACG)
- Conflicts defined in segregation of duties policies
- Violations of the conflicts defined in segregation of duties policies

Application Access Controls Governor (AACG)

AACG is a component of the Governance, Risk, and Compliance Controls (GRCC) suite of products where segregation of duties policies are defined.

- Define SOD controls at any level of access such as in the definition of an entitlement or role.
- Simulate what-if SOD scenarios to understand the effect of proposed SOD control changes.
- Use the library of built-in SOD controls provided as a security guideline.

Your risk tolerance determines how many duties to segregate. The greater the segregation, the greater the cost to the enterprise in complexity at implementation and during maintenance. Balance the cost of segregation with the reduction of risk based on your business needs.

Conflicts

An intra-role conflict occurs when a segregation of duties policy expresses constraints within the construct of a single role (entitlement and duties) that creates violations.

Tip

As a security guideline, use only the predefined duty roles, unless you have added new applications functions. The predefined duty roles fully represent the functions and data that must be accessed by application users and contain all appropriate entitlement. The predefined duty roles are inherently without segregation of duty violations of the constraints used by the Application Access Controls Governor.

Violations

A segregation of duties violation occurs when a policy is defined that allows a segregation of duties conflict to occur.

Notifications report conflicts to the requester of the transaction that raised the violation. Oracle Identity Management (OIM) shows the status of role requests indicating if a segregation of duties violation has occurred.

For information on configuring audit policies, see the Oracle Fusion Applications Administrator's Guide.

For more information on managing segregation of duties, see the Oracle Application Access Controls Governor Implementation Guide and Oracle Application Access Controls Governor User's Guide.

Defining Segregation of Duties Policies: Points To Consider

Segregation of duties (SOD) policies express incompatibilities enforced to control access in defined contexts.

In Oracle Fusion Applications, SOD policies protect against the following incompatibilities.

- Privilege X is incompatible with privilege Y
- Role A is incompatible with role B
- Any privileges in role A are incompatible with any privileges in role B.
- Privilege X is incompatible with any privileges in role B.

The following examples of SOD policies illustrate incompatible entitlement.

- No user should have access to Bank Account Management and Supplier Payments duties.

- No user should have access to Update Supplier Bank Account and Approve Supplier Invoice entitlement.

Data Contexts

You can extend SOD policies to control access to specific data contexts.

For example, no single individual must be able to source a supplier in a business unit and approve a supplier invoice in the same business unit.

Exclusion and Inclusion Conditions

SOD policies may include exclusion conditions to narrow the SOD scope and reduce false positive violations, or inclusion conditions to broaden the scope.

Conditions apply to access points globally, to policies, or to access paths defined by policies. Access path conditions can exclude a user from a role, an Oracle Fusion Applications entitlement from a role, or a permission from an Oracle Fusion Applications entitlement.

The following global exclusion conditions are predefined in Oracle Fusion Applications and available when creating SOD policies.

- User Status
- User Name
- Enterprise Role
- Action
- Business Unit
- Within Same Business Unit

Enforcement

Oracle Fusion Applications enforces SOD policies under the following circumstances.

- When granting entitlement to a role
- When provisioning a role to a user

For information on managing segregation of duties, see Oracle Application Access Controls Governor Implementation Guide and Oracle Application Access Controls Governor User's Guide.

Note

SOD policies are not enforced at the time of role definition.

A single SOD policy can include entitlement from multiple instances of a single enterprise resource planning environment. For example, one SOD policy is

enforced in implementation, test, and production instances of Oracle Fusion Applications.

Managing Segregation of Duties Risks and Violations: Critical Choices

You assess and balance the cost of duty segregation against reduction of risk based on the requirements of your enterprise.

The types of people who resolve SOD conflicts include the following.

- Administrator of an external program such as the Procurement Administrator for the supplier portal or the Partner Manager for the PRM Program
- Senior executive spanning multiple organizations in an enterprise with opposing interests
- Risk management professional implementing an Oracle Governance, Risk and Compliance Controls (GRCC) initiative
 - Predefines a set of conditions and informs access provisioning staff to approve requests and prove the exception based on certain conditions
 - Allows defining rules to route SOD violations for approval

You view and respond to risks and violations in the Application Access Controls Governor (AACG).

You may wish to override an SOD violation. For example, the Accounts Payable Supervisor includes incompatible duties to create both invoices and payments. When you provision this job role to a user, you may waive the violation in the AACG. You may waive the violation for the currently provisioned user, for the SOD policy that raised the violation, or for the SOD policy within a particular data set, such as a business unit.

The risk tolerance of your enterprise guides how you respond to conflicts. For example, a user may be provisioned with both the role of Order Manager and Shipping Agent. The Order Manager role entitles the user to enter orders, which could result in exploitation when filling shipping quotas. You can remove the entitlement to enter orders that the Order Manager job role inherits from the Orchestration Order Scheduling Duty role. Or you could segregate the shipping and order entry duties by defining an SOD policy that allows a user to have either job role but not both.

False Positives

False positives can be SOD policy violations that are not actually violations, or are violations within your risk tolerance and therefore do not require corrective action.

You can reduce false positives by the following methods.

- Define exclusion conditions that can be applied to individual or groups of policies.
- Define logically complex SOD policies that enforce more exacting specifications.
- Determine whether conflicts should be prevented, monitored, or subjected to approval during provisioning.

Path Level Detection

Conflict analysis detects a user's multiple paths to one or more conflicting access points.

For example, a user may be able to reach a single access point through one or more roles, or by one entitlement leading to another through submenus to a function that represents a risk. The resulting conflict path shows if the conflict is generated by inappropriate role provisioning or configuration of applications. The audit shows the paths from any number of users to any number of access points involved in conflicts, which lets you visualize the root cause and remediate effectively.

AACG assigns one or more users to review all paths involved in a given conflict so that the entire conflict can be addressed in a coherent way.

Waiving or Accepting Violations

AACG lets you accept or waive a violation. Your reasons may include that you accept the risk or will define compensating controls.

A waiver may apply to the current user, constraint, or constraint within a dimension such as the business unit.

Resolving Conflicts

The risk tolerance of the enterprise determines whether a segregation of duties conflict must be removed from the security reference implementation.

The following approaches resolve conflicts.

- Change the segregation of duties policy.
- Ensure a job role does not contain incompatible duties.
- Define data security policies that restrict authorized access by incompatible duties.

Changing a segregation of duties policy may not be possible in most cases. For example, a policy that segregates creation of payables invoice from making payables payments should be preserved, even if the Accounts Payables Manager job role includes a duty role for each activity. To prevent an accounts payables manager from being authorized to perform both duties, or from being authorized to make payables payments to self and direct reports, the Accounts Payables Manager job role must be changed. The security implementation can be changed to include two job roles that segregate the incompatible duties. Added data security policy grants can restrict the access to at risk data.

For information on managing segregation of duties, see the Oracle Application Access Controls Governor Implementation Guide and Oracle Application Access Controls Governor User's Guide.

Role Provisioning and Segregation of Duties: How They Work Together

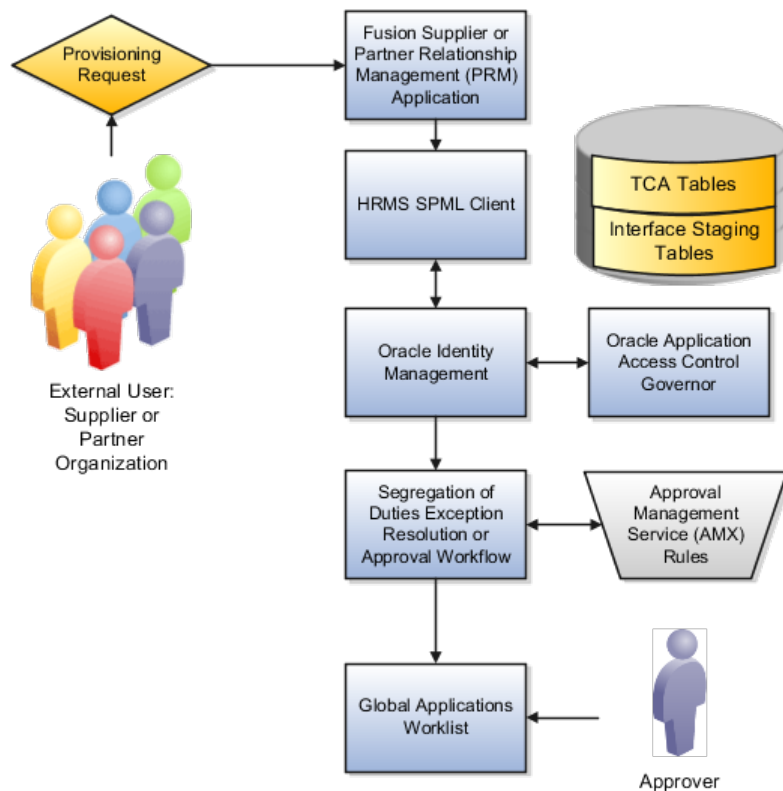
Segregation of duties (SOD) checks occur when roles are assigned to users. The checks are based on Oracle Application Access Controls Governor (AACG) policies. The Oracle Identity Management (OIM) integration includes predefined routing rules for remediation in the Manage IT Security business process.

External users such as suppliers or partners need to be provisioned with roles to facilitate access to parent company interfaces and data. The process by which such provisioning requests are approved in Oracle Fusion Applications helps explain the request flows and possible outcomes.

Note

In Oracle Identity Management (OIM), external users means users who are not specific to applications, such as enterprise roles or the absence of entitlement to access an application.

The figure shows the role provisioning request flow. OIM uses AACG to check segregation of duties violations.



Tables

A supplier or partner requests admission to a program using an implementation of the Supplier Portal Submission. The submission is captured in one or both of the following tables in advance of approving or rejecting the supplier or partner.

- Oracle Fusion Trading Community Model
- Interface Staging

Oracle Fusion Applications collects the employee names for the supplier or partner company at the time the company submits its request to join the program so that all employees accessing Oracle Fusion Applications on behalf of the supplier or partner are provisioned.

AACG in the Oracle Governance, Risk and Compliance Controls (GRCC) suite is certified to synchronize with the policy and identity stores for all pillars or partitions of Oracle Fusion Applications and integrated with the Oracle Fusion Applications security approach to roll up entitlements (by means of duty roles) to the roles that are provisioned to internal users. SOD policies can be defined and enforced at any level of authorization. For external users, SOD policies use attribute information stored in the Trading Community Model tables.

OIM and the SPML Client

Enterprise business logic may qualify the requester and initiate a role provisioning request by invoking the Services Provisioning Markup Language (SPML) client module, as may occur during onboarding of internal users with Human Capital Management (HCM), in which case the SPML client submits an asynchronous SPML call to OIM. Or OIM handles the role request by presenting roles for selection based on associated policies.

OIM recognizes the role provisioning request and initiates a call to AACG.

OIM apprises the SPML client of the current state of the role provisioning request as SOD_CHECK_IN_PROGRESS.

OIM stores the SOD check result as part of OIM audit data.

OIM apprises SPML client of the current state of the SPML request. The provisioning is either still in progress with segregation of duties being checked, or conflicts were found. If conflicts exist, AACG rejects the request and notifies the application.

Status	Conflicts	Current State
SOD_CHECK_IN_PROGRESS	Unknown	Request sent to AACG and waiting for response
SOD_REMEDIATION_IN_PROGRESS	Conflict found	AACG detected violations and remediation is in progress
SOD_CHECK_APPROVED	No conflict found	No SOD violations found
SOD_CHECK_REJECTED	Conflict found	AACG detected violations that cannot be remediated
SOD_REMEDIATION_APPROVED	Conflict found	AACG detected violations that are approved

SOD_REMEDIATION_REJECTED	Conflict found	AACG detected violations that are rejected by approver
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In the absence of an SOD exception, OIM provisions all relevant users.

Note

When a partner user is provisioned, all employees of the partner enterprise are provisioned. SOD checks occur when an external user requests to join a program, because SOD policies operate across Oracle Fusion Applications, not at the individual level. Supplier or partner company user requests are not approved if there is an SOD conflict against the supplier company.

OIM provides AACG with the details of SOD exception approval workflow. AACG audits the outcome for use in future detective controls and audit processes.

Oracle Application Access Controls Governor

AACG may respond with the following.

- Roles may be provisioned to the external user or its employees because no SOD conflict is found
- SOD conflict is found and request is denied because the relevant SOD policy is to be strictly enforced and no exception approval should be allowed
- SOD conflict is found and the exception to the policy is allowed, so the request goes through additional processing, such as an approval process.

Supplier or Partner Relationship Management responds to an SOD exception by updating Trading Community Model tables with the current state. An enterprise may elect to implement a landing pad that offers external users a means of addressing the SOD problem by providing more information or withdrawing the request.

SOD violation checking occurs during role implementation and provisioning, and can be turned on or off if AACG is provisioned and enabled as part of the Oracle Fusion Applications deployment.

Segregation of Duties Exception Resolution or Approval Workflow

Depending upon status, OIM kicks off an auditable SOD exception resolution workflow. Resolution can be conditional based on approval or requirements such as contracts being met.

If one of the paths for exception resolution is to get an approval, then the SOD exception resolution drives the approval using AMX. Standard AMX rules, not business rules, resolve the approval for the SOD exception, including the following.

- Organizational hierarchies
- Multiple mandatory and optional approvers

- Rerouting and approval delegation

The approver resolution uses AMX Rules Designer to access various user attributes and organizational hierarchies managed in Oracle Fusion Applications repositories. This information is typically not available in OIM or the LDAP identity store repository. Enterprises can define additional approval rules using AMX Thin Client.

The SOD Exception Approver gets a notification through supported channels that a new request is awaiting approval. The approver signs in to the global SOA federated worklist application that aggregates all pending worklist items for the user from all Oracle Fusion applications and logical partitions or pillars of applications. The SOD exception approval tasks show up in the same list.

The SOD exception approval task shows the details of the SPML request and SOD Provisioning results in a page rendered by OIM. The approver may take one of the following actions.

- Approve the request as it is
- Reject the request

If the approver approves the request, OIM sends an SOD_REMEDIATION_APPROVED status to the SPML client.

If the approver rejects the request, OIM sends an SOD_REMEDIATION_REJECTED status to the SPML client. The provisioning request is considered completed with a failure outcome and the external users is notified. Oracle Fusion Applications updates the Trading Community Model tables with the rejected status

Remediation Task Assignments

The SOD remediation tasks are assigned based on the role being requested.

1. If the role requested is Chief Financial Officer, the SOD remediation task is assigned to the IT Security Manager role.
2. If the SOD violation results from a policy where the SOD control tag is the Information Technology Management business process and the control priority is 1, the SOD remediation task is assigned to Application Administrator role.
3. In all other scenarios, the SOD remediation task is assigned to the Controller role.

For more information about configuring audit policies, see the Oracle Fusion Applications Administrator's Guide.

For information on managing segregation of duties, see the Oracle Application Access Controls Governor Implementation Guide and Oracle Application Access Controls Governor User's Guide.

Common Applications Configuration: Define Approval Management for Human Capital Management

Approval Management: Highlights

Use approval management to determine the policies that apply to approval workflows for particular business objects such as expense reports. For example, you can specify levels of approval for expense reports over a particular amount, to reflect your own corporate policies. You also determine the groups of users who act on these workflow tasks, for example, the chain of approvers for expense reports.

Approval management is fully described in the Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management. Though the concepts described there apply also to Oracle Fusion Applications, the only setup relevant to Oracle Fusion Applications involves approval groups and task configuration. Customization of approval workflows themselves is described in the Oracle Fusion Applications Extensibility Guide.

Overview

- Approval management is an extension of the human workflow services of Oracle SOA Suite. Refer to the Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management.

See: Introduction to Approval Management

See: Understanding Approval Management Concepts

Approval Groups and Task Configuration

- An approval group consists of a name and a predefined set of users configured to act on a task in a certain pattern. Refer to the Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management.

See: Administering Approval Groups

- Task configuration involves managing policies that control approval flows. Refer to the Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management.

See: Using Task Configuration

- To configure a predefined approval policy, select the predefined rule set and click the Edit task icon button.
- To disable a predefined rule set, select the Ignore this participant check box for that rule set.
- To edit the rules within a predefined rule set, you can insert, update, or delete from the seeded rules as needed while in edit mode.
- You can configure a specific rule to automatically approve without being sent to any approver. Modify the routing for that rule so that it is sent to the initiator (which means the requestor is the approver), set the Auto Action Enabled option to True, and enter APPROVE in the Auto Action field.

Customization

- You can optionally customize predefined approval workflows, for example add post-approval activities or additional stages. Refer to the Oracle Fusion Applications Extensibility Guide.

See: Customizing and Extending SOA Components

Defining Approvals for Human Capital Management: Explained

Oracle Fusion Human Capital Management provides two ways of managing approval policies. This topic introduces each method.

Managing Approval Rules and Notifications for Human Capital Management

Manage Approval Rules and Notifications for Human Capital Management is a simplified, easy-to-use interface for configuring approval policies for the following tasks:

- Hire an employee
- Promote
- Transfer
- Terminate

Using this graphical interface, you select approvers for a task, arrange approvers in the required sequence, and define approval rules for each approver.

Managing Task Configurations for Human Capital Management

Manage Task Configurations for Human Capital Management navigates to Oracle BPM Worklist.

You can use BPM Worklist to review and configure approval policies for any HCM task; however, you are recommended to configure approval policies for the Hire an Employee, Promote, Transfer, and Terminate tasks using the Manage Approval Rules and Notifications for Human Capital Management interface.

You also use BPM Worklist to configure some details for all approval tasks, including Hire an Employee, Promote, Transfer, and Terminate. These details include:

- When to issue approval notifications
- Who can access task contents
- Actions available to approvers
- What to do when errors occur during approval routing
- When tasks expire or should be escalated

- Whether approvers can add other approvers

Predefined Approval Rules for Oracle Fusion Global Human Resources Tasks: Explained

Predefined approval rules exist for many Oracle Fusion Global Human Resources tasks. In most cases, approval by the first-level and second-level managers of the person who submits the transaction is required; however, you can create different approval rules for any task.

This topic identifies Global Human Resources tasks that have predefined approval rules. It also identifies the attributes enabled for use in custom approval rules for Global Human Resources tasks. Attributes that occur in both employment terms and assignments are enabled in both.

Approval by First-Level and Second-Level Managers

For the following tasks, the predefined approval rules require approval by the transaction submitter's first-level and second-level managers. The attributes shown in the following table are enabled for use in custom approval rules; the predefined approval rules do not use them.

Task	Enabled Attributes
Transfer (Line Manager)	Action, Action Reason, Assignment Category, Business Unit, Department, Grade, Destination Legal Employer, Hourly Paid or Salaried, Job, Location, Position, Salary Amount, Salary Components, Worker Category, Working at Home
Promotion (Line Manager)	Action, Action Reason, Assignment Category, Business Unit, Department, Grade, Hourly Paid or Salaried, Job, Location, Position, Salary Amount, Salary Components, Worker Category, Working at Home
Change Manager	Action, Action Reason
Change Location	Action, Action Reason, Location
Change Working Hours	Action, Action Reason, Assignment Category, Hourly Paid or Salaried, Worker Category
Terminate Work Relationship	Termination Action, Termination Reason, Notification Date, Recommended for Rehire, Rehire Recommendation Reason, Termination Date
Hire an Employee	Hire Action, Hire Reason, Assignment Category, Business Unit, Citizenship Nationality, Citizenship To Date, Citizenship Status, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Legislative Information (all attributes), Location, National ID Country, National ID Type, Notice Period, Passport Country, Passport Expiration Date, Passport Type, Payroll, Person Type, Position, Probation Period, Role Name, Salary Amount, Salary Basis, Salary Components, Visa or Permit Country, Visa or Permit Expiration Date, Visa or Permit Status, Visa or Permit Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency

Add a Nonworker	Action, Action Reason, Assignment Category, Business Unit, Citizenship Nationality, Citizenship To Date, Citizenship Status, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Legislative Information (all attributes), Location, National ID Country, National ID Type, Passport Country, Passport Expiration Date, Passport Type, Payroll, Person Type, Position, Role Name, Salary Amount, Salary Basis, Salary Components, Visa or Permit Country, Visa or Permit Expiration Date, Visa or Permit Status, Visa or Permit Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency
Add a Contingent Worker	Placement Action, Placement Reason, Assignment Category, Business Unit, Citizenship Nationality, Citizenship To Date, Citizenship Status, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Legislative Information (all attributes), Location, National ID Country, National ID Type, Passport Country, Passport Expiration Date, Passport Type, Payroll, Person Type, Position, Role Name, Salary Amount, Salary Basis, Salary Components, Visa or Permit Country, Visa or Permit Expiration Date, Visa or Permit Status, Visa or Permit Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency
Add a Pending Worker	Action, Action Reason, Assignment Category, Business Unit, Citizenship Nationality, Citizenship To Date, Citizenship Status, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Legislative Information (all attributes), Location, National ID Country, National ID Type, Notice Period, Passport Country, Passport Expiration Date, Passport Status, Passport Type, Person Type, Position, Probation Period, Role Name, Visa or Permit Country, Visa or Permit Expiration Date, Visa or Permit Status, Visa or Permit Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency, Worker Type

Create Work Relationship (if redirected from an Add Person task)	Action, Action Reason, Assignment Category, Business Unit, Citizenship Nationality, Citizenship To Date, Citizenship Status, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Legislative Information (all attributes), Location, National ID Country, National ID Type, Notice Period, Passport Country, Passport Expiration Date, Passport Status, Passport Type, Payroll, Person Type, Position, Probation Period, Role Name, Salary Amount, Salary Basis, Salary Components, Visa or Permit Country, Visa or Permit Expiration Date, Visa or Permit Status, Visa or Permit Type, Worker Category, Worker Type, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency
Manage Work Schedule Assignment	None

Approval by First-Level Manager

For the following tasks, which include creation, deletion, and editing of the relevant objects, approval by the transaction submitter's first-level manager is required. The attributes shown in the following table are enabled for use in custom approval rules; the predefined approval rules do not use them.

Task	Enabled Attributes
Manage Absence Records	Actual Absence Start Date and Time, Actual Absence End Date and Time, Document Attachments, Document Country, Document Type, Duration, Projected Start Date and Time, Projected End Date and Time, Status
Manage Document Record	Document Category, Document Country, Document Type

Approval by Worker

For the Share Information task, approval by the worker whose information is shared is required if the task is performed by a manager or human resource specialist.

No Predefined Approval Rules

For the following tasks, no predefined approval rules exist. However, the attributes shown in the following table are enabled for use in custom approval rules.

Task	Enabled Attributes
Change Address	Address (all attributes), Phone Number (all attributes)
Change Marital Status	Address (all attributes), Marital Status, Phone Number (all attributes)

Create Employment Terms	Action, Action Reason, Assignment Category, Business Unit, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Location, Notice Period, Payroll, Position, Probation Period, Salary Amount, Salary Basis, Salary Components, Person Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency
Manage Employment	Action, Action Reason, Assignment Category, Business Unit, Contract Type, Contract Duration, Department, Grade, Grade Ceiling Step, Grade Ladder, Grade Rate Value, Grade Step, Hourly Paid or Salaried, Job, Location, Notice Period, Payroll, Position, Probation Period, Salary Amount, Salary Basis, Salary Components, Person Type, Worker Category, Working as a Manager, Working at Home, Working Hours, Working Hours Frequency
Manage Grades	Grade Code, Grade Name, Grade Status, Grade Step Name
Manage Grade Ladders	Grade Ladder Status, Grade Name, Step Rate Name, Step Rate Value
Manage Grade Rates	Grade Rate Name, Grade Rate Status, Grade Rate Type, Maximum Value, Midpoint Value, Minimum Value
Manage Jobs	Approval Level, Full Time or Part Time, Job Family, Job Function, Job Name, Management Level, Regular or Temporary, Status, Valid Grade
Manage Locations	Address (all attributes), Designated Receiver, Fax Number, Main Phone Number, Location Status, Ship-to-Site
Manage Organizations	Classification Code
Manage Person	All attributes of: Address, Citizenship, Communication Methods, Contact Relationship, Disability, Driver's License, E-Mail, Ethnicity, Legislative Information, National ID, Passport, Person Name, Phone Number, Religion, Visa, Work Permit
Manage Positions	Bargaining Unit, Business Unit, Department, Entry Grade, Hiring Status, Job, Location, Regular or Temporary, Seasonal, Security Clearance, Valid Grades

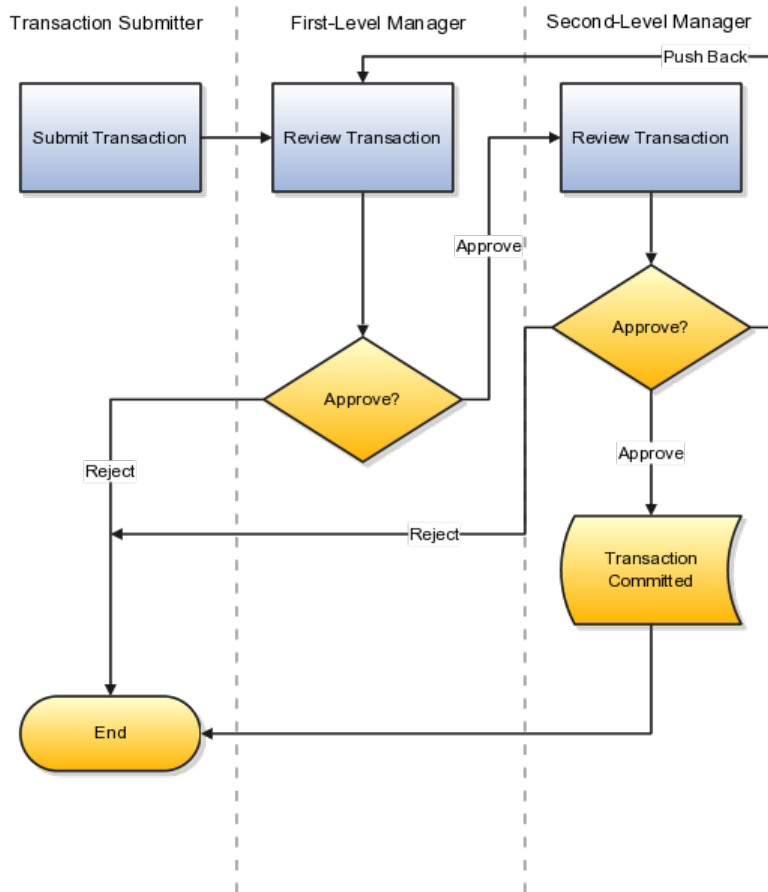
For other Global Human Resources tasks, such as Manage Absence Types, Manage Accrual Plans, and Manage Checklist Templates, no predefined approval rules exist and no attributes are enabled for custom approval rules. Transactions without approval rules or for which no approval task flows exist are approved automatically when approvals are enabled.

The Predefined Approval Flow for Oracle Fusion Global Human Resources: Explained

Oracle Fusion Global Human Resources has one predefined approval flow. Using Oracle JDeveloper, you can edit a copy of this flow and create additional approval flows for transactions that have different approval requirements.

The following figure shows the predefined approval flow.

1. When the transaction is submitted, it is routed automatically to the worklist of the submitter's first-level manager, who is the first approver.
2. If the submitter's first-level manager approves the transaction, it is routed automatically to the submitter's second-level manager, who is the second approver.
3. If the submitter's second-level manager approves the transaction, it is committed to the database tables.



Security permitting, either approver may edit the transaction. A link to edit the transaction is included in all notifications by default; however, the link can be hidden using personalization. The approval process continues unaltered after the transaction has been edited.

Approval Management configuration options for Oracle Fusion Human Capital Management determine most of the actions that are available to the participants in the approval process. For example:

- Either approver can reject the transaction. By default, the approval process stops when the transaction is rejected.
- The second-level manager can push the transaction back to the first-level manager, who then has a second opportunity to review the transaction and either approve or reject it, as appropriate.

- Ad hoc insertion of approvers in the approval list is permitted.
- Approvers can delegate their approval responsibilities to other approvers.

If you change the default settings of the Approval Management configuration options for a task, then different actions or action outcomes become available to this approval flow.

Notifications

The following table summarizes who is notified at each event during the predefined approval flow.

Transaction Event	Transaction Submitter	Approver: First-Level Manager	Approver: Second-Level Manager
Routed for approval		Yes	Yes
Rejected	Yes		
Pushed back		Yes	
Committed	Yes	Yes	Yes

In addition, either approver can request more information from the other approver, the transaction submitter, or both. Such requests do not affect control of the approval process, but the person from whom information is requested receives a worklist notification.

The Manager Hierarchy: How It Is Maintained

In many situations, a person's manager hierarchy must be readily available. For example, a person's line managers may need to be identified during an approval process, and business intelligence reports often retrieve data based on a manager hierarchy.

How the Manager Hierarchy Is Maintained

A person's manager hierarchy could be derived from live data tables, but the impact of that approach on performance is unpredictable. Therefore, the complete manager hierarchy for each person is extracted from live data tables and stored in a separate manager hierarchy table, known as the denormalized manager hierarchy; it ensures that a person's manager hierarchy is both easily accessible and up to date.

The Refresh Manager Hierarchy process populates the denormalized manager hierarchy table when person records are migrated from other applications. Otherwise, whenever a change is made to a person's manager hierarchy, the change is reflected automatically in the denormalized manager hierarchy table. However, by running the Refresh Manager Hierarchy process in addition to these automatic individual updates, you can ensure that the denormalized manager hierarchy is as accurate as possible. Refresh Manager Hierarchy processes all types of manager hierarchies.

The Refresh Manager Hierarchy process has no default schedule; however, you can run the process occasionally to perform a complete refresh of the

denormalized manager hierarchy. Alternatively, you can specify a schedule to run the process at regular intervals. To run the Refresh Manager Hierarchy process, you must have the human resource specialist job role.

Approval Management Configuration Options for Oracle Fusion Human Capital Management: Explained

Approval Management has the following default configuration options for all applications in the Oracle Fusion Human Capital Management family.

Configuration Option	Default Value	Effect of Default Value
Ad hoc insertion of approvers	True	Ad hoc insertion of approvers in the approval list is allowed. Users who add approvers may also modify or remove the approvers that they add.
Allow delegate	True	Approvers can delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.
Allow pushback	True	An approver can push the transaction back to the previous approver, who thereby has a second opportunity to review the transaction.
Allow reassign	True	Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.
Allow request information	True	Approvers can request more information from another approver or the person who submitted the transaction.
Allow self-approval	False	The person who submits the transaction cannot approve it.
Allow withdraw	True	The requester or an administrator can withdraw a transaction while the approval process is incomplete. Approvers who have already approved are notified of the withdrawal. The transaction is removed from the worklists of approvers who have not yet approved.
On error notify	Human Resources Application Administrator	A Human Resources Application Administrator is notified automatically when an error occurs.
Period before task expires	None	Approval tasks do not expire.
Period before task escalates	None	Approval tasks are not escalated to other approvers.

Escalated approver	None	Approval tasks are not escalated to other approvers.
Repeated approver frequency	Once per approval	An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.
Re-evaluate approver list	True	The approver list is regenerated after every response.
Rejection outcome	Stop all	When an approver rejects a transaction, the approval process stops and the transaction is canceled.

Managing HCM Approval Rules and Notifications: Explained

Manage Approval Rules and Notifications is a graphical interface for configuring approval policies for some Oracle Fusion Human Capital Management (HCM) tasks, such as Hire an Employee. This interface works in conjunction with Oracle BPM Worklist, but enables users to identify approvers and configure approval rules easily for some frequently performed HCM tasks.

Configuring Approval Policies

On the Manage Approval Rules page for a selected task, you configure the approval policy by arranging approvers in the required order, defining approval rules for each approver, and submitting the approval policy.

The approval policy takes effect immediately and supersedes the current approval policy for the selected task; however, in-progress approvals complete as expected and do not switch to the new policy.

Approvers

The Manage Approval Rules and Notifications interface supports the following types of approvers:

- Managers of all types
- Named users
- Approval groups, which you define in BPM Worklist
- Position hierarchies
- Representatives, who are workers to whom responsibilities, such as benefits representative, are assigned

Position hierarchies and representatives are supported by the Manage Approval Rules and Notifications interface only; they are not supported by BPM Worklist.

Supported HCM Tasks

You can use the Manage Approval Rules and Notifications interface to configure approval policies for the following HCM tasks:

- Hire an Employee

- Promote
- Transfer
- Terminate

By default, these HCM tasks are approved by two levels of the line-manager hierarchy.

When to Use Oracle BPM Worklist

For the Hire an Employee, Promote, Transfer, and Terminate tasks, you continue to use BPM Worklist to configure notifications, including when notifications are issued, and process details, such as expiration and escalation policies. You use BPM Worklist to configure all aspects of approvals for all other HCM tasks.

To use BPM Worklist, perform the task Manage Task Configurations for Human Capital Management.

Note

If you configure an approval policy (that is, identify approvers and define approval rules) using the Manage Approval Rules and Notifications interface and subsequently edit it in BPM Worklist, you must continue to maintain it in BPM Worklist; you cannot edit the approval policy again in the Manage Approval Rules and Notifications interface.

Approver Types: Explained

You can include any number of approvers of various types in your approval sequence. This topic explains each of the approver types.

Managers

You can include the following predefined types of managers in your approval sequence:

- Line manager
- Resource manager
- Project manager
- Regional manager

If your enterprise defines additional types of managers, then they appear automatically in the Approvers section of the Manage Approval Rules page and you can include them in the approval sequence.

Approval Groups

You create approval groups using Oracle BPM Worklist. When defining your approval sequence, you can enter the names of one or more existing approval groups.

Users

You can include one or more Oracle Fusion Applications users in the approval sequence.

Responsibility Holders

You can include holders of the following predefined responsibilities in your approval sequence:

- Human resources representative
- Benefits representative
- Union representative
- Payroll representative

If your enterprise defines additional responsibility types, then they appear automatically in the Approvers section of the Manage Approval Rules page and you can include them in the approval sequence.

Human resource specialists assign responsibilities to workers using the Manage Areas of Responsibility task. A worker becomes an approver for a transaction if he or she has that responsibility for the transaction subject. For example, if you specify that the benefits representative is an approver for a promotion, then the benefits representative of the worker who is being promoted is invited to approve the promotion.

Positions

If you include a position hierarchy in your approval sequence, then position holders are invited to approve the transaction. For positions with more than one position holder, the transaction is approved by the first position holder to approve.

HCM Approval Rules: Explained

When using the Manage Approval Rules and Notifications interface, you can specify one or more approval rules for each approver type. To create additional approval rules, you either add a new rule or duplicate a selected rule and edit it as appropriate. When you create multiple approval rules for an approver, they are evaluated individually in an undefined order.

Approval rules comprise one or more IF statements and one THEN statement.

IF Statements

IF statements are tests that determine when an approval rule takes effect. For example, you could specify that an approval rule for a promotion takes effect when the worker's department is Sales or the worker's job is Area Manager. The values in the IF statement are those belonging to the worker's proposed new assignment.

You can specify multiple IF statements. If you join multiple statements with "and" operators, then all statements must be true before the approval rule takes effect. If you join multiple statements with "or" operators, then only one of the statements must be true before the approval rule takes effect.

THEN Statements

THEN statements determine:

- How individual approvers of the specified type are identified
- Any actions that approvers are expected to take

The following table summarizes the approval actions.

Approval Action	Description
Approval required	Notifications are issued to the identified approvers and their response is required.
Automatic approval	No notifications are issued to the identified approvers. The transaction is either approved or rejected automatically, and the approvers are recorded as having approved or rejected the transaction. The value of the Set Outcome To attribute for manager hierarchies determines whether the transaction is approved or rejected.
FYI only	Notifications are issued to the identified approvers, but no response is expected.
No approval required	No notifications are issued and no approval is recorded for the transaction.

How individual approvers are identified depends on the approver type. For example, if the selected approver type is a project manager hierarchy, the THEN statement determines:

- How the project manager hierarchy itself is identified
- How the first approver in the manager hierarchy is selected
- How many levels of the manager hierarchy above the first approver are included

Available attributes and default values, if any, vary with the approver type.

Manager Approval-Rule Attributes

When you define approval policies using the Manage Approval Rules and Notifications interface, you can create one or more approval rules for manager hierarchies of predefined and locally defined types. This topic describes the values that you can specify in the THEN statements of approval rules for manager hierarchies.

The following table summarizes the attributes of the manager-hierarchy approval rules and their default values.

Attribute Name	Values	Default Value
Initial Approver	<ul style="list-style-type: none"> • Requester's first-level manager • User 	Requester's first-level manager
Number of Levels	1 or higher	<ul style="list-style-type: none"> • 2, for line-manager hierarchies • 1, for other types of manager hierarchies

Topmost Approver	<ul style="list-style-type: none"> • Requester's first-level manager • Requester's second-level manager • User 	<ul style="list-style-type: none"> • Requester's second-level manager, for line-manager hierarchies • Requester's first-level manager, for other types of manager hierarchies
Initial Approvers to Skip	0, 1, 2	0
Set Outcome To	<ul style="list-style-type: none"> • Approve • Reject 	Approve

Approval-Rule Attributes for Manager Hierarchies

Initial Approver

Identifies both the first approver and the manager hierarchy. By default, approval requests are sent to the requester's first-level manager, and the manager hierarchy is the one associated with the requester's primary assignment. The requester is the worker who submits the transaction.

If you select a user as the initial approver, then the manager hierarchy is the one associated with that user's primary assignment. For example, when promoting one of your direct reports you could select as initial approver a human resource (HR) specialist who is outside your manager hierarchy; approval requests from this rule would be directed to the manager hierarchy of the HR specialist's primary assignment.

If you select a user who is not a manager, then the rule fails.

Number of Levels

Controls how far up the selected manager hierarchy approval requests are sent. The first level is based on both the **Initial Approver** and the **Initial Approvers to Skip** values. For example, if you set **Number of Levels** to 3 and **Initial Approvers to Skip** to 2 when the initial approver is the requester's first-level manager, then approval requests are sent to levels 3, 4, and 5 of the manager hierarchy.

Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.

Topmost Approver

Specifies an approver above whom approvals are not routed.

Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.

For the topmost-approver value, you can select:

- A different manager (first-level or second-level, as appropriate).
- A user who is a manager from the same manager hierarchy as the initial approver.

If you select a user who is not a manager or is from a different manager hierarchy from the initial approver, then the topmost approver is not found. In this case, routing of approvals stops when the number-of-levels value is reached.

Initial Participants to Skip

Allows you to start the approval process at a level above the initial approver in the manager hierarchy. For example, if the initial approver is the requester's first-level manager and you set **Initial Participants to Skip** to **2**, then the first approval request is sent to the requester's third-level manager.

Set Outcome To

Specifies the outcome for automatic approvals. If you set this value to **Approve**, then all identified approvers are recorded as having approved the transaction, even though the approval is automatic. Similarly, if you set this value to **Reject**, then all identified approvers are recorded as having rejected the transaction.

Position-Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Rules and Notifications for Human Capital Management interface, you can create one or more approval rules for a specified position hierarchy.

The following table summarizes the attributes of the position-hierarchy approval rules and their default values.

Attribute Name	Values	Default Value
Number of Levels	Minimum and maximum values relative to: <ul style="list-style-type: none">Initial approverRequester Absolute minimum and maximum values	At most 1 relative to initial approver At least 1 relative to initial approver
Position Hierarchy	All position hierarchies in the enterprise	None
Initial Approver	All positions in the selected position hierarchy	None
Topmost Approver	All positions in the selected position hierarchy	None

Approval-Rule Attributes for Position Hierarchies

Number of Levels

The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value.

You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction.

Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner.

Position Hierarchy

The name of the position hierarchy. Select from all position hierarchies in the enterprise.

Initial Approver

The position of the first approver.

The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve.

Topmost Approver

The position of the topmost approver.

The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve.

Approval routing stops when either the number of levels or the topmost approver is reached, whichever is sooner.

Defining an HCM Approval Policy: Worked Example

This example shows how to define an approval policy for employee hires in the Sales department using the Manage Approval Rules and Notifications for Human Capital Management task.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Who will approve employee hire requests?	<ul style="list-style-type: none">Managers in the Sales department.The human resources representative of any new hire does not need to approve but is informed of the hire after the relevant manager has approved.
Which approval actions must approvers take?	<ul style="list-style-type: none">Managers must approve the hire.The human resources representative receives an approval notification for all hires, but no response is needed.
Can the required level of management approval vary?	<p>The required level of approval varies with the grade of the new hire.</p> <p>The requester's:</p> <ul style="list-style-type: none">First-level manager approves the trainee grades 1 through 3Second-level manager approves the professional grades 4 through 6Third-level manager approves the senior grades 7 and above

Summary of the Tasks

To define the approval policy in this example, you:

1. Navigate to the Manage Approval Rules: Hire an Employee page.
2. Assemble the approval sequence.
3. Define the approval rule for trainee grades.
4. Define the approval rule for professional grades.
5. Define the approval rule for senior grades.
6. Define the approval rule for all grades.

Navigating to the Manage Approval Rules: Hire an Employee Page

1. On the All Tasks tab of the Overview page of the Setup and Maintenance work area, search for the task Manage Approval Rules and Notifications for Human Capital Management.
2. In the Search Results region, click **Go to Task**.
3. On the Manage Approval Rules and Notifications page, enter the search term Hire in the **Name** field.
4. Click **Search**.
5. In the Search Results region, select the task name Hire an Employee.

Assembling the Approval Sequence

1. On the Manage Approval Rules: Hire an Employee page, confirm that an entry for Line Manager appears in the Approval Sequence region.
2. In the Approvers region, click the **Add** icon on the Human Resources Representative entry to add it to the right of the Line Manager entry in the Approval Sequence region.

Defining the Approval Rule for Trainee Grades

1. In the Approval Sequence region, select the Line Manager entry.
2. In the Rules region, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresTraineeGrades. (The name cannot contain spaces.)
4. In the IF statement for the SalesHiresTraineeGrades rule, click the **Add** icon to the right of the first condition to create an additional condition.
5. Complete the fields of the two condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	<=	3	

6. In the THEN statement for the SalesHiresTraineeGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required

Initial Approver	Requester's first-level manager
Number of Levels	1
Topmost Approver	Requester's first-level manager
Initial Approvers to Skip	0

Defining the Approval Rule for Professional Grades

1. Click **Add Rule**.
2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresProfessionalGrades.
4. In the IF statement for the SalesHiresProfessionalGrades rule, click the **Add** icon to the right of the first condition twice to create two additional conditions.
5. Complete the fields of the three condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	>	3	and
Grade	<=	6	

6. In the THEN statement for the SalesHiresProfessionalGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Initial Approver	Requester's first-level manager
Number of Levels	1
Topmost Approver	Requester's second-level manager
Initial Approvers to Skip	1

Defining the Approval Rule for Senior Grades

1. Click **Add Rule**.
2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresSeniorGrades.
4. In the IF statement for the SalesHiresSeniorGrades rule, click the **Add** icon to the right of the first condition to create an additional condition.

5. Complete the fields of the two condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	>	6	

6. In the THEN statement of the SalesHiresSeniorGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Initial Approver	Requester's first-level manager
Number of Levels	1
Topmost Approver	Requester's first-level manager or Requester's second-level manager
Initial Approvers to Skip	2

Note

The value of the **Topmost Approver** attribute has no effect on this rule because the first-level and second-level managers are below the initial approver identified by the rule (the requester's third-level manager). To identify a manager above the requester's third-level manager, you would specify a named user from the same manager hierarchy (for example, the organization's CEO) as the topmost approver.

Defining the Approval Rule for All Grades

1. In the Approval Sequence region, select the Human Resources Representative entry.
2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresAll Grades.
4. In the IF statement for the SalesHiresAllGrades rule, complete the fields of the condition statement as shown in this table.

Attribute Name	Operator	Attribute Value
Department	==	Sales

5. In the THEN statement of the SalesHiresAllGrades rule, complete the fields as shown in this table.

Field	Value
Action	FYI only

User	Worker's representative
------	-------------------------

6. Click Submit.

FAQs for Define Approval Management

How do I define the approval policy for a task?

On the Manage Approval Rules page for a supported task, such as Hire an Employee, begin by deciding who will approve transactions. Using either drag and drop or the **Add** action, move those approvers from the Approvers section to the approval sequence and arrange them in the required order. By default, an approver is added to the sequence immediately following the currently selected approver, but you can use drag and drop to change the approver order. When you have defined the approval sequence, select the first approver in the approval sequence to display any predefined approval rule for that approver type. You can edit the displayed approval rule and create additional approval rules, as appropriate. Edit the rule settings to specify a name for each rule. Define approval rules for the remaining approvers in the approval sequence. When you have defined the approval rules for all approvers, submit the approval policy.

What happens if I edit or delete an approval rule?

If you edit or delete an approval rule on the Manage Approval Rules page, then approvals currently in progress complete as if the rule had not been edited or deleted.

New approvals follow the latest version of the rule.

Common Applications Configuration: Define Help Configuration

Define Help Configuration: Overview

The Define Help Configuration task list contains tasks that let you set up and maintain Oracle Fusion Applications Help for all users. Use the Set Help Options task to determine if certain aspects of Oracle Fusion Applications Help are available to users and to control how aspects of the help site work. Use the Assign Help Text Administration Duty and Manage Help Security Groups tasks to set up customization of help content.

After performing the help configuration tasks, you can review the predefined help and consider whether to add or customize any content. You can also customize help that is embedded in the application, for example hints and help windows, using other tools such as Oracle JDeveloper and Oracle Composer.

Use the Setup and Maintenance work area to access the tasks in the Define Help Configuration task list.

Set Help Options

Help Feature Choices and Help Options: Points to Consider

Help feature choices on the Configure Offerings page in the Setup and Maintenance work area control the look and behavior of Oracle Fusion Applications Help, and also determine which help options are available. Help options are setup options on the Set Help Options page.

Local Installation of Help

Select the Local Installation of Help feature choice so that the Define Help Configuration task list appears in your implementation project, and you can select two additional features (Access to Internet-Based Help Features and Help Customization) to control the fields available on the Set Help Options page.

Access to Internet-Based Help Features

Select this feature choice to provide users access to features that involve navigation to sites on the Web. If you select this feature choice, then the Web Sites Available from Help Site section is available on the Set Help Options page.

Important

Some help includes links to the Oracle Fusion Applications Technology Library. If you select this feature, then these links open the library on the Oracle Technology Network Web site. If you do not select this feature, then your service administrator (Oracle Cloud implementations) or system administrator (other implementations) must download the library from Oracle Technology Network (<http://www.oracle.com/technetwork/documentation/default-1577155.html>) and put all the content from within the extracted folder (for example E28271_01) directly into the appmgr/APPLTOP/fusionapps/applications/ahc/afh/reference/TechLib folder.

Help Customization

Select the Help Customization feature choice if you intend to customize predefined help or add your own files to help. For example, you can add internal policies or procedures as help, and Oracle User Productivity Kit content, if any. Not selecting this feature choice only hides the relevant setup options; help customization is not disabled for users with customization access. To disable help customization, remove the Oracle Fusion Help Text Administration duty from the job roles where it is predefined.

If you select this feature choice, then the Custom Help Security feature choice is available, as well as all these sections on the Set Help Options page:

- Custom Help
- User Productivity Kit
- Privacy Statement

Custom Help Security

Select this feature choice if you want certain help files to be available only to a restricted set of users. You can define the user groups allowed to view corresponding help files. Do not select this feature choice if you do not have this requirement, because the feature can have an impact on performance.

If you select the Custom Help Security feature choice, then the Manage Help Security Groups task is available in the Define Help Configuration task list in your implementation project. There are no help options associated with this feature choice.

Administering Collaboration Features and Announcements in Help: Points to Consider

Announcements and collaboration features (discussions, ratings and comments) allow users to share information regarding help and the subjects that particular help files cover. The collaboration features are also used elsewhere in Oracle Fusion Applications. Discussions may not be available in Oracle Cloud implementations.

Use the Set Help Options page in the Setup and Maintenance work area to enable the announcements and discussions features and to set options about

ratings. When administering these features, consider the purpose of each feature and points that are specific to Oracle Fusion Applications Help.

Announcements

Use announcements to broadcast information to all users of your help site. You can provide information about help, for example new custom help that was recently added, or about anything that users should take note of, for example a change in company policy. Announcements can appear on any of the tabs on the home page of Oracle Fusion Applications Help. You can target specific user groups by posting announcements to specific tabs, for example, posting information related to implementation to the Functional Setup tab.

Only users with the Oracle Fusion Help Text Administration duty role have access to the Manage Announcements icon button in the Announcements sections. They can create, edit, and delete announcements for the tab that they are on, and set the date range for when each announcement is to be displayed.

Discussions

Users can use discussions to post questions or comments about subjects covered in specific help files. For example, after reading help on expense reports, users might have questions or comments about company policies or processes for expenses. Other users who later access this help file would benefit from the information in the discussion.

You can set a help option to enable discussions. Each help file would contain a **Discuss** link that all users can use to read discussions about that file. They can also start a discussion topic or post to existing topics. These discussions are visible only to users in your enterprise.

Important

Do not enable discussions until servers for discussions are up and running.

Only users with the appropriate administrator role can moderate discussions. For more information on granting the administrator role on the discussions server, see the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal.

Ratings and Comments

Users can rate any help file on a five star system and provide feedback about the content. This information is helpful to other users in deciding which help file to open. Help files with a higher average rating are listed first in help windows, and in the help listings you see as you browse using the help navigators.

The scope of ratings and reviews is limited to your enterprise.

FAQs for Set Help Options

When do I link to the Oracle User Productivity Kit library from the help site?

Provide a link to your Oracle User Productivity Kit (UPK) library if you have UPK licensed and custom UPK content to share with your users. You give them

access to a library of custom UPK content in addition to any custom UPK demos that you added to the help site itself. UPK demos that you add as custom help are available only in the See It mode, so the library can include the same demo in other modes. If you have UPK versions earlier than 3.6.1, then you cannot add UPK demos as custom help, so the link is the only way for users to access custom UPK content from the help site.

How can I find the URL to the Oracle User Productivity Kit library?

The URL to enter on the Set Help Options page should be the full path from the Web server where you are hosting your Oracle User Productivity Kit (UPK) content to the index.html file that opens the table of contents for the library, for example, `http://<your domain>.com/UPKcontent/PlayerPackage/index.html`. In this example, you or your UPK administrator would publish one UPK player package that contains all the content to be linked to from Oracle Fusion Applications Help, as well as the index.html file, and place the PlayerPackage folder in a manually created folder called UPKcontent on the Web server.

FAQs for Assign Help Text Administration Duty

Who can add and manage custom help?

Users with the Oracle Fusion Help Text Administration duty role have access to customize help in Oracle Fusion Applications Help. This duty is assigned by default to various job roles, in particular the administrators for product families.

You can assign the duty role to other users who need access to customize help. Use the Manage Duties task in the Setup and Maintenance work area to search for the Oracle Fusion Help Text Administration duty role on the Role Catalog page, and map additional job roles to this duty role.

Manage Help Security Groups

Creating Help Security Groups: Worked Example

This example demonstrates how to create a help security group to define a set of job roles that have access to help. The help security group can then be assigned to particular help files so that only users with any of the defined roles have access to the help.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of users do you need to limit help access to?	Human resources (HR) specialists
Is there a specific time period for which this access is needed?	No, the help files should always be viewed only by the HR specialists
Where do you want this group to appear in the list of values for help security groups?	First

Define a help security group and assign a duty role to the group.

1. From the Setup and Maintenance work area, find the Manage Help Security Groups task and click **Go to Task**.
2. On the Manage Help Security Groups page, add a new row.
3. Complete the fields, as shown in this table. Leave the start and end dates blank.

Field	Value
Help Security Group	HR
Meaning	HR Only
Description	Viewing by HR specialists only
Display Sequence	1

4. Click **Save**.
5. With your new help security group selected, go to the Associated Roles section and add a new row.
6. Select **PER_HUMAN_RESOURCE_SPECIALIST** as the role name.
7. Click **Save and Close**.

You have created a new lookup code for the Help Security Groups lookup type, which is a standard lookup. The lookup code has the name, meaning, and description that you defined for the help security group.

You have also created a data security policy for the help database resource, specifying that the Human Resource Specialist role can view help that is defined with the HR security group. If you go to the Manage Database Resources and Policies page and find the database resource, or object, ATK_KR_TOPICS, then you can see the policy for the Human Resource Specialist role, with the condition that the column name, SECURITY_CODE, is equal to the value HR.

Help File Customization

Help File Customization: Overview

If you have the appropriate job roles, then you can customize the help files in the help site. Use the Manage Custom Help page to maintain both predefined and custom help files. You can create, duplicate, edit, and delete custom files, or set their status to Active or Inactive. For predefined files, you can only duplicate them or set their status. For each help file, predefined or custom, use help locations to determine where the help file appears in the application and in the help site. You have various options in how you add custom help, for example by uploading a file or specifying a URL.

Note

To make a copy of all custom help for testing, migration, or other purposes, use the export and import feature in the Setup and Maintenance work area.

There are various ways to access help customization.

- Many help files can be accessed from help windows in the application. If you want to customize help in the context of a help window, for example create a custom help file and add a link to it from a specific help window, then start by opening that help window. When you click the **Manage Custom Help** link, you go to the Manage Custom Help page, and the help location fields are automatically populated with values that correspond to the help window. This way you can easily select existing files to add to the same help location, and when you create a new file, the same help location appears by default.
- Open the Manage Custom Help page directly from the home page of Oracle Fusion Applications Help or from search result pages.
- To edit a specific file, you can either find it in the Manage Custom Help page, or open the file itself and click the **Edit** link.
- Likewise, you can find glossary terms in the Manage Custom Help page, or click the **Glossary** link in the global area to open the Glossary tab, search for the term, and click **Edit**.

Note

When you search in the Manage Custom Help page, make sure that the **Custom Help Only** check box is not selected if you are looking for predefined help.

If your enterprise has purchased Oracle User Productivity Kit (UPK) content, then your administrator can also add a **UPK** item to the **Help** menu in the global area of Oracle Fusion Applications. When users select this menu item, they access UPK content specific to the page that they are on.

Help Locations: Explained

Help locations determine where users can find help files, custom or not, from either the application or the help site.

Help locations include:

- Page or section values
- Help hierarchies
- Primary locations

Page or Section Values

The value in the **Page or Section** field on the help customization pages represents where users can click a help icon to open a help window that contains

a link to the help file. In most cases, this value represents a page or region header in the application. Help windows are also available on specific tabs or windows, and in the Setup and Maintenance work area for specific task lists or tasks. You can associate a help file with multiple page or section values, or with none at all.

The page or section value reflects the logical navigation to the help window. For example, **Edit Opportunity page, Revenue tab, Recommendations window** does not mean that the help file is available in three different places. The help icon is in the Recommendations window, which is accessed from the Revenue tab on the Edit Opportunity page.

If the value suggests multiple locations, for example **Create and Edit Opportunity pages**, then the help file is available from the page header of both the Create Opportunity and Edit Opportunity pages. If the page or section value is, for example, a dashboard region that appears in multiple dashboards, then the value does not specify the page name but just the region. The help file is available from that region in multiple dashboards.

Help Hierarchies

Help files are associated with help hierarchies, which are used to categorize help files and aid users in finding help. Each help file can have multiple hierarchies, with at least one of type Business Processes. The business process hierarchy is based on the Business Process Management model. Every page or section value is predefined with a specific business process hierarchy. If you select a page or section without entering a business process hierarchy, the predefined hierarchy appears by default.

The Search by Business Process navigator in the help site is based on the business process hierarchy. For example, if you assign two business process hierarchies to a help file, users can find the file in both locations in the navigator. When the user clicks **More Help** from a help window, all help files assigned to the same business process hierarchy as the page or section value are returned as search results.

Similarly, the Search by Product navigator is based on the Product hierarchy type, in which level 1 is the product family, level 2 is the product, and level 3 is the business activity owned by that product.

The Search by Functional Setup navigator is based on the Functional Setup hierarchy type. The level 1 nodes for this hierarchy are:

- Functional Setup Manager, which includes help about using the Setup and Maintenance work area.
- Guides, which contains level 2 nodes that correspond to business areas and setup offerings. All the user reference and functional setup PDF guides are included.
- Offerings, which contains level 2 nodes for each setup offering, and lower levels for the main task lists in the offerings. Help for the task lists and tasks are included.

The Search by Common Tasks navigator is based on the Welcome hierarchy type. The level 1 nodes represent categories of functional areas common to all users.

Primary Locations

The primary location of a help file designates the hierarchy that is displayed for the help file in search results and within the help content as breadcrumbs. You cannot change the primary location of a help file that came with your help installation. Primary locations of predefined help are based on the business process hierarchy, while custom help files can have primary locations based on hierarchies of any type.

Editing Predefined Help and Glossary Terms: Points to Consider

When you open any predefined help file, including glossary terms, that came with Oracle Fusion Applications Help, you can see an edit option if you have roles allowing edit access. When you edit predefined help, keep in mind:

- What happens to the original help file
- Where predefined help appears
- Considerations specific to glossary terms

What Happens to the Original Files

When you edit predefined help, you are actually creating a new custom help file based on the original file, with the same help locations. The customized version replaces the original, which becomes inactive and hidden from users. You can display both versions by reactivating the original in the Manage Custom Help page.

Note

In the Search Results: Existing Help region on the Manage Custom Help page, there is no option to edit predefined help. You can duplicate a predefined help file, edit the copy, and optionally inactivate the original.

Where Predefined Help Appears

All predefined help comes with preassigned help locations, including at least one based on the hierarchy of type Business Processes. Many also have predefined page or section values that indicate where the help can be accessed from help windows in the application.

To change where predefined help appears, either in the help site navigators or in the application, create a duplicate in the Manage Custom Help page. Change or add help locations to your custom copy, and inactivate the original.

Even though glossary terms do not appear in the help site navigators, you still need to enter at least one help location to categorize the glossary term.

Considerations Specific to Glossary Terms

When you edit a predefined glossary term, the original term becomes inactive. Existing links to the glossary term, from other predefined and custom help

files, will automatically point to your custom version. If you later inactivate the custom glossary term, make sure to activate the original term so that the links still work.

Links in Custom Help: Points to Consider

When you create or edit custom help, follow best practices when you include links to help files or other content. If you are working on custom help created by duplicating a predefined help file, then you may see existing links from the original file in the Help Content section. The types of links that you can work with include:

- Related help links
- Standard hypertext links
- Links to documentation library content
- Glossary term links

For all link types, except the standard hypertext links, you must create or edit custom help with a Text or Desktop source type. In other words, you must type the help content directly in the application or use an HTML file that you upload to help. For standard hypertext links, the source type can also be URL.

Related Help Links

Related help is the section at the end of help files that contains links to other help files. The syntax for related help contains a comma-separated list of title IDs that represent help files.

This figure provides an example of related links code.

```
OfaRelatedTopics(CREATE_AUTOMATIC_POSTING_CRITERIA_S_0000,  
JOURNAL_ENTRIES_HOW_THEY_RE_RECORDER_0000)
```

- You can delete this code to remove all related help, or delete title IDs to remove individual links (for example, `CREATE_AUTOMATIC_POSTING_CRITERIA_S_0000`).
- To replace existing links or add new links, you need to retain the code syntax and enter desired title IDs. To find title IDs, search for the help files on the Manage Custom Help page. Title IDs are displayed in the search results, but the **Title ID** column is hidden by default.

Standard Hypertext Links

You can create standard hypertext links to any file or Web site as long as you ensure the stability and validity of the links, including links to other help files, custom or not. These links can appear anywhere in the body of your help file as long as they come before any related help links.

In the Help Content section, highlight the text that you want to use as link text and click the **Add Link** icon button.

For links to other help files, open the file to which you want to link, and click the **E-Mail** link. Use the URL in the autogenerated e-mail text as the link to the file.

Links to Documentation Library Content

The syntax for links to HTML files in documentation libraries, for example the Oracle Fusion Applications Technology Library, is:

```
<span class="HP_topic-link_bridgeDocument-linkToSTDoc_"><?ofa  
linkToSTDoc(WCSUG4636) ?><span class="HP_topic-linktext_">Understanding  
Tags</span><?ofa endLink ?></span>.
```

WCSUG4636 is the anchor ID and Understanding Tags is the link text. You can:

- Modify the link by replacing the existing anchor ID or editing the link text, or both.
- Remove the link by deleting all the code for it.
- Create links to documentation library content by following the same syntax. These links can appear anywhere in the body of your help file as long as they come before any related help links.

Important

To ensure that you are linking to a supported documentation library, enter anchor IDs only from documentation libraries that are linked from predefined help topics.

Glossary Term Links

Glossary term links provide definitions in a note box when users hover over the term in help files.

This figure shows an example of code for a glossary term link.

```
OfaGlossaryTerm("accounting period", ACCOUNTING_PERIOD_0001)
```

In this example, `accounting period` is the link text, or glossary term, and `ACCOUNTING_PERIOD_001` is the identifier, or title ID.

- To remove the link but retain the text, delete all the code except the term itself.
- To add glossary term links, you must follow the link syntax and use the correct title ID for the glossary term. You can find title IDs in the search results of the Manage Custom Help page.

Note

If your custom help has glossary terms and the source type is Desktop File, then make sure before uploading that the quotes around the glossary term are actual quotation marks in raw HTML, not `"`. Otherwise, quotation marks will appear when users view the help file.

Customizing PDF Guides: Worked Example

This example demonstrates how to customize a PDF guide that came with Oracle Fusion Applications Help. This guide is currently not available from any help window in the application.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What changes do you need to make to the guide?	Change the title of a chapter and remove a section in that chapter, to hide content about a particular subject
Which help window should the customized guide appear in?	The help window for the entire Welcome dashboard of Oracle Fusion Applications
Which help navigators should the customized guide appear in, and on which node?	Same as the original guide, plus the path associated with the help window
Do you want to limit access to the customized guide?	No, same as the original guide

Edit a copy of the original PDF guide, and use the Manage Custom Help page to replace the original PDF guide with your new file.

Copying and Editing the PDF Guide

1. Open the original PDF guide from the help site and save a copy to your desktop. Leave open the help file for the guide.
2. Using a PDF editor application, change the title of the chapter wherever the chapter title appears. Delete the content you want to hide from users.
3. Make sure that your new PDF guide is less than 6 MB.

Replacing the Original PDF Guide

1. In the help file that you still have open for the original PDF guide, click the **Edit** link.
2. On the Create Help page, use the default values except where indicated.
3. Update the title to the name that you want to display to users.
4. In the **File Name** field, browse for and select your customized guide.
5. Delete any keywords or parts of the description relevant to the content you removed from the PDF guide.
6. Add a help location with the Business Processes hierarchy type and select **Information Technology Management** as the level 1 node, **Manage Enterprise Application Software** as the level 2 node, and **Use Applications** as the level 3 node.
7. Select **Welcome page** in the **Page or Section** column.
8. Click **Save and Close**. The help file for the original PDF guide is automatically set to inactive.

Adding Custom UPK Content to Help: Worked Example

This example demonstrates how to add custom Oracle User Productivity Kit (UPK) topics as demo help files. These help files function like any predefined help file for demos. You can search and include these files in help windows and navigators as you would other help.

In this scenario, you are adding two demos about social networking, to appear in help windows on the Welcome dashboard.

Note

Your demo must be made with UPK 3.6.1 or later to be added as help.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What UPK content do you want to add to help?	From a UPK module containing five topics, add two as custom demos on the help site
Which help navigators should each demo appear in, and on which node?	Because the two demos are about social networking: <ul style="list-style-type: none">• Search by Common Tasks navigator, under the Collaboration node• Search by Business Process navigator, under Information Technology Management - Manage Networking and Communications - Manage Social Networking Capabilities
Which help window should each demo appear in?	On the Welcome dashboard of Oracle Fusion Applications, one demo goes in the help window in the Activity Stream region, and the other in the People Connection region
Do you want to limit access to the help files for the demos?	No
Do you want the help files to appear in the New and Updated pane?	Yes

Generate a report of UPK document IDs, which you will use when creating custom help, to identify the UPK topics that you want to add. Publish the UPK module as a player package, then create custom help for the UPK topics that you want to use as help demos.

Generating a UPK Document ID Report

1. In the UPK Developer, select **Details View**.
2. Right-click any column header, for example Name, and select **Column Chooser**.
3. In the Column Chooser dialog box, click and drag the Document ID column header and drop it after the Name column. Close the Column Chooser dialog box.
4. From the File menu, select to print, and save the output as a Microsoft Excel file to your desktop.

Creating the Player Package

1. From the UPK Developer, make sure that the topics that you want to add as demos have the See It play mode. The topics can also have other modes, but only the See It mode is included in the custom help file.
2. Publish the module, specifying any location for the output and selecting to publish the selection only.
3. In the Formats section of the Publish Content window, select the **Player** check box under the **Deployment** check box group.
4. In the Player section, select the **Include HTML Web Site** check box, to ensure that the custom help file includes a text-only version of the UPK topic.
5. Finish the publishing process, after optionally setting other options.
6. Navigate to the location where you specified the output to be generated.
7. In the Publishing Content folder, copy the PlayerPackage folder and add it to the web server where you store UPK content.

Creating Custom Help for Demos

1. Open the help window in the Activity Stream region on the Welcome dashboard of Oracle Fusion Applications, and click **Manage Custom Help**.
2. On the Manage Custom Help page, the page or section and hierarchy values are populated with the values for the Activity Stream region.
3. Click **Create**.
4. On the Create Help page, complete the fields in the General Information section, as shown in this table. Use the default values except where indicated.

Field	Value
Title	The name of the UPK topic.
Source Type	Oracle User Productivity Kit
File Location	The full URL of the player package folder on the Web server, for example, <code>http://<your domain>.com/UPKcontent/PlayerPackage.</code>
Document ID	The document ID of the UPK topic to add to the help window in the Activity Stream region. You can copy and paste this ID from the Microsoft Excel file that you generated earlier.
Help Type	Demo
Help Security Group	Unsecured
Keywords	Terms relevant to the demo.
Description	Summary of the demo.
Include in New and Updated pane	Selected

The Help Location section contains values for the help window in the Activity Stream region. This help file will also appear in the Search by Business Process navigator under this predefined hierarchy.

5. Click **Save and Close**.
6. On the Manage Custom Help page, open the help locations for the help file that you just created.
7. Add a help location with the Welcome hierarchy type and select **Collaboration Features** as the level 1 node.
8. Add another help location with the Business Processes hierarchy type and select **Information Technology Management** as the level 1 node, **Manage Networking and Communications** as the level 2 node, and **Manage Social Networking Capabilities** as the level 3 node.
9. Click **Save and Close**.
10. Starting at the Connections region, repeat steps 1 to 9 for the other UPK topic that you want to add.

FAQs for Help File Customization

How can I restrict help content to specific user roles?

When you create or edit help, select a help security group that represents the set of roles that you want to have access to the help. If you do not see the Security Group field, then your administrator has not selected the Custom Help Security feature choice. The Unsecured group has no associated roles, so anyone can view the help. The predefined Secured group includes all internal employees and contingent workers, unless this group has been edited. You can create security groups and associate roles using the Manage Help Security Groups page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Help Security Groups task. Your new security groups are immediately available for use to secure new or edited help files.

Why can't I select and add help to a location?

You must specify a page or section to add the existing help to. To ensure that help is added to the correct help window, go to the page or section in the application, click the **Help** icon, and click the **Manage Custom Help** link in the help window. Alternatively, in the Manage Custom Help page, search for at least a page or section and a level 1 value for the Business Processes hierarchy type before selecting the **Select and Add** option.

You cannot select and add help to a particular hierarchy, on the Manage Custom Help page, without a page or section. To add just a hierarchy, search for the help file, add a new help location, and specify only the hierarchy information.

What happens to custom help when a help patch is applied?

Oracle Fusion Applications Help patches update all help files, both active and inactive, except custom help. Custom help files are not affected by patches.

Consider reviewing inactive files to see if you want to activate the updated version, or to make similar edits to the custom versions of those files, if any.

Embedded Help Customization

Customizing Embedded Help: Highlights

You can customize help that is embedded in the application, for example hints and help windows, for all users of Oracle Fusion Applications.

Embedded help customization is fully described in the Oracle Fusion Applications Extensibility Guide.

- Edit, create, or delete hint text that appears on hover over buttons, links, icons, or tab titles.

See: Customizing or Adding Bubble Embedded Help

- Edit, create, or delete other types of embedded help.

See: Customizing or Adding Static Instructions, In-field Notes, Terminology Definitions, and Help Windows

Common Applications Configuration: Define Application Toolkit Configuration

Define Application Toolkit Configuration: Overview

Oracle Fusion Application Toolkit (ATK) is an application that provides various core components of Oracle Fusion Applications, including the Welcome dashboard, Oracle Fusion Applications Help, the Reports and Analytics pane, and the Watchlist feature. Use the Define Application Toolkit Configuration task list to set up and maintain some of these components for all users, and the Define Help Configuration task list for Oracle Fusion Applications Help.

Note

The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

Use the Setup and Maintenance work area to access the tasks in the Define Application Toolkit Configuration task list.

Map Reports to Work Areas

Additional Report Setup in the Context of the Reports and Analytics Pane: Highlights

Aside from determining which work areas a specific report is mapped to, you can perform additional setup for reports in the context of the Reports and Analytics pane. You can set up report permissions, and enable Oracle Business Intelligence (BI) Publisher reports for scheduled submission.

This additional setup is described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition) and the Oracle Fusion Applications Extensibility Guide.

Report Permissions

- You can restrict access to specific reports for specific users, and this security is not limited to the Reports and Analytics pane. Refer to the

Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition).

See: Assigning Permissions

Oracle Business Intelligence Publisher Reports Submission

- Oracle BI Publisher reports must be registered as processes with Oracle Enterprise Scheduler to be enabled for scheduling. This registration also enables a Schedule link for the report in the Reports and Analytics Pane. Refer to the Oracle Fusion Applications Extensibility Guide, and perform the following steps in the specified order.
 - Create an Oracle Enterprise Scheduler job definition for the report.
See: Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service
 - Specify the job definition details in the report's properties.
See: Enabling Reports for Scheduling from the Reports and Analytics Pane

FAQs for Map Reports to Work Areas

How can I set up the Reports and Analytics pane for all users?

You can remove any currently mapped report from the Reports and Analytics pane, or add mappings to reports from the Oracle Business Intelligence (BI) Presentation catalog. To access the setup, click **Edit Settings** in the Reports and Analytics pane, or use the Map Reports to Work Areas task in the Setup and Maintenance work area. If you do the former, then you can set up only the Reports and Analytics pane on the work area that you are in.

If you do the latter, then you can select a work area to set up. If you do not see the desired work area, most likely you do not have access to it due to security. You can request to be granted a role that has access to the work area, or another administrator or business user with access to the work area can be granted the Reports and Analytics Region Administration Duty to be able to map reports to the work area.

Tip

On the Map Reports to Work Areas page only, you can also use the Synchronize button to remove mappings to reports that are no longer in the catalog, for all work areas at once.

Any changes you make in either UI apply to all users with access to the mapped work area.

Why can't I see reports when mapping reports to work areas for the Reports and Analytics pane?

It is possible that there are no reports currently mapped to the work area that you select in the Map Reports to Work Areas page. Alternatively, reports are mapped, but you do not see them due to security.

Similarly, in the list of all available reports from the catalog, you can see only the reports that you have access to. You can request to be granted a role that has access to the reports that you want to map, or another administrator or business user with access to those reports can be granted the Reports and Analytics Region Administration Duty to be able to map reports to work areas.

Why can't I see reports when I edit settings for the Reports and Analytics pane?

In the Edit Settings window, you may not be able to see a currently mapped report because you do not have access to it due to security.

Similarly, in the list of all available reports from the catalog, you can see only the reports that you have access to. You can request to be granted a role that has access to the reports that you want to map, or another administrator or business user with access to those reports can be granted the Reports and Analytics Region Administration Duty to be able to map reports to work areas.

Set Watchlist Options

Watchlist Setup: Points to Consider

For all users across the site, you can disable or enable predefined Watchlist categories and items, edit their names, and determine how often item counts refresh. You cannot delete predefined Watchlist categories and items, nor create any for the site. Users can create their own Watchlist items through saved searches.

Access the Set Watchlist Options page by starting in the Setup and Maintenance Overview page and searching for the Set Watchlist Options task.

Disabling Predefined Categories and Items

Use the Set Watchlist Options page to enable or disable predefined Watchlist categories and items. Disabling any category or item also disables associated processes involved in calculating the Watchlist item counts for all users. These processes include creating data caches, performing security checks, invoking services across domains, running queries, and so on.

An item with the **Predefined** type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item is not available for users to display in their watchlist
- The item is removed from any watchlist where it is currently displayed

A Watchlist item with the **User-created saved search** type does not appear in the Watchlist; it controls the display of the **Manage Watchlist** button or menu item in pages with saved searches. If you disable this type of Watchlist item, then:

- The **Manage Watchlist** option is not available to users in the corresponding work area, so users cannot use their own saved searches as

Watchlist items. A message is displayed to users when they try to use this option.

- Any user-defined saved searches from that work area already used as Watchlist items are no longer available in the users' watchlist. The user-defined saved searches are still available to be used for searching, but not for the Watchlist.

If you disable a Watchlist category, then the category is not available for users to include in their watchlist, and all Watchlist items within the category are also disabled.

Ultimately, the Watchlist for any user contains the subset of categories and items that are enabled in the Set Watchlist Options page:

- Plus any items based on user-defined saved searches
- Minus any categories or items that the user chooses to hide using Watchlist preferences
- Minus any items with no results found, if the user chooses to hide such items using Watchlist preferences

Specifying Refresh Intervals

All Watchlist items have a predefined refresh interval, which controls how often the query that calculates the count for a Watchlist item can be run. Use the Set Watchlist Options page to edit the interval values. What you specify as the refresh interval for a Watchlist item of type User-created Saved Search applies to all Watchlist items based on saved searches created by users on the corresponding search page.

When the user is in the Welcome dashboard with the Watchlist open for at least two and a half minutes, the query automatically runs for all Watchlist items if no refresh already ran in this user session. To subsequently run the query again, users can manually refresh the Watchlist region. The **Refresh** icon is enabled after five minutes since the last refresh.

Note

During a refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval. Since the manual refresh of the entire Watchlist is not available until five minutes after the last refresh, you should not set a Watchlist item refresh interval that is less than five minutes.

When users open Watchlist from the global area, a refresh automatically runs if five minutes have passed since the last refresh. During this refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval.

For example, you set the interval to eight minutes for a particular Watchlist item. When the user signs in and goes to the Welcome dashboard, with the Watchlist open, the query automatically runs for this Watchlist item after two and a half

minutes. Every two and a half minutes after, a check is performed for stale counts and new cached counts are displayed.

Five minutes after the query ran, the **Refresh** icon is enabled and the user performs a manual refresh. However, the query does not run for this Watchlist item, because the refresh interval is eight minutes. The user navigates away from the Welcome dashboard and opens the Watchlist from the global area six minutes later. A refresh automatically runs because more than five minutes have passed since the last refresh. This time, the query runs for this Watchlist item because it has been more than eight minutes since the query last ran for this item.

Editing Predefined Category and Item Names

Predefined Watchlist category and item names are stored as meanings of standard lookups. Lookup types for predefined categories end with WATCHLIST, for example EXM_EXPENSES_WATCHLIST. Edit the lookup type meaning to change the category name. To change item names, edit lookup code meanings for that lookup type.

Common Applications Configuration: Maintain Common Reference Objects

Maintain Common Reference Objects: Overview

The Maintain Common Reference Objects task list contains Oracle Fusion Middleware Extensions for Applications (Applications Core) tasks that support implementation of common behaviors, such as data security or reference data sets.

Use this task list to manage common reference objects that are defined centrally and shared across applications, in addition to those that are specific to Applications Core functionality. You can access this task list by starting in the Setup and Maintenance Overview page and searching for common reference object task lists.

Note

Offerings also include application-specific tasks for managing Applications Core objects. For example, the Financials offering includes tasks such as Manage Receivables Descriptive Flexfields, and Manage Receivables Lookups.

For more information on configuring custom objects, see the Oracle Fusion Applications Extensibility Guide.

To make the Maintain Common Reference Objects task list available in your implementation project, go to **Setup and Maintenance Overview - Configure Offerings**, and for a specific offering, select the Maintain Common Reference Objects feature choice.

Define Application Taxonomy

Application Taxonomy: Highlights

Application taxonomy is the organization of Oracle application components and functions in a hierarchical structure, from product lines to logical business areas. This hierarchy represents a breakdown of products into units based on how applications are installed and supported. Maintain this hierarchy on the Manage

Taxonomy Hierarchy page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Taxonomy Hierarchy task.

A detailed introduction to application taxonomy is provided in the Oracle Fusion Applications Developer's Guide.

Hierarchy

- The application taxonomy hierarchy contains various levels and types of nodes, or modules.

See: Characteristics of the Level Categories

See: Benefits of a Logical Hierarchy

Usage

- Use application taxonomy to understand relationships among applications and between an application and its files. This information is helpful in managing various phases of the product lifecycle.

See: How to Manage the Lifecycle

Modules in Application Taxonomy: Explained

A module is any node in the application taxonomy hierarchy. The top level of the hierarchy is product line, followed by product family, application, and logical business area. There can be multiple levels of logical business areas, with one or more nested within a parent logical business area.

Product Line

A product line is a collection of products under a single brand name, for example, Oracle Fusion.

Product Family

A product family is a collection of products associated with a functional area that may or may not be licensed together as a single unit, for example Financials.

Application

An application is a single product within a product family, containing closely related features for a specific business solution, for example General Ledger.

Logical Business Area

A logical business area is a collection of business object definitions organized into a logical grouping. It contains the model objects, services, and UI components for those business objects. Logical business areas have their own hierarchy levels and in some cases can be two or three levels deep. Each leaf node has at least one business object and service, up to a maximum of four business objects and associated services. A logical business area with more than four business objects are further refined with child logical business area levels.

Each of these parent-child levels is represented by a directory in the physical package hierarchy.

Managing Modules in Application Taxonomy: Points to Consider

Manage modules on the Create Child Module or Edit Module page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Taxonomy Hierarchy task. When you create a module, it is a child of the currently selected node in the application taxonomy hierarchy. This determines which values are available, for example for module type. Once created, you cannot delete the module or move it elsewhere in the hierarchy. As you create or edit modules, consider the following points regarding specific fields.

Identifiers

Module ID is the unique primary key for nodes in the taxonomy table. When you create a module, an ID is automatically generated. Once the module is created, you cannot update the ID.

Module key and alternative ID are additional identifiers of the module, presented in a way that is easier to read than the module ID. The module key is a string identifier, for example AP for the Oracle Fusion Payables application. The alternative ID is a numeric identifier, for example 1 for the Oracle Fusion product line. These IDs are provided for the product line, product family, and application modules, but you can optionally add them for logical business areas and new custom modules.

Note

Do not change the module key or alternative ID for predefined modules.

The product code is relevant only to application and logical business area modules. You can leave the field blank for other module types. The product code for applications is the short name that can be displayed in lists of application values, for example FND for Oracle Fusion Middleware Extensions for Applications.

Names

Module name is the logical name for the module and is always available. The name must be unique among nodes in the same hierarchy level with the same parent, but try to make it as unique in the whole hierarchy as possible.

The user name and description can appear to users in other parts of Oracle Fusion Applications, so make sure that the values are something that users know to represent the module.

Usage Types

Though you can update the usage type to reflect the current state of the module, just doing so does not affect the actual state. For example, setting a module as installed does not mean it is actually installed if the installation itself has not taken place. Installation refers to operations related to laying down all the

components needed to create an Oracle Fusion Applications environment, while deployment is the process that starts the managed servers and clusters and facilitates the actual use of product offerings. A licensed module is available for installation and deployment, and a deployed module is considered actively used when actually used by users.

Seed Data

If seed data is allowed, then seed data such as flexfields and lookups can be extracted for the module using seed data loaders. By default, extract is allowed for all predefined modules of type application and logical business area.

Associations

You can associate a logical domain to modules of type product family, as well as one or more enterprise applications to modules of type application. This association represents the relationship between the taxonomy modules and the corresponding domain and enterprise applications stored in the Oracle Fusion Applications Functional Core (ASK) tables.

Define Reference Data Sharing

Reference Data Sharing: Explained

Reference data sharing facilitates sharing of configuration data such as jobs and payment terms, across organizational divisions or business units. You define reference data sets and determine how the data is shared or partitioned. Use reference data sets to reduce duplication and maintenance by sharing common data across business entities where appropriate. Depending on the requirement (specific or common), each business unit can maintain its data at a central location, using a set of values either specific to it or shared by other business units.

You can share reference data after it is filtered on the basis of sets. A common reference data set is available as the default set, which can be assigned to several business units sharing the same reference data. For commonly used data such as currencies, you can use the common reference data set and assign it to multiple business units in various countries that use the same currency. In cases where the default set cannot be assigned to an entity, you can create specific sets. The data set visible on the transactional page depends on the sharing method used to share reference data.

For example, XYZ Corporation uses the same grades throughout the entire organization. Instead of managers in different business units setting up the same grades, XYZ Corporation decides to create a set called Grades and assign the grades reference data group for all business units in the organization to the Grades set, so that the grades can be shared.

Note

For specific information on configuring reference data sharing for a particular object or product, refer to its product documentation.

Reference Data Sets: Explained

Reference data sets are logical groups of reference data that can be accessed by various transactional entities depending on the business context. Oracle Fusion Applications contains a common reference data set as well as an enterprise set that may be used as a default set. Depending on your business requirement you can create and maintain additional reference data sets, while continuing to use the common reference data set.

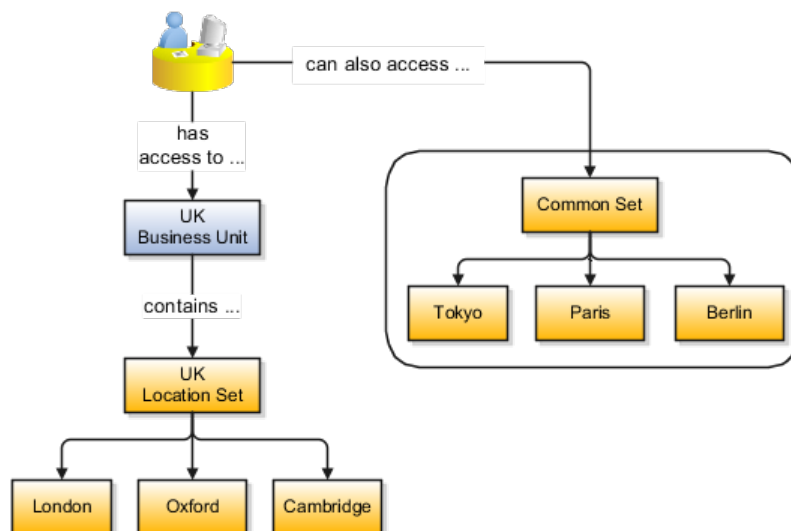
Consider the following scenario.

Your enterprise can decide that some aspects of corporate policy should affect all business units and leave other aspects to the discretion of the business unit manager. This allows your enterprise to balance autonomy and control for each business unit. For example, if your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level, you can let managers define their own sales methods, but define payment terms centrally. In this case, each business unit would have its own reference data set for sales methods, and there would be one central reference data set for payment terms assigned to all business units.

Partitioning

The partitioning of reference data and creation of data sets enable you to create reference entities across tables or lookup types, and share modular information and data processing options among business units. With the help of partitioning, you can choose to create separate sets and subsets for each business unit depending upon its business requirement, or create common sets or subsets to enable sharing reference data between several business units, without the need for duplicating the reference data. Partitioning provides you the flexibility to handle the reference data in a way appropriate to your business needs.

The following figure illustrates the reference data sharing method (assignment to one set only, with common values) where the user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.



Reference Data Sets and Sharing Methods: Explained

Oracle Fusion Applications reference data sharing feature is also known as SetID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses, thereby reducing the administrative burden and decreasing the time needed to implement new business units. For example, you can share sales methods, transaction types, or payment terms across business units or selected other data across asset books, cost organizations, or project units.

The reference data sharing features use reference data sets to which reference data is assigned. The reference data sets group assigned reference data. The sets can be understood as buckets of reference data assigned to multiple business units or other application components.

Reference Data Sets

You begin this part of your implementation by creating and assigning reference data to sets. Make changes carefully as changes to a particular set will affect all business units or application components using that set. You can assign a separate set to each business unit for the type of object that is being shared. For example, assign separate sets for payment terms, transaction types, and sales methods to your business units.

Your enterprise can decide that some aspects of corporate policy should affect all business units and leave other aspects to the discretion of the business unit manager. This allows your enterprise to balance autonomy and control for each business unit. For example, if your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level, you can let managers define their own sales methods, but define payment terms centrally. In this case, each business unit would have its own reference data set for sales methods, and there would be one central reference data set for payment terms assigned to all business units.

The reference data sharing is especially valuable for lowering the cost of setting up new business units. For example, your enterprise operates in the hospitality industry. You are adding a new business unit to track your new spa services. The hospitality divisional reference data set can be assigned to the new business unit to quickly setup data for this entity component. You can establish other business unit reference data in a business unit specific reference data set as needed

Reference Data Sharing Methods

There are variations in the methods used to share data in reference data sets across different types of objects. The following list identifies the methods:

- Assignment to one set only, no common values allowed. The simplest form of sharing reference data that allows assigning a reference data object instance to one and only one set. For example, Asset Prorate Conventions are defined and assigned to only one reference data set. This set can be shared across multiple asset books, but all the values are contained only in this one set.
- Assignment to one set only, with common values. The most commonly used method of sharing reference data that allows defining reference data

object instance across all sets. For example, Receivables Transaction Types are assigned to a common set that is available to all the business units without the need to be explicitly assigned the transaction types to each business unit. In addition, you can assign a business unit specific set of transaction types. At transaction entry, the list of values for transaction types includes transaction types from the set assigned to the business unit, as well as transaction types assigned to the common set that is shared across all business units.

- Assignment to multiple sets, no common values allowed. The method of sharing reference data that allows a reference data object instance to be assigned to multiple sets. For instance, Payables Payment Terms use this method. It means that each payment term can be assigned to one or more than one set. For example, you assign the payment term Net 30 to several sets, but the payment term Net 15 is assigned to only your corporate business unit specific set. At transaction entry, the list of values for payment terms consists of only one set of data; the set that is assigned to the transaction's business unit.

Note: Oracle Fusion Applications contains a reference data set called Enterprise. Define any reference data that affects your entire enterprise in this set.

Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects on the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

Determinant Types

The partitioned reference data is shared based on a business context setting called the determinant type. It is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

Type	Description
Asset Book	Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.
Business Unit	The departments or organizations within an enterprise.
Cost Organization	The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.
Project Unit	A logical organization within an enterprise that is responsible for enforcing consistent project management practices.
Reference Data Set	References to other shared reference data sets.

Determinant

The determinant or determinant value is the value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set. For example, when managing set assignments for the set determinant type, Reference Data Set is the determinant type, and you would enter the corresponding set code value as the corresponding determinant value.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data) that are treated in the same manner because of commonness in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups, based on the functional area and the partitioning requirements that they have in common. For example, all tables and views that define Sales Order Type details might be part of the same reference group.

Note

The reference groups are predefined in the reference groups table and are available for selection and assignment.

Define Lookups

Lookups: Explained

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Type	Lookup Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Customization levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Customization Level

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the customization level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the meanings of predefined lookup codes cannot be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the customization level should be system or extensible to prevent deletion.

Once the customization level is set for a lookup type, it cannot be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

Lookup	Description
Standard	Lists the available codes and translated meanings
Set enabled	Additionally associates a reference data set with the lookup codes
Common	Legacy lookups

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide a criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box

- Specifying an enabled start date, end date, or both
- Specifying a reference data set determinant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

Managing a Standard Lookup: Example

Creating a new standard lookup involves creating or selecting a lookup type to which the lookup code belongs, and determining appropriate values for the lookup codes and their meanings.

Note

You can only create or edit the lookup codes for a particular lookup type if its customization level supports it.

Creating a Lookup Type Called COLORS

Your enterprise needs a list of values for status to be used on various objects such as processes or users. The lookups are colors, so the lookup type you create is COLORS.

Lookup type parameters	Value
Lookup type name	COLORS
Meaning	Status
Description	Status by color
Module	Oracle Fusion Middleware Extensions for Applications

The lookup codes you define for the COLORS lookup type are, BLUE, RED, GREEN, and YELLOW.

Lookup Code	Meaning	Enabled	Display Sequence
BLUE	Urgent	No	4
RED	Stop	Yes	1
GREEN	Go	Yes	3
YELLOW	Caution	Yes	2

Understanding the Resulting Data Entry List of Values

Users need to respond to a process question by indicating whether to stop it, use caution, go ahead, or complete it urgently.

The list of values for the COLORS lookup type includes the meanings for the enabled codes.

Displayed Value	Hidden ID
Stop	RED
Caution	YELLOW
Go	GREEN

Analysis

The BLUE lookup code was not enabled and does not appear in the list of values. The display sequence of values in the list of values is alphabetical unless you enter a number manually to determine the order of appearance. Number 1 indicates the value listed first in the list of values.

Note

Only lookups that are enabled and active, meaning between start and end dates, are visible.

When users enter one of the values from the list of values for the lookup type COLORS, the transaction table records the lookup code. In this example, the code is stored in the Status column

Transaction number	User name	Status
1	Jane	RED
2	Bob	YELLOW
3	Alice	BLUE

The status for one user is BLUE because at the time they entered a value, BLUE was enabled. Disabling a lookup code does not affect transaction records in which that code is stored. Data querying and reporting have access to disabled lookup codes in transaction tables.

Managing Set-Enabled Lookups: Examples

Creating a new set-enabled lookup is similar to creating a standard lookup with the addition of specifying a reference data set determinant for the lookup codes.

Note

You can only create or edit the lookup codes for a particular lookup type if its customization level supports it.

The reference data set for a set-enabled lookup code is part of its foreign key. This is unlike other set-enabled entities.

Selecting a Reference Group for a Set-Enabled Lookup Type

By specifying a reference group for a set-enabled lookup type you indicate which reference data set assignments are available for its lookup codes. For example a COLORS lookup type might be set enabled for a Countries reference group that includes the US and EU reference data set assignments.

Selecting a Reference Data Set for a Set-Enabled Lookup

The reference data set determines which lookup code is included in the list of values. If a COLORS lookup type contains a RED, YELLOW, ORANGE, and GREEN lookup code, you can enable one RED lookup as coming from the US reference data set and another RED lookup as coming from the EU reference data set with divergent meanings.

Reference Data Set	Lookup Code	Lookup Meaning
US	RED	Red
US	YELLOW	Yellow
US	GREEN	Green
EU	RED	Rouge
EU	ORANGE	Orange

In addition to divergent meanings for lookup codes based on associated reference data set, some lookup codes may be unique to one or another reference data set as the ORANGE lookup is to the EU reference data set in this example.

In another example, a lookup type called HOLD_REASON provides a list of reasons for applying a hold to a contract renewal. Reference data sets determine which codes are included in the hold reason list of values.

Reference Data Set	Lookup Code	Lookup Meaning
US	SEC	SEC Compliance Review
US	DIR	Needs Director's Approval
US	VP	Needs Vice President's Approval
CHINA	CSRC	Pending China Securities Regulatory Commission Review
CHINA	PR	Needs President's Approval
COMMON	REQUESTED	Customer Request

Using the Manage Set Assignments task, you have defined assignments that designate the China business unit to refer to the CHINA and the US business unit to refer to the US and all business units to refer to the COMMON set. When end users place a contract hold in the US business unit, only the three reason codes in US_SET are available. When placing a contract hold in the China business, only the two codes in China_SET are available.

FAQs for Define Lookups

How can I edit lookups?

You can edit the existing lookup codes of a lookup type or add new lookup codes on the Define Lookups pages, which you can access by starting in the Setup and Maintenance work area and searching for lookup tasks. You can edit the existing lookup codes of a lookup type, or add new lookup codes to a lookup type, if the customization level for the lookup type supports editing.

Why can't I see my lookup types?

Lookups are listed by lookup type. Typically lookup types are managed using tasks that handle a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. The generic tasks provide access to all lookups types of a kind, such as all common lookups using the Manage Common Lookups task.

If existing lookups are not available to the tasks of the Define Lookups activity, they may be validated for use in a lookup view that is not central to all applications or whose owning application has not been specified in a lookup view.

Lookups can only be managed in the Define Lookups tasks if the lookup's view application is the standard lookups view, common lookups view, or set-enabled lookups view. Lookups defined in an application view can only be managed by following instructions provided by the owning application.

Note

A lookup type and its codes can only be defined in one lookup view.

What's the difference between a lookup type and a value set?

A lookup type consists of lookup codes that are the values in a static list of values. Lookup code validation is a one to one match.

A table-validated value set can consist of values that are validated through a SQL statement, which allows the list of values to be dynamic.

Tip

A table validated value set can be defined based on any table, including the lookups table. This allows a lookup type to be made into a table-validated value set that can be used in flexfields.

Area of Difference	Lookup Type	Value Set
List of values	Static	Dynamic if Table validation type
Validation of values	One to one match of meaning to code included in a lookup view, or through the determinant of a reference data set	By format or inclusion in a table
Format type of values	char	varchar2, number, and so on
Length of value	Text string up to 30 characters	Any type of variable length from 1 to 4000
Duplication of values	Never. Values are unique.	Duplicate values allowed
Management	Managed by both administrators and end-users, except system lookups or predefined lookups at the system customization level, which cannot be modified.	Maintained by administrators, except some product flexfield codes, such as GL for Oracle Fusion General Ledger, which are maintained by end users

A lookup type cannot make use of a value from a value set.

Value sets can make use of standard, common, or set-enabled lookups.

Both lookup types and value sets are used to create lists of values from which users select values.

What's a lookup tag used for?

Tags on lookup codes allow you to add a label to your lookup codes.

Lookup tags are unvalidated and uninterpreted by lookups. A tag can be used to categorize lookups based on facilitating searches or guiding how a lookup should be used.

Document what the tag on a lookup represents and how to use it.

Manage Messages

Messages: Highlights

The message dictionary contains messages that tell users about business rule errors, such as missing or incorrect data, and how to resolve them, to warn users about the consequences of intended actions, and provide information in log files. These messages are defined for specific applications and modules, but a few are common messages that can be used in any application. All applications also use messages stored outside of the message dictionary.

The message dictionary is described in the Oracle Fusion Applications Developer's Guide, and other messages in the Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework.

Managing Messages

- Use the Manage Messages page to create and edit custom messages in the message dictionary, as well as edit predefined messages. Do not delete predefined messages unless you are sure that they are not used anywhere. Refer to the Oracle Fusion Applications Developer's Guide.

See: Introduction to Message Dictionary Messages

- Messages outside of the message dictionary, for example confirmations and field validations, are managed in Oracle Application Development Framework Faces components or through message resource bundles used for translation. Refer to the Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework.

See: Displaying Hints and Error Messages for Validation and Conversion

See: Internationalizing and Localizing Pages

Creating and Editing Messages: Highlights

Each message in the message dictionary has many attributes and components, including message properties, text, and tokens, that you define when creating or editing the message.

Details about these messages are described in the Oracle Fusion Applications Developer's Guide.

Message Properties

- The message type identifies the type of information that the message contains.

See: Understanding Message Types

- The message name and number are identifiers for the message. There are specific message number ranges for predefined messages in each application, and you should not edit numbers assigned to predefined messages. When creating custom messages, use only message numbers within the 10,000,000 to 10,999,999 range.

See: About Message Names

See: About Message Numbers

- The translation notes for predefined messages might contain internal content that you can disregard.

See: About Translation Notes

- The message category, severity, and logging enabled option are related to the incident and logging process.

See: About Grouping Messages by Category and Severity

See: Understanding Incidents and Diagnostic Logs with Message Dictionary

Message Text and Tokens

- The message text comprises various components, some of which are displayed only to select users. To determine which component of the message text is displayed to a particular user, set the Message Mode profile option (FND_MESSAGE_MODE) at the user level for that user. The message component short text is visible to all users and therefore, the profile option does not apply to this component. Also, the profile option applies only to messages in the message dictionary.

See: About Message Components

- Tokens are variables that represent values to be displayed in the message text.

See: About Tokens

Common Messages: Points to Consider

Common messages, which have message names that begin with FND_CMN and message numbers between 0 and 999, are used throughout Oracle Fusion Applications. Each common message can appear in multiple places in any product family. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages that are of type error or warning are part of the message dictionary.

Editing Common Messages

Because a common message can be used in any application, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, make sure that the text would make sense to all users across Oracle Fusion Applications who might see it.

Creating Common Messages

You can create custom common messages for use in multiple places within a single product. Do not begin the message name with FND_CMN, but use another suitable convention. The message number should be within the range that is designated for the product.

Define ISO Reference Data

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes

You cannot change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges

Users can enter transactions denominated in the currency only for the dates within the specified range. If you do not enter a start date, then the currency is valid immediately. If you do not enter an end date, then the currency is valid indefinitely.

Symbols

Even if you enter a symbol for a currency, the symbol is not always displayed when an amount is displayed in this currency. Some applications use currency

symbols when displaying amounts. Others, like Oracle Fusion General Ledger, do not.

Euro Currency Derivation: Explained

Use the Derivation Type, Derivation Factor, and Derivation Effective Date fields to define the relationship between the official currency (Euro) of the European Monetary Union (EMU) and the national currencies of EMU member states. For each EMU currency, you define its Euro-to-EMU fixed conversion rate and the effective starting date.

Note

If you need to use a different currency code for Euro, you can disable the predefined Euro currency and create a new one.

Derivation Type

The **Euro currency** derivation type is used only for the Euro, and the **Euro derived** derivation type identifies national currencies of EMU member states. All other currencies do not have derivation types.

Derivation Factor

The derivation factor is the fixed conversion rate by which you multiply one Euro to derive the equivalent EMU currency amount. The Euro currency itself should not have a derivation factor.

Derivation Effective Date

The derivation effective date is the date on which the relationship between the EMU currency and the Euro begins.

Natural Languages: Points to Consider

Natural languages are all the languages that humans use, written and spoken. If a language is enabled, then users can associate it with entities, for example as languages spoken by sales representatives. When managing natural languages, consider tasks to perform and best practices for entering particular values.

Tasks

Once you add a language, it cannot be deleted, just disabled. You can optionally associate natural languages with International Organization for Standardization (ISO) languages and territories, just for reference.

Values

When you create a natural language, use the alpha-2 ISO code as the language code, or, if not available, then alpha-3. If the language is not an ISO language, then use **x-** as a prefix for the code, for example **x-ja** for a Japanese dialect.

Use the **sgn** code of ISO-639-2 for sign languages, followed by territory code, for example **sgn-US** for American Sign Language. You can also use Internet Assigned Numbers Authority (IANA) language tags.

The natural language description should be the language name with territory name in parenthesis where needed, for example **English (Australia)** and **English (Canada)**.

FAQs for Define ISO Reference Data

When do I create or edit territories?

Edit territory descriptions to determine how they are displayed in lists of country values throughout Oracle Fusion Applications. The predefined territories are all countries from the International Organization for Standardization (ISO) 3166 standard. You usually would not edit territory names or codes.

Do not edit National Language Support (NLS) territory codes, which are identifiers used in the system, unless you need to change the association between ISO and system territory. You usually would not edit the default currency, which is the value that defaults in the **Currency** field in Oracle Fusion Applications user preferences after the user first selects a territory.

Create territories if new countries emerge and the system has not yet been patched with the latest ISO country values.

When do I create or edit industries?

Edit industry descriptions to determine how they are displayed in Oracle Fusion Applications. You usually would not edit industry names, which are from the North American Industry Classification System (NAICS). Enabled industries are mainly used in the context of customization, though these values can also appear in any application.

Create industries if you have particular ones you need, for example for customization, that are not included in the NAICS standard.

When do I associate industries with territories?

Optionally associate industries with territories to provide an industry in territory value, used for customization. For example, administrators can customize a page in one way for users within an industry in one country, and another way for users within the same industry in another country. The administrator would select the appropriate industry in territory value to set the customization context.

When do I create or enable currencies?

Create currencies to use, for example for reporting purposes, if they are not already provided. All currencies from the International Organization for Standardization (ISO) 4217 standard are provided.

Enable any currency other than USD for use in Oracle Fusion Applications, for example for displaying monetary amounts, assigning to sets of books, entering transactions, and recording balances. Only USD is enabled by default.

What's the difference between precision, extended precision, and minimum accountable unit for a currency?

Precision is the number of digits to the right of the decimal point used in regular currency transactions. Extended precision is the number of digits to the right of the decimal point used in calculations for this currency, and it must be greater than or equal to the standard precision. For example, USD would have 2 for precision because amounts are transacted as such, for example \$1.00. For calculations, for example adding USD amounts, you might want the application to be more precise than two decimal digits, and would enter an extended precision accordingly.

Note

Some applications use extended precision. Others, such as Oracle Fusion General Ledger, do not.

Minimum accountable unit is the smallest denomination for the currency. For example, for USD that would be .01 for the cent. This unit does not necessarily correspond to the precision for all currencies.

What's a statistical unit currency type?

The statistical unit currency type is used only for the Statistical (STAT) currency. The Statistical currency is used to record statistics such as the number of items bought and sold. Statistical balances can be used directly in financial reports, allocation formulas, and other calculations.

When do I create or edit ISO languages?

You can edit the names and descriptions of International Organization for Standardization (ISO) languages to determine how they are displayed in lists of ISO language values in Oracle Fusion Applications. The ISO languages are from the ISO 639 standard. If there were changes to the ISO standard and the system has not yet been patched with the latest ISO values, you can update the ISO alpha-2 code or add languages as needed.

When do I edit languages?

Installed languages automatically appear on the Manage Languages page, so you do not manually enter newly installed languages. This page contains all languages available for installation and translation in Oracle Fusion Applications. Each dialect is treated as a separate language. The language codes and names are values used by the system.

You generally would not edit any of the detailed fields unless you really need to and know what they are.

When do I create or edit time zones?

Though all standard time zones are provided, optionally enable only a subset for use in lists of time zone values in Oracle Fusion Applications. You can add time

zones if new zones became standard and the system has not yet been patched with the latest values.

Manage Data Security Policies

Data Security in the Security Reference Implementation: Explained

The reference implementation contains a set of data security policies that can be inspected and confirmed to be suitable or a basis for further implementation using the Authorization Policy Manager (APM).

The security implementation of an enterprise is likely a subset of the reference implementation, with the enterprise specifics of duty roles, data security policies, and HCM security profiles provided by the enterprise.

The business objects registered as secure in the reference implementation are database tables and views.

Granting or revoking object entitlement to a particular user or group of users on an object instance or set of instances extends the base Oracle Fusion Applications security reference implementation without requiring customization of the applications that access the data.

Data Security Policies in the Security Reference Implementation

The data security policies in the reference implementation entitle the grantee (a role) to access instance sets of data based on SQL predicates in a WHERE clause.

Tip

When extending the reference implementation with additional data security policies, identify instance sets of data representing the business objects that need to be secured, rather than specific instances or all instances of the business objects.

Predefined data security policies are stored in the data security policy store, managed in the Authorization Policy Manager (APM), and described in the Oracle Fusion Applications Security Reference Manual for each offering. A data security policy for a duty role describes an entitlement granted to any job role that includes that duty role.

Warning

Review but do not modify HCM data security policies in APM except as a custom implementation. Use the HCM Manage Data Role And Security Profiles task to generate the necessary data security policies and data roles.

The reference implementation only enforces a portion of the data security policies in business intelligence that is considered most critical to risk management without negatively affecting performance. For performance reasons it is not practical to secure every level in every dimension. Your enterprise

may have a different risk tolerance than assumed by the security reference implementation.

HCM Security Profiles in the Security Reference Implementation

The security reference implementation includes some predefined HCM security profiles for initial usability. For example, a predefined HCM security profile allows line managers to see the people that report to them.

The IT security manager uses HCM security profiles to define the sets of HCM data that can be accessed by the roles that are provisioned to users

Data Roles

The security reference implementation includes no predefined data roles to ensure a fully secured initial Oracle Fusion Applications environment.

The security reference implementation includes data role templates that you can use to generate a set of data roles with entitlement to perform predefined business functions within data dimensions such as business unit. Oracle Fusion Payables invoicing and expense management are examples of predefined business functions. Accounts Payable Manager - US is a data role you might generate from a predefined data role template for payables invoicing if you set up a business unit called US.

HCM provides a mechanism for generating HCM related data roles.

Data Security: Explained

By default, users are denied access to all data.

Data security makes data available to users by the following means.

- Policies that define grants available through provisioned roles
- Policies defined in application code

You secure data by provisioning roles that provide the necessary access. Enterprise roles provide access to data through data security policies defined for the inherited application roles.

When setting up the enterprise with structures such as business units, data roles are automatically generated that inherit job roles based on data role templates. Data roles also can be generated based on HCM security profiles. Data role templates and HCM security profiles enable defining the instance sets specified in data security policies.

When you provision a job role to a user, the job role implicitly limits data access based on the data security policies of the inherited duty roles. When you provision a data role to a user, the data role explicitly limits the data access of the inherited job role to a dimension of data.

Data security consists of privileges conditionally granted to a role and used to control access to the data. A privilege is a single, real world action on a

single business object. A data security policy is a grant of a set of privileges to a principal on an object or attribute group for a given condition. A grant authorizes a role, the grantee, to actions on a set of database resources. A database resource is an object, object instance, or object instance set. An entitlement is one or more allowable actions applied to a set of database resources.

Data is secured by the following means.

Data security feature	Does what?
Data security policy	Grants access to roles by means of entitlement
Role	Applies data security policies with conditions to users through role provisioning.
Data role template	Defines the data roles generated based on enterprise setup of data dimensions such as business unit.
HCM security profile	Defines data security conditions on instances of object types such as person records, positions, and document types without requiring users to enter SQL code
Masking	Hides private data on non-production database instances
Encryption	Scrambles data to prevent users without decryption authorization from reading secured data

The sets of data that a user can access via roles are defined in Oracle Fusion Data Security. Oracle Fusion Data Security integrates with Oracle Platform Security Services (OPSS) to entitle users or roles (which are stored externally) with access to data. Users are granted access through the entitlement assigned to the roles or role hierarchy with which the user is provisioned. Conditions are WHERE clauses that specify access within a particular dimension, such as by business unit to which the user is authorized.

Data Security Policies

Data security policies articulate the security requirement "Who can do What on Which set of data," where 'Which set of data' is an entire object or an object instance or object instance set and 'What' is the object entitlement.

For example, accounts payable managers can view AP disbursements for their business unit.

Who	can do	what	on which set of data
Accounts payable managers	view	AP disbursements	for their business unit

A data security policy is a statement in a natural language, such as English, that typically defines the grant by which a role secures business objects. The grant records the following.

- Table or view
- Entitlement (actions expressed by privileges)

- Instance set (data identified by the condition)

For example, disbursement is a business object that an accounts payable manager can manage by payment function for any employee expenses in the payment process.

Note

Some data security policies are not defined as grants but directly in applications code. The security reference manuals for Oracle Fusion Applications offerings differentiate between data security policies that define a grant and data security policies defined in Oracle Fusion applications code.

A business object participating in a data security policy is the database resource of the policy.

Data security policies that use job or duty roles refer to data security entitlement.

For example, the data security policy for the Accounts Payable Manager job role refers to the view action on AP disbursements as the data security entitlement.

Important

The duty roles inherited by the job role can be moved and job roles reassembled without having to modify the data security.

As a security guideline, data security policies based on user session context should entitle a duty role. This keeps both function and data security policies at the duty role level, thus reducing errors.

For example, a Sales Party Management Duty can update Sales Party where the provisioned user is a member of the territory associated with the sales account. Or the Sales Party Management Duty can update Sales Party where the provisioned user is in the management chain of a resource who is on the sales account team with edit access. Or the Participant Interaction Management Duty can view an Interaction where the provisioned user is a participant of the Interaction.

For example, the Disbursement Process Management Duty role includes entitlement to build documents payable into payments. The Accounts Payable Manager job role inherits the Disbursement Process Management Duty role. Data security policies for the Disbursement Process Management Duty role authorize access to data associated with business objects such as AP disbursements within a business unit. As a result, the user provisioned with the Accounts Payable Manager job role is authorized to view AP disbursements within their business unit.

A data security policy identifies the entitlement (the actions that can be made on logical business objects or dashboards), the roles that can perform those actions, and the conditions that limit access. Conditions are readable WHERE clauses. The WHERE clause is defined in the data as an instance set and this is then referenced on a grant that also records the table name and required entitlement.

Data Roles

Data roles are implemented as job roles for a defined set of data.

A data role defines a dimension of data within which a job is performed. The data role inherits the job role that describes the job. For example, a data role entitles a user to perform a job in a business unit.

The data role inherits abstract or job roles and is granted data security privileges. Data roles carry the function security privileges inherited from job roles and also the data security privilege granted on database objects and table rows.

For example, an accounts payables specialist in the US Business Unit may be assigned the data role Accounts Payables Specialist - US Business Unit. This data role inherits the job role Accounts Payables Specialist and grants access to transactions in the US Business Unit.

A data role may be granted entitlement over a set people.

For example, a Benefits Administrator A-E is allowed to administer benefits for all people that have a surname that begins with A-E.

Data roles are created using data role templates. You create and maintain data roles in the Authorization Policy Manager (APM). Use the Manage Data Roles and Security Profiles task to create and maintain HCM data roles in Oracle Fusion HCM.

HCM Security Profiles

HCM security profiles are used to secure HCM data, such as people and departments. You use HCM security profiles to generate grants for an enterprise role. The resulting data role with its role hierarchy and grants operates in the same way as any other data role.

For example, an HCM security profile identifies all employees in the Finance division.

Oracle Fusion Payroll uses HCM security profiles to secure project organizations. Applications outside of HCM can use the HCM Data Roles UI pages to give their roles access to HR people.

Masking and Encryption

Oracle Fusion Applications uses masking to protect sensitive data from view by unauthorized users. Encryption APIs mask sensitive fields in applications user interfaces. Additionally, Oracle Data Masking is available for masking data in non-production instances and Oracle Transparent Data Encryption is available for protecting data in transit or in backups independent of managing encryption keys.

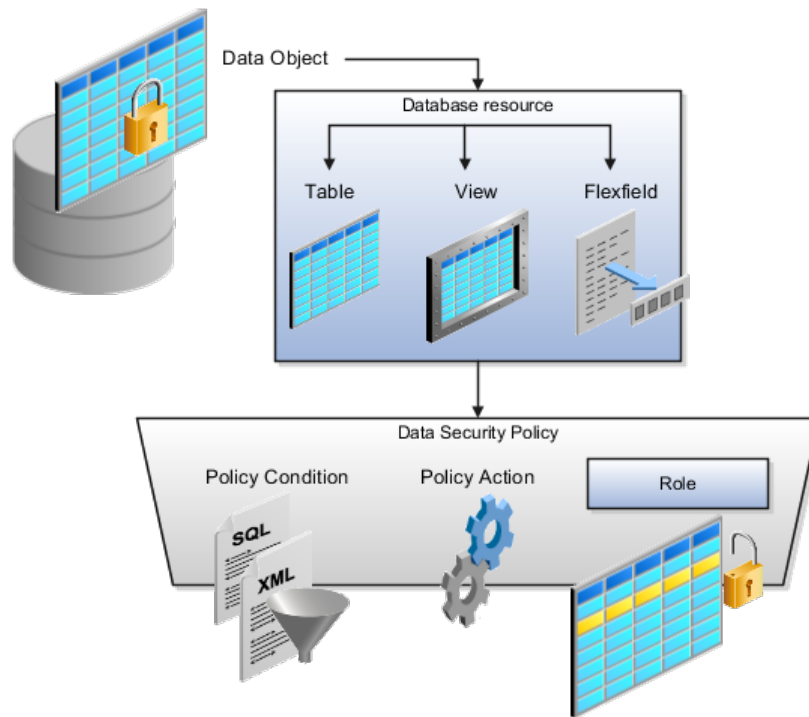
Database Resources and Data Security Policies: How They Work Together

A data security policy applies a condition and allowable actions to a database resource for a role. When that role is provisioned to a user, the user has access to data defined by the policy. In the case of the predefined security reference implementation, this role is always a duty role. Data roles generated to inherit

the job role based on data role templates limit access to database resources in a particular dimension, such as the US business unit.

The database resource defines and instance of a data object. The data object is a table, view, or flexfield.

The following figure shows the database resource definition as the means by which a data security policy secures a data object. The database resource names the data object. The data security policy grants to a role access to that database resource based on the policy's action and condition.



Database Resources

A database resource specifies access to a table, view, or flexfield that is secured by a data security policy.

- Name providing a means of identifying the database resource
- Data object to which the database resource points

Data Security Policies

Data security policies consist of actions and conditions for accessing all, some, or a single row of a database resource.

- Condition identifying the instance set of values in the data object
- Action specifying the type of access allowed on the available values

Note

If the data security policy needs to be less restrictive than any available database resource for a data object, define a new data security policy.

Actions

Actions correspond to privileges that entitle kinds of access to objects, such as view, edit, or delete. The actions allowed by a data security policy include all or a subset of the actions that exist for the database resource.

Conditions

A condition is either a SQL predicate or an XML filter. A condition expresses the values in the data object by a search operator or a relationship in a tree hierarchy. A SQL predicate, unlike an XML filter, is entered in a text field in the data security user interface pages and supports more complex filtering than an XML filter, such as nesting of conditions or sub queries. An XML filter, unlike a SQL predicate, is assembled from choices in the UI pages as an AND statement.

Tip

An XML filter can be effective in downstream processes such as business intelligence metrics. A SQL predicate cannot be used in downstream metrics.

Securing Data Access: Points to Consider

Oracle Fusion Applications supports securing data through role-based access control (RBAC) by the following methods.

Method of securing data	Reason	Example
Data roles apply explicit data security policies on job and abstract roles	Appropriate for job and abstract roles that should only access a subset of data, as defined by the data role template that generates the data role or by HCM security profiles.	Accounts Payable Manager - US data role to provide an accounts payable manager in the US business unit with access to invoices in the US business unit.
Data security policies	Define data access for application roles and provide inheriting job and abstract roles with implicit data security	Projects

If a user has access to the same function through different roles that access different data sets, then the user has access to a union of those data sets.

When a runtime session is created, Oracle Platform Security Services (OPSS) propagates only the necessary user to role mapping based on Oracle Fusion Data Security grants. A grant can specify entitlement to the following.

- Specific rows of data (data object) identified by primary key
- Groups of data (instance set) based on a predicate that names a particular parameter
- Data objects or instance sets based on runtime user session variables

Data is either identified by the primary key value of the row in the table where the data is stored. Or data is identified by a rule (SQL predicate) applied to the WHERE clause of a query against the table where the data is stored.

Grants

Oracle Fusion Data Security can be used to restrict the following.

- Rows that are returned by a given query based on the intended business operation
- Actions that are available for a given row

Grants control which data a user can access.

Note

Attribute level security using grants requires a data security policy to secure the attribute and the entitlement check enforces that policy.

A grant logically joins a user or role and an entitlement with a static or parameterized object instance set. For example, `REGION='WEST'` is a static object instance set and `REGION=&GRANT_ALIAS.PARAMETER1` is a parameterized object instance set. In the context of a specific object instance, grants specify the allowable actions on the set of accessible object instances. In the database, grants are stored in `FND_GRANTS` and object instance sets are stored in `FND_OBJECT_INSTANCE_SETS`. Object access can be tested using the privilege check application programming interface (API).

Securing a Business Object

A business object is a logical entity that is typically implemented as a table or view, and corresponds to a physical database resource. The data security policies of the security reference implementation secure predefined database resources. Use the Manage Data Security Policies task to define and register other database resources.

Data security policies identify sets of data on the registered business object and the actions that may be performed on the business object by a role. The grant can be made by data instance, instance set or at a global level..

Note

Use parameterized object instance sets whenever feasible to reduce the number of predicates the database parses and the number of administrative intervention required as static object instances sets become obsolete. In HCM, security profiles generate the instance sets.

Data Role Templates: Explained

You use data role templates to generate data roles. You generate such data roles, and create and maintain data role templates in the Authorization Policy Manager (APM).

Note

HCM data roles are generated using the Manage Data Roles and Security Profiles task, which uses HCM security profiles, not data role templates, to define the data security condition.

The following attributes define a data role template.

- Template name
- Template description
- Template group ID
- Base roles
- Data dimension
- Data role naming rule
- Data security policies

The data role template specifies which base roles to combine with which dimension values for a set of data security policies. The base roles are the parent job or abstract roles of the data roles.

Note

Abstract, job, and data roles are enterprise roles in Oracle Fusion Applications. Oracle Fusion Middleware products such as Oracle Identity Manager (OIM) and Authorization Policy Manager (APM) refer to enterprise roles as external roles. Duty roles are implemented as application roles in APM and scoped to individual Oracle Fusion Applications.

The dimension expresses stripes of data, such as territorial or geographic information you use to partition enterprise data. For example, business units are a type of dimension, and the values picked up for that dimension by the data role template as it creates data roles are the business units defined for your enterprise. The data role template constrains the generated data roles with grants of entitlement to access specific data resources with particular actions. The data role provides provisioned users with access to a dimensional subset of the data granted by a data security policy.

An example of a dimension is a business unit. An example of a dimension value is a specific business unit defined in your enterprise, such as US. An example of a data security policy is a grant to access a business object such as an invoice with a view entitlement.

When you generate data roles, the template applies the values of the dimension and participant data security policies to the group of base roles.

The template generates the data roles using a naming convention specified by the template's naming rule. The generated data roles are stored in the Lightweight Directory Access Protocol (LDAP) store. Once a data role is generated, you provision it to users. A user provisioned with a data role is granted permission to access the data defined by the dimension and data security grant policies of the data role template.

For example, a data role template contains an Accounts Payable Specialist role and an Accounts Payable Manager role as its base roles, and region as its dimension, with the dimension values US and UK. The naming convention is [base-role-name]:[DIMENSION-CODE-NAME]. This data role template generates four data roles.

- Accounts Payable Specialist - US (business unit)
- Accounts Payable Specialist - UK (business unit)
- Accounts Payable Manager - US (business unit)
- Accounts Payable Manager - UK (business unit)

Making Changes To Data Role Templates

If you add a base role to an existing data role template, you can generate a new set of data roles. If the naming rule is unchanged, existing data roles are overwritten.

If you remove a base role from a data role template and regenerate data roles, a resulting invalid role list gives you the option to delete or disable the data roles that would be changed by that removal.

Making Changes to Dimension Values

If you add a dimension value to your enterprise that is used by a data role template, you must regenerate roles from that data role template to create a data role for the new dimension. For example if you add a business unit to your enterprise, you must regenerate data roles from the data role templates that include business unit as a dimension.

If you add or remove a dimension value from your enterprise that is used to generate data roles, regenerating the set of data roles adds or removes the data roles for those dimension values. If your enterprise has scheduled regeneration as an Oracle Enterprise Scheduler Services process, the changes are made automatically.

For information on working with data role templates, see the Oracle Fusion Middleware Administrator's Guide for Authorization Policy Manager (Oracle Fusion Applications Edition).

Define Document Sequences

Document Sequences: Explained

In Oracle Fusion Applications, each business document or business event is uniquely identified by a document sequence number that you assign to it. However, the document sequencing feature must be turned on (enabled) on the business document or event to allow the assignment. For example, if document sequencing is enabled, you can assign a document sequence number

to an invoice that gets generated in response to a purchase order. You can use document sequences as a proof to track successfully executed transactions as well as failed transactions. Additionally, a document sequence helps in generating an audit trail, which can be used to identify how a particular transaction passed through various applications.

Document sequencing can be managed automatically, manually, and gaplessly.

Note

Plan your document sequencing carefully before you use the options available in the application to apply sequence numbers. Avoid changes to the options after you saved your work on the Manage Document Sequences and Manage Document Sequence Categories pages.

Automatic Sequencing

Automatic document sequencing assigns a unique number to each document as it is generated, and this unique number is stored in the database. The numbering is sequential by date and time of creation. If you define a sequence to automatically number documents, you can provide an initial value to begin the sequence. In absence of a custom value, the default value 1 is used.

Manual Sequencing

Manual sequencing requires you to assign a unique number to each document before it is generated. In manual sequencing, the numerical ordering and completeness of a transaction is not enforced. Users can skip or omit numbers when entering the sequence value. However, each time that a number is assigned, the application validates its uniqueness.

Gapless Sequencing

Gapless sequencing is similar to automatic sequencing. It automatically generates a unique number for each document, but does that only for successfully generated documents. As a result, the sequence is maintained for all the documents that are generated, and no sequence numbers are lost due to incomplete or failed document generation.

Important

Use this type of sequencing only if necessary because it may affect the performance of the system and slow down transaction processing.

Sequential Numbering Enforced Profile Options

The Sequential Numbering Enforced profile validates the documents being created and applies the relevant document sequence, based on the selected option. The following options are available:

- **Always Used:** Sequential numbering is enforced for all document categories. When this option is set, users cannot create a document if its document category is not assigned any active document sequence. The system displays an error.
- **Partially Used:** Sequential numbering is enforced for all document categories. However, if no sequence is available for the document, the

system displays a warning. Users can either proceed without a document sequence or create and assign a document sequence before proceeding.

- **Not Used:** Sequential numbering is not enforced. In this mode, although the documents created do not require a document sequence to be assigned, the system checks for the uniqueness of the document number provided. The system does not display any warning or error.

Restriction

At the site level, the profile is by default set to Partially Used. Avoid changing this option as doing so may interfere with the validation logic and the data that was stored using the earlier option may not appear. However, you can change the option at the product or user level.

Document Sequence Categories: Explained

A document sequence category is a set of documents that share similar characteristics and that are formed into a logical group. Document sequence categories simplify the task of assigning number sequences to specific documents. Instead of assigning a number to each document, you assign a document sequence to one or more document sequence categories. The document sequence category automatically takes care of numbering the documents.

A document sequence category identifies the database table that stores documents resulting from transactions that your users enter. When you assign a sequence to a category, the sequence numbers the documents that are stored in a particular table. You must create document sequence categories to be able to manage the task of assigning document sequences.

Restriction

Once a document sequence category is created, you cannot change the application, the category code, or the table name. Therefore, carefully consider these details and plan your document sequencing requirement before you begin working with the application.

Once you create a document sequence category, it is available for use under the **Document Sequences: Assignments** section on the Manage Document Sequences page. The **Category** field contains the name of the document sequence category. After you create a document sequence, you can assign it to a document sequence category.

Document Sequences: Points to Consider

Sequencing documents is an important business and legal requirement. Certain aspects of the defining process are permanent and cannot be modified later. Therefore, it is important that you first decide the appropriate document sequence to use for a set of documents. You must also decide beforehand the type of document sequencing, because you are not allowed to switch to other types once a sequence is assigned to a document sequence category. Make a

note of the details such as the document sequence and document sequence category so that you can refer to them at a later point in time. Also note if there are any restrictions or configuration prerequisites before you define document sequencing.

Note

Products that implement document sequencing have specifications about its usage. Refer to the corresponding product documentation for specific details and also to determine if there are any restrictions or configuration prerequisites.

Creating and Editing Document Sequences

You can create document sequences that are automatic, manual, or gapless, depending on the business or legal requirement. By default, the current date is considered as the start date. If the end date is left blank, it means that the sequence definition never expires. Among the several options used in creating and editing document sequences, the following options are functionally more important and therefore need to be carefully determined:

- **Determinant Type:** Select to limit the document sequencing activity to certain documents that belong to a specific business entity, such as Ledger, Tax Registration, and so on.
- **Initial Value:** Enter a value for the first document in your sequence. This field applies only to sequences with automatic or gapless numbering types. Sequence numbers should not be greater than eight digits. If you leave this field blank, the first document is automatically assigned a value of 1. Once a document sequence is defined, you cannot change this initial value.

Creating and Editing Document Sequence Categories

Document sequence categories are defined to make it easy to assign document sequence definitions to a group of documents instead of to individual documents. Each document sequence category is mapped to a specific table, where the documents belonging to that category are stored. The table must already be enabled for document sequencing. When specifying the table, you must consider the following points:

- When the sequential numbering feature checks for completeness or generates a report, it locates the category's documents in the table.
- You can select only tables belonging to the application associated with the category.
- Once a category is defined, you cannot change the choice of table.

Assigning Document Sequences

Identify the documents to be numbered before assigning them a document sequence. For each document sequence, there can be only one active assignment to a document sequence category, a method code, and a determinant value (if applicable). As part of the assignment, specify whether the document is created automatically (for example, due to a batch process, or manually through a

form). If you do not specify an end date, the assignment continues to remain active throughout the process cycle. If a determinant type was specified for the document sequence, then enter a specific determinant value related to the selected determinant type.

At runtime, when users create documents, the document sequence to be assigned is determined by finding the active assignment that matches the correct combination of category, numbering method, and the date range containing the transaction date.

Auditing Document Sequences

You can audit document sequences, if required, to provide an audit trail of the document sequences used in a specific product. However, before enabling the audit functionality for a document sequence, you must have created an audit table for the specific document sequence, using appropriate details. Enabling the audit functionality is permitted only for newly created document sequences. You cannot audit document sequences that are already in use by a specific product.

For more information about defining a document sequence audit table, see the Oracle Fusion Applications Developer's Guide.

Define Trees

Trees: Overview

Use the tree management feature in Oracle Fusion applications to organize data into hierarchies. A hierarchy contains organized data and enables the creation of groups and rollups of information that exist within an organization. Trees are hierarchical structures that enable several data management functions such as better access control, application of business rules at various levels of hierarchies, improved query performance, and so on.

For example, XYZ Corporation has two departments: Marketing and Finance. The Finance department has two functional divisions: Receivables and Payables. Defining a tree for the XYZ Corporation establishes a hierarchy between the organization and its departments, and between the departments and their respective functional divisions. Such a hierarchical modeling of organizational data could be used for executing several data management functions within that organization.

You can create one or more versions of trees, and they can be labeled for better accessibility and information retrieval. You can create trees for multiple data sources, which allow the trees to be shared across Oracle Fusion applications.

Tree Structures

A tree structure is a representation of the data hierarchy, and guides the creation of a tree. A tree is an instance of the hierarchy as defined in the tree structure. Tree structures enable you to enforce business rules to which the data must adhere.

The root node is the topmost node of a tree. Child nodes report to the root node. Child nodes at the same level, which report to a common parent node, are called

siblings. Leaves are details branching off from a node but not extending further down the tree hierarchy.

Tree Versions

A tree is created having only one version. However, users can create more than one tree version depending on the need, and they can make changes to those versions. Depending on varying requirements, users can create one or more tree versions and publish all of them or some of them by making the versions active at the same time. Similar to any other version control system, versions of trees are maintained to keep track of all the changes that a tree undergoes in its life cycle.

Tree Labels

Tree labels are short names associated with trees and tree structures and point directly to the data source. Tree labels are automatically assigned to the tree nodes. You can store labels in any table and register the label data source with the tree structure.

Manage Tree Structures

Tree Structures: Explained

A tree structure defines the hierarchy for creating trees and prescribes rules based on which trees are created, versioned, and accessed. You can associate multiple data sources with a tree structure. A tree is an instance of this hierarchy. Every tree structure can contain one or more trees.

You can create tree structures specific to an application but you can share tree structures across applications. If you apply version control to the tree structure, it is carried over to the trees that are based on the tree structure. Each tree version contains at least one root node. Occasionally, a tree version may have more than one root node.

An administrator controls the access to tree structures through a set of rules that are periodically audited for validity.

Tree Structure Definition: Points to Consider

Defining a tree structure involves specifying several important pieces of information on the **Create Tree Structure: Specify Definition** page.

Tree Node Selection

The **Tree Node** table displays data in nodes that exist in the data hierarchy. You must select the correct and most appropriate tree node table to be able to define the tree structure, based on the tree hierarchy you want to establish. This selection also affects the level of security that is set on a tree node and its child entities.

Tree Sharing Mode

The following options are used to determine the mode of sharing a tree structure across the applications.

- Open: Indicates that the tree is associated with all reference data sets.
- Set ID: Indicates that the tree will be associated with a specific reference data set.

Creation Mode

Indicates the source where the tree structure is being defined. For predefined tree structures select Oracle and for custom structures, select Customers.

Customization

You can customize the predefined tree structures as well as the ones that you created. However, customizing the predefined tree structures involves certain level of access restrictions, and will be limited to specific tree nodes and downwards in hierarchy.

Multiple Tree Versions

One or more trees and tree versions can be based on a tree structure. A tree structure can have one or more trees and tree versions based on it. Usually, only one active version is permitted at any given point of time. However, depending on the requirement, you can allow two or more tree versions to be in the active state for the same date range. This flexibility allows you to choose the tree version that you want to implement.

Managing Tree Structures: Points to Consider

You can create, edit, and delete tree structures depending upon the requirement. You can also audit and change the status a tree structure.

Creating and Editing Tree Structures

You can create trees on the basis of a tree structure. When you edit an active tree structure, the status of the tree structure and all associated trees and their versions change to draft. To reuse a tree structure, you can create a copy of it without copying the associated trees and tree versions. If you delete a tree structure, all the associated trees and tree versions are automatically deleted.

Note

For specific information on working with the predefined tree structures that exist in an Oracle Fusion application, refer to the specific product documentation.

Setting Status

If you change the status of a tree structure, the status of the trees and tree versions associated with that tree structure also changes.

The following table lists the different statuses of a tree structure.

Status	Meaning
Draft	Yet to be published or is in a modified state.

Active	In use and based on which one or more trees or tree versions are created.
Inactive	Not in use.

Tree Structure Audit Results: Explained

Use the tree structure audit results to verify the tree structure's correctness and data integrity. The audit results include the following details:

- The name of the validator, which is a specific validation check
- The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors

Running an Audit

Setting the status of a tree structure to active automatically triggers an audit of that tree structure. You can also manually trigger an audit on the manage Tree Structures page, using **Actions - Audit**. The Tree Structure Audit Result table shows a list of validations that ran against the selected tree structure.

Validation Details

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.

Validator	Description (what is checked)	Possible Cause for Validation Failure	Suggested Corrective Action
Restrict By Set ID	On the Manage Tree Structures: Specify Data Sources page, if the Set ID check box is selected to enable the Restrict Tree Node List of Values Based on option for a tree structure, each of its data source view objects must have a reference data set attribute. This validation does not take place when the check box is not selected.	Even when the check box is selected, one or more of its data source view objects does not contain a reference data set attribute.	If reference data set restriction is required for this tree structure, include a reference data set attribute on all data sources. Otherwise, deselect the check box.
Row Flattened Table Name	On the Manage Tree Structures: Specify Performance Options page, a valid row flattened table must be specified for the tree structure. It can either be the standard row flattened table <code>FND_TREE_NODE_RF</code> or a custom table.	<ul style="list-style-type: none"> • The specified table does not exist in the database. • The specified table does not contain the same columns as the <code>FND_TREE_NODE_RF</code> table. 	Correct the row flattened table definition.

Available Label Data Sources	<p>On the Manage Tree Structures: Specify Data Sources page, if a labeling scheme is specified for the tree structure by selecting a list item from the Labeling Scheme list box, the label data source view object specified for each data source must be accessible, and the primary keys must be valid. This restriction does not apply when you select None from the Labeling Scheme list box.</p>	<ul style="list-style-type: none"> Any of the specified label data source view objects do not exist. Any of the specified label data source view objects do not have primary keys. When a label data source view object is initially defined, the database registers the primary keys for the view object. If the view object is later modified such that its primary keys no longer match the primary keys that were registered earlier, this validation fails. 	<ul style="list-style-type: none"> Correct the specified label data source view object. Correct the primary keys of the specified label data source view object. Either correct the primary keys in the label data source view object to match the primary keys that were earlier registered in <code>FND_TS_DATA_SOURCE</code>, or correct the primary keys registered in that table to match the new view object definition.
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Available Data Sources	Each data source view object specified for the tree structure must be accessible, and all its primary key attributes must be valid.	<ul style="list-style-type: none"> Any of the specified data source view objects do not exist. When a data source view object is initially defined, the database automatically registers the primary keys for the view object if the Use non-defined primary key columns check box on the Data Source dialog box is not selected. If the check box is selected, the database registers the primary keys specified explicitly by the user on the Add Data Source dialog box. If the registered primary keys contain any duplicates, this validation fails. The Use non defined primary key columns check box is selected in a data source, but the list of specified primary key columns does not match the primary keys defined in the corresponding data source view object. Any common attribute that exists in both the data source view object and the tree node view object is not of the same data type in both view objects. 	<ul style="list-style-type: none"> Correct the specified data source view object. Correct the duplicate column in the registered primary keys. Correct the primary keys of the specified data source view object. Correct any mismatch in data types.
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Column Flattened Table Name	On the Manage Tree Structures: Specify Performance Options page, a valid column flattened table must be specified for the tree structure. It can either be the standard row flattened table <code>FND_TREE_NODE_CF</code> or a custom table.	<ul style="list-style-type: none"> The specified table does not exist in the database. The specified table does not contain the same columns as the <code>FND_TREE_NODE_CF</code> table. 	Correct the column flattened table definition.
Restrict by Date	On the Manage Tree Structures: Specify Data Sources page, if the Date Range check box is selected to enable the Restrict Tree Node List of Values Based on option for a tree structure, each of its data source view objects must have effective start date and effective end date attributes. This validation does not take place when the check box is not selected.	Even when the check box is selected, one or more of its data source view objects does not contain effective start date and effective end date attributes.	If the date restriction is required for this tree structure, include the effective start date and effective end date attributes on all data sources. Otherwise, deselect the check box.
Tree Node Table Name	On the Manage Tree Structures: Specify Definition page, a valid tree node table must be specified for the tree structure. It can either be the standard row flattened table <code>FND_TREE_NODE</code> or a custom table.	<ul style="list-style-type: none"> No table is specified in the Tree Node Table field. The specified table does not exist in the database. The specified table does not contain the same columns as the <code>FND_TREE_NODE</code> table. 	Correct the tree node table definition.
Allow Node Level Security	If the Allow Node Level Security option is set to No for the tree structure, the same option cannot be set to Yes on any of its data sources. This is a database setting that is not visible on the Manage Tree Structures page.	The option is set to No for the tree structure but one or more associated data sources have that option set to Yes.	Correct the option setting in the tree structure and their data sources.

Specifying Data Sources for Tree Structures: Points to Consider

The data sources provide the items for establishing hierarchy in a tree structure. In the tree management infrastructure, these data sources are Oracle Application

Development Framework (ADF) business components view objects, which are defined by application development.

Labeling Schemes

Selecting a labeling scheme determines how the tree nodes are labeled. You may select a labeling scheme to assign at the data source level, at the parent node level, or keep it open for customer assignment. You may also choose not to have any labeling scheme. However, if you decide to use any of the labeling schemes, you may need to select the following additional options, to restrict the list of values that appear under the selected tree node.

- **Allow Ragged Nodes:** To include nodes that have no child nodes, and are shorter than the remaining nodes in the entire hierarchy.
- **Allow Skip Level Nodes:** To include nodes that are at the same level but have parent nodes at different levels.

Restriction of Tree Node Values

You can decide the depth of the tree structure by selecting an appropriate value from the list. Keeping the depth limit open renders an infinite list of values. Using the following options, you can restrict the list of values that appear for selection under a specific tree node.

- **Date Range:** Specifies whether a selection of nodes should be restricted to the same date range as the tree version.
- **Allow Multiple Root Nodes:** Allows you to add multiple root nodes when creating a tree version.
- **Reference Data Set:** Specifies whether a selection of nodes should be restricted to the same set as the tree.

Data Source Values and Parameters

Tree data sources have optional data source parameters with defined view criteria and associated bind variables. You can specify view criteria as a data source parameter when creating a tree structure, and edit the parameters when creating a tree. Multiple data sources can be associated with a tree structure and can have well-defined relationships among them.

Note

Parameter values customized at the tree level override the default values specified at the tree-structure level.

The data source parameters are applied to any tree version belonging to that data source, when performing node operations on the tree nodes. Data source parameters also provide an additional level of filtering for different tree structures. The tree structure definition supports three data source parameter types.

- **Bound Value:** Captures any fixed value, which is used as part of the view criteria condition.
- **Variable:** Captures and binds a dynamic value that is being used by the data source view object. This value is used by the WHERE condition of the data flow.
- **View Criteria:** Captures the view criteria name, which is applied to the data source view object.

You can also specify which of the data source parameters are mandatory while creating or editing the tree structure.

View objects from the ADF business components are used as data sources. To associate the view object with the tree structure, you can pick the code from ADF business component view objects and provide the fully qualified name of the view object, for example, `oracle.apps.fnd.applcore.trees.model.view.FndLabelVO`.

Specifying Performance Options for a Tree Structure: Points to Consider

Tree structures are heavily loaded with data. As a tree management guideline, use the following settings to improve performance of data rendering and retrieval.

- Row Flattening
- Column Flattening
- Column Flattened Entity Objects
- ADF Business Component View Objects

Row Flattening

Row flattening optimizes parent-child information for run-time performance by storing additional rows in a table for instantly finding all descendants of a parent without initiating a CONNECT BY query. Row flattening eliminates recursive queries, which allows operations to perform across an entire subtree more efficiently.

To store row flattened data for the specific tree structure, users can either use the central `FND_TREE_NODE_RF` table or they can register their own row flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales Division), and Sales Division is the parent of Region (Sales Division-Region), a row-flattened table contains an additional row with Corporation directly being the parent of Region (Corporation-Region).

Column Flattening

Column flattening optimizes parent-child information for run-time performance by storing an additional column in a table for all parents of a child.

To store column flattened data for the specific tree structure, users can either use the central `FND_TREE_NODE_CF` table or they can register their own column flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales Division), and Sales Division is the parent of Region (Sales Division-Region), a flattened table in addition to these columns, contains three new columns: Region, Sales Division, and Corporation. Although positioned next to each other, the column Region functions at the lower level and Corporation at the higher level, retaining the data hierarchy.

Column Flattened Entity Objects

In the absence of a column-flattened table, if you need to generate the business component view objects for your tree structure for the flattened table, use the tree management infrastructure to correctly provide the fully qualified name of the entity object for the column flattened table.

ADF Business Component View Objects

View objects from the ADF business components can also be used as data sources, eliminating the need to create new types of data sources. This field is to store the fully qualified name for the business component view object generated by the tree management for business intelligence reporting and usage. The business component view object is a combination of the tree data source and column flattened entity. Using this option prevents data redundancy and promotes greater reuse of existing data, thereby improving the performance of the tree structure.

Manage Tree Labels

Tree Labels: Explained

Tree labels are tags that are stored on tree nodes. You can store labels in any table and register the label data source with the tree structure. When a labeling scheme is used for trees, the selected labels are stored in the tree label entity and each tree node contains a reference to a tree label in the labeling scheme.

The following table lists the three ways in which tree labels are assigned to the tree nodes.

Labeling Scheme	Description
Level	Labels that are automatically assigned based on the data source to which the tree node belongs. A level label points to a specific data source. For example, in a tree that reflects the organizational hierarchy of an enterprise, all division nodes appear on one level and all department nodes on another.
Group	Labels that you can arbitrarily assign to tree nodes.
Depth	Labels that are automatically assigned based on the depth of the tree node within the tree. No manual assignment is performed. Note In an unbalanced hierarchy, a level may not be equal to depth.

Manage Trees and Tree Versions

Managing Trees and Tree Versions: Points to Consider

You can create and edit trees and tree versions depending upon the requirement. A tree can have one or more tree versions. Typically, when changes are made to an existing tree, a new version is created and published.

Creating and Editing Trees

Trees are created based on the structure defined in the tree structure. You can create trees, modify existing trees, and delete trees. If you want to copy an existing tree, you can duplicate it. However, only the tree is duplicated and not its versions.

Creating a tree involves specifying the tree definition and specifying the labels that are used on its nodes. If the selected tree structure has data sources and parameters defined for it, they appear on the page allowing you to edit the parameter values at the tree node level.

Note

Parameter values customized at the tree level will override the default values specified at the tree-structure level.

Creating and Editing Tree Versions

Tree versions are created at the time of creating trees. A tree must contain a version.

Editing an existing tree provides you the choice to update the existing version. You can also edit the existing version that lies nested under the tree in the search results.

When you edit a tree version bearing Active status, the status changes to Draft until the modifications are saved or cancelled.

Tree Version Audit Results: Explained

Use the tree version audit results to verify the tree version's correctness and data integrity. The audit results include the following details:

- The name of the validator, which is a specific validation check
- The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors

Running an Audit

An audit automatically runs whenever a tree version is set to active. You can also manually trigger an audit on the Manage Trees and Tree Versions page, using **Actions - Audit**. The Tree Version Audit Result table shows a list of validations that ran against the selected tree version.

Validation Details

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.

Validator	Description (what is checked)	Possible Cause for Validation Failure	Suggested Corrective Action
Effective Date	The effective start and end dates of the tree version must be valid.	The effective end date is set to a value that is not greater than the effective start date.	Modify the effective start and end dates such that the effective start date is earlier than the effective end date.
Root Node	On the Manage Tree Structures: Specify Data Sources page, if the Allow Multiple Root Nodes check box for the Restrict Tree Node List of Values Based on option is not selected, and if the tree structure is not empty, the tree version must contain exactly one root node. This validation does not take place if the check box is selected.	Even if the check box is deselected, the tree version has multiple root nodes.	Modify the tree version such that there is exactly one root node.
Data Source Max Depth	For each data source in the tree structure, on the Data Source dialog box, if the data source is depth-limited, the data in the tree version must adhere to the specified depth limit. This validation does not apply to data sources for which the Maximum Depth field is set to Unlimited .	The tree version has data at a depth greater than the specified depth limit on one or more data sources.	Modify the tree version such that all nodes are at a depth that complies with the data source depth limit.
Duplicate Node	On the Data Source dialog box, if the Allow Duplicates check box is not selected, the tree version should not contain more than one node with the same primary key from the data source. If the check box is selected, duplicate nodes are permitted.	Even when the check box is deselected, the tree version contains duplicate nodes.	Remove any duplicate nodes from the tree version.

Available Node	All nodes in the tree version should be valid and available in the underlying data source.	<ul style="list-style-type: none"> A node in the tree version does not exist in the data source. Deleting data items from the data source without removing the corresponding nodes from the tree version can result in orphaned nodes in the tree version. For example, if you added node A into your tree version, and subsequently deleted node A from the data source without removing it from the tree version, the validation fails. The tree version contains a tree reference node, which references another tree version that does not exist. 	Remove any orphaned nodes from the tree version. Update tree reference nodes so that they reference existing tree versions.
Node Relationship	All nodes must adhere to the relationships mandated by the data sources registered in the tree structure.	The tree structure has data sources arranged in a parent-child relationship, but the nodes in the tree do not adhere to the same parent-child relationship. For example, if the tree structure has a Project data source with a Task data source as its child, Task nodes should always be under Project nodes in the tree version. This validation fails if there are instances where a Project node is added as the child of a Task node.	Modify the tree version such that the nodes adhere to the same parent-child relationships as the data sources.

SetID Restricted Node	On the Manage Tree Structures: Specify Data sources page, if the Set ID check box is selected to enable the Restrict Tree Node List of Values Based on option for each tree node, the underlying node in the data source must belong to the same reference data set as the tree itself. This restriction does not apply when the check box is not selected.	Even when the check box is selected, the tree version has nodes whose data source values belong to a different reference data set than the tree.	Modify the tree version such that all nodes in the tree have data sources with reference data set matching that of the tree.
Label Enabled Node	On the Manage Tree Structures: Specify Data Sources page, if a labeling scheme is specified for the tree structure by selecting a list item from the Labeling Scheme list box, all nodes should have labels. This restriction does not apply when you select None from the Labeling Scheme list box.	The tree structure has a labeling scheme but the tree version has nodes without labels.	Assign a label to any node that does not have a label.

Date Restricted Node	On the Manage Tree Structures: Specify Data Sources page, if the Date Range check box is selected to enable the Restrict Tree Node List of Values Based on option for a tree structure, each node in the underlying data source must have an effective date range same as the effective date range of the tree version. This restriction does not apply if the check box is not selected.	Even when the check box is selected, there are data source nodes that have a date range beyond the tree version's effective date range. For example, if the tree version is effective from Jan-01-2012 to Dec-31-2012, all nodes in the tree version must be effective from Jan-01-2012 to Dec-31-2012 at a minimum. It is acceptable for the nodes to be effective for a date range that extends partly beyond the tree version's effective date range (for example, the node data source value is effective from Dec-01-2011 to Mar-31-2013). It is not acceptable if the nodes are effective for none or only a part of the tree version's effective date range (for example, the node data source value are effective only from Jan-01-2012 to June-30-2012).	Ensure that all nodes in the tree version have effective date range for the effective date range for the tree version.
Multiple Active Tree Version	On the Manage Tree Structures: Specify Definition page, if the Allow Multiple Active Tree Versions check box is not selected for the tree structure, there should not be more than one active tree version under a tree at any time. This restriction does not apply if the check box is selected.	Even when the check box is not selected, there is more than one active tree version in the tree for the same date range.	Set no more than one tree version to Active within the same date range and set the others to inactive or draft status.
Range Based Node	On the Data Source dialog box, if the Allow Range Children check box is not selected, range-based nodes are not permitted from that data source. This restriction does not apply if the check box is selected.	Even when the check box is not selected, there are range-based nodes from a data source.	Ensure that any range nodes in your tree version are from a data source that allows range children.

Terminal Node	On the Data Source dialog box, if the Allow Use as Leaves check box is not selected, values from that data source cannot be added as leaves (terminal nodes) to the tree version. This restriction does not apply if the check box is selected.	Even when the check box is not selected, values from a data source are added as leaf nodes (terminal nodes).	Modify the tree version such that all terminal nodes are from data sources for which this check box is selected.
Usage Limit	On the Data Source dialog box, if the Use All Values option is selected to set the Usage Limit for the data source, every value in the data source must appear as a node in the tree. This restriction does not apply if None option is selected.	Even if the Use All Values option is selected, there are values in the data source that are not in the tree version.	For each data source value that is not yet available, add nodes to the tree version.

Trees and Data Sources: How They Work Together

Data sources form the foundation for tree management in Oracle Fusion Applications. Tree structures, trees, and tree versions establish direct and real-time connectivity with the data sources. Changes to the data sources immediately reflect on the **Manage Trees and Tree Versions** page and wherever the trees are being used.

Metadata

Tree structures contain the metadata of the actual data that is used in Oracle Fusion Applications. Tree structures contain the core business logic that is manifested in trees and tree versions.

Data Storage

Trees and tree versions are built upon the tree structures. They employ the business rules defined in the tree structures and allow an application to select and enable a subset of trees to fulfill a specific purpose in that application.

Access Control

Source data is mapped to tree nodes at different levels in the database. Therefore, changes you make to the tree nodes affect the source data. Access control set on trees prevents unwanted data modifications in the database. Access control can be applied to the tree nodes or anywhere in the tree hierarchy.

Adding Tree Nodes: Points to Consider

Tree nodes are points of data convergence that serve as the building blocks of a tree structure. Technically, the node may be stored either in a product-specific table or in an entity that has been established by tree management as the default

storage mechanism. However, since all data in Oracle Fusion Applications usually have a storage home, only user-created data needs to be stored in an entity.

Nodes are attached to tree versions. Whenever you create or edit a tree version, you need to specify its tree node.

Managing Tree Nodes

You can create, modify, or delete tree nodes on the **Tree Version: Specify Nodes** page. To add a tree node, ensure that the tree structure with which the tree version is associated is mapped to a valid data source. You can also duplicate a tree node if the multiple root node feature is enabled.

Node Levels

In most trees, all nodes at the same level represent the same kind of information. For example, in a tree that reflects the organizational hierarchy, all division nodes appear on one level and all department nodes on another. Similarly, in a tree that organizes a user's product catalog, the nodes representing individual products might appear on one level and the nodes representing product lines on the next higher level.

When levels are not used, the nodes in the tree have no real hierarchy or reporting structure but do form a logical summarization structure. Strictly enforced levels mean that the named levels describe each node's position in the tree. This is natural for most hierarchies. Loosely enforced levels mean that the nodes at the same visual level of indentation do not all represent the same kind of information, or nodes representing the same kind of information appear at multiple levels. With loosely enforced levels, users assign a level to each node individually. The level is not tied to a particular visual position.

Node Types

A tree node has the following node types.

- **Single:** Indicates that the node is a value by itself.
- **Range:** Indicates that the node represents a range of values and possibly could have many children. For example, a tree node representing account numbers 10000 to 99999.
- **Referenced Tree:** Indicates that the tree node is actually another version for the tree based on the same tree structure, which is not physically stored in the same tree. For example, a geographic hierarchy for the United States can be referenced in a World geographic hierarchy.

Define Profile Options

Profile Options: Explained

Profile options manage configuration data centrally and influence the behavior of applications. Profile options serve as permanent user preferences and

application configuration parameters. You configure profile options with settings for specific contexts or groups of users. Users customize how their user interfaces look and behave by changing the values of available profile options.

Profile options store the following kinds of information.

Type of Information	Profile Option Example
User preferences	Settings to provide access to social networking features
Installation information	Setting to identify the location of a portal
Configuration choices	Settings to change user interface skins and behaviors
Processing options	Settings to affect how much information to log either for an entire site or a specific user

You can add and configure new profile options in addition to configuring predefined profile options that are implemented as updateable.

Profile Option Definition and Configuration

Application developers add new profile options and configure ones that are not to be updated by other users. Application administrators and implementation consultants configure profile options with profile option values that are implemented as updatable.

Profile option definitions consist of the following.

- Profile option name
- Application and module in the application taxonomy
- Profile option values
- Profile options categories
- Profile option levels
- Profile option level hierarchy

Profile options can appear on any user interface page without indication that a profile option is what is being set.

Profile Option Values

Some profile options have predefined profile option values.

The Manage Profile Option Values task flow allows an administrator to set updatable profile option values at the available levels, including the user level. You can access the Manage Profile Option Values task starting in the Setup and Maintenance Overview page and searching for profile option tasks.

You can set profile option values at different levels: site, product, and user. The following table provides examples.

Profile Option Level	Value of the Profile Option Level	Profile Option Value	Effect
User	Manager1	UK pound sterling	Access to site and all products shows UK pounds sterling in effect
User	Manager2	US dollar	Access to site and all products shows US dollars in effect
Product	Financials for EMEA	Euro	Unless superseded by a user level value, Euros in effect for Financials for EMEA applications
Site	Site	UK pound sterling	UK pounds sterling in effect for all other users and products

Context such as user session or accessed product determines which profile option value is associated with the profile option name. In the example, if manager1 does not set a profile option value for this profile option, access to Financials for EMEA shows currency in Euros; and access to other products shows currency in UK pounds sterling.

Profile Option Categories

Categories group profile options based on their functional area. Profile option categories facilitate searching and defining data security.

For example, in Oracle Fusion Receivables, the Transactions profile option category groups profile options related to setting how Receivables transactions are to be processed, such as Require Adjustment Reason.

A profile option can be in more than one category.

Profile Option Hierarchies and Levels

Application developers specify at which hierarchy level a profile option is enabled. The predefined profile option hierarchy levels are site, product, and user.

The hierarchy levels specified in the profile option definition determine the context in which a profile option value may be set. If the profile option value at a particular level is updatable, an administrator can update the profile option value for that context.

Note

Profile options should only be enabled for context levels that are appropriate for that profile option. For example, a profile option indicating a global configuration setting should not be enabled at the user level, if users cannot choose a different value for that setting.

For security, one level in the hierarchy is designated as a user level. A profile option may be enabled at any or all hierarchy levels. When enabled at all levels,

the predefined ordering of profile option hierarchy levels gives precedence to the values that are set at the user level over values set at the product and site levels, and precedence to values set at the product level to values set at the site level. If there is no value for the current user, then the product value applies. If there is no value for the user or product, then the site value applies.

The table shows the predefined profile option hierarchy and ordering.

Hierarchy Level	Priority When Multiple Levels Set	Effect on Applications	Example
Site	Lowest	Affect all applications for a given implementation	Currency for the site is set to Euros.
Product	Supersedes Site	Affect all applications of a product family such as Financials	Currency for the Financials products set to UK pound sterling.
User	Highest, supersedes Product	Affect only the experience of the current user	Currency for the user of Financials applications set to US dollars.

You can configure updatable values for profile options at one or more levels depending on which levels are enabled in the profile option definition. When a profile is set at more than one level, higher levels of specificity override lower levels of specificity.

In the example, if the currency setting for the site is UK pounds sterling, but the Financials division works in the Netherlands using the Euro, a manager in the US can override that product level setting at the user level to use US dollars when accessing Financials applications.

In another example, if a profile option called Printer is set only at the site and product levels. When a user logs on, the Printer profile option assumes the value set at the product level, since it is the highest level setting for the profile.

Tip

Set site-level profile option values before specifying values at any other level. The profile option values specified at the site-level work as defaults until profile option values are specified at the other levels.

Planning Profile Options: Points to Consider

Plan profile options before defining and configuring them.

The following aspects assist you in better planning how to manage profile options.

- Profile option tasks
- Before creating a profile option
- Profile options data model

Profile Option Tasks

Users may be able to set their own profile options, depending on settings in the profile option definition. However, not all profile options are visible to end users, and some profile options, while visible, may not be updated by end users.

The following table lists tasks and considerations relevant to planning profile options.

Tasks	Role	Considerations
Planning, creating, and editing a new profile option	Applications developer	Since profile options are for permanent settings, do not use profiles options to cache temporary session attributes. Add capacity for user preferences and system configuration. Customize profile options with values, value behaviors, validation, category values, and security. Define the levels at which the profile option is enabled.
Configure values in an existing profile option	Applications developer, application administrator, and implementation consultant	Manage the values for existing profile options.
Create and edit profile option categories	Applications developer, application administrator, and implementation consultant	Manage categories for organizing existing profile options.

Note

Since a profile option enables a behavior in an application user interface or across applications, a value change made by an end user is reflected in the UI page for managing profile option values.

Before Creating a Profile Option

Profile options are best defined for managing configuration data centrally and influencing the behavior of applications.

If the purpose of a profile option setting is specific to a piece of data (typically setup data), it is best implemented as an attribute of that data.

Do not use profile options for behavior that is not configurable.

Profile options exist independent of role.

Do not use profile options to implement function security. For example, an application should not check for a profile option value set to yes to provide access to a page. Do not use profile options to implement data security, such as a profile option value that must be set to a specific value to provide view access to an entity.

Do not use profile options to capture a dynamic system states, such as data stored in a temporary table. Use Global Variables for temporary states instead.

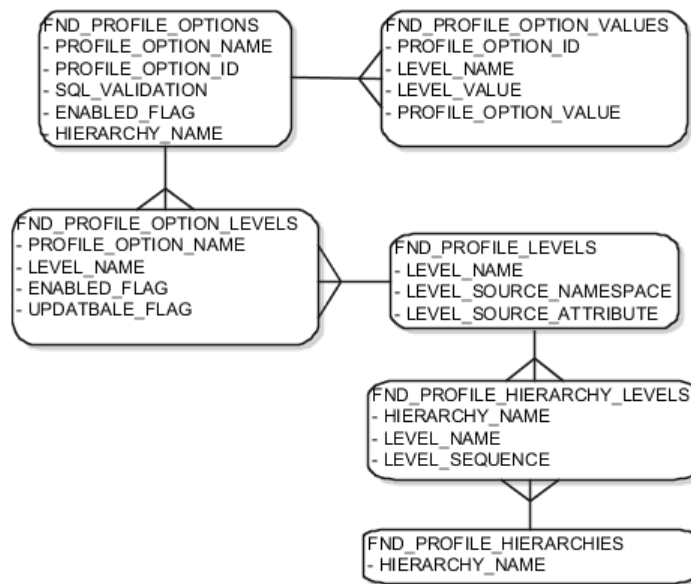
Evaluate if there is a genuine need before creating a profile option. Do not force users to make a decision about an aspect of their application use that is of no concern.

Evaluating need includes looking for duplicate or similar profile options, even in other products, before creating a new one. For example, you do not need multiple profile options to choose a preferred currency.

Profile Options Data Model

The profile option data model illustrates the relationships among profile option elements.

The figure shows the data model of profile option entities.



For more information about planning profile options, see the Oracle Fusion Applications Developer's Guide.

Managing Profile Options: Points to Consider

A profile option definition consists of a name for the profile option and valid values. It is defined within a module of the application taxonomy. Application developers manage profile options to create new profile options or modify existing profile option definitions, which includes specifying the levels at which a profile option is enabled and defining values. Implementation consultants and application administrators configure existing profile options by managing the profile option's updatable values, and creating categories that group profile options.

Configuring a Profile Option

A profile option definition includes information about the owning application and module in the application taxonomy. A start or end date, or both may limit

when a profile option is active. The profile option definition may include an SQL validation statement that determines which values are valid, and the hierarchy levels at which the profile option is enabled and updatable.

To be visible to users, a profile option must be user enabled. You can also allow user updates of the profile option, which means users can make changes to the validation and the profile option level information.

Profile option levels specify at which context level profile values may be enabled or updated. .

Profile options should only be enabled for context levels that are appropriate for that profile option. For example, a profile option indicating a global configuration setting should not be enabled at the user level, if users cannot choose a different value for that setting.

SQL Validation

The SQL validation of the profile option definition determines what valid profile option values are available. In the absence of validation, any value is valid.

For example, SQL validation provides a means of defining a list of values for the valid values of the profile option. The SQL validation can use lookups to provide the valid values for profile options, such as the lookup codes of the YES_NO lookup type.

With a profile option called DEFAULT_LANGUAGE, you can configure the following validation.

```
SELECT DESCRIPTION Language, NLS_LANGUAGE
FROM FND_LANGUAGES_VL
WHERE INSTALLED_FLAG IN ('B','I')
ORDER BY DESCRIPTION
```

This results in the following list of values based on data in FND_LANUGUAGE_VL.

Display Value	Hidden Value
American English	US
French	F
Spanish	E

Hidden values must be varchar2(2000).

Profile options generally provide configuration values within a particular context. Though you can create a profile option to be global, think of global values as default values to avoid storing inappropriate configuration information as profile option values. Create global profile options that have corresponding contextual levels.

Managing Profile Option Categories: Points to Consider

Use profile option categories to group profile options.

Organizing Profile Options in Categories

As a guideline, group profile options in a single category if the profile options affect the same feature, or if an administrator would likely want to see the profile options in the results of a single search.

Application developers are responsible for the initial groupings and then administrators can make changes based on their specific needs. Administrators can categorize profile options and then easily search on profile options by category.

Tip

Define profile option categories first and assign new profile options to existing categories rather than defining profile options first and then defining categories to categorize them.

Adding New Profile Option Categories

You can add new categories or add profiles to an existing category.

You can create a profile option category by duplicating an existing category and editing it for a new grouping of profile options. You can add multiple profile options to a category. A profile option can exist in multiple categories.

Profile Option Order in a Category

Specify a profile option sequence to determine the order of profile options when queried by profile option category.

Viewing and Editing Profile Option Values: Points to Consider

A profile option value consists of the value and the context or level where the value is set. You specify the context with a pairing of the profile option value's level and level value, such as the product level and the level value GL for Oracle Fusion General Ledger. Adding or modifying profile option values can include deciding which valid values are enabled or updatable at which level.

The SQL validation of the profile option definition determines what valid profile option values are available. In the absence of validation, any value is valid.

Profile Option Levels and User Session Context

Site level profile option values affect the way all applications run for a given implementation. Product level profile option values affect the way applications owned by a particular product code behave. For example, a product may use profile options set at the product level to determine how regions provided by a common module such as those available from Oracle Fusion Trading Community Model or Customer Relationship Management (CRM) display in a particular work area or dashboard. User level profile option values affect the way applications run for a specific application user.

Whichever profile option value is most specific to a user session, that is the value at which the profile option is set for the user session.

For example, the predefined FND_LANGUAGE profile option sets the default language. In addition to a site level value, you can define a value for various product or user levels.

Level Name	Level Value	Profile Option Value
Site	InFusion	American English
Product	Customer Center	French
Product	CRM Application Composer	American English
User	Application Administrator	American English
User	Hima	Hindi

Values at the site level take effect for any user unless overridden by a different value set at the more specific levels of product and user. Product level profile option values affect the way applications owned by a particular product code behave. In addition to user level profile option values in applications, selections may be available in the user preferences workspace.

The following table demonstrates the FND_LANGUAGE profile option settings that would apply to specific users, based on the example above. For example, the user Hima is using the CRM Application Composer product, in the InFusion site. The example above shows that this profile option is set to Hindi at the user level for Hima. Because user is the highest applicable level for Hima, the applicable profile option value is Hindi for Hima.

Site	Product	User	Highest Available Level	Active Profile Option Value
InFusion	CRM Application Composer	Hima	User	Hindi
Acme	Payables	Application Administrator	User	American English
InFusion	Customer Center	Guillaume	Product	French
InFusion	Payables	Implementation Consultant	Site	American English
Acme	Payables	Implementation Consultant	none	no value

Note

More than one site level value is relevant in an enterprise with multiple tenants using a single instance of Oracle Fusion Applications.

Effect of Changes to Profile Option Values

Any change you make to a user level profile option has an immediate effect on the way applications run for that session. When you sign in again, changes made to your user level profile options in a previous session are still in effect. When

you change profile option value at the product level and no user level values are set, you see the update immediately, but other users may not see the changed value until signing out and back in. When you change a profile option value and the new value affects other users, the change takes effect only when users sign in the next time.

Changes to site level profile options take effect for any user session that is started after the setting has been changed. Changes to site or user level profile options do not affect any user sessions that are already in progress when the change is made.

Changes to site or user level profile options take effect for any C or PL/SQL processes, such as scheduled jobs, that are launched after the setting has been changed. Profile option changes do not affect C or PL/SQL processes that are already running.

Define Flexfields

Flexfields: Overview

Flexfields are a mechanism for configuring and extending applications to meet enterprise-specific needs. Using flexfields, you can extend application objects to capture data that would not otherwise be tracked by the application, or configure intelligent key codes comprised of meaningful parts according to your business practices. Flexfields encapsulate all of the pieces of information related to a specific purpose, such as a key identifying a particular purchase, or the components of a student's contact information, or the features of a product in inventory.

A flexfield is an extensible data field consisting of subfields. Each subfield is a flexfield segment. You configure segments to capture enterprise-specific information. Each segment captures a single atomic value, has a name, and maps to a pre-reserved column in the applications database.

Flexfields allow enterprise requirements to be met without changing the data model. Different data can be captured on the same database table.

Application developers create a flexfield and register it so that it is available for configuration. Administrators and implementation consultants setup or configure segments and other properties of the available flexfields. End users see flexfield segments as attributes of information displayed in the application user interface. They enter a value for the attribute. The value may be selected from a list of valid values or entered as free-form text that complies with formatting rules.

Manage flexfields using tasks you access by starting in the Setup and Maintenance Overview page.

Tip

Use the **Business Object** parameter to search Application Key Flexfields, Application Descriptive Flexfields, and Application Extensible Flexfields to find

all tasks related to flexfields. To manage any flexfield across all Oracle Fusion Applications products, search for the Define Flexfields task list and access the Manage Descriptive Flexfields, Manage Extensible Flexfields, and Manage Key Flexfields tasks.

Types of Flexfields

The following three types of flexfields are available in Oracle Fusion Applications and provide a means to customize applications features without programming.

- Key
- Descriptive
- Extensible

For example, in Oracle Fusion Financials, key flexfields represent objects such as accounting codes and asset categories. Generally, correct operations of a product depend on key flexfield setup. In Oracle Fusion Payables, a descriptive flexfield expands a customizable area of an invoices page by providing subfields for collecting invoice details. You can implement these subfields, which are descriptive flexfield segments, as context sensitive so they appear only when needed. Extensible flexfields are similar to descriptive flexfields, but provide additional advanced features. Generally setup of descriptive and extensible flexfields is optional because their segments capture additional information that is stored attributes on an entity

Segments

All flexfields consist of segments. Segments represent attributes of information. They can appear globally wherever the flexfield is implemented, or based on a structure or context.

You define the appearance and meaning of individual segments when configuring a flexfield.

A key flexfield segment commonly describes a characteristic of the entity identified by the flexfield, such as a part number structured to include information about the type, color, and size of an item. A descriptive flexfield segment represents an attribute of information that describes a characteristic of the entity identified on the application page, such as details about a device containing components, some of which are globally present on the page while others are contextually dependent on the category of the device.

Value Sets

A value set is a predefined, named group of values that can be used to validate the content of a flexfield segment.

You configure a flexfield segment with a value set that establishes the valid values that an end user can enter for the segment. You define the values in a value set, including such characteristics as the length and format of the values. You can specify formatting rules, or specify values from an application table or predefined list. Multiple segments within a flexfield, or multiple flexfields, can share a single value set.

Structure and Context

Key flexfields have structure. Descriptive flexfields and extensible flexfields have context.

Each key flexfield structure is a specific configuration of segments. Adding or removing segments, or rearranging their order, produces a different structure. The database columns on which segments in different structures are based can be reused in as many structures as desired.

Descriptive flexfield segments can be context-sensitive, which means available to an application based on a context rather than globally available wherever the flexfield appears. (which means available to an application based on a context value rather than globally available wherever the flexfield appears. A descriptive flexfield context is a set of context-sensitive segments that store information related to the same context value. You define contexts as part of configuring a descriptive flexfield. End users see global segments, as well as any context-sensitive segments that apply to the selected context value.

Extensible flexfield segments are made available to an application based upon a category value. An extensible flexfield context serves as a container for related segments, used to organize the various segments that are applicable to a category value. You define contexts with context-sensitive segments and associate them to categories as part of configuring an extensible flexfield. End users see the segments displayed in subregions, one for each context associated to the selected category value.

In descriptive flexfields and extensible flexfields, the database columns on which context-sensitive segments are based can be reused in as many contexts as desired.

Deployment

A flexfield must be deployed to display its current definition in a runtime application user interface. For example, if the deployment status is Edited, the flexfield segments may appear in the UI based on the flexfield definition at the time of last deployment, rather than the current definition.

You can deploy a flexfield as a sandbox for testing the configuration before deploying it to the mainline for all users.

Runtime Appearance

In an application user interface, descriptive flexfield segments appear as label and field pairs or as a table of fields where the column headers correspond to the labels. The fields represent the flexfield segments and accept entered input or a selection from a list of choices that correspond to the segment's assigned value set. Extensible flexfield segments appear grouped within labeled regions, where each grouping is a context and the region labels are the context names.

Use the **Highlight Flexfields** command in the Administration menu of the Setup and Maintenance work area to identify the location of the descriptive and key flexfields on the runtime page. Flexfields in highlight mode display an information icon to access details about the flexfield, and an edit icon to manage the flexfield.

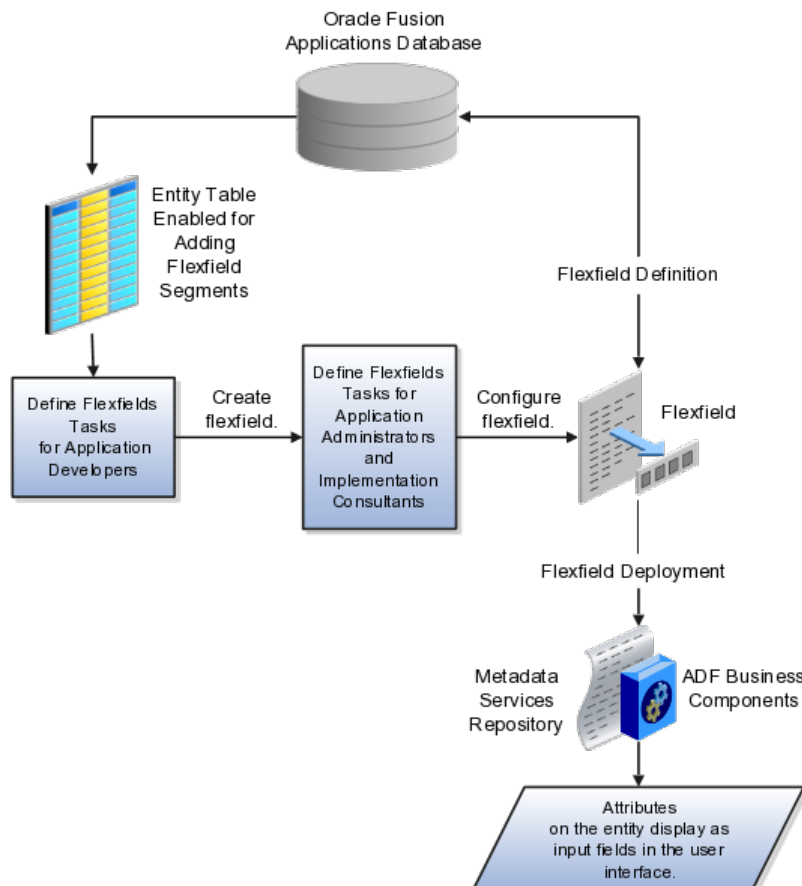
All segments of a single flexfield are grouped together by default. The layout and positions of the flexfield segments depend on where the application developer places the flexfield on the page. Flexfields may also be presented in a separate section of the page, in a table, or on their own page or subwindow.

You can use Oracle Composer to edit the layout, position, or other display features of the flexfield segments.

Flexfields and Oracle Fusion Application Architecture: How They Work Together

Administrators configure flexfield segments to capture data that represents the values of attributes. Flexfield segments represent attributes of entities (business objects). Most business objects are enabled for descriptive flexfields. Some business objects are enabled for extensible flexfields.

The figure shows the layers of a flexfield: the business entity table and metadata in the database, business components that are Application Development Framework (ADF) objects or ADFbc objects derived from the metadata and stored in the Metadata Services Repository (MDS), and the user interface where the input fields defined by the flexfield segments are rendered. The flexfield definition consists of all the metadata defined during configuration and stored in the database.



Application developers create a flexfield and register it so that it is available for configuration. Administrators and implementation consultants configure segments and other properties of the available flexfields. This information is stored as additional flexfield metadata in the database. Deploying the flexfield generates ADF business components based on the flexfield metadata in the database.

Integration

A flexfield affects the Web Services Description Language (WSDL) schemas exposed by ADF services and used by SOA composites. The Web services that expose base entity data also expose flexfield segment data.

Attributes incorporate into SOA infrastructure (BPEL, Rules) and integrate with business intelligence (Oracle Business Intelligence, Extended Spread Sheet Database (ESSbase)).

Flexfield configurations are preserved across Oracle Fusion Applications updates.

Deployment

The metadata for the flexfield is stored in the application database as soon as you save your configuration changes. Deploying the flexfield generates the ADF business components so that the runtime user interface reflects the latest definition of the flexfield in the metadata.

Importing and Exporting

You can export and import flexfields with a deployment status of Deployed or Deployed to Sandbox across instances of Oracle Fusion Applications using the Setup and Maintenance Overview page. Ensure a flexfield is eligible for migration (by verifying that it has successfully deployed) prior to attempting the migration.

Runtime

For a flexfield to reflect the latest flexfield definition at runtime it must be deployed. The user interface accesses a business object and the deployed flexfield definition indicates which business object attributes the flexfield captures values for. If you add display customizations for a flexfield using Oracle Composer, these are customizations on the page so that the same flexfield segments can appear differently on various different pages.

Values entered for segments are validated using value sets.

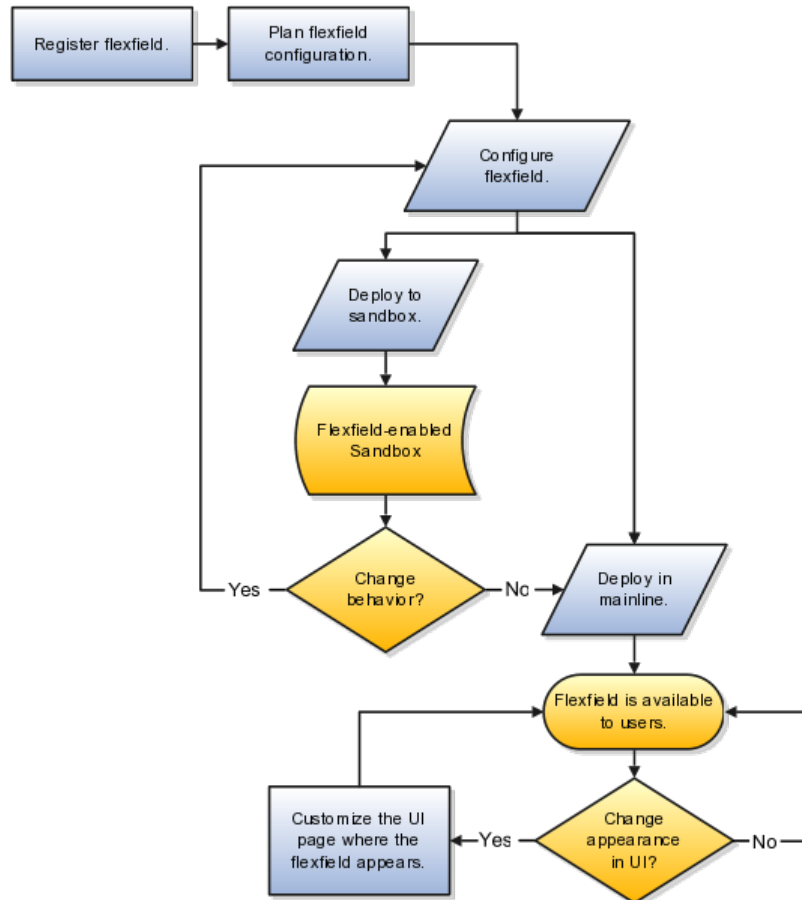
Flexfield Management

Managing Flexfields: Points to Consider

Managing flexfields involves, registering, planning, and configuring flexfields.

You plan and configure the registered flexfields provided in your applications by applications developers. How you configure flexfield segments determines how the flexfield segments appear to end users. Optionally, you can customize the UI page to change how the flexfield segments appear to end users on that page.

The figure shows the processes involved in making flexfields available to end users. The tasks in the Define Flexfields activity allow administrators to configure and deploy flexfields. If you deploy a flexfield to a sandbox and decide not to make further changes, you select the flexfield in the Manage Flexfields tasks of the Define Flexfields activity and deploy the flexfield in the mainline so it is available to users.



Registering Flexfields

Application development registers flexfields so they are available to administrators and implementation consultants for configuration.

Application development creates the capacity of database tables to support flexfields so an enterprise can capture specific information about an entity. Many flexfields are predefined in Oracle Fusion Applications.

A flexfield must be registered before it can be configured.

For more information on registering flexfields, see Oracle Fusion Applications: Developer's Guide.

Planning Flexfields

All flexfields consist of segments which represent attributes of an entity. The values an end user inputs for an attribute are stored in a column of the entity

table. Application development enables columns of entity tables for use in flexfields during flexfield registration.

A flexfield must be registered before it can be configured. Before configuring new flexfield segments for your enterprise, be sure to plan their implementation carefully.

For more information on planning flexfield configuration, see Oracle Fusion Applications Extensibility Guide.

Configuring Flexfields

Administrators or implementors configure flexfields so they meet the needs of the enterprise. Some flexfields require configuration to make an application operate correctly.

Configuring a flexfield includes the following.

- Defining value sets against which the values entered by end users are validated
- Defining the structure or context of the segments in the flexfield
- Specifying the prompt, length and data type of each flexfield segment
- Specifying valid values for each segment, and the meaning of each value within the application

Tip

As a flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield.

Some descriptive flexfields provide parameters that are attributes of the same or related entity objects. You use parameters to set the initial value or derivation value of an attribute from external reference data, such as a column value or a session variable, rather than from user input.

Note

Adding segments to represent additional attributes is considered a custom task. For more information, see the Oracle Fusion Applications Extensibility Guide.

For more information on adding columns to a table, see the Oracle Fusion Applications Developer's Guide.

For more information on configuring flexfields for custom attributes, see also the Oracle Fusion Applications Extensibility Guide.

Enabling a Flexfield Segment for Business Intelligence

You can enable key flexfield segment instances and descriptive flexfield segments for business intelligence if the flexfield is registered in the database as an Oracle Business Intelligence-enabled flexfield. For more information on enabling segments for business intelligence, see points to consider when enabling key and descriptive flexfield segments for business intelligence.

Deploying Flexfields

After you configure or change a flexfield, you must deploy it to make the latest definition available to end users.

You deploy a flexfield in the mainline for general use in a test or production environment, or you can deploy a flexfield as a flexfield-enabled sandbox to confirm that it is correctly configured before deploying it to the mainline.

Deploying a flexfield results in a deployment status. Once deployed, the deployment status indicates the state of the currently configured flexfield relative to the last deployed definition

Optionally Changing How Flexfield Segments Appear in a User Interface Page

The flexfield attributes you define integrate with the user interface pages where users access the attributes' business object. Application development determines the UI pages where business objects appear and the display patterns used by default to render flexfield segments.

You can customize the appearance of the flexfield segments in the UI page using Oracle Composer once the flexfield is deployed to the mainline.

For more information on customizing flexfield appearance with Oracle Composer, see guidance on customizing existing pages in Oracle Fusion Applications Extensibility Guide.

For more information on planning flexfields or customizing them beyond the configuration possible in the Define Flexfields tasks, see Oracle Fusion Applications Extensibility Guide.

For more information on creating flexfields and adding them to a UI page, see Oracle Fusion Applications Developer's Guide.

Identifying Flexfields on a Runtime Page

The **Highlight Flexfields** command in the Administration menu of the Setup and Maintenance work area identifies the location of descriptive and key flexfields on the runtime page by displaying an information icon for accessing details about each flexfield.

Even if a flexfield has not yet been deployed and does not appear on the runtime page in normal view, it appears in the Highlight Flexfield view for that page. **Highlight Flexfields** accesses the current flexfield metadata definition.

Use the highlighted flexfield's edit icon to manage the descriptive or key flexfield directly. Alternatively, note a highlighted flexfield's name to search for it in the tasks for managing flexfields.

Flexfield Segment Properties: Explained

Independent of the value set assigned to a segment, segments may have properties such as validation.

Range Validation of Segments

Range validation enables you to enforce an arithmetic inequality between two segments of a flexfield. For example, a product must be ordered before it can be shipped, so the order date must be on or before the ship date, and consequently the order date segment value must be less than or equal to the ship date segment value. You can use range validation to ensure this relationship.

The conditions for range validation are as follows.

- Segments must be configured for range validation in pairs, one with the low value and one with the high value.
- Both segments must be the same data type.
- Both segments must be part of the same structure in a key flexfield or part of the same context in a descriptive flexfield or extensible flexfield.
- The low value segment must have a lower sequence number than the high value segment.
- Non-range validated segments can exist between a range validated pair, but range validated pairs cannot overlap or be nested.

You can configure as many range validated pairs as you want within the same flexfield. Your application automatically detects and applies range validation to the segment pairs that you define, in sequence order. It must encounter a low value segment first, and the next range validated segment it encounters must be a high value segment. These two segments are assumed to be a matching pair. The low value and the high value can be equal.

Code Naming Conventions

When entering codes such as segment code, enter a code consisting of the characters A-Z, a-z, 0-9, with a non-numeric leading character.

The code is used in the flexfield's element in the XML schema for web services. You can maximize the readability of the schema by naming codes with a leading alphabetic character followed by alphanumeric characters. The use of spaces, underscores, multi-byte characters, and leading numeric characters, which are all encoded in XML schemas, make the codes in the schema element difficult to read.

This applies to context code in descriptive and extensible flexfields, and to structure instance code in key flexfields.

Flexfields and Value Sets: How They Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise's value sets validate the values your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

Defining and Assigning Value Sets

As a flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield.

Caution

Be sure changes to a shared value set are compatible with all flexfield segments using the value set.

Shared Value Sets

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared values set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

Deployment

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide end users with the valid values for the attributes represented by the segments.

Defaulting and Deriving Segment Values: Explained

To populate a flexfield segment with a default value when a row is created, specify a default type of constant or parameter and a default value.

To synchronize a segment's value with another field's value whenever it changes, specify the derivation value to be the flexfield parameter from which to derive the attribute's value. Whenever the parameter value changes, the attribute's value is changed to match. If you derive an attribute from a parameter, consider making the attribute read-only, as values entered by users are lost whenever the parameter value changes.

When defaulting or deriving a default value from a parameter, only those attributes designated by development as parameters are available to be chosen.

Different combinations of making the segments read only or editable in combination with the default or derivation value or both, have different effects.

Initial runtime behavior corresponds to the row for the attribute value being created in the entity table. If the default value is read only, it cannot subsequently be changed through the user interface. If the default value is not read only, users can modify it. However, if the segment value is a derived value, a user-modified segment value is overwritten when the derivation value changes.

Default Type	Default value specified?	Derivation value specified?	Initial runtime behavior	Runtime behavior after parameter changes
None	No	Yes	No initial segment value	Changed parameter derivation value updates segment value

Constant	Yes	No	Default segment value	N/A
Constant	Yes	Yes	Default segment value	Changed parameter derivation value updates segment value
Parameter	Yes	No	Default segment value is the parameter's default value	N/A
Parameter	Yes	Yes, and same as default value	Default segment value is parameter's default and derivation value	Changed parameter derivation value updates segment value
Parameter	Yes	Yes, and different from default value	Default segment value is parameter's default value	Changed parameter default value does not update segment value. Only the changed derivation value updates the segment value.

Flexfield Deployment

Flexfield Deployment: Explained

To use a flexfield at runtime, the flexfield must have been deployed at least once. Deployment generates or refreshes the Application Development Framework (ADF) business component objects that render the flexfield in a user interface. Flexfields are deployed for the first time during the application provisioning process.

After you configure or change a flexfield, you must deploy it to make the latest definition available to end users. You can deploy a flexfield to a sandbox for testing or to the mainline for use.

Deployment Status

Every flexfield has a deployment status.

A flexfield can have the following deployment statuses.

Deployment Status	Meaning
Edited	The flexfield metadata definition has not been deployed yet. Updates of the metadata definition are not applied in the runtime environment yet.
Patched	The flexfield metadata definition has been modified through a patch or through a data migration action, but the flexfield has not yet been deployed so the updated definition is not reflected in the runtime environment.

Deployed to Sandbox	The current metadata for the flexfield is deployed in ADF artifacts and available as a flexfield-enabled sandbox. The status of the sandbox is managed by the Manage Sandboxes task available to the Administrator menu of the Setup and Maintenance work area.
Deployed	The current metadata for the flexfield is deployed in ADF artifacts and available to end users. There have not been any changes to the flexfield since it was last deployed in the mainline.
Error	The deployment attempt in the mainline failed.

Note

Whenever a value set definition changes, the deployment status of a flexfield that uses that value set changes to edited. If the change results from a patch, the deployment status of the flexfield changes to patched.

Initial Deployment Status of Flexfields

The Oracle Fusion Applications installation loads flexfield metadata into the database. This initial load sets the flexfield status to Edited to indicate that the flexfield has not been deployed yet. The application provisioning process during installation deploys the predefined flexfields of the provisioned applications, which sets their status to Deployed if no errors are encountered.

When accessing a provisioned application, deployed flexfields are ready to use. In some cases, flexfield availability at runtime requires setup, such as defining key flexfields.

Metadata Validation

Use the Validate Metadata command to view possible metadata errors before attempting to deploy the flexfield. Metadata validation is the initial phase of the Deploy and Deploy to Sandbox commands. By successfully validating metadata before running the deployment commands, you can avoid failures in the metadata validation phase of a deployment attempt. Errors in the metadata validation phase of deployment cause the deployment attempt to abort. Metadata validation results do not affect the deployment status of a flexfield.

Flexfield Deployment Status: How It Is Calculated

Flexfield deployment status indicates how the flexfield metadata definition in the Oracle Fusion Applications database relates to the Application Development Framework (ADF) business components generated into a Metadata Services (MDS) repository.

Settings That Affect Flexfield Deployment Status

If you have made a change to a flexfield and expect a changed deployment status, be sure you have saved your changes. No settings affect flexfield deployment status.

How Flexfield Deployment Status Is Calculated

If the flexfield definition has been edited through the Define Flexfields activity task flows, the status is Edited. The latest flexfield metadata definition in the Oracle Fusion application diverges from the latest deployed flexfield definition. Any change, including if a value set used in a flexfield changes, changes the deployment status to Edited. If a flexfield has never been deployed, its status is Edited.

Note

When an application is provisioned, the provisioning framework attempts to deploy all flexfields in that application.

If you deploy the flexfield to a sandbox successfully, the status is Deployed to Sandbox. The latest flexfield metadata definition in the Oracle Fusion application matches the metadata definition that generated ADF business components in a sandbox MDS repository. Whether the sandbox is active or not does not affect the deployment status. If the flexfield was deployed to a sandbox and has not been edited or re-deployed to the mainline since then, the status remains Deployed to Sandbox independent of whether the sandbox is active, or who is viewing the status.

If you deploy the flexfield successfully, meaning to the mainline, the status is Deployed. The latest flexfield metadata definition in the Oracle Fusion application matches the metadata definition that generated ADF business components in a mainline MDS repository. Change notifications are sent when a flexfield is deployed successfully to the mainline.

If either type of deployment fails so the current flexfield definition is not deployed, the status is Error. The deployment error message gives details about the error. The latest flexfield metadata definition in the Oracle Fusion application likely diverges from the latest successfully deployed flexfield definition.

If the flexfield definition has been modified by a patch, the status is Patched. The latest flexfield metadata definition in the Oracle Fusion application diverges from the latest deployed flexfield definition. If the flexfield definition was Deployed before the patch and then a patch was applied, the status changes to Patched. If the flexfield definition was Edited before the patch and then a patch was applied, the status will remain at Edited to reflect that there are still changes (outside of the patch) that are not yet in effect.

When a deployment attempt fails and you can access the Deployment Error Message for details.

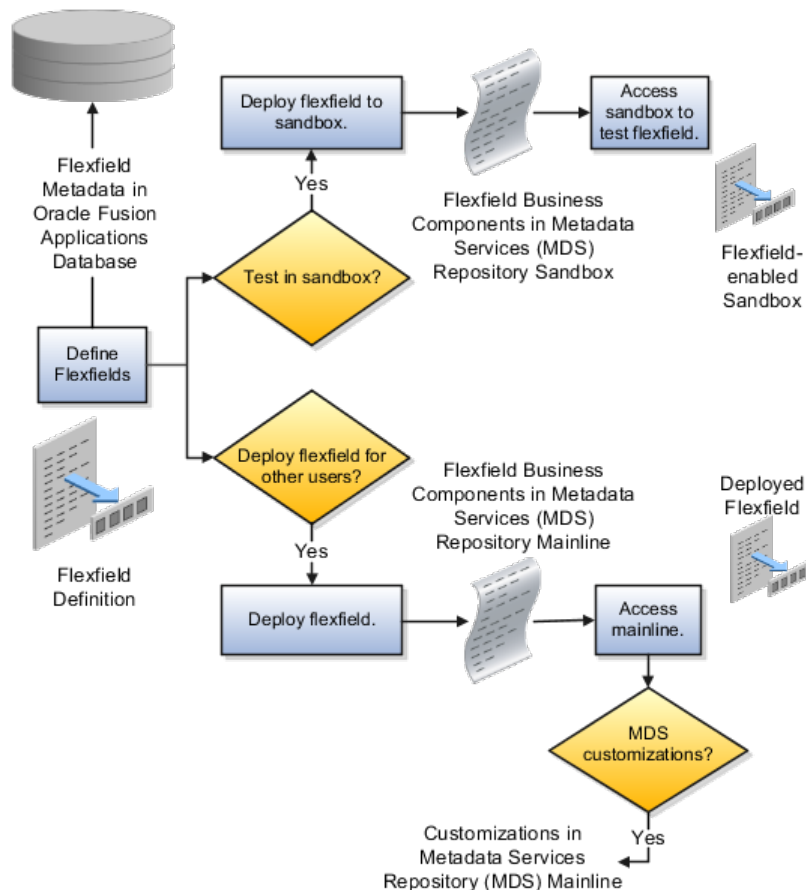
Deploying a Flexfield-Enabled Sandbox: How It Works With Mainline Metadata

The flexfield definition in a sandbox corresponds to the flexfield metadata definition in the Oracle Fusion Applications database at the time the flexfield was deployed to the sandbox. When the flexfield is ready for end users, the flexfield must be deployed to the mainline.

A flexfield-enabled sandbox uses the following components.

- Flexfield metadata in the Oracle Fusion Applications database
- Flexfield business components in a sandbox Metadata Services (MDS) repository
- User interface customizations for the flexfield in the mainline MDS repository

The figure shows the two types of deployment available in the Manage Flexfield tasks of the Define Flexfields activity. Deploying a flexfield to a sandbox creates a sandbox MDS repository for the sole purpose of testing flexfield behavior. The sandbox is only accessible to the administrator who activates and accesses it, not to users generally. Deploying a flexfield to the mainline applies the flexfield definition to the mainline MDS repository where it is available to end users. After deploying the flexfield to the mainline, customize the page where the flexfield segments appear. Customization of the page in the sandbox MDS repository cannot be published to the mainline MDS repository.



Sandbox Metadata Services Repository Data

Deploying the flexfield to a sandbox generates the Application Development Framework (ADF) business components of a flexfield in a sandbox MDS repository for testing in isolation.

Warning

Do not make changes to flexfield segment display features in a flexfield-enabled sandbox as these changes will be lost when deploying the flexfield to the mainline.

Mainline Metadata Services Repository Data

The Oracle Fusion Applications database stores the single source of truth about a flexfield. From this the ADF business component objects that implement the flexfield in the runtime user interface are generated in the mainline MDS repository when the flexfield is deployed.

Deploying a Flexfield-Enabled Sandbox: Points to Consider

Deploying a flexfield to a sandbox creates a flexfield-enabled sandbox . Each flexfield-enabled sandbox contains only one flexfield.

You can test the runtime behavior of a flexfield in the flexfield-enabled sandbox. If changes are needed, return to the Define Flexfield tasks to change the flexfield definition.

When you deploy a flexfield to sandbox, the process reads the metadata about the segments from the database, generates flexfield Application Development Framework (ADF) business component artifacts based on that definition, and stores in the sandbox only the generated artifacts derived from the definition.

Sandbox MDS Repository Data

The sandbox data allows you to test the flexfield in isolation without first deploying it in the mainline where it could be accessed by users.

Warning

Do not make changes to flexfield segment display features in a flexfield-enabled sandbox as these changes will be lost when deploying the flexfield to the mainline.

Managing a Flexfield-Enabled Sandbox

When you deploy a flexfield as a sandbox, that flexfield-enabled sandbox automatically gets activated in your user session. When you sign back in to see the changes, the sandbox is active in your session.

You can only deploy a flexfield to a sandbox using the Define Flexfields task flow pages.

You also can use the Manage Sandboxes feature in the Administration menu of the Setup and Maintenance work area to activate, access, or delete a flexfield-enabled sandbox.

Note

Whether you use the Define Flexfields or Manage Sandboxes task flows to access a flexfield-enabled sandbox, you must sign out and sign back in before you can see the changes you deployed in the runtime.

You cannot publish the flexfield from the sandbox to the mainline. You must use the Define Flexfields task flow pages to deploy the flexfield for access by users of the mainline because the flexfield configuration in the mainline is the single source of truth.

Deploying Flexfields Using the Command Line: Explained

You can use the Manage Key Flexfields, Manage Descriptive Flexfields, and Manage Extensible Flexfields tasks to deploy flexfields. You can also use WebLogic Server Tool (WLST) commands for priming the Metadata Services (MDS) repository with predefined flexfield artifacts and for deploying flexfields.

The table describes the available commands.

WebLogic Server Tool Command	Description
<code>deployFlexForApp</code>	Deploys all flexfields for the specified enterprise application. Only flexfields whose status is other than deployed are affected by this command unless the option is enabled to force all flexfields to be deployed regardless of deployment status. Initial application provisioning runs this command to prime the MDS repository with flexfield artifacts.
<code>deployFlex</code>	Deploy a single flexfield regardless of deployment status
<code>deployPatchedFlex</code>	Deploys flexfield changes that have been delivered using a flexfield Seed Data Framework (SDF) patch. Deploys flexfields that have a Patched deployment status.
<code>deleteFlexPatchingLabels</code>	Displays MDS label of flexfield changes for viewing and deleting patching labels.

Executing these commands outputs a report at the command line. The report provides the following information for every flexfield that is processed.

- Application identity (APPID)
- Flexfield code
- Deployment result, such as success or error

In case of errors, the report lists the usages for which the errors were encountered. If a runtime exception occurs, the output displays the traceback information. For each WLST flexfield command, adding the `reportFormat='xml'` argument returns the report as an XML string.

Consider the following aspects of command line deployment.

- Preparing to use the WLST flexfield commands

- Using the `deployFlexForApp` command
- Using the `deployFlex` command
- Using the `deployPatchedFlex` command
- Using the `deleteFlexPatchingLabels` command
- Exiting the WLST and checking the results

Preparing To Use the WLST Flexfield Commands

You can only execute the WLST flexfield commands on a WebLogic Administration Server for a domain that has a running instance of the Oracle Fusion Middleware Extensions for Applications (Applications Core) Setup application.

For more information on deploying the Applications Core Setup application, see the Oracle Fusion Applications Developer's Guide.

Ensure that the AppMasterDB data source is registered as a JDBC data source with the WebLogic Administration Server and points to the same database as the ApplicationDB data source.

Start the WebLogic Server Tool (WLST) tool, if it is not currently running.

UNIX:

```
sh $JDEV_HOME/oracle_common/common/bin/wlst.sh
```

Windows:

```
wlst.cmd
```

Connect to the server, replacing the user name and password arguments with your WebLogic Server user name and password.

```
connect('wls_username', 'wls_password', 'wls_uri')
```

The values must be wrapped in single-quotes. The `wls_uri` value is typically `T3://localhost:7101`.

For more information on the WLST scripting tool, see the Oracle Fusion Middleware Oracle WebLogic Scripting Tool.

Using the `deployFlexForApp` Command

The `deployFlexForApp` command translates the product application's predefined flexfield metadata into artifacts in the MDS repository.

Important

This command is run automatically when you provision applications. However, after custom applications development, you must run the `deployFlexForApp` command after you configure your application to read the flexfield artifacts from the MDS repository and before you log into the application for the first time, even if there is no predefined flexfield metadata.

This command does not deploy flexfields that have a status of Deployed unless the force parameter is set to 'true' (the default setting is 'false').

For more information on priming the MDS partition with configured flexfield artifacts, see the Oracle Fusion Applications Developer's Guide.

From the WLST tool, execute the following commands to deploy the artifacts to the MDS partition, replacing `product_application_shortname` with the application's short name wrapped in single-quotes.

```
deployFlexForApp('product_application_shortname'[, 'enterprise_id']  
[, 'force'])
```

In a multi-tenant environment, replace `enterprise_id` with the Enterprise ID to which the flexfield is mapped. Otherwise, replace with 'None' or do not provide a second argument.

To deploy all flexfields regardless of their deployment status, set force to 'true' (the default setting is 'false'). If you want to deploy all flexfields in a single-tenant environment, you either can set `enterprise_id` to 'None', or you can use the following signature:

```
deployFlexForApp(applicationShortName='product_application_shortname', force='true')
```

Tip

The application's short name is the same as the application's module name.

For more information about working with application taxonomy, see the Oracle Fusion Applications Developer's Guide.

Using the `deployFlex` Command

From the WLST tool, execute the following command to deploy a flexfield, replacing `flex_code` with the code that identifies the flexfield, and replacing `flex_type` with the flexfield's type, which is either DFF, KFF, or EFF.

```
deployFlex('flex_code', 'flex_type')
```

The values must be wrapped in single-quotes.

Using the `deployPatchedFlex` Command

Use the `deployPatchedFlex` command for situations where the patching framework does not invoke the command, such as when an application has been patched offline.

If the installation is multi-tenant enabled, the command deploys all patched flexfields for all enterprises. This command is not intended to be invoked manually.

Check with your provisioning or patching team, or the task flows for managing flexfields, to verify that the flexfield has a Patched deployment status.

From the WLST tool, execute the following command to deploy the artifacts to the MDS partition of all flexfields that have a READY status.

```
deployPatchedFlex()
```

Execute the following command to deploy all flexfields that have either a READY status or an ERROR status.

```
deployPatchedFlex(mode='RETRY')
```

Using the deleteFlexPatchingLabels Command

Whenever you deploy flexfield changes to MDS using the `deployPatchedFlex()` WLST command, an MDS label is created in the format `FlexPatchingWatermarkdate+time`. Use the `deleteFlexPatchingLabels` command to inquire about and delete these labels.

From the WLST tool, execute the `deployPatchedFlex()` command with no arguments to delete the flexfield patching labels.

To output a list of flexfield patching labels, execute the command with the `infoOnly` argument, as follows:

```
deleteFlexPatchingLabels(infoOnly='true')
```

Exiting the WLST and Checking the Results

To exit the tool, execute the following command.

```
disconnect()
```

Optionally, sign into the application, access user interface pages that contain flexfields, and confirm the presence of flexfields for which configuration exists, such as value sets, segments, context, or structures.

Manage Value Sets

Value Sets: Explained

A value set is a set of valid values that you assign to a flexfield segment.

An end user enters a value into a flexfield segment while using the application. The flexfield validates the segment against the set of valid values that you configured as a value set and assigned to the segment.

For example, you can define a required format, such as a five digit number, or a list of valid values, such as green, red, and blue.

Flexfield segments are usually validated, and typically each segment in a given flexfield uses a different value set. You can assign a single value set to more than one segment, and you can share value sets among different flexfields.

Caution

Be sure changes to a shared value set are compatible with all flexfields segments using the value set.

Defining value sets involves making decisions about the following.

- Validation

- Security
- Precision and scale
- Usage and deployment

Validation

The following types of validation are available for value sets.

- Format only, where end users enter data rather than selecting values from a list
- Independent, a list of values consisting of valid values you specify
- Dependent, a list of values where a valid value derives from the independent value of another segment
- Subset, where the list of values is a subset of the values in an existing independent value set
- Table, where the values derive from a column in an application table and the list of values is limited by a WHERE clause

A segment that uses a format only value set does not present a list of valid values to users.

You can build a tree structure from the values in an independent value set whose data type is character.

Note

Adding table validated value sets to the list of available value sets available for configuration is considered a custom task.

For more information, see the Oracle Fusion Applications Extensibility Guide.

Security

Value set security only works in conjunction with usage within flexfield segments. If a value set is used standalone, meaning outside a flexfield, value set security is not applied, but Oracle Fusion data security is enforced.

You can specify that data security be applied to the values in flexfield segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment end users can view or modify.

Value set security applies at the value set level. If a value set is secured, every usage of it in any flexfield is secured. It is not possible to disable security for individual usages of the same value set.

Value set security applies to independent, dependent, or table-validated value sets.

Value set security applies mainly when data is being created or updated, and to key flexfield combinations tables for query purposes. Value set security does not determine which descriptive flexfield data is shown upon querying.

Security conditions defined on value sets always use table aliases. When filters are used, table aliases are always used by default. When predicates are defined for data security conditions, make sure that the predicates also use table aliases.

For key flexfields, the attributes in the view object that correspond to the code combination ID (CCID), structure instance number (SIN), and data set number (DSN) cannot be transient. They must exist in the database table. For key flexfields, the SIN segment is the discriminator attribute, and the CCID segment is the common attribute.

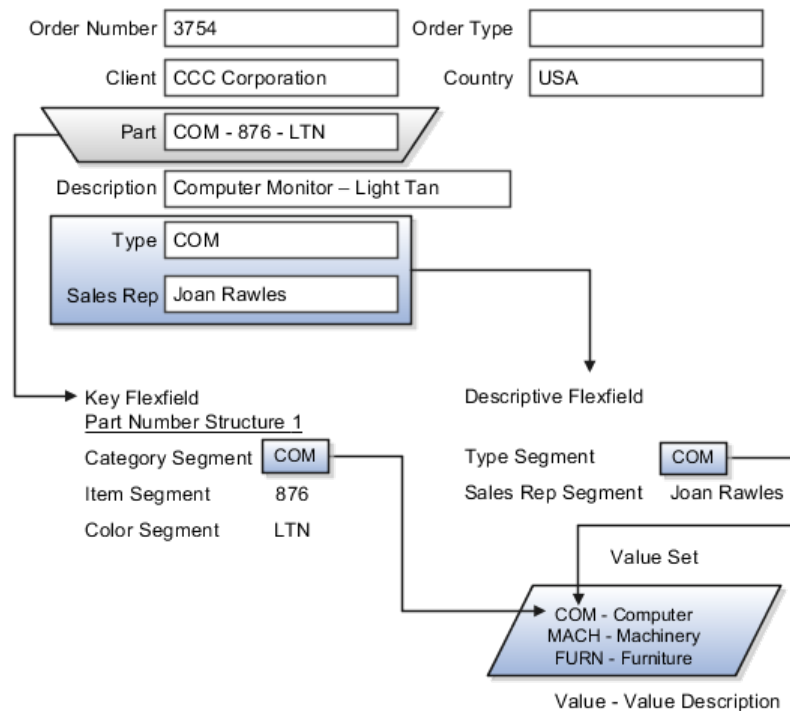
Precision and Scale

For a value set with the data type Number, you can specify the precision (maximum number of digits user can enter) or scale (maximum number of digits following the decimal point).

Usage and Deployment

The usage of a value set is the flexfields where that value set is used. The deployment status of flexfields in which the value set is used indicates the deployment status of the value set instance.

The figure shows a value set used by a segment in a key flexfield and the context segment of a descriptive flexfield.



For most value sets, when you enter values into a flexfield segment, you can enter only values that already exist in the value set assigned to that segment.

Global and context-sensitive segment require a value set. You can assign a value set to a descriptive flexfield context segment. If you specify only context values, not value sets for contexts, the set of valid values is equal to the set of context values.

Defining Value Sets: Critical Choices

Validation and usage of value sets determine where and how end users access valid values for attributes represented by flexfield segments.

Tip

As a flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield.

Value Sets for Context Segments

When assigning a value set to a context segment, you can only use table-validated or independent value sets. The data type must be character and the maximum length of the values being stored must not be larger than column length of the context.

Format Only Validation

The format only validation type enables end users to enter any value, as long as it meets your specified formatting rules. That is, the value must not exceed the maximum length you define for your value set, and it must meet any format requirements for that value set.

For example, if the value set allows only numeric characters, your user could enter the value 456 (for a value set with maximum length of three or more), but could not enter the value ABC. A format only value set does not otherwise restrict the range of different values that users can enter. For numeric values, you can also specify if a numeric value should be zero filled or how many digits should follow the radix separator.

Interdependent Value Sets

You cannot specify a dependent value set for a given segment without having first defined an independent value set that you apply to another segment in the same flexfield. You use a dependent value set to limit the list of values for a given segment based on the value that the end user has chosen for a related independent segment. The available values in a dependent list and the meaning of a given value depend on which value was selected for the independently validated segment.

For example, you could define an independent value set of U.S. states with values such as CA, NY, and so on. Then you define a dependent value set of U.S. cities, with values such as San Francisco and Los Angeles that are valid for the independent value CA, and New York City and Albany that are valid for the independent value NY. In the UI, only the valid cities can be selected for a given state.

Because you define a subset value set from an existing independent value set, you must define the independent value set first. End users do not need to choose a value for another segment first to have access to the subset value set.

Table Validation

Typically, you use a table-validated set when the values you want to use are already maintained in an application table (for example, a table of vendor names). Table validation allows you to enable a segment to depend upon multiple prior segments in the same context or structure.

Table-validated value sets have unique values across the table, irrespective of bind variables. The WHERE clause fragment of the value set is considered if it does not have bind variables. If it has bind variables, the assumption is that the values are unique in the value set.

Range

In the case of format, independent, or dependent value sets, you can specify a range to further limit which values are valid. You can specify a range of values that are valid within a value set. You can also specify a range validated pair of segments where one segment represents the low end of the range and another segment represents the high end of the range

For example, you might specify a range for a format-only value set with format type Number where the user can enter only values between 0 and 100. If you use a table value set, you cannot reference flexfield segments in the WHERE clause of the value set. For example, the WHERE clause cannot reference a segment or a value set.

Security

In the case of independent and dependent values, you can specify that data security be applied to the values in segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment end users can view or modify.

When you enable security on a table-validated value sets, the security rule that is defined is absolute and not contingent upon the bind variables (if any) that may be used by the WHERE clause of the value set. For example, suppose a table-validated value set has a bind variable to further filter the value list to x, y and z from a list of x, y, z, xx, yy, zz. The data security rule or filter written against the value set should not assume anything about the bind variables; it must assume the whole list of values is available and write the rule, for example, to allow x, or to allow y and z. By default in data security all values are denied, and show only rows to which access has been provided.

Maintenance

There is no need to define or maintain values for a table-validated or subset value set, as the values are managed as part of the referenced table or independent value set, respectively.

If your application has more than one language installed, or there is any possibility that you might install one or more additional languages for your application in the future, select **Translatable**. This does not require you to provide translated values now, but you cannot change this option if you decide to provide them later.

For more information about defining value sets, see the Oracle Fusion Applications Extensibility Guide.

Manage Descriptive Flexfields

Descriptive Flexfields: Explained

Descriptive flexfields provide a way to add custom attributes to entities, and define validation and display properties for them. These attributes are generally standalone. They don't necessarily have anything to do with each other and are not treated together as a combination.

All Oracle Fusion Applications business entities that you can access are enabled for descriptive flexfields. Descriptive flexfields are optional. You can choose to configure and expose segments for the descriptive flexfield defined and registered in your database, or not.

A descriptive flexfield provides a set amount of segments for an entity. The segments of a descriptive flexfield are made available to end users as individual fields in the application user interface.

Context

A descriptive flexfield can have only one context segment to provide context sensitivity.

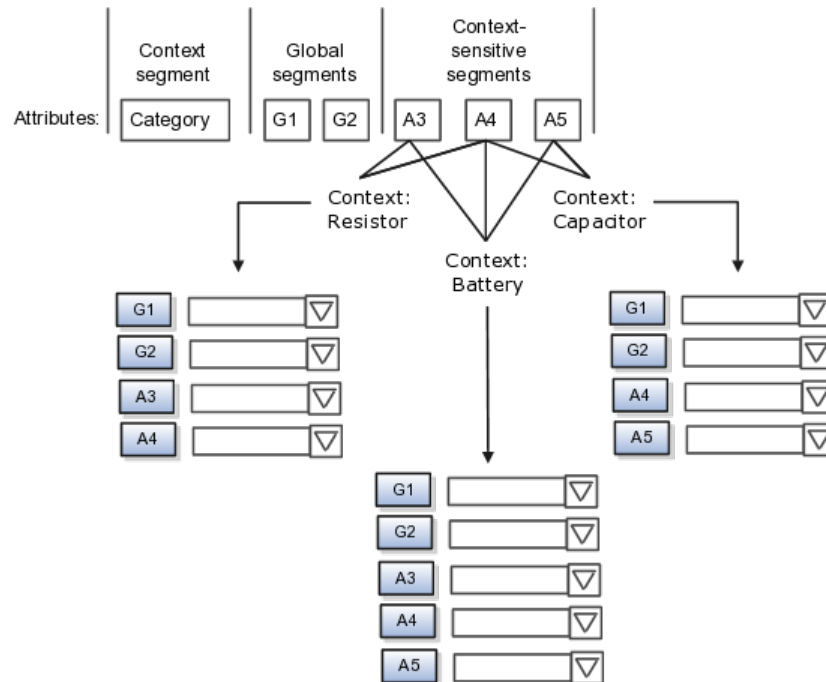
The same underlying column can be used by different segments in different contexts. For example, you can define a Dimensions context that uses the ATTRIBUTE1 column for height, the ATTRIBUTE2 column for width, and the ATTRIBUTE3 column for depth. You can also define a Measurements context that uses the same columns for other attributes: the ATTRIBUTE1 column for weight, the ATTRIBUTE2 column for volume, and the ATTRIBUTE3 column for density.

Segments and Contexts

Descriptive flexfield segments are of the following types.

Segment Type	Runtime Behavior
Global segment	Always available
Context segment	Determines which context-sensitive segments are displayed
Context-sensitive segment	Displayed depending on the value of the context segment

In the figure, a descriptive flexfield has one context segment called Category for which there are three values: Resistor, Battery, and Capacitor. In addition, the descriptive flexfield consists of two global segments that appear in each of the contexts, and three context-sensitive segments that only appear in the context in which they are configured.



Application development determines the number of segments available for configuring. During implementation you determine which attributes to add using the available segments, and the context values and the combination of attributes in each context. A segment can be used for different attributes, such as Height in Context1 and Color in Context2. Each segment of a descriptive flexfield that you make available to end users is exposed in the user interface as an individual field.

Value Sets

For each global and context-sensitive segment, you configure the values allowed for the segment and how the values that end users enter are validated, including interdependent validation among the segments.

Managing Descriptive Flexfields: Points to Consider

Configuring descriptive flexfields involves managing the available flexfields registered with your Oracle Fusion Applications database and configuring their flexfield-level properties, defining and managing descriptive flexfield contexts, and configuring global and context-sensitive segments.

Every descriptive flexfield is registered to include a context segment, which you may choose to use or not.

Segments

You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order. You cannot enter a number for one segment that is already in use for a different segment.

Value sets are optional for context segments. The value set that you specify for a context segment consists of a set of context codes, each of which corresponds to a context that is appropriate for the descriptive flexfield. If you do not specify a value set for a context segment, the valid values for that context segment are derived from the context codes. The definition of each context segment specifies the set of context-sensitive segments that can be presented when that context code is selected by the end user.

For reasons of data integrity, you cannot delete an existing context. Instead, you can disable the associated context value in its own value set by setting its end date to a date in the past.

You can configure the individual global segments and context-sensitive segments in a descriptive flexfield. These segment types are differentiated by their usage, but they are configured on application pages that use most of the same properties.

Usages

Descriptive flexfield usages allow for the same definition to be applied to multiple entities. Descriptive flexfield tables define the placeholder entity where the flexfield segment values are stored once you have configured the descriptive flexfield.

Parameters

Parameters are public arguments to a descriptive flexfield. Parameters provide outside values in descriptive flexfield validation. Parameters can be referenced by the logic that derives the default segment value and in table-validated VALUE set WHERE clauses.

Delimiters

A segment delimiter or separator visually separates segment values when the flexfield is displayed as a string of concatenated segments.

Manage Extensible Flexfields

Extensible Flexfields: Explained

Extensible flexfields are like descriptive flexfields, with some additional features.

- You can add as many context-sensitive segments to the flexfield as you need. You are not dependent on the number of segments predefined and registered for the flexfield.
- You can configure a one-to-many relationship between the entity and its extended attribute rows.
 - A row of data can have multiple contexts associated with it.
 - A row of data can have multiple occurrences of the same context.

- You can configure contexts in groups so the attributes in the context always appear together in the user interface.
- You can use existing hierarchical categories so that entities inherit the contexts that are configured for their parents. Contexts are reusable throughout categories.
- You can specify view and edit privileges for the extensible flexfield segments to control who sees the attributes and who can change the attribute's values.

When you configure a context for multiple rows per entity, the segments are displayed as a table.

Unlike descriptive flexfields, the extension columns corresponding to extensible flexfields segments are part of extension tables, separate from the base application table. Unlike descriptive flexfield contexts, the set of attributes in an extensible flexfield context remains constant and does not differ by context value.

An extensible flexfield describes an application entity, with the runtime ability to expand the database that implementation consultants can use to define the data structure that appears in the application.

Extensible flexfields support one-to-many relationships between the entity and the extended attribute rows.

Usages

As with descriptive flexfields, you can define multiple usages for an extensible flexfield, which enables several application tables to share the same flexfield.

For example, a flexfield for shipping options can be used by both a Supplier table and a Buyer table. In addition, you can associate a context with one, some, or all of the flexfield's usages. Thus, with the shipping information example, you can associate a warehouse context with the Supplier usage, a delivery location context with the Buyer usage, and a ship-via context with all usages.

Categories

Extensible flexfields support multiple contexts, and the contexts can be grouped into categories. Every extensible flexfield has at least one category, or root category, and some extensible flexfields support a hierarchy of categories, where a given category can inherit contexts from its parent categories.

You can define categories for extensible flexfields, and you can associate any combination of contexts with a given category.

For example, the Electronics and Computers category hierarchy might include a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on. The Home Entertainment product might have contexts that specify voltage, dimensions, inputs and outputs. Contexts are reusable within a given extensible flexfield. For example, the dimensions context could be assigned to any category that needs to include dimensional information.

Pages

Extensible flexfields allow you to combine contexts into groups known as pages, which serve to connect the contexts so they will always be presented together in the application user interface.

Each application page corresponds to one extensible flexfield category, with a separate region of the page for each associated context.

Managing Extensible Flexfields: Points to Consider

Configuring extensible flexfields involves managing the available flexfields registered with your application database and configuring their flexfield-level properties, defining contexts, categories, and pages, and configuring the segments for each extensible flexfield.

Contexts

A context can be defined as single row or multi row. Single row contexts are the same as descriptive flexfields contexts. A single row context has only one set of context-sensitive segments. A multi-row context enables you to associate multiple sets of values with the same object instance.

For example, for a BOOK table, you could create a multi-row context named chapters that contains a chapter segment and a number of pages segment. Multiple chapters can then be associated with each book in the BOOK table.

Set the context to translatable so free-form text entered by end users is stored in the language of the user's locale, and different translations of that text can be stored in other languages. Segments in the translated contexts should utilize format-only value sets for storing free-form, user-entered text.

Categories

A category is a grouping of related data items that can be considered to belong together. You can associate any combination of contexts with a given category.

A category hierarchy logically organizes a set of categories.

For example, the Electronics and Computers category hierarchy might include a Computer category and a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on.

A category can be a child or sibling of an existing category. The hierarchy can be as simple or as complex as desired, with any combination of zero or more sibling categories and zero or more child categories. If no category is defined, the data items are grouped under a single predefined default category.

Each category has associated contexts that store relevant information about a data item in that category. For example, a Home Entertainment product has contexts that specify Voltage, Dimensions, Inputs and Outputs. Contexts are reusable within a given extensible flexfield; the Dimensions context could be assigned to any category that needs to include dimensional information.

If a hierarchy includes child categories, each child category inherits the contexts from its parent category; for example, the Home Entertainment category inherits Voltage and Dimensions from the Electronics and Computers category.

Each extensible flexfield is associated with a particular category hierarchy. You can think of category hierarchies as the defining framework for extensible flexfields and their contexts. A category hierarchy specifies which contexts are valid for each category.

An extensible flexfield can include multiple contexts which you define to support a given category. These contexts can be suitable for a variety of different purposes, but within a particular category, some contexts might be considered to be related to, or dependent on, each other. You can combine these contexts into groups known as pages, which serve to connect the contexts so they will always be presented together in the application user interface.

For example, the Home Entertainment category might have an Electrical Specifications page that contains the Voltage, Inputs and Outputs contexts, and a Physical Specifications page that contains the Dimensions and Form Factor contexts.

Indexed Segments

You can designate an extensible flexfield segment as indexed so that it is one of the selectively required attributes an end user can use in an attribute search. If you indicate in the Manage Extensible Flexfield UI page that a segment should be indexed, the column representing the segment must be added to the database index. This is commonly done by a database administrator (DBA).

When an extensible flexfield with indexed segments is deployed, search task flows are generated along with the other flexfield artifacts and specify the indexed attributes as selectively required. In the deployed extensible flexfield's search task flow, an end user must specify at least one of the indexed attributes in the search criteria. This prevents non-selective searches which could cause performance issues.

For example, if you index the memory and processor attributes and ensure that the corresponding columns in the database are indexed, an end user can search an item catalog for computers by entering processor or memory or both as a search criterion. No search is performed if an end user enters an attribute as search criteria that is not indexed.

Manage Key Flexfields

Key Flexfields: Explained

Key flexfields provide a means to capture a key such as a part number, a job code, or an account code. A key flexfield consists of one or more segments, where each segment can have a meaning.

For example, a part number 10-PEN-BLA-450 might correspond to a black pen from vendor #450 sold by division #10 (office supplies). Behind the scenes, the application uses a unique number, 13452, for this part, but the end user always see the 10-PEN-BLA-450 part number.

The following aspects are important to understanding key flexfields.

- Architecture
- Segments and segment labels
- Structures
- Segment and structure instances
- Combinations
- Dynamic combination creation
- Security

Key flexfields are not optional. You must configure key flexfields to ensure that your applications operate correctly. You configure and maintain key flexfield definitions with the Manage Key Flexfields task.

Architecture

When you configure a key flexfield, you define metadata about the key flexfield such as how many segments are in a structure, how many structures the flexfield uses, what value sets each segment uses, and so on. This is flexfield metadata stored in flexfield metadata tables.

Based on the flexfield metadata, actual part numbers are captured at runtime as a combination of segment values and stored in a combinations table. A combinations table contains all the segment columns for a flexfield, plus a unique ID column and a structure instance number column that differentiates multiple arrangements of the segment columns.

For example, a part number that can be comprised of multiple segments can be represented by a key flexfield. A part number key flexfield has a corresponding combinations table, where the flexfield stores a list of the complete codes, with one column for each segment of the code, together with the corresponding unique ID and structure instance number for the code. When users define a new part number or maintain existing part numbers in the parts catalog, they directly maintain rows in the combination table.

The foreign key table contains a different business entity than the combinations table. For example, the business entity in the foreign key table is order lines or invoice lines that contain foreign key references to parts for ordering and so on. Any number of foreign key tables can reference a particular entity represented by a key flexfield.

Segments and Segment Labels

A key flexfield consists of segments. Segments consist of a prompt, a short prompt, display width, a number that determines where in the sequence of a key flexfield structure the segment exists, the range type and the column name of the attribute being captured by the segment, a default value set and a label for the segment. A segment label identifies a particular segment of a key flexfield. Segment labels are defined and made available by applications development.

Applications identify a particular segment for some purpose such as security or computations. Segment name or segment order cannot reliably identify a segment because key flexfield segments can be configured to appear in any order with any prompts. A segment label functions as a tag for a segment.

For example, Oracle Fusion General Ledger needs to identify which segment in the Accounting Flexfield contains balancing information and which segment contains natural account information. General Ledger uses a segment label to determine which segment you are using for natural account information. When you define your Accounting Flexfield, you must specify which segment label apply to which segments.

Some labels must be unique, and cannot be applied to more than one segment in each structure. Other labels are required, and must be applied to at least one segment in each structure.

A segment label orients an end user's search of segments, such as the Cost Center label for all segments across key flexfields that capture a value for cost center.

Structures

A key flexfield structure definition includes the number of segments and their order.

In some applications, different users need to see different segment structures for the same flexfield. A key flexfield can have multiple structures if registered to support more than one structure.

The flexfield can display different fields for different end users based on a data condition in your application data, such as the value of another field entered by the end user or the user's role. For example, the correctly formatted local postal address for customer service inquiries differs based on locale. A postal address key flexfield could display different segments and prompts for different end users based on a location condition in your application data, such as the user's role or a value entered by the user.

Each structure can have one or more segments. Thus a segment is a child of a structure. If you want to store a particular segment, such as Cost Center, in two different structures, you must define the segment separately in each structures.

Each structure may have one or more structure instances. Each instance of a structure shares the same number and order of segments, but differs in the allowable values or value sets that validate the segments.

Structure and Segment Instances

You can define multiple configurations of a key flexfield structure. These structure instances have the same segment structure, in the same sequence order. They differ primarily in how each segment is validated. You define a structure instance for each key flexfield and each key flexfield structure instance.

The segments in a key flexfield structure instance are segment instances. A segment instance is a segment with a specific value set assigned to it.

If a key flexfield has been registered with a tree structure, you can specify a tree code for a segment instance, where the tree code defines a hierarchical relationship between the segment values.

Combinations

A combination is a complete code, or combination of segment values that makes up the code, that uniquely identifies an object.

For example, each part number is a single combination, such as PAD-YEL-11x14 or 01-COM-876-7BG-LTN. In these combinations, the hyphen is the segment separator. If you had ten parts you would define ten combinations. A valid combination is simply an existing or new combination that can currently be used because it is not out of date or disabled, and does not violate cross-validation or security rules. A combination has different segments depending on the flexfield structure being used for that combination. Any combination is associated with only one particular flexfield structure.

Many Oracle Fusion Applications products refer to a key flexfield combination by using the name of the entity or the key flexfield itself. For example, Oracle Fusion Assets uses the asset key flexfield and refers to one of its combinations as an asset key or asset key flexfield. In another example, other Oracle Fusion Applications products including Oracle Fusion General Ledger (GL) refer to combinations of the accounting flexfield as account or GL account.

Each key flexfield has one corresponding table, known as the combinations table, where the flexfield stores a list of the complete codes, with one column for each segment of the code, together with the corresponding unique ID number (a code combination ID number or CCID) for that code. Then, other tables in the application have a column that stores just the unique ID for the code. For example, you may have a part number code, such as PAD-YEL-11x14. The Parts combinations table stores that code along with its ID, 57494. If your application allows you to take orders for parts, you might then have an Orders table that stores orders for parts. That Orders table would contain a single column that contains the part ID, 57494, instead of several columns for the complete code PAD-YEL-11x14.

Typically one combinations page maintains the key flexfield, where the key flexfield is the representation of an entity in your application. The combinations page is where you maintain individual combinations, such as part numbers.

Dynamic Combination Creation

Dynamic combination creation is the insertion of a new valid combination into a combinations table from a page other than the combinations page.

Dynamic combination creation may be enabled at the following levels.

Level Of Dynamic Combination Creation	Controlled By:
Flexfield	Application development
Each usage or reference to the key flexfield	Application development
Structure instance	Administrators and implementation consultants
Other	Administrators and implementation consultants

If your key flexfield or certain usages or references of the key flexfield do not permit dynamic combination creation, you may control whether dynamic

combination creation is enabled for each structure instance. If enabled, a user can enter a new combination of segment values using the flexfield window from a foreign key page. For example, when entering a transaction, a GL user can enter a new expense account code combination for an account that does not yet exist. Your application creates the new account by inserting the new combination into the combinations table behind the scenes. Assuming that the new combination satisfies any existing cross-validation rules, the flexfield inserts the new combination into the combinations table, even though the combinations table is not the underlying table for the foreign key page.

Managing Key Flexfields: Points to Consider

Consider the plans for a key flexfield, security, and resulting runtime pages when configuring key flexfields.

Planning

Plan structures carefully and allow for future needs.

Caution

Do not change the number, order, and maximum length of segments once you have acquired flexfield data.

Structure Delimiters

A delimiter separates the segments when they appear to end users. The delimiter value of a structure specifies the character used to visually separate segment values when the key flexfield is displayed as a string of concatenated segments in the UI.

Tip

Choose the delimiter value of your key flexfield carefully so that it does not conflict with the flexfield data. For example, if your data frequently contains periods, such as in monetary or numeric values, do not use a period as your segment separator. Any character you expect to appear frequently in your segment values or descriptions is not a good choice for the delimiter.

If you change the configuration of a key flexfield, such as the delimiter, the change affects the previously stored key flexfields with that structure.

Security

Oracle Fusion data security enforces value set security.

Within key flexfields, value set security applies to the selection of the individual segment values in the segment list of values. When selecting a key flexfield segment value from the combination table, data security allows display of only the combinations whose segment values you have access to. Applications development controls whether or not value set security rules propagate to the foreign key table. By default they do.

Runtime Pages

Application development determines the user interface (UI) pages used to render flexfields. The types of key flexfield UI pages are as follows.

- Combinations pages where underlying entity objects use the combinations table itself
- Foreign key pages where the underlying entity objects contain a foreign key reference to the combinations table
- Partial usage page where some or all of the key flexfield's segment columns are in a product table

The same key flexfield can be used in different ways on different pages.

A page with a foreign key reference has a base table or view that contains a foreign key reference to a combinations table with the actual flexfield segment columns. This allows manipulating rows containing code combination IDs (CCID).

A page with partial usage of a key flexfield presents segments that are defined on a product's transactional table in addition to being defined on a combinations table. In the case of a partial usage page, it is possible that only part of the configuration is visible. This allows the key flexfield to behave more like a descriptive flexfield.

A code combination maintenance page or combinations page presents the combinations table. This allows directly creating and maintaining code combinations. The combinations table contains all key flexfield segment columns and a unique ID column.

A typical application has one and only one combinations page. An application might not have a combinations page if it does not support maintenance by administrators.

A page containing a search region enables end users to select which attributes of the key flexfield view object to use as criteria to search for flexfield metadata.

For example, you can configure seven segments for the Account key flexfield. In a foreign key reference page, end users see the typical key flexfield picker with all seven segments where they can search for combinations. In a partial usage page using the same key flexfield, end users potentially could see only a single segment such as the Cost Center labeled segment, or they might see multiple segments but displayed as individual segments rather than as a picker for choosing combinations

For more information on key flexfield pages, see the Oracle Fusion Applications Developer's Guide.

Key Flexfield Structures: Explained

A key flexfield structure arranges the segments of a key so you can reuse a single key flexfield in multiple combinations of the same or a subset of segments.

Multiple instances of a single structure can accommodate differences in the value sets assigned to the structure's segments.

The structure determines the following aspects of a key flexfield.

- The segments to include
- The order of the segments
- Segment labels on the included segments
- Properties for each segment applied to the instances of the segments in an instance of the structure

Managing Key Flexfield Structures

All the segments defined for a key flexfield are available to be included in a key flexfield structure.

You can define as many segments as there are defined segment columns in your key flexfield combinations table.

Restriction

Be sure to add segments in the order that your key requires. Once deployed, the order cannot be changed.

Enable segments to indicate that they are in use. A flexfield does not display disabled segments in runtime.

Tip

To protect the integrity of your data, disable a segment if you have already used it to enter data.

Key Flexfield Structure Instances and Segment Instances: Explained

A key flexfield structure can have one or more alternate structure instances.

The instances of a key flexfield structure share the following aspects of the structure.

- The same set of segments
- The same arrangement of segments
- The same properties at the segment and structure levels

Differences among structure instances at the structure level include whether dynamic combination creation is allowed.

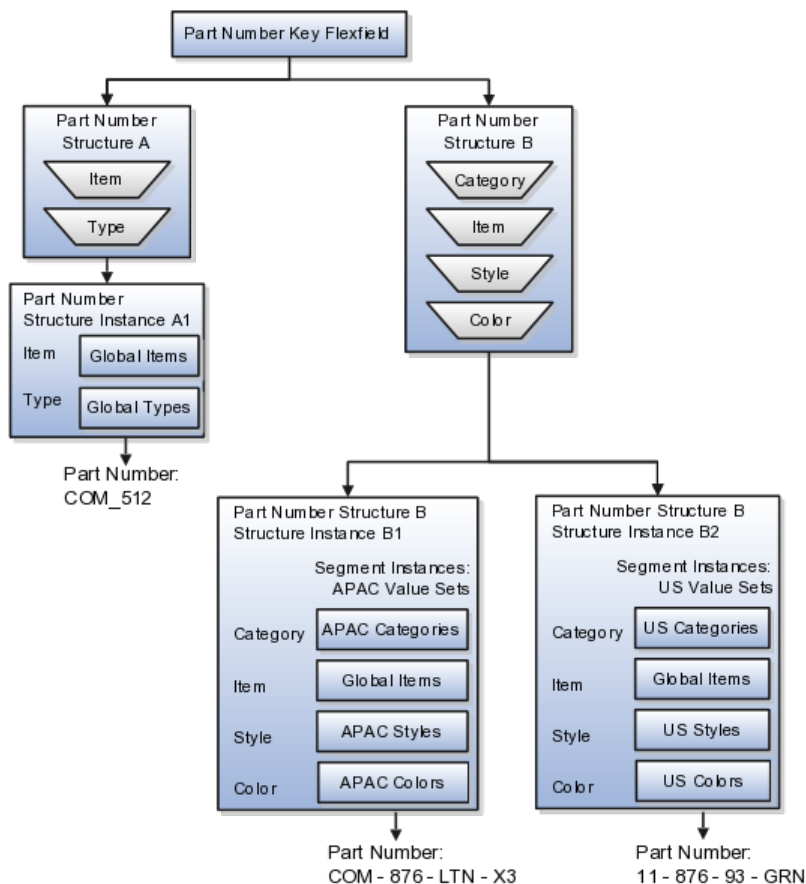
Differences among segment instances at the structure instance level include the following.

- Value set
- Default type and default value

- Tree code
- Whether the segment is any of the following
 - Required
 - Displayed
 - Enabled for business intelligence
 - Optional or required as a query criterion

For example, you could use one group of value sets for the US and another for France.

The figure shows two structures instances for a part number structure. The structures differ in the number of segments and the segment separators used. The structure instances of a structure share all properties that are defined for the structure, but can vary in the properties defined at the structure instance or segment instance level, such as the value set assigned to the segment instances.



Query Required Segment Instances

You can designate a key flexfield segment instance as query required so that it is one of the selectively required attributes an end user can use in a key flexfield combination search. If you indicate in the Manage Key Flexfields UI page that a segment instance should be indexed, the column representing the segment

must be added to the database index. This is commonly done by a database administrator (DBA).

Following deployment, the combination picker of the key flexfield displays the query required attributes as selectively required. An end user must specify at least one of the query required attributes in the search criteria. This prevents non-selective searches that could cause performance issues.

For example, if you mark the cost center and account attributes as query required and ensure that the corresponding columns in the database are indexed, an end user can search for combinations by entering cost center or account or both as a search criterion. No search is performed if an end user does not enter at least one query required attribute as search criteria.

Tip

Index the Structure Instance Number column on your combinations table to improve performance.

Dynamic Combinations

If a key flexfield supports dynamic combination creation, you can choose to enable this feature by selecting **Dynamic Combination Creation Allowed**. This will allow end users to enter values at runtime that produce new code combinations for the flexfield. If not enabled, new valid combinations can only be entered using the combinations table for the flexfield.

Trees

If a tree code has been defined for the value set assigned to the segment instance, and you assign the tree code to the segment instance, tree hierarchy search operations are available on the segment values.

For a segment instance to be based on a tree, the following must be true.

- Application development registered the key flexfield with a tree structure.
- A tree code for that tree structure exists.
- The tree code that includes tree versions containing the values of the value set assigned to the segment instance.
- You assign the desired tree code directly to the segment instance.

Provided these conditions are satisfied, different segment instances that use the same value set can be assigned the same or different tree codes, meaning they use a different hierarchy definition over the same values.

Key Flexfields: Example

A key flexfield can capture expense account information.

Scenario

When entering details for each expense, the user specifies an account to which the expense is charged.

Entering Expense Accounts

A user interface for entering expenses gives the user the option of selecting an expense account that identifies the cost center and other details needed for processing the expense.

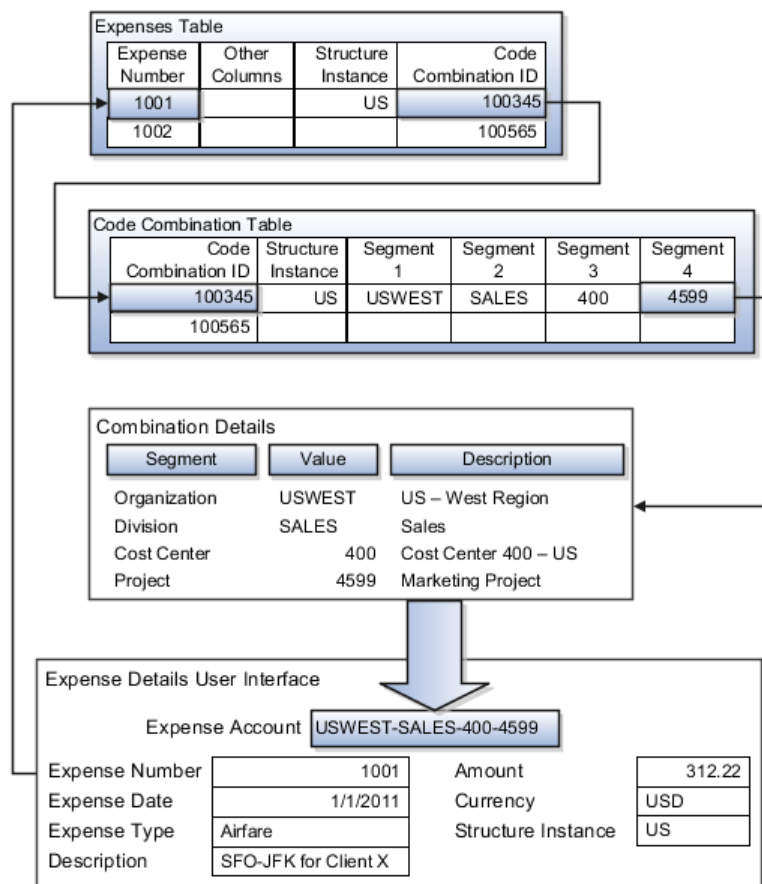
Analysis

The expense account field is a foreign key reference to a code combination (EXPENSE_LINES.EXPENSE_ACCOUNT = ACCOUNTS.CCID).

Code Combination Table for Entering Accounts and Employees

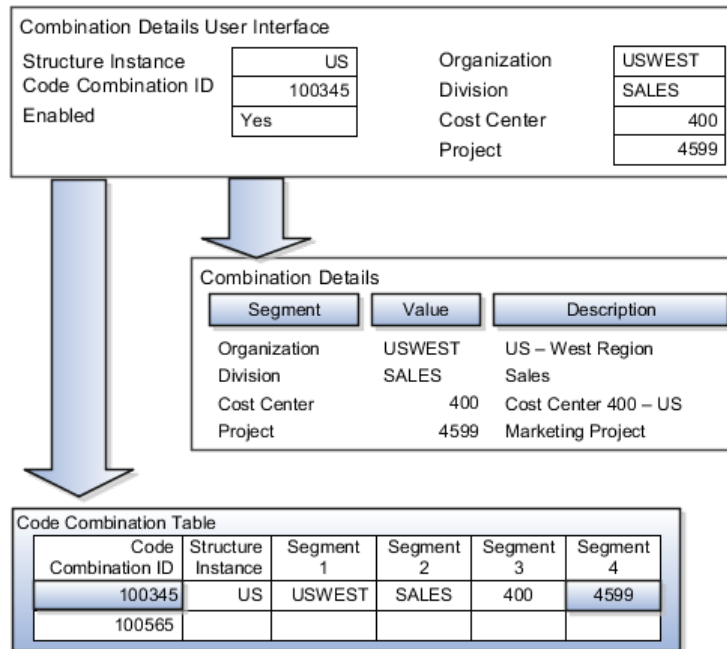
The code combination table supports entering account information, such as for expense accounts.

The figure shows the origin in the code combination table of the account specified by the user. The code combination ID record stores the information of the key flexfield segments used to assemble the expense account based on the key flexfield configuration.



The combinations page, which is the maintenance page for the key flexfield, is for managing rows in the combination table. In this example, managing the combinations means adding or editing account numbers that adhere to the key flexfield metadata rules.

The figure shows the code combination details for the example expense account reflected in the flexfield configuration and the code combination table.

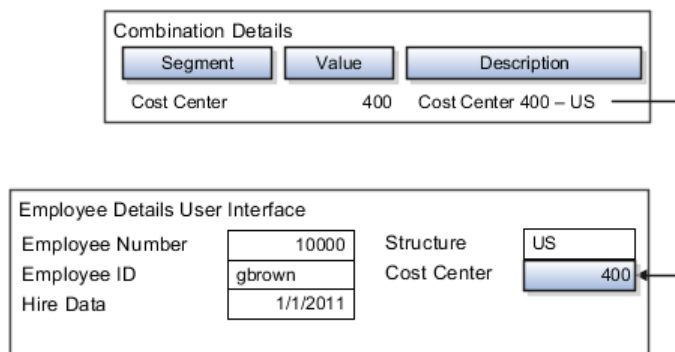


If dynamic combination creation is not enabled, then when entering an expense line, the user can only select an account that already exists in the ACCOUNTS (combinations) table. If they require an account that does not exist, they must consult with the appropriate application administrator who can add the account to the combinations table.

If dynamic combination creation is enabled, then when entering an expense line, the user can either select a pre-existing account, or type in a new account that created dynamically on the fly in the ACCOUNTS (combinations) table. Once the new combination is created, the same user can refer to it on the expense line.

When managing employee information, the user specifies the cost center that the employee belongs to. The cost center field corresponds to a single, labeled segment of the Account Key Flexfield and has metadata defined such as the allowable value set for that segment.

In this figure, instead of specifying a cost center ID reference to an account, only the Cost Center segment is used and the value is stored directly on the employee table.



FAQs for Define Flexfields

Why did my flexfield changes not appear in the runtime UI?

The ADF business components or artifacts of a flexfield, which are generated into an metadata services (MDS) repository when the flexfield is deployed, are cached within a user session. You must sign out and back in again to view flexfield definition changes reflected in the runtime application user interface page.

A flexfield's status relative to its deployment determines whether the flexfield segments as currently defined in the metadata are available to end users. The flexfield segments seen by end users in the runtime correspond to the flexfield definition that was last deployed successfully.

What happens if a value set is security enabled?

Value set security is a feature that enables you to secure access to value set values based on the end user's role in the system.

As an example, suppose you have a value set of US state names. When this value set is used to validate a flexfield segment, and users can select a value for the segment, you can use value set security to restrict them to selecting only a certain state or subset of states based on their assigned roles in the system.

For example, Western-region employees may choose only California, Nevada, Oregon, and so on as valid values. They cannot select non-Western-region states. Eastern-region employees may choose only New York, New Jersey, Virginia, and so on as valid values, but cannot select non-Eastern-region states. Value set security is implemented using Oracle Fusion Applications data security.

How can I set a default value for a flexfield segment?

When you define or edit a flexfield segment, you specify a default value from the values provided by the value set assigned to that segment.

You can set the default value to be a parameter, which means the entity object attribute to which the parameter you choose is mapped will provide the initial default value for the segment.

You can set to be a constant, if appropriate to the data type of the value set assigned to the segment.

In addition to an initial default value, you can set a derivation value for updating the attribute's value every time the parameter value changes. The parameter you choose identifies the entity object source attribute. Any changes in the value of the source attribute during runtime are reflected in the value of the segment.

If the display type of the segment is a check box, you can set whether the default value of the segment is checked or unchecked.

Define Attachments

Attachments: Explained

Attachments are pieces of supplementary information that users can associate with specific business objects such as expense reports or purchase orders. Attachments can be URLs, desktop files, text, or in cases where available, repository folders. For any given business object, a user may be able to only view attachments, or also create, delete, or edit attachments, depending on security. For more information on an introduction to attachments, see the Oracle Fusion Applications Developer's Guide.

Repository

Attachments are stored in a content server, the Oracle Enterprise Content Management document repository. Users have no real interaction with the repository unless the repository mode is enabled for attachments on specific business objects. In which case, users can share attachments among objects, update attachments by checking them out of and back in to the repository, and perform other tasks. Access to attachment files is controlled by a digital signing mechanism. Depending on security, users might have direct access to the repository.

Security

Data security that applies to a specific business object also applies to attachments for that object, as determined by the attachment entity defined for the object. For example, if a user has no access to a specific expense report, then the same user cannot access attachments for the expense report. You can also use attachment categories to control access and actions on attachments, based on roles associated with the category. For more information on securing attachments, see the Oracle Fusion Applications Developer's Guide.

Attachment Entities: Explained

An attachment entity is usually a database entity, for example a table or view, that represents a business object attachments can be associated with. Each attachment UI must be defined with a corresponding attachment entity, which not only identifies the business object to attach to, but also controls what users can do. Attachment entities are used only in the context of attachments and exist separately from the database entities that they are based on.

Edit and create attachment entities on the Manage Attachment Entities page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Attachment Entities task. Though you would generally use predefined attachment entities with attachment UIs, you might need to create new entities, for example when developing custom UIs.

Entity Names

An attachment entity name should match the name of the table or view that represents the business object to attach to. The name is also used in the

repository folder that is automatically created to store attachments for the entity. The attachment entity display name should be something that users know to represent the business object.

Database Resource

The data security policies associated with the database resource defined for the attachment entity would apply to attachments for that entity. For example, based on the database resource for the expense reports attachment entity, the same policies apply to attachments for expense reports. The database resource value must match the value in the OBJ_NAME column in the FND_OBJECTS table for the business object that the entity represents.

Enabling Security

Security based on the database resource associated with the attachment entity is always in effect. What you can enable or disable is security based on attachment categories. If any of the attachment categories associated with the attachment entity has data security defined, then that security applies to this entity only if enabled.

Attachment Entities and Attachment Categories: How They Work Together

The association between attachment entities and categories determines which categories can be used for an entity. For example, categories associated with the expense report attachment entity are available to be implemented in attachment UIs for expense reports. You can define these associations when managing either entities or categories. Any association changes in either the Manage Attachment Entities or Manage Attachment Categories page are reflected on the other page. You can access either page by starting in the Setup and Maintenance Overview page and searching for attachment tasks.

Managing Entities

You determine which attachment categories are relevant to a particular entity on the Manage Attachment Entities page, and each entity must have at least one category. Depending on configuration, any or all of the available categories for that entity are used. For example, you assign three categories to the expense reports attachment entity. For a particular expense report page with attachments functionality, you can customize the attachments component to specify which of the three categories are used. Based on your selection, the data security defined for each category, if any, is applied to attachments on that page if the attachment entity has category-based security enabled.

Managing Categories

If you create an attachment category and need to assign it to multiple attachment entities, use the Manage Attachment Categories page. The association means the same as the association on the Manage Attachment Entities page.

FAQs for Define Attachments

What's an attachment category?

An attachment category is used to classify and secure attachments. Each attachment user interface must be defined with at least one category for users to be able to add attachments. If there are multiple categories, users can view them and select one when adding attachments. For example, attachments for an expense report can be categorized as receipts, scanned invoice images, and so on.

You can also associate roles with categories to determine user access and actions for attachments, based on the categories assigned to the attachment entity. For example, security for expense report attachments can be based in part on the categories assigned to the expense report attachment entity. You can define multiple categories per module, and add and manage custom categories for your own purposes. For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Use the Manage Attachment Categories page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Attachment Categories task.

Set Activity Stream Options

Activity Stream Options: Highlights

Activity Stream is a region on the Oracle Fusion Applications Welcome dashboard and other pages in various applications. Users track the activities and transactions of other users in this region. You can set options that affect the all Activity Stream regions for all users across your site. Individual users can still override your settings through Activity Stream preferences.

Activity stream settings are described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. When you read content from that guide, note that:

- Your setup applies to all users, not just yourself or any individual user.
- You can disregard discussions about how to access the settings, because you access the Set Activity Stream Options page by starting in the Setup and Maintenance Overview page and searching for the Set Activity Stream Options task.

Setting Activity Stream Options

- Define the types of users to display activities about in the Activity Stream region, the types of activities to track, and other settings.

See: Setting Activity Stream Preferences

Manage Menu Customizations

Managing Menu Customizations: Highlights

You can customize the Navigator menu, which is the main menu of Oracle Fusion Applications and is always available in the global area. Use the Manage

Menu Customizations page, which you can access by starting in the Setup and Maintenance Overview page and searching for the Manage Menu Customization task.

An overview of customizing the Navigator menu is provided in the Oracle Fusion Applications Extensibility Guide. Details of the values you enter to define menu items are provided in the Oracle Fusion Applications Developer's Guide.

Overview

- Navigator menu customization involves managing items, which are nodes in the menu that take the user to the desired destination, and groups, which are categories of items. The label is the menu item or group text displayed to users, and only rendered items and groups are visible to users. Items and groups that are not rendered are displayed in italics in the menu customization pages. Refer to the Oracle Fusion Applications Extensibility Guide.

See: Customizing the Navigator Menu

Menu Items

When you customize items in the Navigator menu, you determine if the item takes users to a specific page in Oracle Fusion Applications or to another application or Web site. The details of what you enter to define the menu item depend on the type of destination. If you duplicate a menu item, the new item appears below the selected source item.

- For menu items to an Oracle Fusion Applications page, do not enter anything in the Destination field, but specify the focus view ID of the target page, Web application, secured resource name, application stripe, and page parameters list. The secured resource name identifies the page definition file that is used to secure resource grants for the page, for example `oracle.apps.view.pageDefs.CaseList_Form_Attach_UIShellPagePageDef`. The application stripe is the partition for the application in the policy store, for example `crm`. If you enter both a secured resource name and an application stripe, then the menu item is rendered only if the logged-in user has permission to view that secured resource. If either value is missing, then the item is not secured. Refer to the Oracle Fusion Applications Developer's Guide.

See: Menu Attributes Added by Oracle Fusion Middleware Extensions for Applications

- For menu items to another application or Web site, enter only the full URL in the Destination field.

Manage Applications Core Common Reference Objects: Manage Applications Core Messages

Common Messages: Points to Consider

Common messages, which have message names that begin with `FND_CMN` and message numbers between 0 and 999, are used throughout Oracle Fusion

Applications. Each common message can appear in multiple places in any product family. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages that are of type error or warning are part of the message dictionary.

Editing Common Messages

Because a common message can be used in any application, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, make sure that the text would make sense to all users across Oracle Fusion Applications who might see it.

Creating Common Messages

You can create custom common messages for use in multiple places within a single product. Do not begin the message name with FND_CMN, but use another suitable convention. The message number should be within the range that is designated for the product.

Manage Applications Core Common Reference Objects: Manage Applications Core Administrator Profile Values

Creating and Editing Messages: Highlights

Each message in the message dictionary has many attributes and components, including message properties, text, and tokens, that you define when creating or editing the message.

Details about these messages are described in the Oracle Fusion Applications Developer's Guide.

Message Properties

- The message type identifies the type of information that the message contains.

See: Understanding Message Types

- The message name and number are identifiers for the message. There are specific message number ranges for predefined messages in each application, and you should not edit numbers assigned to predefined messages. When creating custom messages, use only message numbers within the 10,000,000 to 10,999,999 range.

See: About Message Names

See: About Message Numbers

- The translation notes for predefined messages might contain internal content that you can disregard.

See: About Translation Notes

- The message category, severity, and logging enabled option are related to the incident and logging process.

See: About Grouping Messages by Category and Severity

See: Understanding Incidents and Diagnostic Logs with Message Dictionary

Message Text and Tokens

- The message text comprises various components, some of which are displayed only to select users. To determine which component of the message text is displayed to a particular user, set the Message Mode profile option (FND_MESSAGE_MODE) at the user level for that user. The message component short text is visible to all users and therefore, the profile option does not apply to this component. Also, the profile option applies only to messages in the message dictionary.

See: About Message Components

- Tokens are variables that represent values to be displayed in the message text.

See: About Tokens

Profile Options and Related General Preferences: How They Work Together

Some Oracle Fusion Middleware Extensions for Applications profile options are related to general preferences in the global area.

Preferences

The related general preferences are Default Application Language, Territory, Date Format, Time Format, Currency, and Time Zone. When the user changes any of these preferences, the stored values in LDAP are updated accordingly.

Profile Options

The corresponding profile options are Default Language, Default Territory, Default Date Format, Default Time Format, Default Currency, and Default User Time Zone. No matter what you set for these profile options at any level, the preferences settings, or LDAP values, take precedence. The profile option value is used only if the LDAP value is not available. Updating the profile option value does not automatically update the value in LDAP or preferences.

Document Sequences: Explained

In Oracle Fusion Applications, each business document or business event is uniquely identified by a document sequence number that you assign to

it. However, the document sequencing feature must be turned on (enabled) on the business document or event to allow the assignment. For example, if document sequencing is enabled, you can assign a document sequence number to an invoice that gets generated in response to a purchase order. You can use document sequences as a proof to track successfully executed transactions as well as failed transactions. Additionally, a document sequence helps in generating an audit trail, which can be used to identify how a particular transaction passed through various applications.

Document sequencing can be managed automatically, manually, and gaplessly.

Note

Plan your document sequencing carefully before you use the options available in the application to apply sequence numbers. Avoid changes to the options after you saved your work on the Manage Document Sequences and Manage Document Sequence Categories pages.

Automatic Sequencing

Automatic document sequencing assigns a unique number to each document as it is generated, and this unique number is stored in the database. The numbering is sequential by date and time of creation. If you define a sequence to automatically number documents, you can provide an initial value to begin the sequence. In absence of a custom value, the default value 1 is used.

Manual Sequencing

Manual sequencing requires you to assign a unique number to each document before it is generated. In manual sequencing, the numerical ordering and completeness of a transaction is not enforced. Users can skip or omit numbers when entering the sequence value. However, each time that a number is assigned, the application validates its uniqueness.

Gapless Sequencing

Gapless sequencing is similar to automatic sequencing. It automatically generates a unique number for each document, but does that only for successfully generated documents. As a result, the sequence is maintained for all the documents that are generated, and no sequence numbers are lost due to incomplete or failed document generation.

Important

Use this type of sequencing only if necessary because it may affect the performance of the system and slow down transaction processing.

Sequential Numbering Enforced Profile Options

The Sequential Numbering Enforced profile validates the documents being created and applies the relevant document sequence, based on the selected option. The following options are available:

- **Always Used:** Sequential numbering is enforced for all document categories. When this option is set, users cannot create a document if its

document category is not assigned any active document sequence. The system displays an error.

- Partially Used: Sequential numbering is enforced for all document categories. However, if no sequence is available for the document, the system displays a warning. Users can either proceed without a document sequence or create and assign a document sequence before proceeding.
- Not Used: Sequential numbering is not enforced. In this mode, although the documents created do not require a document sequence to be assigned, the system checks for the uniqueness of the document number provided. The system does not display any warning or error.

Restriction

At the site level, the profile is by default set to Partially Used. Avoid changing this option as doing so may interfere with the validation logic and the data that was stored using the earlier option may not appear. However, you can change the option at the product or user level.

Common Applications Configuration: Define WebLogic Communication Services Configuration

Click to Dial: Explained

Use Click to Dial to place a call to a contact from a hyperlink on the phone number or phone icon.

Here are a few topics that are important to know when using Click to Dial:

- Normal call flow
- Interaction Records and Notes
- Operational Notes

Note

Click to Dial must be enabled to make calls using the various contact information pages and pop-up UIs. When enabled, phone numbers appear as hyperlinks. Interaction logging is available if that feature is enabled. If interaction logging is available, a note indicating that fact will be displayed in the UI. See Click to Dial: Top Tasks for more information about enabling these features.

Normal Call Flow

Click to Dial uses a call-the-caller-then-call-the-callee procedure for completing a phone call. That format and the normal flow of this procedure are described below.

- **You initiate a call**

If you see a small orange square next to a contact or customer name, click the square to display further details, including phone numbers. To place a call, place your mouse over the phone number hyperlink and click.

Note

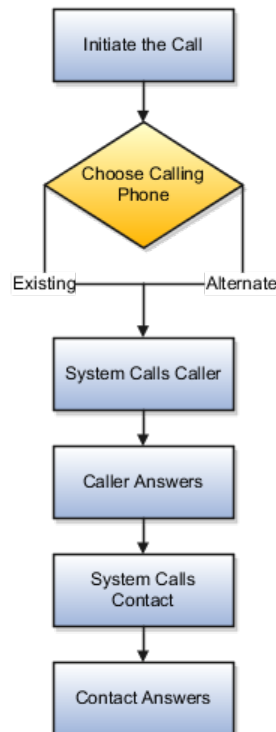
Click to Dial does not work on phone numbers that are marked with a Do Not Call icon.

-
- **Select a Calling Phone**

Choose the calling phone number. Usually the calling phone is a number from your profile information. Alternately, if you need to use a phone not in your profile, you can specify a different number to originate your call.

- **Call Flow**

After you select the calling phone number, the system calls you back on that number, waits for you to answer, and then calls the person for whom the call is intended.



Interaction Records and Notes

Click to Dial automatically creates an interaction record of the call, when that feature is enabled. The details window that provides the phone number may also show an Interaction icon that you can click to display a list of interaction records to edit, for example to provide a description of the call. The window may also provide a notes feature that you can use to record notes during the call.

Interaction Logging

The interaction record is logged as soon as the call is either successfully set up or known to have failed.

The interaction log records the customer, call participants, a timestamp noting the start time of the call, the direction of the communication, in or outbound, and

the resolution code. The description is automatically updated with these three items:

- Call ID from OWLCS
- Your chosen phone number
- Contact phone number

The call resolution code is determined from OWLCS and recorded in the interaction:

OWLCS Call Status	Resolution Code in Interaction
CallConnected	CALL ANSWERED
CallAborted	FAILED
CallHangUp	FAILED
CalledPartyBusy	NOT AVAILABLE
CalledPartyNoAnswer	NOT AVAILABLE
CalledPartyNotReachable	NOT AVAILABLE
CallingPartyBusy	FAILED
CallingPartyNoAnswer	FAILED
CallingPartyNotReachable	FAILED

Editing interactions

Once the call is established, if Interactions is available, you can use the Interactions icon on the UI to launch the interaction record list view. Select the current interaction record to edit it.

Operational Notes

Because of the call-the-caller-then-call-the-callee format, there are some conditions that may occur due to several calling situations. Some of these conditions are described below:

- Why don't I hear a ring-back tone? As soon as you answer the system call-back, the system immediately dials the contact. You won't hear a ring-back tone as in a normal outbound phone call. However, you can tell that the call attempt is progressing because:
 - The phone indicates that the connection is active. If the call to the contact reaches a busy tone or the call attempt times out, the connection is dropped.
 - The dialing window stays on the screen while the call attempt is progressing. It disappears when the connection is either successfully established or fails.
- What if your phone is busy and the call-back goes directly to voice mail? Normally this would not happen because you would not initiate a new call when you are already busy on another call. However, this situation could occur due to a race condition, that is where another incoming call reaches your phone before the Click to Dial call-back. When this happens, two different scenarios could occur:

- If your phone is configured for busy-forward-all-to-voice-mail, the Click to Dial call would be forwarded to your voice mail, and the system thinks that the caller has answered the call and will proceed to call the contact. On answering, the contact hears your voice-mail greeting.
- If your phone is capable of presenting a second call to the user, as is supported by many office phones and mobile phones, then you can still answer the Click to Dial call and there is no issue.
- What if you wait too long to answer the call-back? In other words, you wait longer than the ring-no-answer-forward-to-voice-mail timer on the phone system and the call goes to voice mail. Normally, this would not happen because you are expecting the inbound call after you started the call, and would answer promptly. However, if for some reason you do not answer and allow the call to ring-no-answer-forward to voice mail, then the system would think that you have answered the call and will proceed to call the contact. On answering, the contact hears your voice-mail greeting.
- What if the contact does not answer in 30 seconds and the system abandons the call attempt? If the contact's voice mail is configured to answer after 30 seconds, you will not be able to leave a message.

Click-to-Dial: Top Tasks

Click-to-Dial is a feature of the customer contact process. Phone communication to customers and employees is initiated with a click of the mouse, leveraging your customer contact information and the application context. The Click-to-Dial feature uses Oracle WebLogic Communication Services, OWLCS, to enable communications. Applications that provide the Click-to-Dial functionality do so primarily through contextual actions in the application.

Additionally, Click-to-Dial utilizes Oracle Fusion Interactions as an optional transaction logging feature that will track information about the call such as the customer, call participants, a timestamp noting the start time of the call, the direction of the communication, in or outbound, and the resolution code.

Click-to-Dial integrates with your telephony environment and must be manually enabled in your deployment. This topic highlights what is required to set up the Click-to-Dial feature and to implement logging of the calls made using the Click-to-Dial feature.

Terms used in setting up these communications

- PSTN: Public switched telephone network is the network of the world's public circuit-switched telephone networks.
- SIP: Session initiation protocol, an open signaling protocol standard that is used to set up phone calls
- TPCC: Third Party Call Control enables an application to control the telephony network to set up calls automatically.
- OWLCS: Oracle WebLogic Communication Services. Offers the TPCC service to Fusion applications and sets up the calls via SIP integration with the telephony network.

The set up task list Define WebLogic Communication Services Configuration delineates four tasks required for the correct configuration and implementation of Click-to-Dial. There is an optional task, separate from the set up task list, required for implementing Interaction logging.

Information about implementing Click-to-Dial can be found in the Oracle Fusion Applications Administrator's Guide. Detailed information about configuring and maintaining WebLogic Communication Services is found in the Oracle WebLogic Communication Services Administrator's Guide

Configure and Deploy WebLogic Server

- Deploy WebLogic Communication Services: After the Oracle WebLogic communication server is deployed, this manual task activates the server.

See: Oracle WebLogic Communication Services Administrator's Guide

Integrate Communications Services

- Integrate WebLogic Communication Services with Telephony Network: This manual task integrates communications within the telephony environment. OWLCS must be configured to interface with the specific characteristics of the telephony network.

See: Managing Oracle WebLogic Communication Services for Click-to-Dial Functionality

Specify the Domain and Address

- Register a URL for the telephony gateway or soft switch for SIP domain: This task defines the Server protocol, defaulted to http, the external server host address and external server port address. The Associated Modules section is not required for setup. You can also perform this as a manual task using the Oracle Fusion Topology Manager to configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by Click-to-Dial to correctly form the SIP addresses required by WebLogic Communication Services. See the link to Configuring PSTN Gateway Address Using Topology Manager: Worked Example.

Enable Click-to-Dial

- After configuring the server and defining the SIP domain, perform the Enable Click-to-Dial task. This task sets the value of the profile option Enable Click-to-Dial to 'Yes.'

Call Logging via Fusion Interactions

- To initiate the Interaction based logging for Click-to-Dial, set the profile option Call Interaction Logging Enabled to 'YES.'

Configuring PSTN Gateway Address Using Topology Manager: Worked Example

This example demonstrates how, during the implementation of the **Register URL for the telephony gateway or soft switch for SIP domain** task,

you must manually configure the PSTN gateway address by registering HzCTDPstnGatewayApp to a given environment using Oracle Fusion Topology Registration

These steps configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by Click to Dial to correctly form the SIP addresses required by WebLogic Communication Services.

For example: SIP:+1650-555-1212@pstn_gateway.oracle.com;user=phone where pstn_gateway.oracle.com is the SIP domain. The SIP domain can also be expressed in the format 10.1.1.1 (IP address).

Configuring PSTN using the Topology Manager

1. Sign in to Oracle Fusion Applications as a user that has **application implementation consultant** and **WebLogic Services administration** roles
2. In Fusion Applications Setup and Maintenance, click Register Enterprise Applications from the regional area under **Topology Registration**
3. On the Register Enterprise Applications page, click the plus icon to add an enterprise application. An Add Enterprise Application popup appears
4. Enter the new application information: Click Search in the Enterprise Application list field. Enter **HzCTDPstnGatewayApp** in the name field and click Search. Click OK.
5. Enter the other fields in the Add Enterprise Application popup

Field	Value
Name	HzCTDPstnGatewayApp
Server Protocol	SIP This field is ignored by click-to-dial. Oracle WebLogic Communication Service (OWLCS) always uses the SIP protocol.
External Server Host	10.143.167.91 (Used as an example) A host name can be used instead of an IP address.
External Server Port	0 (Used as an example) This field is ignored by click to dial.

6. Click Save and Close

Common HCM Configuration: Define Workforce Records

Define Availability

Worker Availability: How It Is Determined

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

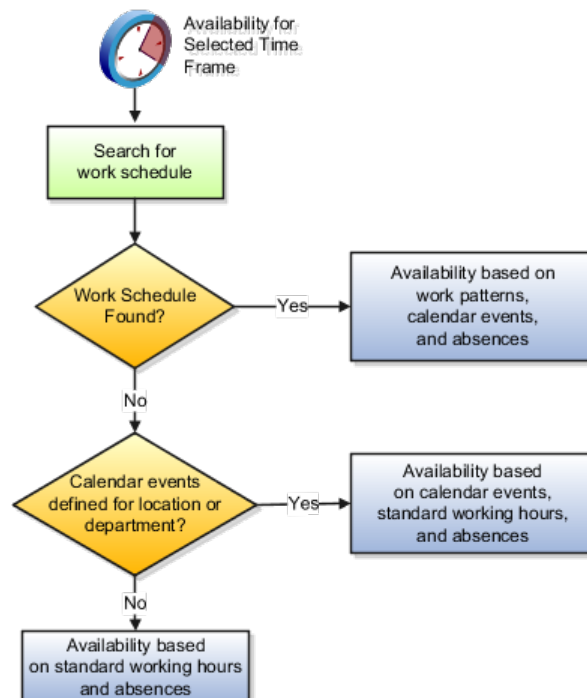
- Absence entries during that period
- The work schedule that the worker presently follows
- Calendar events

Settings That Affect Worker Availability

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

How Worker Availability Is Determined

The following figure shows how worker availability is determined.

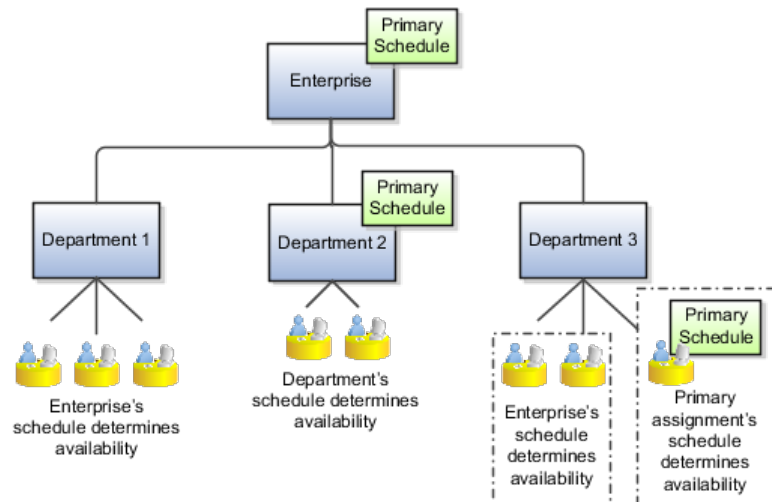


The application searches for primary work schedules that were assigned to these workforce structure levels in the following order:

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

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

For example, you assigned a primary schedule at the enterprise level. However, since workers belonging to a particular department in that enterprise follow different work timings, you assigned a different primary schedule to that department. The department's primary schedule determines worker availability because that schedule takes precedence over the one that was defined at the enterprise level. In the same example, if you assigned a primary schedule to a worker (primary assignment) belonging to the same department, then that schedule determines the worker's availability because a schedule assigned to the primary assignment takes precedence over the ones defined at the department level and the enterprise level. The following diagram illustrates this example:



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

If no primary schedule was assigned to any of the workforce structures, then the worker availability is based on absences, calendar events, if created for the worker's location or department, and standard working hours defined for the worker's primary assignment. If no calendar events were created, then the application determines availability only on the basis of the standard working hours and absences.

Calendar Event Coverage Type: Critical Choices

When you create a calendar event, you determine which set of workers the event must apply to. You must use one of these types of hierarchies to determine coverage:

- Organizational
- Geographic

You create the organizational or geographical hierarchies using the Manage Trees page. For the hierarchy to be visible when you create a calendar event, you must ensure that the hierarchy is active.

Note

A calendar event, by default, applies to all workers belonging to the hierarchy nodes you included in the coverage. However, if you assign work schedules to workers, the calendar event only applies to them if you add the event as an exception in the work schedule.

Using an Organization Hierarchy

Use an organizational hierarchy to apply a calendar event to your workers' assignments on the basis of the department that they belong to. For example, you want the Annual Sales Team Outing calendar event to apply to workers in the Sales department and its subordinate nodes, but not the Research department.

Using a Geographic Hierarchy

Use a geographic hierarchy to apply a calendar event to your workers' assignments on the basis of the country that they belong to. For example, you may want to apply the Boxing Day calendar event to all workers in the UK, but not those in the US.

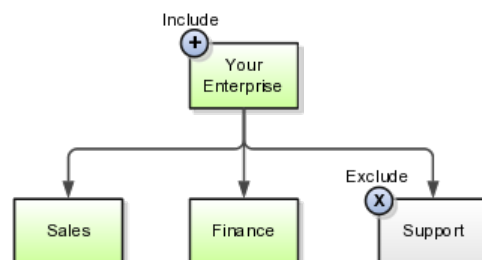
Defining Calendar Event Coverage: Examples

When you use a geographic or organizational hierarchy for calendar event coverage, you can select which nodes in the hierarchy to include in or exclude from the coverage. You can also override the calendar event name or its category for a specific node in the hierarchy.

Adding and Removing Coverage in a Hierarchy

You want to apply the New Phone System Training calendar event to all workers in your enterprise except those working in the Support department. When an event applies to most of a hierarchy, it's efficient to use the Include tool to include the whole hierarchy in the coverage and then use the Exclude tool to leave out the exceptions.

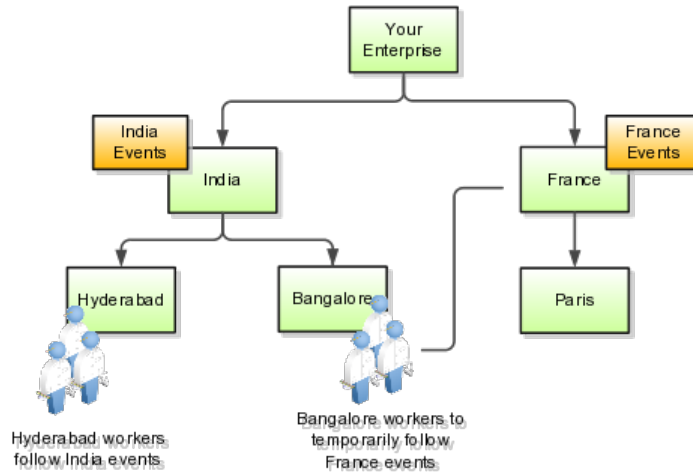
The following diagram shows how to include and exclude calendar event coverage in a sample organization hierarchy.



Overriding Coverage for Specific Locations

You have set up public holidays and other calendar events for workers at your India location and France location using a geographic hierarchy. For six months, workers at your Bangalore location will work closely with their counterparts in Paris on a critical project. During this time, you want the Bangalore workers

to follow the events you set for France. On the Manage Locations page, edit the location information for Bangalore and set the geographic hierarchy to France. The following diagram shows a sample geographical hierarchy where employees of a particular location share calendar events of another country.



Overriding Coverage for Specific Employees

Some workers from your Hyderabad location are closely working on a project with their counterparts at your France location for a year. For that duration, you want to change coverage for these employees so that they follow the calendar events you set up for the France location. For each worker, open the Manage Employment page, and set the Geographic Hierarchy to France.

Overriding the Calendar Event Name in a Hierarchy

You have set up the May Day calendar event for all locations in your enterprise. However, you want the event to be referred to as Labour Day for your France location. On the Calendar Event page, select the France location node on your geographical hierarchy and use the Override tool to enter a new name for the event.

Overriding the Calendar Event Category in a Hierarchy

You have associated the Good Friday calendar event with the Public Holiday event category and applied the coverage to all departments in your enterprise. However, you want to change the event category to a voluntary holiday instead of a public holiday for your Finance department. On your organization hierarchy, select the Finance node and use the Override tool to select a different category.

Setting Up a Geographic Tree for Use with Calendar Events: Worked Example

This example demonstrates how to create a geographic tree so that calendar events can be associated to employees on the basis of their country.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which countries must be included in the geographic tree?	Your enterprise has employees working in the US, the UK, India, and Japan.

Between which dates must the geographic tree version be enabled?	January 1, 2011 to December 31, 2011.
--	---------------------------------------

The following is a summary of tasks that you must perform.

1. Launch the Manage Geography Trees task.
2. Create a geographic tree based on HCM Geographic Tree Structure, a predefined tree structure.
3. On the basis of the tree that you created, create a tree version and add country nodes to it.
4. Audit the tree version to identify and correct any validation errors that the audit detects. Activate and row-flatten the tree version.

Launching the Manage Geography Trees Task

1. In the Functional Setup Manager (FSM), click the All Tasks tab.
2. In the Search region, enter Manage Geography Trees in the Name field.
3. Click Search.
4. In the search results, click Go to Task for the Manage Geography Trees task.

Creating a Geographic Tree

1. On the Manage Trees and Tree Versions page, select **Create Tree** from the **Actions** menu.
2. On the Create Tree: Specify Definition page, complete the fields, as shown in this table.

Field	Value
Name	Enterprise Locations
Code	ENT_LOC
Tree Structure	HCM Geographic Hierarchy Tree Structure

3. Click **Next**.
4. Click **Submit**.

Creating a Geographic Tree Version

1. On the Manage Trees and Tree Versions page, select the tree that you created.
2. From the **Actions** menu, select **Tree Version**.
3. On the Create Tree Version: Specify Definition page, complete the fields, as shown in this table.

Field	Value
Name	Enterprise Locations Version 1
Effective Start Date	January 1, 2011

Effective End Date	December 31, 2011
--------------------	-------------------

4. Click **Next**.
5. On the Create Tree Version: Specify Nodes page, click **Add**.
6. On the Add Tree Node window, select Root in the Available Nodes region and move it to the Selected Nodes region. You select the root node because the topmost node in a geographic tree must be the root node.
7. Click **OK**.
8. On the Create Tree Version: Specify Nodes page, select the root node, and click **Add**.
9. On the Add Tree Node window, select Geographic Tree Territory Code Data Source in the **Data Source** field.
10. Select the following country nodes in the Available Nodes region:
 - GB United Kingdom
 - IN India
 - JP Japan
 - US United States
11. Move the country nodes to the Selected Nodes region.
12. Click **OK**.
13. Click **Submit**.

Auditing and Activating the Geographic Tree Version

1. On the Manage Trees and Tree Versions page, select the tree version that you created.
2. Select **Audit** from the **Actions** menu.
3. On the Trees Audit Result page, click **Online Audit**.
4. Click **Done**.
5. On the Manage Trees and Tree Versions page, select the tree version that you created.
6. From the **Actions** menu, select **Set Status**, and then select **Active**.

Row-Flattening the Tree Version

You row flatten a tree so that retrieval and display of the tree is faster.

1. Navigate to the Manage Trees and Tree Versions page.
2. From the **Actions** menu, select **Flatten**, and then select Row Flattening.
3. On the Row Flattening page, click **Online Flattening**.
4. Click **Done**.

For more information, see Case Study: How to Set Up a Geography Tree and Link to a Calendar Event on My Oracle Support at <https://support.oracle.com>.

Creating and Assigning a Work Schedule: Worked Example

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

The following table summarizes key decisions in this scenario:

Decisions to Consider	In This Example
Which calendar events must be included in the work schedule?	All public holidays
Which geographical location must the calendar events apply to?	India
What shifts must workers follow?	Day shift (9 a.m. to 5 p.m.). Night shift (5 p.m. to 1 a.m.).
What is the work pattern that workers must follow?	Day shift from Monday to Wednesday. Night shift on Thursday and Friday. Weekly holiday on Saturday and Sunday.
When must the work schedule start and end?	Starts on 1 January, 2011. Ends on 31 December, 2011.
Which shift must workers work first when the work schedule starts?	Day shift
What eligibility criteria must you associate the work schedule with so that line managers can easily find the schedule to assign to workers?	All employees who belong to the support department
Which department must this schedule be assigned to?	Support department
What exceptions must be made to the work schedule of Vijay Singh who works in the same department?	Vijay Singh is scheduled to attend the Advanced Communication Skills training course on 8 February, 2011 during which time, the work schedule must indicate that he is unavailable.

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

Prerequisites

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

Creating Calendar Events

1. On the Manage Calendar Events page, click **Create**.

2. On the Create Calendar Event page, complete the fields, as shown in this table:

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

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

Creating Shifts

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

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

3. Click **Save and Close**.

Creating a Workday Pattern

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

Field	Value
Name	Weekly Work Pattern
Length in Days	7

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

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

5. Click **Save and Close**.

Creating a Work Schedule

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

Field	Value
Name	Work Schedule for Support
Category	Work
Type	Time
Effective From Date	01 January, 2011
Effective To Date	31 December, 2011
Pattern	Weekly Work Pattern
Exceptions	Public Holiday event category
Eligibility Profile	Support_Workers

4. Click **Submit**.

Assigning the Work Schedule to a Department

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

Field	Value
Resource Type	Department
Name	Support department
Start Date	01 January, 2011
End Date	31 December, 2011

Starting Shift	Day Shift
Primary	Yes

6. Click **Submit**.

Modifying the Work Schedule of a Worker

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

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

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

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

7. Click **Submit**.

FAQs for Define Availability

How do I create a calendar event category?

In addition to the predefined Public Holiday event category, you can create your own calendar event categories by adding values to the Calendar Event Category lookup type.

When do calendar events affect workers?

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

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

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

How can I associate calendar events with countries?

On the Manage Trees page, you must create a geographic tree version using the predefined HCM Geographic Hierarchy tree structure and add country nodes. When you create a calendar event, you select that geographic tree version and select countries that you want the calendar event to apply to.

Define Person Record Values

Person Types: Explained

You use person types to identify different groups of people in your enterprise.

For example, for purposes of reporting, you may want to identify contractual workers in your enterprise with the Contingent Worker person type, and regular employees with the Employee person type. You can maintain information for a group of people on the basis of the person type. You can also secure access to information on the basis of the person type.

System Person Types

These are predefined person types that the application uses to identify a group of people. You cannot change, delete, or create additional system person types.

User Person Types

Each system person type contains a user person type that you can configure to your requirements. You can change, remove, or create additional user person types to suit your enterprise requirements. For example, if your enterprise refers to its employees as associates instead of employees, you change the Employee user person type to Associate. In another example, if you want to classify employees further as equity partners, non-equity partners, and associates, you add these user person types under the Employee system person type. There is no limit to the number of user person types that you can add to a system person type.

Person Names: Explained

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

Name Styles

The structure of a person's name can vary among countries. For this reason, a predefined name style exists for many countries for capturing relevant components of a person's name. The name style determines:

- Which name components appear when you create a person record.
For example, one country may display first name, last name, and title while another displays first name, middle name, and last name.
- The order in which the name components appear.
- Which name components are required and which are optional.
For example, in one country you may be required to enter a title and in another the title may be optional.

When a country-specific name style does not exist, a universal name style (last name, first name, and title) is used.

When you create a person record you select a legal employer, which sets the legislative context for the record. For example, if the legal employer is a Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person's contacts have the same name style as the person for whom they are contacts.

Name Formats

When a person's name is displayed to users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names last name may appear before first name, but in other contexts first name appears before last name. A name format is a template for arranging the components of a name, such as first name, last name, and title, in a specified order for a particular purpose. Four name formats are available: display name, list name, full name, and order name.

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

Global and Local Name Formats

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

Global names use one name format; therefore, they enable users in multinational enterprises to see person names presented consistently, regardless of their countries of origin.

Users who view or manage person records in a single country may prefer to see local names. For example, users who view or manage person records only in Japan may prefer to see Japanese rather than global formats of person names.

Person-Name Languages

Each enterprise identifies a global-name language. Person names appear in this language by default. When you create a person record, you can enter a local

name in a different language from the global-name language. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the local-name language. For example, if the global-name language for the enterprise is American English and you set the local-name language in a person record to Japanese, users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese. All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English.

Note

If you enter no local name in a person record, the local name is the same as the global name by default.

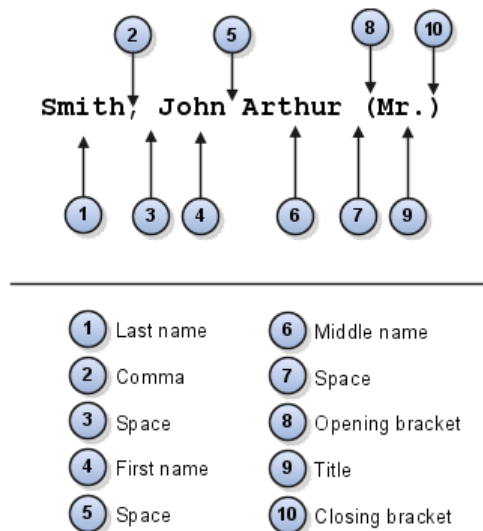
Users can set preferences to select the language in which they see the display-name versions of person names.

Person Name Formats: Explained

A person name format type determines how a person's name appears across Oracle Fusion Applications.

Each person name format type contains a sequence of name components that represents different parts of a person's name, for example, first name, last name, and punctuation marks. You can change the sequence of, remove, or include additional name components according to your requirements.

The following figure illustrates name components along with punctuation marks that make up a name format.



Predefined Name Format Types

Oracle Fusion HCM provides the following predefined format types that you can configure.

Format Type	Usage	Default Structure
Full Name	For names that appear in reports.	[Last Name], [First Name] [Middle Name] [Title]
Display Name	For names that appear singly, for example, on the Person Management page header.	[First Name] [Prefix] [Last Name]
List Name	For names that appear in lists	[Prefix] [Last Name], [First Name]
Order Name	For names that appear in name-ordered lists where the full name alone is not sufficient to sort the list.	[Last Name] [First Name]

Note

When you create or edit format types, to avoid creating blank person names, ensure that you include at least one name component that is never blank.

Local and Global Name Formats

A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation.

A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

Oracle Fusion HCM includes local and global formats for each format type. When you create a new format on the basis of an existing format type, you identify it as either local or global. For local format types, you must also select the legislation that the format type applies to.

Person Lookups: Explained

This topic identifies common lookups that are person-related and have user or extensible customization levels. Review these lookups, and update them as appropriate to suit enterprise requirements.

Person Information Lookups

Person information lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_NATIONAL_IDENTIFIER_TY	Type of a person's national identifier, such as social security number, civil registration number, or national insurance number	Extensible
PERSON_TYPE_STATUS	Status of a user person type, such as active or inactive	User
EMAIL_TYPE	Type of a person's e-mail address, such as home e-mail or work e-mail	Extensible

ADDRESS_TYPE	Type of a person's address, such as home address or mailing address	Extensible
PHONE_TYPE	Type of a person's phone, such as home phone or mobile phone	Extensible
PER_CM_MTHD	Communication methods for a person, such as e-mail or instant messenger	Extensible
PER_CONTACT_TIMES	Times of day when a specified phone number can be used, such as evenings or weekends	Extensible
PER_ETHNICITY	Person's ethnicity, such as Hispanic, Asian, or American Indian	Extensible
PER_RELIGION	Person's religion, such as Christianity, Hinduism, or Islam	Extensible
PROFESSION	Person's profession reported on a visa or work permit, such as engineer, nurse, or teacher	Extensible
TITLE	Person's title, such as Miss, Doctor, or Professor, forming part of the person's name	Extensible
HONORS	Higher qualifications, such as CPA, PhD, or DDS, forming part of the person's name	Extensible
PER_HIGHEST_EDUCATION_LEV	Person's highest level of academic qualification, such as BSc, Diploma, or MA.	User
MILITARY_RANK	Person's military rank, such as private, sergeant, or corporal, forming part of the person's name	Extensible
BLOOD_TYPE	Person's blood group, such as A rhesus negative or B rhesus positive	User
CONTACT	Relationship between a person and the person's contact, such as partner, child, or brother	Extensible
MAR_STATUS	Person's marital status, such as single, married, or legally separated	Extensible

Document Information Lookups

Document information lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_DRIVERS_LICENSE_TYPE	Type of a person's driver's license, such as permanent or temporary	Extensible
PER_CITIZENSHIP_STATUS	Status of a person's citizenship, such as active or expired	Extensible
PER_PASSPORT_TYPE	Type of a person's passport, such as emergency or regular	Extensible

PER_VISA_PERMIT_TYPE	Type of a person's visa or work permit, such as temporary worker or residence permit	Extensible
PER_VISA_PERMIT_STATUS	Status of a person's visa or work permit, such as pending or active	Extensible

Disability Information Lookups

Disability information lookups are described in the following table.

Lookup Type	Description	Customization Level
DISABILITY_CATEGORY	Type of a person's disability, such as hearing loss or visual impairment	User
DISABILITY_REASON	Causes of a person's disability, such as accident or illness	Extensible
DISABILITY_STATUS	Status of a person's disability registration, such as approved or pending	User

Communicating Person and Assignment Changes to Consumer Applications: Explained

Some Oracle Fusion applications, such as Oracle Fusion Trading Community Model, need to be alerted when changes to person and assignment details occur so that they can synchronize their information with that held by Oracle Fusion Global Human Resources.

To share changes to person and assignment details with consumer applications, you run the process Synchronize Person Records. This process raises an HCM event (ChangedPersonDetails), for which consumer applications listen. On input to the process, you can specify start and end dates; the process raises events for changes that become current between those two dates. If you specify no date, the process runs for the system date (today's date), and events are raised for changes that become current on that date.

You are recommended to schedule Synchronize Person Records to run daily.

Changes Notified to Consumer Applications

When you run Synchronize Person Records, the ChangedPersonDetails event is generated by changes to:

- Person
- Person name
- Person work e-mail address
- Person phones
- Person image

- Service dates
- Assignments (including changes to job, position, department, work location, work location address, manager, and worker type)

Changes to the names of a person's existing job, position, department, work location, or work location address do not cause the ChangedPersonDetails event to be generated.

FAQs for Define Person Record Values

What happens if I change the status of a user person type?

The status of a user person type determines whether it is available across Oracle Fusion HCM.

If you inactivate a user person type, there is no impact on worker assignments that are currently associated with that person type. However, starting from the date of inactivation, you can no longer select that person type to associate with worker assignments.

Note

You cannot inactivate a default user person type; you must first select a different user person type as the default.

What's the purpose of the default user person type?

Each system person type contains a default user person type that the application uses to associate with person records for reporting and display purposes. When you hire a worker and specify assignment information, the application associates the default user person type with that worker assignment. However, if you select a different person type, then the application considers the selected person type as the default one for that worker.

When does the application update stored names with a person name format?

When you run the Update Person Names process. When you update a name format, you run this process so that the application updates the stored names according to the rules of the updated format type. You can run the process for a specific name-format and legislation combination.

How can I switch between local and global formats to display person names?

You use the HR: Local or Global Name Format profile option. If you select the global name format, then person names appear in the same format across all legislations. If you select a particular legislation, then person names appear in a format specific to that legislation. For example, if you set the profile option to Japan, then Japanese person names appear in the local name format that was created for Japan. However, person names that were stored using formats other than those of the Japanese legislation appear according to the global name format.

Define Employment Record Values

Assignment Statuses: How They are Set Up

Each assignment contains an assignment status. The assignment status contains an HR status, a payroll status, and optionally user statuses. The HR status and payroll status values are linked to the assignment status and are set automatically when the assignment status changes.

This table summarizes the values of the three statuses.

Assignment Status	HR Status	Payroll Status
Active - payroll eligible	Active	Process
Active - no payroll	Active	Do not process
Suspended - payroll eligible	Suspended	Process
Suspended - no payroll	Suspended	Do not process
Inactive - payroll eligible	Inactive	Process
Inactive - no payroll	Inactive	Do not process

Assignment Status

When you create or edit an assignment, you select an action that categorizes the change and determines what are the next steps. Some actions make an automatic change to the assignment status. For example, when you create an assignment, its status is set automatically to Active - payroll eligible. The same action sets the HR status to Active and the payroll status to Process. Otherwise, you must set the assignment status directly.

User Status

You can define one or more user names for each assignment status value. If multiple user statuses exist for a HR status, you must designate any one user status as the default status corresponding to the HR status. The default assignment status is attached to an assignment unless you specify a default user status. For example, when you create an assignment, its status is set automatically to the default assignment status corresponding to the HR status Active.

Enforcing Grades at Assignment Level: Points to Consider

This topic describes the effects of the following employment-related profile options:

- PER_ENFORCE_VALID_GRADES
- PER_DEFAULT_GRADE_FROM_JOB_POSITION

Enforce Valid Grades (PER_ENFORCE_VALID_GRADES)

If you set this site-level profile option to Yes, then users can select a grade for an assignment or set of employment terms only from those grades that are valid for the job or position.

- If users select both a job and a position for the assignment or employment terms, then they can select grades that are valid for the position only.
- If valid grades are defined for neither the job nor the position, then users can select from all grades.

If you set this profile option to No, which is the default value, then users can select from all grades.

Default the Grade from the Job or Position (PER_DEFAULT_GRADE_FROM_JOB_POSITION)

If you set this site-level profile option to Yes, and there is only one valid grade for a job or position, then that grade is used by default in the assignment or employment terms. In addition, if an entry grade is defined for a position, then that grade is used by default when the user creates a new set of employment terms or a new assignment.

If you set this profile option to No, which is the default value, then users can select from all grades.

Employment Lookups: Explained

This topic identifies common lookups that are employment-related and have user or extensible customization levels. Review these lookups, and update them as appropriate to suit enterprise requirements.

Employment Contract Lookups

Employment contract lookups are described in the following table.

Lookup Type	Description	Customization Level
CONTRACT_TYPE	Type values, such as fixed-term, full-time, and seasonal	User

Employment Terms and Assignment Lookups

Employment terms and assignment lookups are described in the following table.

Lookup Type	Description	Customization Level
BUDGET_MEASUREMENT_TYPE	Work measure values, such as headcount and FTE	Extensible
EMP_CAT	Assignment categories, such as full-time regular and part-time temporary	User

EMPLOYEE_CATG	Worker type values, such as white collar, blue collar, and civil servant	User
BARGAINING_UNIT_CODE	Codes that identify bargaining units, such as health professionals, steel workers, and public service workers	User
PER_SUPERVISOR_TYPE	Manager types, such as line manager, project manager, and technical manager	Extensible

Note

If your enterprise uses matrix management (where a worker assignment has multiple managers of different types), then you need to review the predefined manager types in the PER_SUPERVISOR_TYPE lookup and add any missing types. You may also need to create job roles for managers other than line managers and ensure that they have appropriate access to the records of workers who report to them.

Terminations Lookups

Terminations lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_PDS_REHIRE_REASON	Reasons, such as misconduct and poor performance, for not recommending rehire of a worker	User

Areas of Responsibility Lookups

Areas of responsibility lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_RESPONSIBILITY_TYPES	Worker responsibilities, such as benefits representative, union representative and fire warden	Extensible

Define Documents

Document Types, Categories, and Statuses: Explained

Document records enable persons to create and maintain documents such as medical certificates, licenses, and visas. Document categories (for example, absence) provide a way to group these documents into meaningful categories at a higher level. Document subcategories (for example, general or medical) provide further grouping of documents. Document types (for example, leave approval or medical report) provide a lower level categorization of documents. To supplement the predefined document types, categories, and subcategories, you can create your own to suit the requirements of your enterprise.

Document Types

The type of documents you can access depends on your role. For example, line managers, but not HR managers, may be able to view workers' payslips. Using the document type security profile, you can restrict which users or roles can access particular documents. The document type also indicates if the document requires approval. If you want to track the expiry of the document record, define **Valid Till** as a required or relevant attribute in the document type and specify the expiration notification period. The Enterprise Scheduler Service (ESS) generates a report of expired documents and notifies persons based on the notification preferences specified in the document type.

Document Categories

Use the `DOCUMENT_CATEGORY` lookup type to define new document categories and subcategories. Define document categories as values for the `DOCUMENT_CATEGORY` lookup type and document subcategories as extended lookup values for the selected category.

Document Statuses

Approval statuses enable you to identify and track document records requiring approval. Define approval statuses as values for the lookup type `DOCUMENT_STATUS`.

Note that the application does not use the approval statuses to determine the document approval process. These statuses are for information purposes only.

FAQs for Define Documents

What's the purpose of creating a document record?

Create document records to store information about documents such as work permits, and visas, and upload electronic versions of the documents as attachments. Document records store necessary document details such as the period for which the document is valid. This information can then be used for reporting purposes. For example, HR specialists can see the reports of documents that are near expiration in their dashboard.

Why are some approvers already appearing for the document record?

The document type you select determines whether the document record requires approval. The list of approvers is predefined for the document type, however, you can add additional approvers. You receive a notification once the document record is approved. Following approval, the document record is then accessible and available for use in reports and analytics, for example.

Schedule Processes for Portrait Gallery

Maintaining Person Keywords: Explained

Several attributes of person, employment, and profile records are used as person-search keywords. Keyword values are copied automatically from the originating

records to the PER_KEYWORDS table, where they are indexed to improve search performance.

This topic explains:

- How person keywords are maintained
- Why you run the Update Person Search Keywords process
- How to schedule the Update Person Search Keywords process

How Person Keywords Are Maintained

Whenever the value of a keyword attribute changes (for example, if a person acquires a language skill or a different phone number), an event is raised. In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table; therefore, most changes are made in PER_KEYWORDS immediately and automatically.

When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.

Why You Run the Update Person Search Keywords Process

Although most changes to the PER_KEYWORDS table are made automatically, you need to run the Update Person Search Keywords process regularly because the automatic process does not apply future-dated changes to the PER_KEYWORDS table. Running the Update Person Search Keywords process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

How to Schedule the Update Person Search Keywords Process

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals (for example, weekly at a specified time).

The likely volume and frequency of changes to person records in your enterprise will determine how often you run the Update Person Search Keywords process:

- If the volume and frequency are high, you need to schedule the process to run frequently.
- If the volume and frequency are low, running the process once a month is recommended.

When you run the Update Person Search Keywords process, the whole PER_KEYWORDS table is refreshed; therefore, you are recommended to run the process at times of low activity to avoid performance problems.

Person-Record Keyword Searches: Explained

The application searches for keyword values in these attributes of a person's records: department, job name and code, position name and code, person name, primary e-mail, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, affiliations, areas of interest, and areas of expertise.

This topic describes:

- Access to restricted information

- Keyword indexing
- Searches using date-effective keywords

Access to Restricted Information

Access to information about a person's competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations is restricted to a person's line managers. For example, if a line manager searches for a language skill and a match is found in the language-skills information of the manager's direct or indirect reports, that information appears in the search results. Restricted information is not searched and is never included in search results when the searcher is not a line manager. However, if the match is found in public information, such as areas of expertise, it appears in the search results for any user.

Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that there is no difference between the source and indexed values. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

Searches Using Date-Effective Keywords

In the professional user person search, you can enter an effective as-of date. When date-effective values, such as work location, are copied to the keywords table, their history is not copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results may not be as expected.

For example:

- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.
- The changed work location is copied automatically to the keywords table on 27 January, 2011.
- You search for a person on 1 February, 2011 using the keyword Headquarters and the effective as-of date 10 January, 2011.

Although the work location on 10 January, 2011 was Headquarters, assignment 12345 does not appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

Relationship Strength in the Gallery Search: How It Is Calculated

Gallery search results can be listed in order of the strength of the relationship between the person performing the search and each person whose assignment is in the search results: the stronger the relationship, the nearer to the top of the results an assignment appears. This topic describes how relationship-strength values are calculated for individual factors, such as proximity in the manager hierarchy and work location, and how those results are combined to give an overall relationship-strength value.

How Relationship Strength Is Calculated

The calculation of relationship strength is based on several factors.

1. When the searcher's primary assignment is in the same organization or position hierarchy as a person's assignment, the strength of the relationship depends on their proximity to each other in the hierarchy. To calculate the relationship strength, 100 is divided by the number of boundaries plus 1 between the searcher and the person, as shown in the following table.

Hierarchy Boundaries	Calculation	Relationship Strength (%)
0	100/1	100
1	100/2	50
2	100/3	33.3
3	100/4	25

The maximum number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

2. When the searcher's primary assignment is in the same manager hierarchy as a person's assignment, the strength of the relationship depends on their proximity to each other in any direction in the hierarchy. To calculate the relationship strength, 100 is divided by the number of people removed from the searcher the person is, as shown in the following table.

People	Calculation	Relationship Strength (%)
1	100/1	100
2	100/2	50
3	100/3	33.3
4	100/4	25

Only the manager hierarchy associated with the line manager of the searcher's primary assignment is included in the calculation.

The maximum number of hierarchy boundaries to include in the calculation is 4 by default. You can set this value for the enterprise on the HR: Maximum Hierarchy Proximity profile option.

3. The location on the searcher's primary assignment is compared with the location on the person's assignment. Relationship strength values are allocated according to the relative locations of the searcher and the person, as shown in the following table.

Location	Relationship Strength (%)
Same floor of building	100
Same building	80

Same postal code	60
Same town or city	40
Same country	20

People in a different country from the searcher have no relationship with the searcher.

4. The number of times the searcher selects a person's assignment from the search results is recorded automatically. This value is compared with the maximum number of times the searcher has selected any person and assignment in a specified period. For example, if the searcher selects Andrew Jones 10 times in a week and Gloria Schmidt twice in a week, then the relationship strength values are 100% for Andrew Jones and 20% for Gloria Schmidt. The period of time during which the searcher's selection history is recorded is 7 days by default. You can set this value for the enterprise on the HR: Selection History Timeout profile option.
5. If the searcher is in the same social network as the person, then the relationship-strength value is 100%; otherwise, the relationship-strength value is 0%.
6. The relationship strength for each individual factor is multiplied by a weighting value, which is 0.5 by default, as shown in the following example.

Factor	Relationship Strength (%)	Weighting	Result (%)
Organization hierarchy proximity	100	0.5	50
Position hierarchy proximity	0	0.5	0
Manager hierarchy proximity	100	0.5	50
Location proximity	80	0.5	40
Selection history	40	0.5	20
Social network	100	0.5	50
Totals		3	210

You can change the weighting values for individual factors on the relevant profile options, such as HR: Manager Hierarchy Weight and HR: Location Proximity Weight, to change the relative importance of those factors.

7. Each search result has a default searcher rating of 3, which has no effect on the relationship strength. However, the searcher can set this rating for individual results to a value between 1 and 5; values above 3 increase the relationship strength and values below 3 decrease it.

Each rating value is associated with a multiplying factor. The highest multiplying factor (the one used when the searcher sets the rating for a search result to 5) is specified on the profile option HR: Relationship Priority Factor, which is set to 2 by default. This table shows the default multiplying factors

Searcher Rating	Multiplying Factor
1	1/2
2	1/1.5
3	1
4	1.5
5	2

The total of the individual relationship-strength percentages is multiplied by the multiplying factor associated with the searcher's rating. For example, if the default rating (3) applies, then $210 \times 1 = 210$. The searcher can double the multiplying factor by setting a search result's rating to 5 or halve it by setting the rating to 1.

If you change the setting of HR: Relationship Priority Factor, then you automatically change the associated multiplying factors. This table shows the multiplying factors for HR: Relationship Priority Factors from 3 through 6.

Searcher Rating:	1	2	3	4	5
HR: Relationship Priority Factor 3	1/3	1/2	1	2	3
HR: Relationship Priority Factor 4	1/4	1/2.5	1	2.5	4
HR: Relationship Priority Factor 5	1/5	1/3	1	3	5
HR: Relationship Priority Factor 6	1/6	1/3.5	1	3.5	6

If you increase the HR: Relationship Priority Factor value, you increase the effect of the searcher's ratings relative to the other factors.

- The result of multiplying the total of the individual percentages by the factor associated with the searcher's rating is divided by the sum

of the individual weighting values. The result of this calculation is the relationship strength between the searcher and the person in the search result. For example: $210/3=70\%$

Results that are greater than 100 are set to 100%.

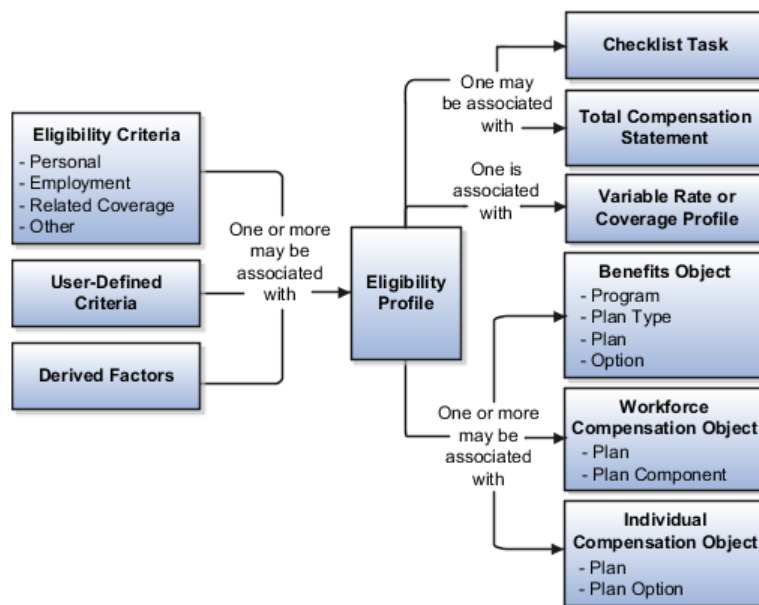
Because the factors that contribute to this calculation are likely to change often, the calculation runs daily by default and the results are stored. However, you can schedule the Calculate Relationship Strength process to suit local requirements.

Define Eligibility Profiles

Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

You can associate an eligibility profile with different kinds of objects:

- Associate an eligibility profile with a variable rate or variable coverage profile to establish the criteria required to qualify for that rate or coverage.
- Associate an eligibility profile with a checklist task to control whether that task appears in an allocated checklist.
- Associate an eligibility profile with a total compensation statement to apply additional eligibility criteria after statement generation population parameters.
- Associate one or more eligibility profiles with a benefits or compensation object to establish the eligibility criteria for specific plans and options.

Derived Factors: Explained

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

You can create six different types of derived factors: age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. For example, the determination rule for an age derived factor specifies the day on which to evaluate the person's calculated age for eligibility. If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.

For the full-time equivalent factor, you specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. For example, if the percentage range is 90 to 100 percent for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

Other settings define the unit of measure for time or monetary amounts, rounding rules, and minimums and maximums.

Derived Factors: Examples

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine dependent eligibility. You can also use age as a factor when determining life insurance rates. Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band are the same:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table illustrates a set of length-of-service bands that could be used to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire (This sets the beginning of the period being measured.)
Determination Rule	End of year (This sets the end of the period being measured.)
Age to Use	Person's
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table illustrates a set of compensation bands that could be used to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Age to Use: Points to Consider

The **Age to Use** value that you select is an important aspect of an age derived factor. This value determines whose birth date is used to calculate the derived age.

Selecting Person's Age to Use

In most cases, you use the **Person's** value in the **Age to Use** field to define an age derived factor for either a participant or dependent eligibility profile. In this case,

each person's birth date is used to calculate the age criterion by which eligibility is evaluated for that person.

Example

For example, if you select **Person's** as the **Age to Use** value, and associate the age derived factor with a dependent eligibility profile, each dependent's eligibility is evaluated based on the age calculated from his or her own birth date.

Selecting Other Age to Use Values

You might select another predefined value in the **Age to Use** field if you intend to evaluate participant or dependent eligibility or rates based on someone else's age, such as a spouse, child, or other dependent.

Note

If you choose **Inherited Age**, the evaluation is based on the date of birth as defined in the person extra information flexfield.

Example

If you select **Person's oldest child** as the **Age to Use** value, and associate this derived factor with a dependent eligibility profile, eligibility for all dependents is evaluated based on the age of the participant's oldest child. Consequently, when the oldest child reaches the maximum age of eligibility, for instance, all dependents become ineligible.

User-Defined Criteria: Explained

You can define your own criteria to meet any special needs of your organization. For example, if your organization employs deep sea divers and offers different benefits or benefits rates based on how deep they dive, you can create Depth of Diving as a new eligibility criterion.

The data for the eligibility criterion must be stored in a table that is accessible to the application. If the data is stored in either the Person or Assignment table, you can select the table and column from a list, and then specify the lookup type used to validate input values. You can also allow a range of valid values if the field stores a numeric value or a date.

Note

To select the correct values for the column and lookup fields, you must have a basic understanding of the structure of the table that stores the eligibility criterion information.

If the data is stored in a table other than the Person or Assignment table, you must first create a formula to retrieve the data from the table, and then set the formula type to **User-Defined Criteria**.

You can define two sets of criteria on the User-Defined Criteria page. The participant must meet the criteria defined in either set to be considered eligible

(or to be excluded from eligibility if the **Exclude** check box is selected when the criteria is added to an eligibility profile).

After you have created your user-defined criteria, you can add it to an eligibility profile.

User-Defined Criteria: Examples

The following scenarios illustrate how to define different types of user-defined criteria. In each example, you must first create the user-defined criteria and then add it to an eligibility profile and set the criteria values to use in the profile.

Set Eligibility Based on Custom Attribute

A commercial diving company wants to offer different benefit rates to employees who dive to depths greater than 330 feet. This data is stored for each employee in a custom attribute called Dive_Depth in the Person table. To define eligibility based on diving depth, set the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Table	Person
Column	Dive_Depth_Attribute
Lookup	Dive_Depth_Validation
Enable range validation one	Selected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab, which is under the Other tab on the Create or Edit Eligibility Profile page:

Field	Value
Set 1 Meaning	329
Set 1 To Meaning	9999
Exclude	Deselected

Save the eligibility profile and associate it with a variable rate profile.

Exclude Work-at-Home Assignments from Eligibility

An employer wants to exclude work-at-home assignment from eligibility for a transportation benefit option. To accomplish this, set the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Table	Assignment
Column	Work_at_home
Lookup	YES_NO
Enable range validation one	Deselected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab:

Field	Value
Set 1 Meaning	Yes
Exclude	Selected

Save the eligibility profile and associate it with the transportation benefit option.

Use a Formula to Determine Eligibility

A company wants to offer a spot incentive bonus to hourly employees who worked 100 percent of their scheduled shift hours in a three month period. To determine eligibility for the bonus, create a formula that calculates scheduled hours less worked hours for each week in the previous three months. If the result of successive calculations is less than or equal to zero, then the formula returns a result of Yes. The first step is to create the formula. Once the formula has been defined, create a user-defined criterion to run the formula. Enter the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Access One Formula	Worked_Sched_Hours_Percent
Enable range validation one	Deselected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab:

Field	Value
Set 1 Meaning	Yes
Exclude	Deselected

Save the eligibility profile and associate it with the bonus compensation object.

Note

For very complex scenarios, your organization or implementation team can write a custom program to evaluate eligibility, and then create a formula that calls the custom program.

Range of Scheduled Hours: Example

This example illustrates how to define eligibility criteria based on the number of hours an employee is scheduled to work within a specified period of time.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to employees who were scheduled to work between 30 and 40 hours each week or between 130-160 each

month as of the end of the previous quarter. To do this, add two different ranges on the Range of Scheduled Hours tab, which is under the Employment tab on the Create or Edit Eligibility Profile page.

Set the values for the first range as shown in this table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the second range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Eligibility Profiles: Explained

An eligibility profile defines criteria used to determine whether a person qualifies for a benefits offering, variable rate profile, variable coverage profile, compensation object, checklist task, or other object for which eligibility must be established.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type and usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses derived factors, user-defined formulas, or user-defined criteria to establish eligibility, you must create these items before you create the eligibility profile.

- If you are defining eligibility criteria for a checklist task, variable rate profile, or variable coverage profile, you must include all criteria in a single eligibility profile, because these objects can be associated with only one eligibility profile. You can, however, associate multiple eligibility profiles with benefits offerings and compensation objects.
- Eligibility profiles are reusable, so use names that identify the criteria being defined rather than the object with which the profile is associated. For example, use "Age-20-25+NonSmoker" rather than "Supplemental Life-Min Rate."

Specifying Profile Types and Usage

When you create an eligibility profile, you specify whether the profile applies to participants or dependents. Use participant profiles to define criteria for employees or ex-employees who are eligible for company-sponsored benefits. Use dependent profiles for participants' spouses, family members, or other individuals who qualify as dependents. Dependent profiles can be associated only with plans and plan types.

An eligibility profile's usage determines the type of objects the profile can be associated with. For example, if you set the profile usage to **Benefits**, the profile is available for selection when you are associating eligibility profiles with benefits objects, such as programs, plans, plan types, options, variable rate profiles, and variable coverage profiles. You can also set the usage to **Compensation**, **Checklist**, or **Global**.

Defining Eligibility Criteria

Criteria defined in an eligibility profile are divided into categories:

- **Personal:** Includes gender, person type, postal code ranges, and other person-specific criteria
- **Employment:** Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria
- **Derived factors:** Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service
- **Other:** Includes miscellaneous and user-defined criteria
- **Related coverage:** Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from

eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65. If you exclude certain age bands, then all age bands not explicitly excluded are automatically included. Similarly, if you include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person needs to satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object you are defining eligibility for support multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?

Support for Multiple Eligibility Profiles

If you are defining eligibility criteria for a checklist task, variable rate profile, or variable coverage profile, you must include all criteria in a single eligibility profile, because these objects can be associated with only one eligibility profile. You can, however, associate multiple eligibility profiles with benefits offerings and compensation objects.

Efficiency and Performance

For optimum performance and efficiency, you should usually attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. Plan types in program, plans in program, plans, and options in plans inherit the eligibility criteria associated with the program. For example, to be eligible for a benefits plan type, a person must satisfy eligibility profiles defined at the program level and at the plan type in program level.

However, it is sometimes faster to create more than one profile and attach the profiles at various levels in the hierarchy. For example, you might exclude employees from eligibility at the program level who do not have an active assignment. At the level of plan type in program, you might exclude employees who do not have a full-time assignment. Finally, at the plan level, you might exclude employees whose primary address is not within a service area you define.

Note

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, try to keep all excluded criteria in a separate eligibility profile.

Eligibility Profiles: Examples

The following examples illustrate scenarios where eligibility profiles are needed and briefly describe the setup required for each scenario.

401(k) Eligibility

A 401(k) savings plan is restricted to full-time employees under 65 years of age. To restrict eligibility for the plan, you must first create a derived factor for the age band of 65 and older, if one does not already exist. Then create an eligibility profile. Set the **Profile Usage** to **Benefits** and the **Profile Type** to **Participant**. Add the following criteria:

Criteria Type	Name	Values
Employment	Assignment Category	Full-Time
Derived Factor	Age	Select the age derived factor you created previously, and then select the Exclude check box.

Associate the eligibility profile with the 401(k) plan.

Bonus Eligibility

A bonus is offered to all employees who received the highest possible performance rating in all rating categories. To restrict eligibility for the bonus, create an eligibility profile. Set the **Profile Usage** to **Compensation** and the **Profile Type** to **Participant**. Add the following criteria for each rating category:

Criteria Type	Name	Values
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value.

Associate the eligibility profile with the bonus compensation object.

Checklist Task Eligibility

A new hire checklist contains tasks that do not apply to employees who work in India. To restrict eligibility for the tasks, create a participant eligibility profile. Set the **Profile Usage** to **Checklist** and the **Profile Type** to **Participant**. Add the following criteria:

Criteria Type	Name	Values
Employment	Work Location	Select India as the work location, and then select the Exclude check box.

Associate the eligibility profile with each checklist task that does not apply to workers in India.

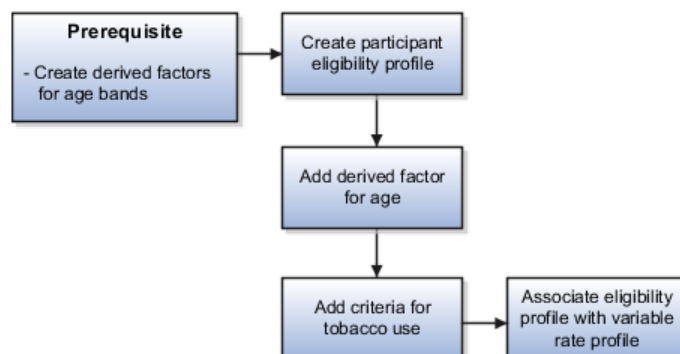
Creating a Participant Eligibility Profile: Worked Example

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. The profile includes two eligibility criteria: age and tobacco. Once the eligibility profile is complete, you can associate it with a variable rate profile.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
What are the criteria values?	Age: Under 30 Tobacco Use: None
Should persons meeting these criteria be included or excluded from eligibility?	Included

The following figure shows the tasks to complete in this example:



Note

In this example, you create one eligibility profile that defines the requirements for a single variable rate. Typically, you create a set of eligibility profiles, one for each variable rate. When you have completed all steps described in this example, you can repeat them, varying the age and tobacco use criteria, to create a separate profile for each additional rate.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

1. In the Plan Configuration work area, click **Manage Eligibility Profiles**.
2. Click the **Create** menu, and then click **Create Participant Profile**.
3. In the Eligibility Profile Definition region of the Create Participant Eligibility Profile page, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Name	Age Under 30+Non-Smoking
Profile Usage	Benefits
Description	Participant, age under 30, non smoker
Status	Active
Assignment to Use	Any assignment

Adding the Derived Factor for Age

1. In the Eligibility Criteria region, select the Derived Factors tab.
2. On the Age tab, click **Create**.
3. In the **Sequence** field, enter 1.
4. In the **Age** field, select the derived factor that you previously defined for ages under 30.
5. Do not select the **Exclude** check box.

Adding the Criteria for Tobacco Use

1. Select the Personal tab.
2. On the Uses Tobacco tab, click **Create**.
3. In the **Sequence** field, enter 1.
4. In the **Tobacco Use** field, select None.
5. Do not select the **Exclude** check box.
6. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

1. In the Plan Configuration work area, click **Manage Benefits Rates**.
2. Select the Variable Rates tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Note

You can reuse this eligibility profile by associating it with other objects that restrict eligibility, including benefits offerings, compensation plans, and checklist tasks.

Common HCM Configuration: Define Workforce Business Processes and Events

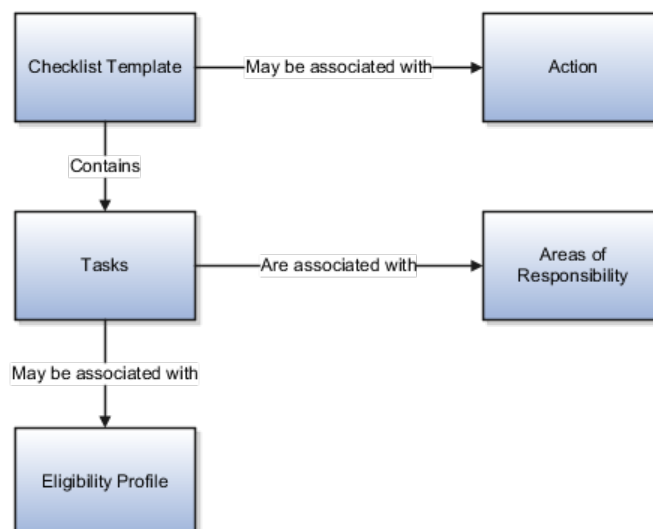
Define Checklists

Checklist Components: How They Fit Together

Use checklists for actions that require the completion of standard tasks, such as creating users or reassigning resources. For example, employee hire and termination actions typically require a number of people to complete standard tasks. You create and maintain tasks within a checklist template. You can create checklist templates that can be allocated to persons either automatically or manually.

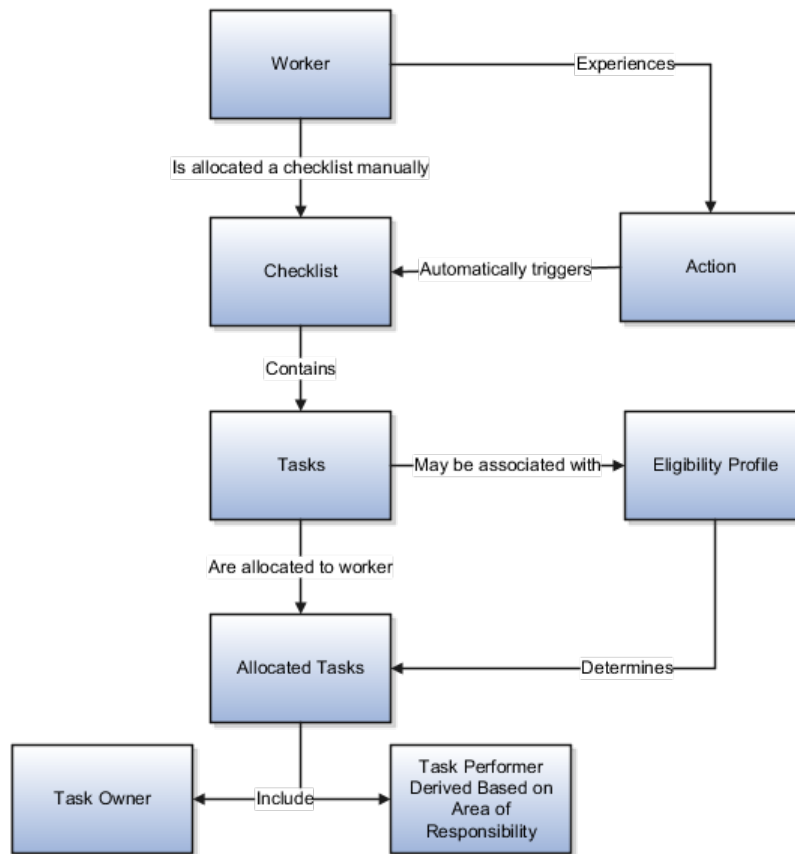
The figure shows the components of a checklist template and their major relationships.

HR Specialist Creates Checklist Template



This figure shows the components of the checklist allocation process and how they relate to each other.

Checklist is Allocated to Worker



Action

Actions track changes in personal circumstances, for example, new hire, transfer, or termination. Link an action to a checklist template to allocate the checklist to persons automatically when they experience the action. Note that, the checklist template is still available for manual allocation, even if it is linked to an action.

Task

You create tasks within a checklist template, however, managers can also create and maintain tasks within an allocated checklist. You can enter a task duration and specify if a task is required. When the task appears in an allocated checklist, the date in the target end date field reflects this duration. You can set the checklist status to completed only if all the required tasks are complete.

Eligibility Profile

Link an eligibility profile to a checklist task to control whether that task appears in a specific allocated checklist. The task appears in the allocated checklist of a worker only if the worker matches the eligibility criteria.

Task Performer

Performer is the person carrying out the task. You select the task performers' areas of responsibility when you create a checklist template. During checklist

allocation, the persons with the selected responsibilities are automatically assigned as performers for the tasks and notified of the assignment. You can view, but not update, the task performers in the allocated checklist.

Allocated Checklist

Allocated checklists are those that have been allocated to workers and contain the tasks relevant to them.

Task Owner

Task owner, generally synonymous with a manager, is the person responsible for ensuring task completion. Managers can display the tasks within an allocated checklist and monitor the status themselves or assign alternative owners for the tasks.

Checklist and Task Statuses: Explained

Managers can display the allocated checklists for their workers and update the checklist and task statuses as necessary. Performers and owners can view the checklist tasks assigned to them in their worklist and update the task status. Note that these statuses are not used to determine the checklist or task availability, they are for information purposes only.

The checklist and task statuses are:

- Initiated
- Completed
- Rejected
- Outstanding
- In Progress
- Suspended

Initiated

The status of the checklist and the tasks in the checklist is automatically set to initiated when you allocate the checklist.

Completed

Use this status to indicate that the checklist or task is complete. You can set the checklist status to completed only if all the required tasks are complete. The checklist status is automatically set to completed when you set the status of the last required task to completed. Note that the task does not disappear from the allocated checklist or the worklist when you set the status to completed. You must delete it yourself if required.

Rejected

Use this status to reject a checklist, for example, because it was wrongly allocated to a person. Task owners or performers can use this status to decline ownership of a task, for example, if the task has been wrongly assigned to them.

Outstanding

Use this status to indicate that the checklist or task is not complete by the target date.

Other Task Statuses

Use the other statuses to record progress made against the checklist or tasks, for example, to indicate that tasks are in progress or the checklist is suspended because of unavailability of resources.

Creating a Checklist Template: Worked Example

This example demonstrates how to create a checklist template that is allocated automatically to all newly hired workers to track certain tasks involved in hiring a worker. The tasks in the checklist vary according to eligibility rules.

The following table summarizes key decisions for this scenario:

Decisions to Consider	In this Example
Allocate checklist automatically?	Yes, checklist is allocated automatically to persons experiencing new hire action.
Which tasks to include in the checklist?	<ul style="list-style-type: none">• Create E-mail Account• Issue Laptop• Issue Meal Vouchers
What are the task performers' responsibilities?	<ul style="list-style-type: none">• Performers for the tasks Create E-mail Account and Issue Laptop have the responsibility IT Support Representative.• Performers for the task Issue Meal Vouchers have the responsibility HR Representative.
Do eligibility rules apply to any tasks?	<ul style="list-style-type: none">• Issue Laptop applies to manager users only• Issue Meal Vouchers applies to work location India only

Create a checklist template, associate it with the Hire action, and create three tasks for the template.

Prerequisites

1. Create an eligibility profile **Manager_Users** for all manager users.
2. Create an eligibility profile **Work_Location_India** for work location India.
3. Create a responsibility **IT Support Representative** and assign persons to this responsibility.

Creating a Checklist Template

1. On the Person Management Overview page, click **Manage Checklist Templates** to open the Manage Checklist Templates page.

2. Click **Create**.
3. On the Create Checklist Templates page, complete the fields, as shown in this table:

Field	Value
Name	New Hire
Category	On Boarding
Action	Hire

Creating Checklist Tasks

1. In the Tasks region, click **Create**.
2. For each task, complete the fields, as shown in this table:

Field	Create E-mail Account Task	Issue Laptop Task	Issue Meal Vouchers Task
Required	Yes	No	No
Eligibility Profile		Manager_Users	India_Work_Location
Responsibility Type	IT Support Representative	IT Support Representative	HR Representative

3. Click **Submit**.

FAQs for Define Checklists

Can managers make changes in the checklist template after creating it?

No. Managers cannot edit or delete the checklist template that they create using the save as template option. However, they can allocate the checklist template to workers and edit the checklist and task attributes within the allocated checklists. The HR specialist can make changes in the checklist template if required and make the revised template available for allocation to all users.

How do changes in the checklist template affect allocated checklists?

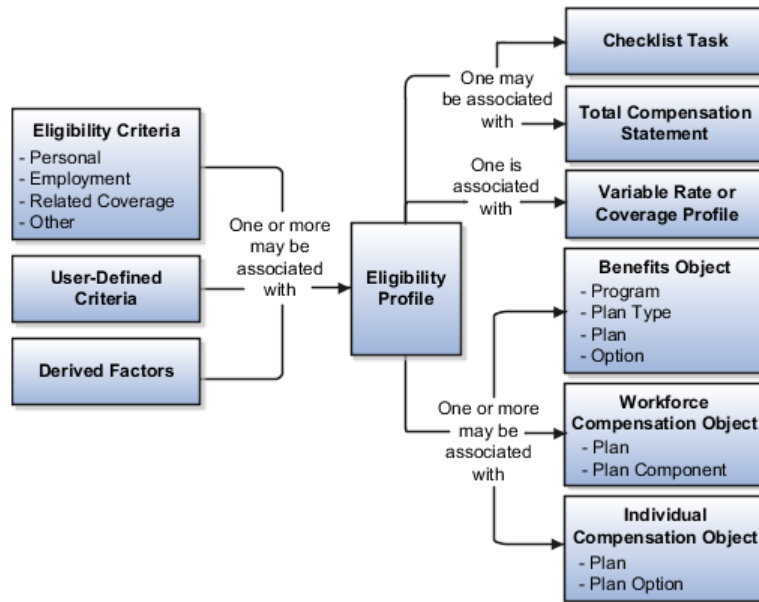
Each allocated checklist is a specific instance of the checklist template. Therefore, changes in the checklist template do not affect the allocated checklists. Similarly, the checklist template is unaffected by changes in the allocated checklists.

Define Profile Eligibility

Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

You can associate an eligibility profile with different kinds of objects:

- Associate an eligibility profile with a variable rate or variable coverage profile to establish the criteria required to qualify for that rate or coverage.
- Associate an eligibility profile with a checklist task to control whether that task appears in an allocated checklist.
- Associate an eligibility profile with a total compensation statement to apply additional eligibility criteria after statement generation population parameters.
- Associate one or more eligibility profiles with a benefits or compensation object to establish the eligibility criteria for specific plans and options.

Derived Factors: Explained

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

You can create six different types of derived factors: age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. For example, the determination rule for an age derived factor specifies the day on which to evaluate the person's calculated age for eligibility. If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.

For the full-time equivalent factor, you specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. For example, if the percentage range is 90 to 100 percent for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

Other settings define the unit of measure for time or monetary amounts, rounding rules, and minimums and maximums.

Derived Factors: Examples

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine dependent eligibility. You can also use age as a factor when determining life insurance rates. Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band are the same:

Field	Value
Determination Rule	First of calendar year

Age to Use	Person's
Units	Year
Rounding	None

Length of Service

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table illustrates a set of length-of-service bands that could be used to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire (This sets the beginning of the period being measured.)
Determination Rule	End of year (This sets the end of the period being measured.)
Age to Use	Person's
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table illustrates a set of compensation bands that could be used to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000

Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Age to Use: Points to Consider

The **Age to Use** value that you select is an important aspect of an age derived factor. This value determines whose birth date is used to calculate the derived age.

Selecting Person's Age to Use

In most cases, you use the **Person's** value in the **Age to Use** field to define an age derived factor for either a participant or dependent eligibility profile. In this case, each person's birth date is used to calculate the age criterion by which eligibility is evaluated for that person.

Example

For example, if you select **Person's** as the **Age to Use** value, and associate the age derived factor with a dependent eligibility profile, each dependent's eligibility is evaluated based on the age calculated from his or her own birth date.

Selecting Other Age to Use Values

You might select another predefined value in the **Age to Use** field if you intend to evaluate participant or dependent eligibility or rates based on someone else's age, such as a spouse, child, or other dependent.

Note

If you choose **Inherited Age**, the evaluation is based on the date of birth as defined in the person extra information flexfield.

Example

If you select **Person's oldest child** as the **Age to Use** value, and associate this derived factor with a dependent eligibility profile, eligibility for all dependents is evaluated based on the age of the participant's oldest child. Consequently, when the oldest child reaches the maximum age of eligibility, for instance, all dependents become ineligible.

User-Defined Criteria: Explained

You can define your own criteria to meet any special needs of your organization. For example, if your organization employs deep sea divers and offers different benefits or benefits rates based on how deep they dive, you can create Depth of Diving as a new eligibility criterion.

The data for the eligibility criterion must be stored in a table that is accessible to the application. If the data is stored in either the Person or Assignment table, you can select the table and column from a list, and then specify the lookup type used to validate input values. You can also allow a range of valid values if the field stores a numeric value or a date.

Note

To select the correct values for the column and lookup fields, you must have a basic understanding of the structure of the table that stores the eligibility criterion information.

If the data is stored in a table other than the Person or Assignment table, you must first create a formula to retrieve the data from the table, and then set the formula type to **User-Defined Criteria**.

You can define two sets of criteria on the User-Defined Criteria page. The participant must meet the criteria defined in either set to be considered eligible (or to be excluded from eligibility if the **Exclude** check box is selected when the criteria is added to an eligibility profile).

After you have created your user-defined criteria, you can add it to an eligibility profile.

User-Defined Criteria: Examples

The following scenarios illustrate how to define different types of user-defined criteria. In each example, you must first create the user-defined criteria and then add it to an eligibility profile and set the criteria values to use in the profile.

Set Eligibility Based on Custom Attribute

A commercial diving company wants to offer different benefit rates to employees who dive to depths greater than 330 feet. This data is stored for each employee in a custom attribute called Dive_Depth in the Person table. To define eligibility based on diving depth, set the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Table	Person
Column	Dive_Depth_Attribute
Lookup	Dive_Depth_Validation
Enable range validation one	Selected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab, which is under the Other tab on the Create or Edit Eligibility Profile page:

Field	Value
Set 1 Meaning	329
Set 1 To Meaning	9999
Exclude	Deselected

Save the eligibility profile and associate it with a variable rate profile.

Exclude Work-at-Home Assignments from Eligibility

An employer wants to exclude work-at-home assignment from eligibility for a transportation benefit option. To accomplish this, set the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Table	Assignment
Column	Work_at_home
Lookup	YES_NO
Enable range validation one	Deselected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab:

Field	Value
Set 1 Meaning	Yes
Exclude	Selected

Save the eligibility profile and associate it with the transportation benefit option.

Use a Formula to Determine Eligibility

A company wants to offer a spot incentive bonus to hourly employees who worked 100 percent of their scheduled shift hours in a three month period. To determine eligibility for the bonus, create a formula that calculates scheduled hours less worked hours for each week in the previous three months. If the result of successive calculations is less than or equal to zero, then the formula returns a result of Yes. The first step is to create the formula. Once the formula has been defined, create a user-defined criterion to run the formula. Enter the following values on the Create or Edit User-Defined Criteria page:

Field	Value
Access One Formula	Worked_Sched_Hours_Percent
Enable range validation one	Deselected

Save the user-defined criteria, and then add it to an eligibility profile. Set the following values on the User-Defined Criteria tab:

Field	Value
Set 1 Meaning	Yes
Exclude	Deselected

Save the eligibility profile and associate it with the bonus compensation object.

Note

For very complex scenarios, your organization or implementation team can write a custom program to evaluate eligibility, and then create a formula that calls the custom program.

Range of Scheduled Hours: Example

This example illustrates how to define eligibility criteria based on the number of hours an employee is scheduled to work within a specified period of time.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to employees who were scheduled to work between 30 and 40 hours each week or between 130-160 each month as of the end of the previous quarter. To do this, add two different ranges on the Range of Scheduled Hours tab, which is under the Employment tab on the Create or Edit Eligibility Profile page.

Set the values for the first range as shown in this table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the second range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Eligibility Profiles: Explained

An eligibility profile defines criteria used to determine whether a person qualifies for a benefits offering, variable rate profile, variable coverage profile, compensation object, checklist task, or other object for which eligibility must be established.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type and usage

- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses derived factors, user-defined formulas, or user-defined criteria to establish eligibility, you must create these items before you create the eligibility profile.
- If you are defining eligibility criteria for a checklist task, variable rate profile, or variable coverage profile, you must include all criteria in a single eligibility profile, because these objects can be associated with only one eligibility profile. You can, however, associate multiple eligibility profiles with benefits offerings and compensation objects.
- Eligibility profiles are reusable, so use names that identify the criteria being defined rather than the object with which the profile is associated. For example, use "Age-20-25+NonSmoker" rather than "Supplemental Life-Min Rate."

Specifying Profile Types and Usage

When you create an eligibility profile, you specify whether the profile applies to participants or dependents. Use participant profiles to define criteria for employees or ex-employees who are eligible for company-sponsored benefits. Use dependent profiles for participants' spouses, family members, or other individuals who qualify as dependents. Dependent profiles can be associated only with plans and plan types.

An eligibility profile's usage determines the type of objects the profile can be associated with. For example, if you set the profile usage to **Benefits**, the profile is available for selection when you are associating eligibility profiles with benefits objects, such as programs, plans, plan types, options, variable rate profiles, and variable coverage profiles. You can also set the usage to **Compensation**, **Checklist**, or **Global**.

Defining Eligibility Criteria

Criteria defined in an eligibility profile are divided into categories:

- **Personal:** Includes gender, person type, postal code ranges, and other person-specific criteria
- **Employment:** Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria
- **Derived factors:** Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service
- **Other:** Includes miscellaneous and user-defined criteria
- **Related coverage:** Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65. If you exclude certain age bands, then all age bands not explicitly excluded are automatically included. Similarly, if you include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person needs to satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object you are defining eligibility for support multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?

Support for Multiple Eligibility Profiles

If you are defining eligibility criteria for a checklist task, variable rate profile, or variable coverage profile, you must include all criteria in a single eligibility profile, because these objects can be associated with only one eligibility profile. You can, however, associate multiple eligibility profiles with benefits offerings and compensation objects.

Efficiency and Performance

For optimum performance and efficiency, you should usually attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating

criteria at lower levels. Plan types in program, plans in program, plans, and options in plans inherit the eligibility criteria associated with the program. For example, to be eligible for a benefits plan type, a person must satisfy eligibility profiles defined at the program level and at the plan type in program level.

However, it is sometimes faster to create more than one profile and attach the profiles at various levels in the hierarchy. For example, you might exclude employees from eligibility at the program level who do not have an active assignment. At the level of plan type in program, you might exclude employees who do not have a full-time assignment. Finally, at the plan level, you might exclude employees whose primary address is not within a service area you define.

Note

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, try to keep all excluded criteria in a separate eligibility profile.

Eligibility Profiles: Examples

The following examples illustrate scenarios where eligibility profiles are needed and briefly describe the setup required for each scenario.

401(k) Eligibility

A 401(k) savings plan is restricted to full-time employees under 65 years of age. To restrict eligibility for the plan, you must first create a derived factor for the age band of 65 and older, if one does not already exist. Then create an eligibility profile. Set the **Profile Usage** to **Benefits** and the **Profile Type** to **Participant**. Add the following criteria:

Criteria Type	Name	Values
Employment	Assignment Category	Full-Time
Derived Factor	Age	Select the age derived factor you created previously, and then select the Exclude check box.

Associate the eligibility profile with the 401(k) plan.

Bonus Eligibility

A bonus is offered to all employees who received the highest possible performance rating in all rating categories. To restrict eligibility for the bonus, create an eligibility profile. Set the **Profile Usage** to **Compensation** and the **Profile Type** to **Participant**. Add the following criteria for each rating category:

Criteria Type	Name	Values
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value.

Associate the eligibility profile with the bonus compensation object.

Checklist Task Eligibility

A new hire checklist contains tasks that do not apply to employees who work in India. To restrict eligibility for the tasks, create a participant eligibility profile. Set the **Profile Usage** to **Checklist** and the **Profile Type** to **Participant**. Add the following criteria:

Criteria Type	Name	Values
Employment	Work Location	Select India as the work location, and then select the Exclude check box.

Associate the eligibility profile with each checklist task that does not apply to workers in India.

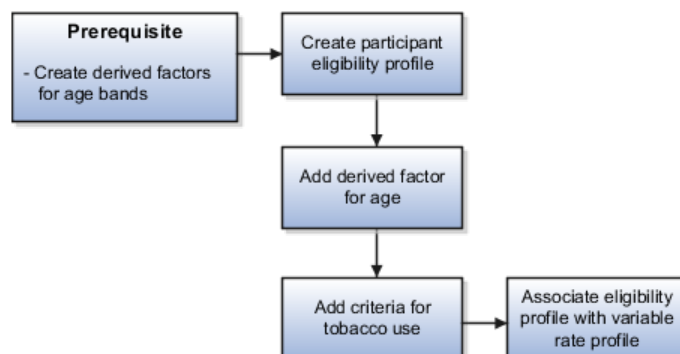
Creating a Participant Eligibility Profile: Worked Example

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. The profile includes two eligibility criteria: age and tobacco. Once the eligibility profile is complete, you can associate it with a variable rate profile.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
What are the criteria values?	Age: Under 30 Tobacco Use: None
Should persons meeting these criteria be included or excluded from eligibility?	Included

The following figure shows the tasks to complete in this example:



Note

In this example, you create one eligibility profile that defines the requirements for a single variable rate. Typically, you create a set of eligibility profiles, one for each variable rate. When you have completed all steps described in this example, you can repeat them, varying the age and tobacco use criteria, to create a separate profile for each additional rate.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

1. In the Plan Configuration work area, click **Manage Eligibility Profiles**.
2. Click the **Create** menu, and then click **Create Participant Profile**.
3. In the Eligibility Profile Definition region of the Create Participant Eligibility Profile page, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Name	Age Under 30+Non-Smoking
Profile Usage	Benefits
Description	Participant, age under 30, non smoker
Status	Active
Assignment to Use	Any assignment

Adding the Derived Factor for Age

1. In the Eligibility Criteria region, select the Derived Factors tab.
2. On the Age tab, click **Create**.
3. In the **Sequence** field, enter 1.
4. In the **Age** field, select the derived factor that you previously defined for ages under 30.
5. Do not select the **Exclude** check box.

Adding the Criteria for Tobacco Use

1. Select the Personal tab.
2. On the Uses Tobacco tab, click **Create**.
3. In the **Sequence** field, enter 1.
4. In the **Tobacco Use** field, select None.
5. Do not select the **Exclude** check box.
6. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

1. In the Plan Configuration work area, click **Manage Benefits Rates**.
2. Select the Variable Rates tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Note

You can reuse this eligibility profile by associating it with other objects that restrict eligibility, including benefits offerings, compensation plans, and checklist tasks.

Define HCM Events

HCM Events: Explained

A common events model for Oracle Fusion Human Capital Management (HCM) products defines how to respond to certain data changes or business process trigger points. A common model enables a single event definition to drive both externally published business events and internal processes.

The events model comprises the following key components:

- Event definitions
- Event types
- Event handlers
- Published business events
- Archived event data

Event Definitions

An event definition identifies a set of registered HCM event objects, such as entity objects, that can be used to raise events.

Event Types

Event types define the type of object to be detected, the particular DML mode for the type of data change, such as update, insert, or delete, along with any rules or conditions that further qualify the event. These conditions determine whether an event triggers further processing activities, such as archiving information relating to the event, internal processing initiated by the event, or publication of business events to the SOA framework. A common example of an event type is updates to a particular object attribute.

Event Handlers

When the conditions of an event type are satisfied, an internal handler can specify how related functional areas within HCM are notified or an external handler can specify a published event to be raised.

Published Business Events

An implementer can associate a particular published business event with a particular event definition so that when the change is detected, the associated published business event is raised to the SOA application server. Published business events can be raised from any of the registered HCM event objects.

Archived Event Data

When defining event types, the implementer can indicate which attribute data should be stored for auditing purposes. The availability of archived events data also can assist internal HCM products to determine the nature of specific data changes when they are notified of the occurrence of an event.

When defining which data should be archived for a particular event type, the implementer can also specify the number of calendar days after the detected event that the data must be stored. After the specified number of days, the data can be purged from the database.

Managing HCM Events Types: Points to Consider

You can create or modify HCM event types when the predefined event types do not sufficiently meet the needs of your enterprise.

To determine your approach, consider the following questions:

- Do the predefined event types cover the conditions you want to capture for data change event detection?
- Does your enterprise have custom processes or services associated with a published business event?

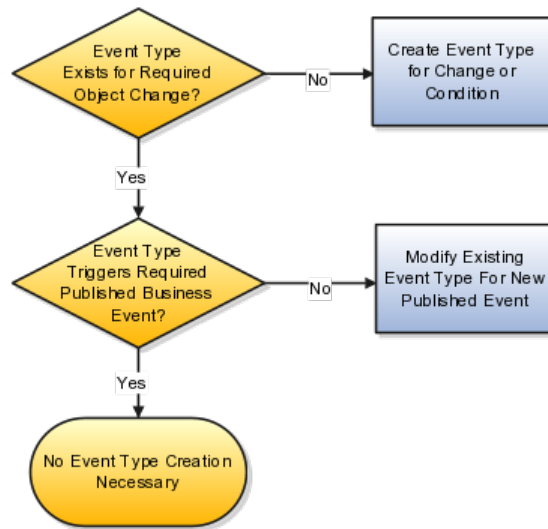
For example, you can modify an existing event type to add a different published business event to be consumed by the new process or service if that is the only modification. If there other modifications you want, such as additional detection conditions or data changes, you can create a new event type.

- Do any required SOA services already exist?

Examples of published business events as external handlers that invoke SOA processes include ChangedPersonDetails, that invokes a process in Oracle Fusion Trading Community Model, and ChangeLocation, that invokes a process in Oracle Fusion Financials. You can review existing published services in the Oracle Enterprise Repository.

Event Type Customization

The following figure illustrates the decision points for HCM event type customization.



Creating an Event Type from an Existing Event Type: Worked Example

This example demonstrates how to create an event type that is based on a predefined event type but captures additional data.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Which predefined event type is closest to meeting my business needs?	PhoneUpdate
What additional data must be captured?	Extension
What condition triggers this event?	Updates to telephone extension data
What rules must be met to trigger this event?	Rule to detect changes to work telephone data

In this example, the organization wants to capture changes to telephone extension number data for people within a particular building, and notify the operator who handles incoming calls for that building. The predefined event type does not contain the extension information or publishing conditions for that data, so you add a new condition that is defined to publish only where extension data is changed.

Choosing the Event Type to Extend

Find a predefined event type that best suits your needs by looking for object and attribute similarities. The predefined event types cannot be changed, so instead you create a copy after noting its values to use in the new event type.

1. In the regional search pane of the Setup and Maintenance work area, search for the Manage HCM Event Types task.
2. In the search results table, click **Go to Task**.

3. In the Source Object field on the Manage HCM Event Types search page, enter PhoneEO and click **Search**.
4. Select the row for PhoneUpdate and click **Edit**.
5. Note the values for this event type as shown in the following table:

Field or Tab	Value
Source Object	PhoneEO
Rule	eo.New("PhoneType") > "W" & eo.New("PhoneType") < "X"
DML Mode	Update
External Handlers Published Event Name	ChangedPersonKeywords

Creating a Copy of the Event Type

Copy the values from the event type you want to extend into a new event type.

1. On the Manage HCM Event Types page, click **Create**.
2. In the Name field, enter a new name for the event, such as PhoneExtUpdate.
3. In the Source Object field, enter PhoneEO.
4. In the DML Mode list, select **Update**.
5. In the Storage Duration field, enter the number of days to store any archived data for this event.
6. On the External Handlers tab, click **Add Row**.
7. Search for and select the ChangedPersonKeywords published event, and then click **OK**.

Adding Detection Rules

1. In the Rule field in Event Type Details region, enter the following rule that picks up changes on all Phone entity objects whose Phone Type attribute is Work Telephone:

```
eo.New("PhoneType") > "W" & eo.New("PhoneType") < "X".)
```

2. Run a test to make sure the rule syntax is correct.

Note

There is no built-in syntax validation so testing that the rule is working as designed is strongly recommended. You can test the rule and monitor the event publication or examine the log files.

Adding a New Data Attribute

1. On the Condition Attributes tab, select **Extension** and move it to the Selected Attributes list.
2. Click **Save and Close**.

Creating an Event Type for a Custom Process: Worked Example

This example demonstrates how to create an event type that invokes a custom business process.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
What condition triggers this event?	Change to termination date data.
What process will be triggered by this event?	Custom process: NotifiedTerminationDate.

In this example, the business requires that the application initiates a special process whenever an administrator terminates an employee. This example creates a new event type that detects changes to termination date for employees' period of service.

Prerequisites

1. Create the custom process (external handler) to be triggered as a result of this event detection and name it NotifiedTerminationDate.
2. Ensure that NotifiedTerminationDate exists as a published event in a namespace accessible to the application, adhering to your company standards.

Note

If an internal handler is used with an event type, its class name must be fully qualified and must exist in the system classpath.

Creating an Event Type for Termination Notification

1. In the regional search pane of the Setup and Maintenance work area, search for the Manage HCM Event Types task.
2. In the search results table, click **Go to Task**.
3. On the Manage HCM Event Types page, click **Create**.
4. In the Name field, enter a new name for the event, such as TerminationDateUpdate.
5. In the Source Object field, enter PeriodOfServiceEO.
6. In the DML Mode list, select Update.
7. In the Storage Duration field, enter the number of days to store any archived data for this event.

Adding a Condition Attribute

1. On the Condition Attributes tab, select one or more of the following related attributes and move them to the Selected Attributes list.
 - AcceptedTerminationDate
 - ActualTerminationDate

- AdjustedSysDate
- LastWorkingDate
- NotifiedTerminationDate
- OriginalDateOfHire
- ProjectedTerminationDate
- RehireRecommendation

Adding a Custom Process

1. On the External Handlers tab, click **Add Row**.
2. Search for and select the NotifiedTerminationDate published event, and then click **OK**.
3. Click **Save and Close**.

Using Rules in Event Types: Examples

Rules in event types define the conditions under which changes to data are detected. Rules must be written using Groovy syntax. All attributes that you include as part of a rule must exist on the object for which the event type is built.

Note

There is no built-in syntax validation, so testing that the rule is working as designed is strongly recommended. You can test the rule and monitor the event publication or examine the log files.

Comparing Attributes

Rule syntax for attribute names is case sensitive, so be sure to enter attributes correctly and enclose them in double quotation marks.

When referring to an object's old value, use the following syntax:

```
eo.Old("attrName")
```

When referring to an object's new value, use the following syntax:

```
eo.New("attrName")
```

Using Operators

Operators in rule syntax are useful for creating the conditional criteria that you want an event to detect.

Operator	Usage
>	Greater than
<	Less than
= =	Equals
&	And

	Or
--	----

The following scenarios illustrate using operators with proper rule syntax:

Detection Based on Object Status

This example shows the proper syntax for the event detection to occur only when the status for an object has a particular value, in this case, when the performance document approval status attribute (PerformanceDocApproveStatusUpdate) is changed to Submitted.

```
eo.New("StatusCode") == "SUBMITTED"
```

Detection Only For Specific Object Type

This example shows the proper syntax for the event detection to occur only for a specific object type, in this case, only when the Phone Type attribute of the Phone entity object is Work Telephone.

```
eo.New("PhoneType") > "W" & eo.New("PhoneType") < "X"
```

PhoneType represents the lookup table, PHONE_TYPE, which contains three lookup codes for work telephones: W1 W2, and W3. The rule above applies to phone types greater than W and less than X, the next letter of the alphabet, so that detection occurs for all phone types that begin with the letter W. This way, if you later add another lookup code for a fourth work telephone, W4 for example, the rule still applies correctly.

Using Published Events and SOA Services with HCM Events: Highlights

Understanding how HCM events work with external processes requires some knowledge of service-oriented architecture (SOA). The following resources provide key information about using SOA services and how to create, publish, and subscribe to business events in your enterprise using Oracle SOA Suite and Oracle Enterprise Repository.

SOA Services and Published Events

- For information about using SOA services and creating and publishing business events, refer to the following documents:
See: Getting Started with Oracle SOA Suite
See: Developer's Guide for Oracle SOA Suite
- For information about using Oracle Enterprise Repository to locate existing published events and services, refer to the following document:
See: User's Guide for Oracle Enterprise Repository

Purging Archived HCM Event Data: Worked Example

This example demonstrates how to purge object change data that was stored as a result of published event detection.

Purging Archived Data by Date

1. From the Setup and Maintenance work area, search for Purge HCM Events Archive Data, and then click **Go to Task**.
2. In the Purge Date field, enter the date when you want the application to purge the archived HCM events data.

Note

You cannot purge archived data that has not met or exceeded its storage duration. For example, if a particular event is defined to store data for 365 days, and you enter a purge date of 5 March 2012, only data that was archived for that event before 5 March 2011 will be purged.

3. Click **Submit**.

FAQs for Define HCM Events

When should I purge archived HCM events data?

Purge data from the tables that contain archived data for HCM events when a database administrator determines that the size of the tables is too big.

The archive tables to monitor for archived HCM events data are:

- HRC_EVT_OBJ_CHANGES
- HRC_EVT_OBJ_CHANGE_COMPONENTS
- HRC_EVT_OBJ_CHG_ATTRIBUTES

Manage Payroll Process Configuration

Payroll Process Configuration Groups: Explained

Payroll process configuration groups provide sets of payroll action parameters, primarily related to logging and performance, for your processes and reports. When you run a process, you can select a process configuration group. If you do not select a process configuration group, the application uses the parameters in the default group.

You must specify the default group in the Process Configuration Group ACTION_PARAMETER_GROUPS profile option. You can set the profile option in the Setup and Maintenance work area using the Manage Default Process Configuration Group Profile Option Values task or the Manage Administrator Profile Values task.

Note

Entering a value for this profile option is a required step. The value of the Payroll License parameter in the process configuration group selected in the profile option determines the element templates used in the Manage Elements task and

whether deduction cards are created automatically for new employees when you hire them.

A default process configuration group is predefined. You can edit the predefined group on the Default Group tab of the Manage Payroll Process Configuration page. You can select this group or another one as the default for your sites using the Process Configuration Group ACTION_PARAMETER_GROUPS profile option.

You can also create as many additional groups as you require on the Group Overrides tab on the Manage Process Configuration Group page. For example, you might want to create a group with the logging parameters turned on to troubleshoot processes. You can also specify different performance parameter values (such as chunk size and buffer size) for running different processes.

Payroll Process Configuration Group Parameters

Payroll action parameters are system-level parameters that control aspects of the payroll batch processes. The effects of setting values for specific parameters may be system wide. Payroll batch processes read values from the PAY_ACTION_PARAMETERS table on startup, or provide appropriate values by default, if specific parameter values are not specified.

For some parameters you should understand the concept of array processing and how this affects performance. Values for each parameter are predefined with the system, but you can override these values as part of your initial implementation and for performance tuning. Use the Manage Payroll Process Configuration task in the Setup and Maintenance work area.

The following table describes action parameters and lists values and predefined default values:

Parameter	Description	Values	Default Value
Balance Buffer Size	Used for array inserts and updates of latest balances, based on one row per balance.	Maximum: 1000. Minimum: 1. Note If your trace files show differences between execute and fetch timings, look at the buffer sizes you are using. Try setting each of these to 100.	500
Shuffle Chunk Processing	Random processing of order chunks for assignment actions.	Yes, No	No
Chunk Size	Number of payroll relationship actions processed together.	Maximum: 16000. Minimum: 1.	20
Cost Buffer Size	Used for array insert and select statements when calculating the costing of the payroll run results.	Maximum: 1000. Minimum: 1.	500

Element Entry Buffer Size	Buffer size used in the initial array selects of element entries, element entry values, run results, and run result values per assignment.	Maximum: 1000. Minimum: 1.	500
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Formula Execution Logging	Code area where logging is performed.	<p>The action parameter mechanism is only available for formula logging in the Payroll run. It is possible to perform logging with a combinations of characters. For example, the 'di' string corresponds to the logging of database item cache access and formula input and output values.</p> <hr/> <p>Note</p> <p>The dump logging options should only be used in rare circumstances, especially the T trace option, which generates very large amounts of data that would significantly slow down processing.</p> <hr/> <p>d = database item cache access</p> <p>D = database item cache dump</p> <p>f = formula cache access</p> <p>F = formula cache dump</p> <p>i = formula input/output values</p> <p>w = working storage area access</p> <p>W = working storage area dump</p> <p>n = nested calls</p> <p>c = change contexts</p> <p>s = SQL execution (database item and PLSQL formula function calls)</p> <p>m = miscellaneous</p> <p>T = trace (very large level that provides the inputs and outputs of every call made when executing a formula)</p> <p>1 = level 1 (combination of i, m, f, and C)</p> <p>2 = level 2 (combination of 1, d, w, c, and n)</p> <p>3 = level 3 (combination of 2, T, and s)</p>	No logging.
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Logging Area	Area where code logging can be performed.	The values correspond to c-code entries in the form PY_ENTRY (env, pyipppr); where pyipppr is the functional area that will have logging enabled.	Note If this isn't set, logging is not limited to a particular code area if logging is enabled by the Logging Category pay action parameter.
Assignment ID to End Logging	Assignment ID that ends logging.		All assignments
Assignment ID to Start Logging	Assignment ID that starts logging.		All assignments
Logging Category	Helps investigate problems with large volumes of detailed data.	GMPE or blank for no logging. You can specify multiple values.	No logging.
Maximum Number of Payroll Relationship Actions to Roll Back	Number of payroll relationship actions that can be rolled back, when rolling back a process.	Minimum: 1	50
Maximum Errors Allowed	Number of payroll relationship actions that can be rolled back, when rolling back a process.	Minimum: 0	CHUNK_SIZE or 20
Maximum Iterations Allowed per Run Action	Maximum number of iterations allowed per run action within Net to Gross calculations within the Payroll Run.	Minimum: 0	15
Notifications Expiration Offset	Number of days before a payroll flow notification is automatically deleted.		
Payroll License	Provides features, such as element templates, appropriate to selected product license.	PAYROLL, HR_ONLY, and PAYROLL_INTERFACE.	HR_ONLY
Process Timeout	Number of minutes before the Run Balance Generation process times out.	Minimum: 0	If not specified, no timeout limit is enforced.
Remove Report Assignment Actions	Removes report processing actions after reports are generated.	Yes, No	Yes
Run Result Buffer Size	Used for array inserts and updates, based on 1 row for each payroll run result.	Maximum: 1000. Minimum: 1.	500
Override Location for Tax Libraries	Directory location for Quantum tax libraries.	There are no set values. Values for this parameter would be directory structures on the client site.	\$VERTEX_TOP/lib

Accounting Date for Transfer to General Ledger	Date earned or date paid, used to transfer and post journal entries for costing results to Oracle Fusion General Ledger.	E = date earned P = date paid	P
Reversal and Balance Adjustment Accounting Date	Accounting date based on the process date of reversal or balance adjustment or the process end date of the Transfer to Subledger Accounting task, which is used to transfer journal entries for costing results to Oracle Fusion General Ledger.	T = transfer using end date of the Transfer to Subledger Accounting task as the accounting date P = use process date of the reversal or balance adjustment as the accounting date	P
Threads	Total number of subprocesses that can run from the Oracle Enterprise Scheduler Service.	Minimum: 1.	1
Wage Basis Rules Buffer Size	Used in array selects from the PAY_TAXABILITY_RULES table within the Payroll Calculation process.	Minimum: 100	500
Trace	Enables the database trace facility for application processes written in C only.	Yes, No	No
Trace Level	Sets the trace level of the trace event. To generate the finest level of detail, enter the highest value.	1, 4, 8, 12	None
User Messaging	Enables detailed logging of user-readable information to the PAY_MESSAGE_LINES table.	Yes, No	No

Parallel Processing Parameters

THREADS

Oracle Fusion Global Payroll is designed to take advantage of multiprocessor machines. This means that you can improve performance of your batch processes by splitting the processing into a number of threads, or subprocesses, which run in parallel.

Note

Using threads and subprocesses may also improve performance if you are using PAYROLL_INTERFACE.

When you submit a batch process, the THREADS parameter determines the total number of subprocesses that run concurrently. The process submits THREADS minus 1 subprocesses.

Set this parameter to the value that provides optimal performance on your server. The default value of 1 is set for a single-processor machine. Benchmark

tests on multiprocessor machines show that the optimal value is approximately 2 processes per processor. So, for example, if the server has 6 processors, you should set the initial value to 12 and test the impact on performance of variations on this value.

CHUNK_SIZE

Size of each commit unit for the batch process. This parameter determines the number of assignment actions that are inserted during the initial phase of processing and the number of assignment actions that are processed at one time during the main processing phase. Parameter values range from 1 to 16,000. The default value is 20.

Note

This does not apply to all processes, such as Generate Check Payments and Retroactive Pay.

During the initial phase of processing, this parameter defines the array size for insert. Large chunk size values are not desirable and the default value has been set as a result of benchmark tests. Each thread processes one chunk at a time.

Logging Parameters

During implementation and testing, you may need to turn on logging to provide a large volume of detailed information that is useful for investigating problems. Use this parameter only when you need to investigate problems that are not easily identified in other ways. The logging activities can impact the overall performance of the process you are logging. Usually, this feature is needed during your initial implementation and testing before you go live. In a normal operation you should disable detailed logging.

Note

If you need to contact Oracle Support for assistance in identifying or resolving problems in running your payroll processes, you should prepare your log file first. Define the logging category, area, and range of assignments before resubmitting the problem.

LOGGING

Logging categories define the type of information included in the log. You can set any number of these categories by specifying multiple values so you can focus attention on specific areas that you think may be causing a problem. Parameter values are one or more logging categories, as described below. The default value is No logging.

The following table explains each logging category:

Parameter Value	Logging Category	Description
B	Balance Information.	Provides output information that shows the creation and maintenance of balances used during payroll processing.
C	C cache structures information.	Provides output information that shows details of the payroll cache structures and changes to the entries within the structure. While working on a service request, Oracle may ask you to use this parameter to gather additional information.

E	Element entry information.	Provides output information that shows the state of the element entries in the process memory after the entries have been retrieved from the database. The information is provided whenever data for an entry is changed during processing.
F	Formula information.	Provides output information that shows details of formula execution, including formula contexts, inputs, and outputs.
G	General logging information.	Provides general information, rather than a specific information type. This parameter does not provide sorted output. In general, it is recommended that you choose parameters that provide specific types of information.
I	Balance output information.	Provides output information that shows details of values written to the database from the balance buffers.
L	Balance fetching information.	Provides output information that shows the balances retrieved from the database and whether or not the process will use those balances. (If balances such as Year To Date totals have expired because the year has changed, the process resets them and uses the new balance.)
M	Entry or exit routing information.	Provides output information to show when any function is entered and exited. The system may display messages such as In: pyippee and Out: pyippee. This information is indented to show the call level, and can be used to trace the path taken through the code at the function call level. Often, this information is useful when attempting to track down a problem such as a core dump.

P	Performance information	Provides output information to show the number of times certain operations take place at the assignment and run levels and why the operation took place. This parameter is often used to balance the buffer array write operation.
Q	C cache query information.	Provides output information that shows the queries being performed on the payroll cache structures. While working on a service request, Oracle may ask you to use this parameter to gather additional information.
R	Run results information.	Provides output information that shows details of run results and run result values just as they are about to be written to the database from the Run Results buffer or the Values buffer. This enables verification that the buffer contents were correct.
S	C cache ending status information.	Provides output information that shows the state of the payroll cache before the process exits, whether that process ends with success or an error. While working on a service request, Oracle may ask you to use this parameter to gather additional information.

T and Z	PL/SQL detail and PL/SQL output.	To obtain detailed information about the PL/SQL calls made by the Payroll application, use the combination of the T parameter and the Z parameter. This combination is typically useful for obtaining information about payroll processes that use a large amount of PL/SQL code, such as prepayments and archive. The output from using these parameters is buffered while the process is running and is placed at the end of the log file after processing is complete. Each payroll process instance has its own log file, located under the log subdirectory for the particular process ID.
V (USA and Canada only)	Vertex tax calculation information.	Provides output information that shows the values being passed in and out of a third-party Vertex tax engine. This parameter also provides a separate file in the Out directory that shows the internal settings of the Vertex engine. This logging option is available to customers in the USA and Canada only.

Payroll License Configuration: Critical Choices

The Payroll License parameter on the Manage Payroll Process Configuration page has three allowable values that determine how payroll-related features function within Oracle Fusion Applications. You must ensure that the value for the Payroll License parameter in your default configuration group is appropriate for your licensing agreement.

The three allowable values for the Payroll License parameter for the following product licenses are:

- Oracle Fusion Global Payroll: `PAYROLL`
- Oracle Fusion Global Payroll Interface: `PAYROLL_INTERFACE`
- Other HCM Products: `HR_ONLY`

Global Payroll

Global Payroll customers must set the Payroll License parameter to `PAYROLL` to ensure the complete set of payroll-related element templates is available

when creating elements. These element templates assist in element creation and automatically create and generate fast formulas for new elements. Elements created without this set of element templates will not be suitable for costing or payment processing in Global Payroll.

The PAYROLL license setting also prevents any organization payment methods without a payment source from being associated when creating payroll definitions, which reduces potential problems during payment processing. For some localizations, the PAYROLL license setting enables deduction cards to be automatically generated as part of the new-hire process.

Global Payroll Interface

Global Payroll Interface customers must set the Payroll License parameter to PAYROLL_INTERFACE to ensure the correct set of element templates is available. Earnings elements created without this license setting will not automatically generate the associated features, such as the formulas and balances required when calculating gross earnings for employees.

Other HCM Products

Customers of other HCM products must set the Payroll License parameter to HR_ONLY to ensure the correct set of element templates is available. These element templates are simplified to facilitate creating elements to capture just the required information. Elements created without this license setting will include formulas and balances, which are required for payroll purposes but are unnecessary for HR purposes.

Common HCM Configuration: Define Extracts

Defining an Extract: Worked Example

This example demonstrates the steps required to create an extract definition. Before you create an extract definition, you should understand the following details: the information that you want to extract; the structure in which the data must be extracted and how you want to deliver this data (including file format, delivery mechanism and frequency information).

FAST bank is a global organization with subsidiaries all over the world. As part of an external business reporting requirement, FAST bank is required to extract the department and employee details (grouped by department) across the entire company. This information must be sent to a third party in an XML file and to HR Managers in a PDF file using e-mail.

The following table summarizes the key decisions in this scenario:

Decisions to Consider	In This Example
How many extracts do I need to create to produce this type of report?	You create one extract definition to define a headcount report.
What type of extract do I create?	You create a HR Archive extract.
How many blocks do I need to create?	In this example there are 2 functional groups of information, therefore you create two blocks, one for department and one for employees.
How many records do I need to create?	<p>You decide the number of records based on the sub-group of data elements within a block. In this example, you create two records for the department block:</p> <ul style="list-style-type: none">• Department Details• Department Summary <p>You create one record for the employees block: Employee Details.</p>

<p>How many data elements do I need to create?</p>	<p>You decide the number of data elements based on the specific information required for that report. In this example, create the following data elements for the Department Details record:</p> <ul style="list-style-type: none"> • Department Name • Department Location <p>For the Department Summary record, create the following data elements:</p> <ul style="list-style-type: none"> • Record Code • Report Date • Employee Count <p>For the Employees Details record, create the following data elements:</p> <ul style="list-style-type: none"> • Full Name • Gender • Date of Birth • Salary • Bonus • Tax Rate
<p>Do I need to create any fast formulas?</p>	<p>You can use fast formulas at the following levels:</p> <ul style="list-style-type: none"> • Extract Criteria level to determine certain conditions. • Extract Rule level to derive data element values. • Extract Advanced Condition level to specify complex conditions. • Extract Record level to automatically generate formulas when you use the Generate Formula option.

Creating an Extract Definition

1. On the Manage HCM Extract Definitions page click on the Create icon to create a new extract.
2. Enter 01-Jan-2000 as the Session Effective Date.

The session effective date is an effective start date that applies to all date-effective interactions in the current session.

3. Enter FAST Bank Extract as the name and select HR Archive as the type. The application automatically creates the tag name based on the extract name and uses this name to generate the XML output file.

4. Click Save and the application saves the extract definition and automatically generates the parameters based on the type of extract. The parameters control the output of an extract. In this example, the application creates the following parameters:
 - Effective Date
 - Legislative Block
 - Parameter Group
 - Report Category
 - Request ID
 - Start Date

Creating Extract Blocks

1. Select the Extract Block link from the navigation tree to open the Extract Blocks region.
2. Click on Create to define a new block. A block represents data that belongs to one or more logical data entities.
3. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Departments
User Entity	PER_EXT_SEC_ORGANIZATION_UE
Root Block	Yes (By selecting this checkbox you select this block as the starting point for the extract execution.)

4. Select Save and Create Another to create a block for Employees.
5. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Employees
User Entity	PER_EXT_SEC_ASSIGNMENT_UE
Root Block	No

Creating Extract Block Links

1. Select Extract Block in the navigation tree to display the blocks in a table. Block links enable you to define the master-detail of parent-child relationship between the entities. For example, the Employees and Departments blocks are linked with Department ID.
2. Select the Employees Block and define the block link details.
3. Complete the general fields, as shown in this table:

Field Name	Entry
Parent Block	Departments
Parent Block Database Item	PER_EXT_ORG_ORGANIZATION_ID
Block Database Item	PER_EXT_ASG_ORG_ID

4. Define the block criteria for each block. Block criteria enables you to specify the filter conditions of what data you want to archive. You can specify the filter conditions as an expression or fast formula.

Creating Extract Records

1. Select the Departments Block from the navigation tree and select the Create icon in the Extract Records region. Extract records represent a physical collection of all required fields. If a block has 3 records, then you can specify the sequence in which the application processes the records using the sequence field. You can also select the Next Block to identify which block the application processes next.
2. Create two records for the Departments Block.
3. Complete the general fields, as shown in this table:

Field	Department Summary	Department Details
Name	Department Summary	Department Details
Effective Start Date	1/1/00	1/1/00
Sequence	20	10
Type	Trailer Record	Header Record
Process Type	Fast Formula	Fast Formula
Next Block	NA	Employees

4. Save the records, then select the Employees Block and select the Create icon in the Extract Records region.
5. Create one record for the Employees Block.
6. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Employee Details
Effective Start Date	1/1/00
Sequence	10
Type	Detail Record
Process Type	Fast Formula

Creating Data Elements

1. Select the Departments Block from the navigation tree and select the Department Details record.

An extract data element is an individual field of a record.

2. Create the following extract data elements for the Department Details record and select Save.
3. Complete the general fields, as shown in this table:

Field Name	Data Element Entry	Data Element Entry
Name	Department Name	Department Location
Type	Database item group	Database item group
Database Item Group	Organization Name	Organization Location Country

4. Save the record, then select the Department Summary record.
5. Select the Create icon in the Extract Data Elements region.
6. Create the following extract data elements for the Department Summary record and select Save.
7. Complete the general fields, as shown in this table:

Field Name	Data Element Entry	Data Element Entry	Data Element Entry
Name	Record Code	Report Date	Employee Count
Data Type	Text	Date	Number
Type	String	Parameter Element	Summary Element
String Value	999	NA	NA
Parameter	Effective Date	NA	NA
Aggregate Function	NA	NA	Count
Aggregate Record Name	NA	NA	Employees Employee Details

8. Select the Employees Block from the navigation tree and select the Employee Details record.
9. Create the following extract data elements for the Employee Details record and select Save.
10. Complete the general fields, as shown in this table:

Field Name	Data Element Entry	Data Element Entry	Data Element Entry
Name	Full Name	Gender	Date of Birth
Start Date	1/1/00	1/1/00	1/1/00
Data Type	Text	Text	Date

Type	Database Item Group	Decoded database item group	Database item group
Database Item Group	Person Full Name	Person Gender	Person Date of Birth

Field Name	Data Element Entry	Data Element Entry	Data Element Entry
Name	Salary	Bonus	Tax rate
Start Date	1/1/00	1/1/00	1/1/00
Data Type	Number	Number	Text
Type	Database item group	Record Calculation	Rule
Database Item Group	Assignment Salary Amount	NA	NA
Calculation Expression	NA	Salary * 0.5	NA
Rule	NA	NA	FAST Bank Tax Rule

Defining the Delivery Options

1. Navigate to the Extract Execution Tree to validate the extract definition setup.
2. Select Export XSD to download the XML Schema Definition (.xsd) file for this extract setup. This exported file contains the structure of the extract definition: the blocks, records, and data elements.
3. Select the Extract Delivery Options region to define the formatting and layout options for the extract definition.

You can define delivery options for an extract using a BI publisher template, with the following delivery file output types: PDF, XLS, XML, DOC, and the following delivery modes FTP, email, fax. You can also choose Documents of Record as the delivery mode. This delivery mode enables you to store the output in the database and allows employees to view online payslips from documents of record. If the XML output is split and burst as separate files, then you can select the bursting node. For example, if you want all employees to be sent an email with their payslip, then set the bursting node to Employee_ID.

4. Complete the general fields, as shown in this table:

Field	Value	Value
Start Date	1/1/00	1/1/00
End Date	12/31/12	12/31/12
BI Publisher Template	ReportLayout	EFTLayout

Output Type	PDF	EFT
Delivery Type	Email	FTP
Delivery Option Name	Email to HR	FTP to 3rd Party
Output Name	HeadcountReport	EFTReport

5. Define further information for each delivery option in the Additional Details region. For example, add the server, username and password for the FTP delivery type.
6. Enter FAST Bank Extract as the reporting category and click Submit.

Submitting an Extract

An extract definition automatically creates an extract process with the same name as the extract. The extract process enables you to define an execution sequence of multiple tasks, including pre and post tasks. You can use the Refine HCM Extracts task to view and modify the extract process, if required.

1. Select the Submit an HCM Process task and select the FAST Bank Extract process.
2. Enter FAST Bank Extract - Jan 2012 as the Payroll Flow.
3. Enter 1/1/12 as the Effective Date.
4. Select Next. You can specify interaction details if the task is dependent on other tasks with different extract processes. For example, this task must wait because another task is running.
5. Select Next and review the extract.
6. Select Submit.
7. Select OK and View Checklist to view the status of the process.
8. Select the View an HCM Process task to review the results of the extract run. Search for the FAST Bank Extract process.
9. Select Go to Task for FAST Bank Extract - Jan 2012 and view the report output.

Extract Components: How They Work Together

The HCM Extracts feature is a flexible tool for generating data files and reports. You use the extract components to define what information you want the application to extract and report on, and how the information is displayed, formatted and delivered. An extract definition consists of: one or more extract blocks, depending on how many logical entities you want to extract; one or more extract records depending on how many groups of information you want to collect; and one or more data elements depending on how many individual fields of data you want to extract.

Extract Definitions

An extract definition refers to the complete setup of an extract, that consists of extract blocks, criteria, records, data elements, advance conditions and output

delivery options. You use HCM extracts to extract, archive, transform, report, and deliver high volumes of HCM data from the Fusion HCM database. You can view the extracted data in the UI before generating the final output. You can generate the output in the following formats:

- CSV
- XML
- Excel
- HTML
- RTF
- PDF

You can distribute the extracted information by email, fax and other delivery modes. Some common examples of extracts are: PDF payslips delivered to employees' mailboxes, payroll or benefits data transferred to third-party service providers, HR and talent data exchange between Fusion and legacy applications, for example in a coexistence scenario.

Blocks

Extract blocks represent a business area or logical entity, for example person, assignment, or benefits. The application uses this information to retrieve the report data items. You define one block as the primary or root block and this block is the starting point of the data extraction.

Extract block links capture the association details between the current block and the parent block. The block links form the hierarchical relationship among the blocks.

Extract block criteria enables you to define a set of filtering conditions the application must perform on an extract block. You specify the criteria conditions using an expression or fast formula.

Extract Records

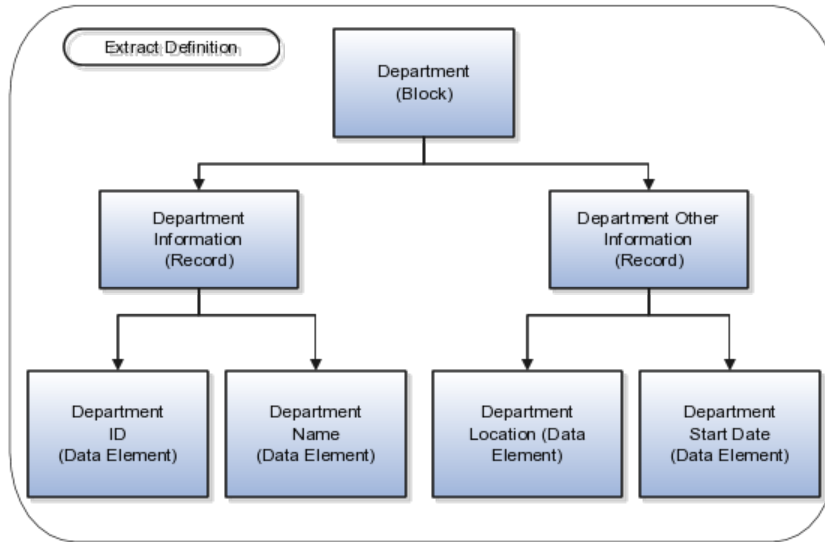
Extract records represent a grouping of related data or a physical collection of all fields required in the extract. For example, the Employee block can have records such as Basic Details, Pay Details, Location Details, and Primary Contact. An extract record is a collection of data elements which you can organize in a required sequence. For example, if a block has 3 records, then you can specify the sequence in which the application processes the records. You can also select the next block to identify which block the application processes next.

Data Elements

Data elements are the individual fields inside the extract record. A data element is the lowest attribute level of a HCM extract and represents a piece of information, for example, person first name, person last name or person date of birth.

This figure demonstrates the hierarchy of information within a block definition. In this example, the block is a container for the logical group of data called

Department. Within the Department block there are two records of department data called Department Information and Department Other Information (extract records). Within the subgroup of Department Information there are two elements of information called Department ID and Department Name. Within the subgroup of Department Other Information there are two elements of information called Department Location and Department Start Date. An extract definition is a hierarchy of information with data elements such as Department ID at the bottom.



FAQs for Define Extracts

How can I restrict the records to be extracted?

You can use extract block criteria to define a set of filtering conditions the application performs on an extract block. For example, you can use database items in the fast formula to represent the `town_or_city` and `primary_flag` columns in the `per_addresses` table to restrict the data to people living in London only. The extract definition would then exclude people with a primary address of anywhere other than London. You can specify the criteria conditions using an expression or fast formula.

Common HCM Configuration: Set Up Banks, Branches, and Accounts

Entering Bank Information for Personal Payment Methods: Critical Choices

Bank, branch, and bank account information is shared across multiple applications. For example, if you add an employee's bank details for expense payment, the same bank details are available for managing electronic funds transfer (EFT) payment details for that employee. Who enters bank information depends on how security is configured at your site.

The configuration choices are:

- Enter bank information centrally
- Enter bank information on the Manage Personal Payment Methods page

Entering Bank Information Centrally

By default, only cash managers can enter banks and branches. They use the Set Up Bank, Branches, and Accounts task list in the Setup and Maintenance work area.

A web service is also available to migrate personal payment method information, including employee bank account details, from external sources.

Entering Bank Information on the Manage Personal Payment Methods Page

By default, on the Manage Personal Payment Methods page, employees can enter their own bank account details for existing banks and branches, but they cannot create new banks and branches. Similarly payroll managers, payroll administrators, and payroll coordinators can enter account details for the employees they handle, but they cannot create new banks and branches. If you want to enable the create option for any of these roles, you must add the Bank and Branch Management duty role to the relevant role.

It is not possible to edit bank and branch details on the Manage Personal Payment Methods page. You must use the Set Up Bank, Branches, and Accounts task list to edit existing banks and branches.

Important

If you enable employees or other roles to create banks and branches, provide guidance to use unique names and follow appropriate naming conventions.

Payroll Setup for Banks and Cash Management: Explained

Oracle Fusion Global Payroll integrates with Oracle Fusion Cash Management, which facilitates the setup of banks, branches, and bank accounts, and the reconciliation of bank statements with payment transactions.

A manager with the appropriate duty role, usually a Cash Management cash manager, creates the following information in the Setup and Maintenance area.

- Banks, bank branches, and bank accounts for the payment sources used to issue payments
- Transaction codes used in bank statements that you map to transaction codes that you set up for payment methods
- Reconciliation Differences account and reconciliation rules, to support reconciliation of your payments with bank statements

Set Up Banks

Before you can set up banks, you must complete the tasks for payroll and Financials to set up a chart of accounts and ledger. This information is then used to set up banks. For example, when creating a bank for a payment source, you select a legal entity assigned to a ledger for the associated legislative data group.

Complete the following tasks to create banks for your payment sources.

Task	Action
Manage Banks	Create the bank information required for the payment sources used in your payroll transactions.
Manage Bank Branches	Create the bank branch information required for the payment sources used in your payroll transactions.
Manage Bank Accounts	Create the bank account information required for the payment sources used in your payroll transactions.

Set Up Payroll Transactions Codes

If you cost your payments, complete the following tasks to set up and map transaction codes in Cash Management for the organization payment methods.

Task	Action
Manage Bank Statement Transaction Codes	Create transaction codes for the transaction types that support your organization payment methods. When creating the codes, refer to the transaction and statement codes that your enterprise currently uses.
Manage Cash Transaction Type Mapping	Map transaction types to payment types used for the organization payment methods that support costing of payments. Identify the organization payment methods for payroll accounts, such as payroll liability, cash, and cash clearing accounts.

Set Up Accounts and Rules for Reconciliation

Payroll processes transfer your payment entries to Cash Management for manual or automatic reconciliation with bank statements, and cost the unreconciled and reconciled payments to the appropriate account, such as the cash clearing and cash accounts. A reconciliation difference account records discrepancies, such as over or under payments.

If you automatically reconcile payment transactions, complete the following tasks to set up tolerance and reconciliation rules in Cash Management. For manual reconciliation, you make decisions during the reconciliation process when matching bank statement lines and system transactions.

Task	Action
Manage Bank Statement Reconciliation Tolerance Rules	Create tolerance rules based on date, amount, or percentage that prevent or warn you when reconciliation exceeds a defined tolerance.
Manage Bank Statement Reconciliation Matching Rules	Define bank statement automatic reconciliation matching rules.
Manage Bank Statement Reconciliation Rule Sets	Assign a group of matching rules and tolerance rules to a bank account for reconciling bank statement lines with transactions.
Manage Bank Accounts	Specify the Reconciliation Differences account you set up in Oracle Fusion General Ledger to use for storing discrepancies that exceed the tolerance rules in the payment amounts reported in the bank statements.

Common HCM Configuration: Manage Tablet Application Configuration

Oracle Fusion Tap: Highlights

Oracle Fusion Tap enables you to use a tablet device to complete day-to-day sales and human resources tasks, and review key business information.

For example, HR professionals can use Oracle Fusion Tap to:

- Monitor business critical performance indicators, receive alerts, and drill down to details accessed through integration with real-time business intelligence
- Compare workers, no matter where they are in the organization, by simply tapping on them in the interactive organizational chart
- Obtain a true view of workers by blending human resource information with job specific information
- Export a peer, their peers, and their direct reports with a single tap on a contact list

Sales managers and executives can use Oracle Fusion Tap to view key performance indicators and obtain an accurate view about how the business is performing. Salespeople can also:

- Access contacts, accounts and opportunities when out of the office
- Identify key contacts and collaborate with sales co-workers
- Browse interactive sales catalogs to discover, present, and compare products
- Log sales activities and notes quickly and easily

Oracle Fusion Tap Capabilities and Installation

- End users can learn about Oracle Fusion Tap capabilities and installation. See: Oracle Fusion Tap Capabilities and Installation document (1430761.1) on My Oracle Support at <https://support.oracle.com>

Extensibility

- Administrators can learn how to configure the different page displays for opportunities on tablet devices. See: Oracle Fusion Tap Extensibility (1430783.1) on My Oracle Support at <https://support.oracle.com>

See Also

- You can view more details about extensibility options and capabilities across all Oracle Fusion applications.

See: Oracle Fusion Applications Extensibility Guide

- You can access more implementation information for Workforce Deployment.

See: Oracle Fusion Applications Workforce Deployment Implementation Guide

- You can access more Sales implementation information.

See: Oracle Fusion Applications Sales Implementation Guide

Define Worker Goal Setting

Define Worker Goal Setting: Overview

In the Define Worker Goal Setting activity, human resource (HR) specialists can manage performance and development goal plans, assign goals to workers using a mass process, administer worker goals, and manage the goal library.

For both setup and maintenance tasks, they can:

- Create performance or development goal plans and assign them to organizations, a manager hierarchy, or individual workers.
- Add or update an existing goal plan to add workers, goals, or organizations.
- Populate existing goal plans to add more goals.
- Assign goals using a mass process that they add or edit, or those from the goal library or organization, to a selected population of workers.
- Edit, cancel, or delete performance and development goals of workers.
- Manage goals in the library so that workers can add the goals for their own use, or managers can assign the goals to workers.

For setup tasks only, the HR specialist can also:

- Set profile options to specify the Oracle Fusion Goal Management features that your organization will use, such as the goal library, and goal plans, and approvals.
- Manage common lookups and update those that have user or extensible customization levels.
- Manage e-mail notification settings that are sent to workers and managers reminding them of upcoming events and approvals.

For the setup tasks, use the Setup and Maintenance work area to access the tasks in the Define Worker Goal Setting task list. You can also use the Goal Management work area to access the maintenance tasks.

Goal Management: Explained

Oracle Fusion Goal Management provides the ability for workers, managers, and organization owners to set and define goals that support the common objectives of your organization. Using Goal Management, you can grow your

organization's talent by creating development goals that capture the growth and career aspirations of the entire workforce. Workers can update goals throughout a goal setting and tracking cycle, and managers and organization owners can track the goals as workers progress through them.

Goal management supports:

- Goal types
- Target outcomes
- Tasks
- Specific, measurable, achievable, relevant, and time-based (SMART) goals
- Goal plans

Availability of these aspects of goal management depends on application settings defined by your organization.

Goal Types

Workers and managers can create two types of goals: performance and development. Workers can also create personal goals.

Performance goals are results-oriented, measure work-related performance, and often use specific targets to assess the level of workers' achievement. Performance goals can be used in performance documents as part of the evaluation process.

Development goals facilitate the career growth of individuals so that they can perform better in their current jobs or prepare themselves for advancement.

Personal goals are available only to the worker. Workers can use personal goals to stretch their capabilities to increase their skills, for example, or as draft goals that they can copy to their performance or development goals.

Managers who are organization owners can also add new or existing goals as performance organization goals, and assign them to any level of the manager assignment hierarchy to support the organization's overall business objectives. Workers' own goals can also be aligned to the organization goals to achieve the same objective.

Target Outcomes

Target outcomes enable the linking of a goal to specific skills or qualifications such as competencies, degrees, certifications, and others. Target outcomes can be used to increase a worker's proficiency for current or future job requirements, or to add to the worker's set of skills.

Tasks

Tasks are specific actions added to a goal that a worker undertakes in order to achieve the goal.

Goal tasks can be of various types, including mentoring, researching, and coaching.

SMART Goals

To measure the performance of workers, help them improve productivity, and achieve career objectives, Goal Management supports goals that are: specific, measurable, achievable, relevant, and time-based (SMART).

For example, the goals can specify how workers will measure achievement of objectives and include target dates.

Goal Plans

Goal plans are used to manage a collection of performance or development goals for a specific period. Goal plans can be rolled out to individuals, a selected hierarchy, or a wider population within the organization.

Making Goals Available to Workers: Points to Consider

There are three ways to make goals available to workers:

- Assign goals to the workers.
- Publish goals to the entire organization.
- Share goals with workers and colleagues.

Any one or all three methods can be used to enable workers to access goals, depending on application settings.

Assigning Goals to Workers

Managers can assign performance goals or development goals to their direct reports. They can assign their own goals, add new ones, or use existing goals from the goal library. Managers can assign goals to all their direct reports or a specific direct report. When managers assign their own goals to workers, the workers' goals are aligned automatically to the manager's goal.

As organization owners, managers can also assign organization goals as performance goals to workers. They can add new organization goals, or use existing organization or library goals to assign directly to any level of the supervisory hierarchy. Organization goals that are assigned to workers are aligned automatically to the original organization goal.

Managers can cascade goals using goal assignment. Using that method, organization owners, for example, can assign goals to their direct report line managers. The line managers can in turn assign the goals to their direct reports. They can assign the goals exactly as they are, or change them to fit the population to which they are assigning the goals.

When goal plans are used, human resource (HR) specialists can assign performance goals or development goals to workers by creating a goal plan for a specific population, then adding goals to it. The HR specialist can add goals directly to the plan either before or after creating it. Managers or workers can add additional goals to the plan after it is created.

Once the goals are assigned, workers can adapt them to their particular needs, dependent on approval. They can change goal names, target completion dates, tasks and target outcomes, and other characteristics.

Publishing Goals to the Entire Organization

Organization owners can publish goals to make them available for workers in the supervisor hierarchy to add to their list of goals. Workers and managers can also align individual worker goals to published organization goals. When workers add an organization goal to their own goals, that new goal is automatically aligned to the published organization goal.

Sharing Goals with Workers and Colleagues

Managers can share goals with their direct and indirect reports as an alternative to assigning the goals, for cases where managers want workers to know about the goals but let the workers to decide to add the goals or not. Workers can share goals with their colleagues. Workers can also align their goals to the shared goals of either a manager or a colleague. A goal that a worker adds from shared goals is automatically aligned to the original goal that was shared.

Goals: How They Work with Performance Documents

Performance goals that workers or managers add or edit in Oracle Fusion Goal Management or performance documents are synchronized so that they are consistent in both locations.

The goal details held in performance documents and the Goal Management component have some differences:

- Primary goal characteristics, such as the goal name, description, success criteria, and completion date, are kept identical in both locations.
- Goal ratings that the worker or manager provide in the performance document are not available on the Goal Management pages.
- Goal weights added on the Goal Management pages are added to the performance document only when the goal is initially added to the document; afterwards, weights are maintained independently.
- Comments created on the Goal Management pages are visible in the performance document; those made in the performance document do not appear on the Goal Management pages.

Updating Performance Documents from Goal Management

Goals are added to the performance document when the document is created if the performance template is configured to use workers' goals. Workers and managers can add performance goals on the Goal Management pages and the goals are pulled into the performance documents of the workers when the documents are created. A goal appears in all of a worker's performance documents that have start and end dates that encompass the goal start, target completion, or actual completion dates of the goal. If the worker or manager adds a goal on the Goal Management pages that the worker completed, it can appear in the performance document so they can rate it.

When workers or managers add goals or edit goal details in Goal Management, the changes are reflected in an existing performance document when the worker or manager performs the update action in the performance document, which they can do at any time during the evaluation period.

Updating Goal Management from Performance Documents

Any goals that workers or managers add to or edit in a performance document are updated in Goal Management when the performance document is saved or submitted.

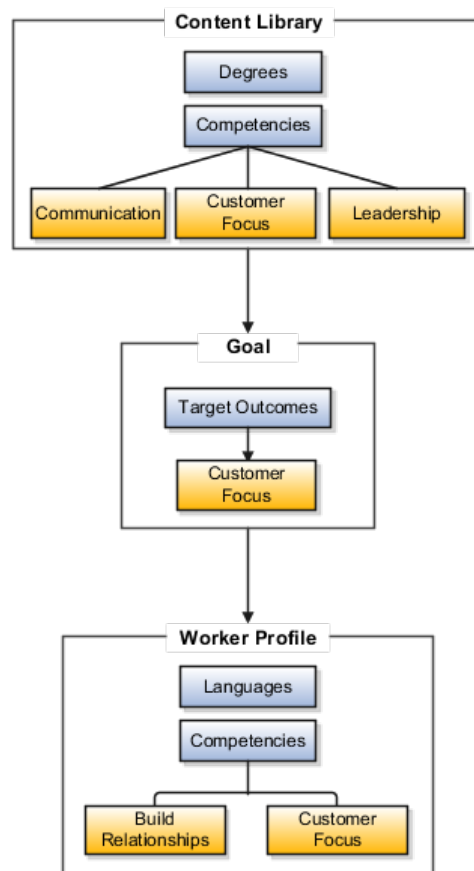
If goal plans are enabled, when workers or managers add a goal to the performance document, it is added to the goal plan with start and end dates that encompass the start , target completion, or actual completion dates of the

goal. If a goal plan is not enabled for the period that includes the goal dates, the goal will not be added to any goal plan but will still appear in the worker's performance goals list.

Goals: How They Work with Profiles

Human resource (HR) specialists, line managers, and workers can add target outcomes to goals to help workers add or improve the requisite skills, competencies, certifications, or other qualifications they need or desire to increase performance on a current job, or prepare for a future job. Target outcomes are content items from Oracle Fusion Profile Management. Once the goal is completed, the worker's person profile is updated to include the content item that the target outcome addressed. If the content item already existed in the worker's person profile, it is updated to include new or changed information. Target outcomes must be enabled in the Oracle Fusion Goal Management profile options to be available.

The figure shows how a content item, in this case the competency Customer Focus, is added from the content library to a goal as a target outcome, and then to the worker profile when the goal is completed.



Adding Target Outcomes to Goals

When adding or editing goals for workers, managers and workers can add target outcomes to goals from the available list of content types, such as competencies, or degrees. HR specialists can also add target outcomes to goals when they:

- Add goals to the goal library
- Add goals to a goal plan when creating or populating the plan
- Mass assign goals
- Administer goals

Target outcomes are drawn from content items, categorized by content type, that are maintained in Profile Management. A content type must have a relationship defined with goals in Profile Management to be available to add to goals.

Updating Worker Profiles

When the goal is completed, and approved if approvals are required, then the worker's person profile is updated to include the target outcomes. For content items that require a rating level, such as competencies, the manager must select a rating level, which is the rating level that is associated with the content item.

Using Development Goals in Talent Pools: Explained

By adding development goals to a talent pool, you can ensure that all the members of your talent pool accomplish certain tasks, enabling you to manage and track goals of pool members for current and future jobs. By tracking the progress of your pool members on assigned goals, you can track the readiness of a member to be promoted to a higher position.

Adding Development Goals to a Talent Pool

Only talent pool owners can add development goals to a talent pool. When creating or editing a talent pool, you can add or remove development goals by using the Edit Talent Pool: Manage Development Goals page. You can add development goals to a talent pool only from the goal library. When you assign goals to a worker from a talent pool, these goals are added automatically to the worker's goals list on the My Goals page and My Directs' Goals page, where the worker and manager can edit and update the goal. If a worker inherits a goal from the talent pool that he or she already has, then that goal is not duplicated on the worker's goals list on the My Goals page and My Directs' Goals page.

Note

When you add a worker to a talent pool, the goals already associated with the talent pool are not automatically assigned to the worker. Only those goals that are added later to the talent pool are automatically assigned to the worker.

Removing Development Goals from a Talent Pool

Only talent pool owners can remove development goals from a talent pool. If you remove a development goal from a talent pool, that goal is not automatically removed from the workers' goals list who inherited the goal from the talent pool. If you want to remove a goal from a worker's goals list, then after you remove a goal from the talent pool, you must manually delete it from the worker's goals list.

Removing or Updating Development Goals Contained in a Talent Pool from the Goal Library

If you update in the goal library a development goal that has been added to a talent pool, then the updates to that goal are not reflected in the talent pool. If you want the goal in the talent pool to reflect the changes made to it in the goal

library, you must remove that goal from talent pool and add the updated goal to the talent pool.

FAQs for Define Worker Goal Setting

How can I diagnose any issues with Oracle Fusion Goal Management data?

After populating the Oracle Fusion Goal Management data tables, you can run the Goal Management Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Goal Management, the test validates four categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Field Level Validation:** Field level attributes must match the business rules set up in Goal Management.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.

Can I copy goals from an external database?

You can copy the details of the existing goals of an external database into a spreadsheet template to upload them to the Oracle Fusion database.

Manage Worker Goal Descriptive Flexfields

Descriptive Flexfields for Oracle Fusion Goal Management

You can use descriptive flexfields to add custom attributes for a goal entity, such as goals, goal access, and goal plans, and define validation and display properties for them. For example, you can create a descriptive flexfield to distinguish between goals that are for projects, or those for a half year or full year.

Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for goals. You can add more information related to goals, goal access, and goal plans.

There are three descriptive flexfields available in Oracle Fusion Goal Management.

Descriptive Flexfield	Description
HRG_GOALS	Fields for goal information displayed on the My Goals page.
HRG_GOAL_ACCESS	Fields for goal sharing details displayed in the Share region of the Goal Details page after a goal is shared from the Goal Management pages.
HRG_GOAL_PLANS_B	Fields for goal plan details displayed on the Create and Edit Performance Goal Plan and Create and Edit Development Goal Plan pages.

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment. For more information on using flexfields for custom attributes, see the Oracle Fusion Applications Extensibility Guide.

Manage Worker Goal Setting Lookups

Oracle Fusion Goal Management Lookups: Explained

This topic identifies common lookups for Oracle Fusion Goal Management that have user or extensible customization levels. Review these lookups, and update them as appropriate to suit enterprise requirements.

Goal Management Lookups

Goal Management lookups are described in the following table.

Lookup Type	Description	Customization Level
HRG_DEV_GOAL_CATEGORY	Categories of development goals, such as short-term, medium-term, and long-term.	Extensible
HRG_GOAL_MEASUREMENT_LEVEL	Levels of goals, such as target, and stretch.	Extensible
HRG_GOAL_QUANTITATIVE_UNITS	Units of quantitative measurement for goals, such as currency, number, and percentage.	Extensible
HRG_GOAL_SOURCE	The source from which the goal was added, such as goal library, worker goals, or organization goals.	Extensible
HRG_GOAL_TASK_TYPE	Categories of task types for goals, such as coaching, project, and research.	Extensible
HRG_PERCENT_COMPLETE	The completion percentage of a goal, such as 0, 25, 50, 75 and 100.	Extensible
HRG_PERF_GOAL_CATEGORY	Categories of performance and personal goals, such as career, education, and skill.	Extensible
HRG_PRIORITY	Priorities of goals, such as high, medium, and low.	Extensible

Manage Worker Goal Setting Profile Option Values

Oracle Fusion Goal Management Profile Options: Critical Choices

Set profile options to specify the Oracle Fusion Goal Management features that you will use, such as the goal library and goal plans, and to set the online processing threshold. You determine whether to enable the following features:

- The Goal Management business process and goal library

- Performance, development, and personal goal types
- Goal plans
- Goal sharing and goal alignment
- Manager approval for changes to goals
- Other features: goal tasks, target outcomes, goal weights, associating goals to spaces, and excluding goals from performance documents

You also set the online processing threshold, which is the maximum number of records in a mass goal assignment process the application can automatically process.

Goal Management Business Process and Goal Library

This table lists the profile options that enable the Goal Management business process and the goal library.

Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
Goal Management Business Process Enabled	Y	Performance goals can be added to performance documents from the goal library or workers' goals created in the Goal Management component. Talent review participants can add performance and development goals during a talent review. Makes goals available to workers and managers on the development and growth card in the portrait.	Performance goals cannot be added to performance documents from the goal library or workers' goals created in the Goal Management component. Managers and workers can still add ad hoc goals to performance documents, and goals that they already added from the library can still be edited. Goals cannot be added during a talent review, and are unavailable on the development and growth card in the portrait.
Goal Library Enabled	Y	HR specialists can create goals in the central repository that can be reused throughout the organization.	Prevents use of goals from the library, and goals must be created individually, including those added to performance documents or a talent review. However, goals previously added from the library can still be edited.

Performance, Development, and Personal Goal Types

This table lists the profile options that enable the performance (including organization goals), development, and personal goal types.

Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
Performance Goals Enabled	Y	Makes performance goals available to workers, managers, and HR specialists on the pages in the Goal Management component, to workers and managers on the development and growth card in the portrait, and to talent review meeting participants.	Prevents access to existing performance goals or adding new ones on the Goal Management pages and the development and growth card in the portrait. HR specialists, managers, and workers cannot add goals from the goal library to performance documents. However, managers and workers can edit existing goals and add ad hoc goals. Participants cannot add or review performance goals during a talent review.
Development Goals Enabled	Y	Makes development goals available to workers, managers, and HR specialists on the pages in the Goal Management component, to workers and managers on the development and growth card in the portrait, and to talent review meeting participants.	Prevents access to existing development goals or adding new ones on the Goal Management pages and the development and growth card in the portrait. Participants cannot add or review development goals during a talent review.
Personal Goals Enabled	Y	Makes personal goals available to workers on the pages in the Goal Management component.	Prevents access to existing personal goals or adding new ones on the Goal Management pages.
Organization Goals Enabled	Y	Makes organization goals available to workers, managers, and HR specialists on the pages in the Goal Management component.	Prevents access to existing organization goals or adding new ones on the Goal Management pages.

Goal Plans

This table lists the profile options that enable features related to goal plans.

Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
Performance Goal Plans Enabled	Y	<p>HR specialists can generate a performance goal plan. The goal dates determine which plan the performance goal is in.</p> <p>HR specialists, managers, and workers can still add goals to performance documents, and managers can add goals during a talent review, outside a goal plan, if performance document templates and talent review templates are configured to allow adding goals.</p>	Prevents generation of any new goal plans and makes all goals in existing goal plans read-only.
Development Goal Plans Enabled	Y	<p>HR specialists can generate development goal plans.</p> <p>Managers can still add development goals during a talent review outside a goal plan, if talent review templates are configured to allow adding goals. Managers and workers can assign the goals to goal plans after the goals are added.</p>	Prevents generation of any new goal plans and makes all goals in existing goal plans read-only.
Performance Goals Outside of Goal Plan Enabled	Y	HR specialists, managers, and workers can create and manage performance goals that are not in goal plans.	Prevents adding performance goals on the pages in the Goal Management component outside the goal plan dates.
Development Goals Outside of Goal Plan Enabled	Y	HR specialists, managers, and workers can create development goals that are not in goal plans.	Prevents adding development goals on the pages in the Goal Management component outside the goal plan dates.

This table lists the profile option that controls the number of goals plans that appear on the My Goals home page.

Profile Option Display Name	Default	Effect
Number of Goal Plans Displayed on Goals Home Page	2	Sets the number of goal plans that appear in the goal plan and saved searches choice lists on the My Goals home page and the My Organization Goals page. The two goal plans that are displayed are the current one and the most recent past one. Increasing the number adds additional past goal plans to the view. Set the number to 1 to display only the current goal plan.

Goal Sharing and Goal Alignment

This table lists the profile options that enable goal sharing and alignment.

Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
Goal Alignment Enabled	Y	Workers and managers can support organization goals by creating a relationship between their own goals and those of their managers, colleagues, or the organization.	Preserves existing alignment but prevents new goal alignment.
Goal Sharing Enabled	Y	Enables managers and workers to let others copy their goals.	Preserves existing sharing but prevents new goal sharing.

Manager Approvals for Changes to Goals

This table lists the profile options that require manager approvals for changes to goals.

Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
Require Manager Approval for Changes to Key Goal Fields	N	Enables HR specialists and managers to select whether to let workers edit key goal fields without manager approval when assigning goals to workers. Key goal fields include goal name, start date, and others. Also, requires manager approval to delete goals added by workers.	Enables workers to edit key goal fields and delete goals added by them without manager approval.
Require Manager Approval for Adding a New Goal	N	Enables workers to add performance or development goals to their goals without manager approval.	Requires manager approval when workers add performance or development goals.

Require Manager Approval for Updating Goal Status to Completed	Y	Requires manager approval when workers update the goal status to Completed or when workers delete goals.	Enables workers to update the goal status to Completed or delete a goal without approval.
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Other Features

This table lists the profile options that enable goal tasks, target outcomes, goal weights, the association of goals to spaces, and the exclusion of goals from performance documents.

Profile Option Display Name	Default	Effect	Updates
Goal Tasks Enabled	Y	HR specialists, workers, and managers can add tasks to performance, development, personal, or organization goals.	Tasks do not display in the Goal Management component, unless the option was once enabled, tasks were created, and then the option is disabled. In that case, any tasks created when it was enabled are visible, but cannot be edited.
Goal Target Outcomes Enabled	Y	HR specialists, workers, and managers can add target outcomes to performance, development, and personal goals.	Target outcomes do not display in the Goal Management component, unless the option was once enabled, target outcomes were created, and then the option is disabled. In that case, any target outcomes created when it was enabled are visible, but cannot be edited.
Goal Weight Enabled	Y	HR specialists can enable goal weights when creating goal plans so they, workers, and managers can add weights to goals. Weights will transfer to performance documents at the time the goal is added to the performance document, if the performance template specifies that goals can have weights.	Weight fields do not display in the Goal Management component.
Group Space Enabled	Y	Workers can associate goals to spaces.	Prevents associating new goals to spaces, but workers can view the linked spaces for existing goals.

Goal Exclusion from Performance Documents Enabled	N	Adds all performance goals to performance documents when the document is created or updated or when goals are added using the Goal Management business process. Performance document templates must be configured to use goals from the Goal Management business process.	Managers can select which goals to include in performance documents when adding goals for a worker.
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Online Processing Threshold

This table shows the profile options settings for manager approvals and the online processing threshold, as well as the effects of the settings, and any subsequent changes to these settings.

Profile Option Display Name	Default	Effect
Online Processing Threshold	25	<p>Determines the maximum number of records in goal assignment processes that the application can automatically process. This applies when the HR specialist mass assigns goals or creates goal plans, or when managers or organization owners assign goals.</p> <p>If the number of records exceeds the threshold, the process is submitted to the scheduled process queue. The number of records in the process is calculated by the following formula: Number of goals x Number of assignees.</p>

Sharing Goals: Explained

Managers and workers can share goals so that others can add a copy of the goal or align their own goals to it.

Managers can share goals either with their direct or all reports. Workers can share their goals with the colleagues whom they select. Tasks that are associated with goals can also be shared. An email notification is sent to the people with whom the goal is shared.

Workers and managers can share goals by clicking the **Share** button on the My Goals page and selecting whom to share with. They can also select the option to share the goal when adding or editing a goal. Managers can select the option to share the goal with their direct reports instead of sharing with each report individually. Once shared, a goal is visible to the person with whom it is shared in the **Shared Goals** region of that person's My Goals page.

Updating and Aligning Shared Goals

Workers can update a goal added from a shared goal to change the goal name and dates, and add target outcomes and tasks if appropriate. If the worker adds a goal shared by a manager, the new goal is aligned automatically to the manager's goal, so that the added goal supports the original goal.

Adding and aligning do not alter the original goal.

Note

The ability to change some key goal fields and add target outcomes and tasks to an added goal is dependent on application settings.

Sharing Goals when a Worker or Manager Transfers

When a worker or manager is transferred so that the worker is no longer a direct report of the manager, the availability of the goal to the worker depends on how the manager shared the goal with the worker.

If the manager shared the goal by selecting the worker individually, the goal is still available to the worker and appears in the Colleagues section of the worker's My Goals page.

If the manager shared the goal using the **Share with my direct reports** option, then the shared goal is removed from the My Goals page for any workers who are no longer direct reports of the manager.

Aligning Goals: Explained

By aligning performance goals, you create a relationship between a worker's goal and another goal, usually a higher-level organization or manager goal, so that the worker's goal supports and contributes to achieving the higher-level goal. Goals can also be aligned to those of colleagues to support peers' goals. Supporting goals can be aligned to only one other goal. Private goals cannot be aligned to another goal or have other goals aligned to them. Organization owners cannot align their organization goals to other organization goals because they are the highest ranking person in the organizational hierarchy.

Goal alignment provides the flexibility to:

- Align goals automatically.
- Modify supporting goals.
- Remove alignment.

Aligning Goals Automatically

When organization owners assign organization goals to workers, or managers assign their own goals to workers, the assigned goals are copies of the source organization or manager goal. These assigned goals are automatically aligned to the source goal. Goals that workers or managers add from either an organization goal, or a goal shared by a manager or colleague, are also automatically aligned to the organization or shared source goal.

Modifying Supporting Goals

Supporting goals can be identical to the source goal, perhaps with different targets, or they can be completely different. Workers can modify the attributes of the aligned goal.

Removing Alignment

Managers, workers, and HR specialists can remove alignment from one goal to another if desired. If a goal that is aligned to another goal is deleted, the alignment is removed between the goals, but the goal that is not deleted is not affected otherwise. The remaining goal can be aligned to another goal. Canceled goals remain aligned with other goals until the alignment is changed to another goal or removed.

Manage Goal Plans, Goal Mass Assignment, and Administer Goals

Goal Plans: Explained

Goal plans are a collection of performance or development goals that are grouped by common characteristics, such as a specified time frame and a particular department that must work on them. Goal plans are optional for tracking goals.

Using goal plans, you can:

- Group goals to track them easily for a specific population and time period
- Assign goals to a specific population
- Associate goals to existing goal plans
- Add goals to goal plans from other sources

Grouping and Tracking Goals for a Specific Period

Create performance and development goal plans to contain goals for a group of individuals, to track worker performance and development for the period of the goal plan. Managers, workers, and organization owners can use goal plans to help them sort and track their individual and organization goals and ensure that they have appropriate goals for the goal plan period.

Assigning Goals to a Specific Population

When creating a goal plan, you can assign goals that are specific to the hierarchical structure of one or more managers, and individuals as well. Organization owners assign goals to the goal plans for their organizations on the My Organization Goals page. After creating a goal plan, you can use the Populate feature to add goals to the goal plan at any time within the time period that the goal plan is active. When you use the Mass Assign Goals feature, the assigned goals are added to any plan that has start and end dates that include the start, target completion, or actual completion dates of the goals. Workers and managers can edit goals to accommodate their specific circumstances after the goals are assigned.

Associating Goals to Existing Goal Plans

Workers, managers and organization owners can associate goals to goal plans once the plan is created. When workers or managers add goals to the worker

goals, the goals are associated with goal plans that have start and end dates that encompass the start date, target completion date, or actual completion date of the goal. If those dates belong to different goal plans, the goal is associated with all goal plans for those dates. Goals with no dates are not associated to any plans.

Adding Goals to Goal Plans from Other Sources

Goals added in performance documents or talent reviews are added to goal plans if the start date, target completion date, or actual completion dates of the goals lie between the start and end dates of a goal plan. If no goal plans exist for the dates of the goal, the goal is added to the worker goals on the My Goals page, but not to a plan. If a plan is created later that spans the goal dates, workers and managers can associate the goal with the plan by navigating to the pages where they edit goals and selecting a plan.

Creating Goal Plans: Points to Consider

You can create goal plans to aid your workers and managers in tracking and sorting goals. Goal plans are optional. To use goal plans, you must decide:

- The goal plan type
- Dates that a goal plan is active
- Which manager hierarchies, individuals, or organizations to assign the goal plan to
- Whether to add goals to the plan now or later
- Whether to add eligibility profiles to the plan now or later

Selecting the Goal Plan Type

Create a performance goal plan for performance goals, or a development goal plan to contain development goals. A specific goal can belong to one goal plan type or the other, but not both.

Workers and managers can add goals from the performance goal plan to performance documents to be rated as part of worker evaluations. You can assign performance goal plans to organizations. The organization owner can add goals to a performance goal plan, and use analytics to track how many goals workers have aligned to the organization goals, and the progress they are making toward completing the goals.

Workers can use development goal plans to track development goals to increase their competencies or add to their skill set.

Selecting Goal Plan Active Dates

You must select start and end dates for the plan. For example, it is good practice to select dates to correspond to performance evaluation periods. Dates are used to determine which goals are eligible to belong to a plan. Goals with any or all of the start dates, target completion dates, or actual completion dates, that fall within the start and end dates of a goal plan can belong to the plan.

Assigning the Plan

You can assign performance and development goal plans to a manager hierarchy, or individuals. You can also assign performance goal plans to one or more

organizations to make the plans visible to managers on the My Organizational Goals page. On that page, managers can view and assign goals to the plan and use analytics to track the goals.

Workers, managers, and organizations can have more than one goal plan assigned to them. For example, you can create a current goal plan for the direct and indirect reports of a manager so that the workers have one plan that is active now, and another with a start date in the future. The future goal plan can be used to hold goals that will be addressed later, or current goals that span a longer period than does the current goal plan.

You can assign a goal plan to additional organizations, manager hierarchies, or individuals after the plan was created and submitted by using the Assign feature. Goals that are already part of the plan will be assigned to the new people to whom the goal plan is assigned.

Adding Goals to a Plan

You can add goals either that you create, or existing goals that you select, to the goal plan when creating it at a later time. If your enterprise uses tasks and target outcomes, you can add those to the goals you add to the plan. If you have goals that apply to a wide population, it you may prefer to assign these to the plan directly. If goals are generally supplied by managers and workers, you may prefer to assign one goal plan to a wide population without goals. The workers and managers can add the goals to the plan after you submit the plan.

You can add goals only to plans that are assigned to a manager hierarchy or individuals. You cannot add goals to a performance plan that you assign to an organization. If you create a goal plan and assign it both to individuals and an organization, any goals that you add to the plan will be assigned to the individuals, but not to the organization. Organization owners add goals to goal plans using the My Organization Goals page. Goals that you add to a worker's goal plan are added to all that worker's goal plans that have start and end dates that encompass the start, target completion, or actual completion dates, of the goals.

Goals that you add to the goal plan are available to the workers and managers after the plan is submitted. They can edit the goals to suit the needs of the worker or enterprise.

You can add additional goals to an existing plan by using the Populate or Mass Assign Goals features. For example, if a senior manager needs to roll out a new goal late in the goal plan period, you can add it directly to the plan using the Populate feature, submit the plan, and the new goal is added for everyone who is assigned the goal plan. To add goals to the plan using the Mass Assign Goals feature, you can select the population to whom you want to mass assign the goal. The goal is added to the active goals plans of workers who have goal plans that have start and end dates that span the start, target completion, or actual completion dates of the goal.

Adding Eligibility Profiles to a Plan

You can add eligibility profiles to goal plans to restrict goals added to this plan to individuals who meet the criteria of all required profiles. You can restrict goals to workers who meet eligibility requirements by job, job role, location, age, or other criteria. For example, you can add a location eligibility profile to a goal plan if you want to restrict goals to individuals who are located in certain place. You can

further refine eligibility by adding length of service criteria to restrict workers by location and length of service.

When creating goal plans, you can select to assign the goals to individuals immediately or at a scheduled time in the future. However, if the goal plans include eligibility profiles, they are not assigned immediately or at a scheduled time. In this case, the application runs the mass assign goals process as an enterprise scheduler service process. The enterprise scheduler schedules these processes as job requests and assigns goals when a request is completed.

Goal Plans: Examples

There are two types of goal plans available to assign to workers or organizations: performance and development. The following examples illustrate how human resource (HR) specialists and managers can use goal plans to track worker goals.

Adding Additional Goals to Performance Goal Plans with Existing Goals

Your company uses goal plans to manage worker performance goals. The company requires that the entire staff must complete at least one goal: Complete Ethics Course. Barbara Richardson, a manager, wants to add additional goals to the goal plan for all of her direct reports.

The human resources (HR) specialist creates a goal plan for all the workers in the company for the appropriate goal plan period and includes the Complete Ethics Course goal. Barbara uses the Manage My Directs' Goals page to select the goal plan, and adds additional goals to the goal plan for each of her direct reports.

When application settings specify that performance goals must be in a goal plan, all performance goals that the worker or manager add for the worker, or that are assigned, become part of the goal plan, or another goal plan with start and end dates that encompass the goal start date, target completion date, or actual completion date. When application settings permit, the worker or manager can add performance goals to the worker's goals outside of a goal plan.

Adding Development Goals to Plans

The HR specialist creates the development goal plan for all of Barbara's direct and indirect reports. Barbara wants to assign development goals to a direct report to help the worker prepare for a possible promotion. From the Manage My Directs' goals page, Barbara navigates to the worker's My Goals page, and on the Development Goals tab, she selects goals to assign to the worker to help the worker achieve the promotion.

Mass Assignment of Goals: Explained

Mass assign goals is a feature for assigning goals to a number of people at the same time. Using this feature, human resource (HR) specialists select goals from the goal library and assign them to a selected population of workers. As a requester for a manager, HR specialists can use this feature to assign the performance and development goals of that manager.

Through this feature, HR specialists select goals, specify start and target completion dates of the goals, and select population of workers to whom the goals will be assigned. HR specialists can select workers by name, department, job, and e-mail. HR specialists can assign goals to managers and all of their

reports or to their direct reports only. HR specialists can also exclude specific individuals from a manager's direct or all reports lists.

As the requester for an organization department manager, HR specialists can assign that manager's organization goals. For a manager who does not manage an organization, the HR specialist can assign that manager's individual goals.

Goal Plans for Mass Assigned Goals

When HR specialists mass assign goals, they can assign performance or development goals to workers without specifying a goal plan for goals. If goal plans are used, goals with either a start date or target completion date that is contained within the start and end dates of a goal plan of the same type as the goal (either performance or development) are added to the plan. HR specialists can also mass assign goals when workers are not using goals plans.

Eligibility Profiles for Mass Assigned Goals

When HR specialists mass assign goals, they can select eligibility profiles to restrict the performance or development goals to workers who meet the profile criteria. When mass assigning goals, HR specialists can select to assign the goals to individuals immediately or at a scheduled time in the future. However, if the goals include eligibility profiles, they are not assigned immediately or at a scheduled time. In this case, the application runs the mass assign goals process as an enterprise scheduler service process. The enterprise scheduler schedules these processes as job requests and assigns goals when a request is completed.

Using Eligibility Profiles for Goal Assignment: Explained

An eligibility profile in goal management defines criteria used to determine whether an individual qualifies for a goal. Human resource (HR) specialists can use eligibility profiles to establish eligibility for goals when creating a goal plan or mass assigning goals.

Running the Process to Establish Eligibility

When mass assigning goals or creating goal plans, you can select to assign goals to individuals immediately or at a scheduled time in the future. However, if you include eligibility profiles in goals or goal plans and select to assign goals immediately, the application runs the mass assign goals process as a service process. In this case, the goals are assigned to individuals once the service process is complete. If you select to assign goals at a scheduled time, the goals are assigned to individuals at the scheduled time.

If eligibility profiles are selected in a goal plan or during mass assignment of goals, the application assigns goals as follows:

- If all eligibility profiles are marked as required, then an individual must meet criteria of all the eligibility profiles.
- If no eligibility profile is marked as required, then an individual must meet criteria of at least one eligibility profile.
- If some eligibility profiles are marked as required and some are not, then an individual must meet criteria of all the required profiles and at least one nonrequired profile.
- If only one eligibility profile is marked as required, then an individual must meet criteria of that eligibility profile.

Restricting Goal Availability

You can restrict goals to individuals who meet eligibility requirements by job, job role, location, age, or other criteria. You must select eligibility profiles with profile usage marked as Goals Management. You can also select whether an eligibility profile is required for goals. For example, you can add the following eligibility profiles to a goal:

- Location is France
- Designation is Marketing Manager
- Designation is Product Manager

When mass-assigning goals or creating a goal plan, you select Location is France as the required eligibility profile and leave the other two eligibility profiles as not required. In this case, the application assigns goals to all individuals whose location is France and designation is Marketing Manager or Product Manager.

Eligibility Profiles and Goal Plans

You can select eligibility profiles to restrict the goals added to a goal plan to workers who meet the profile criteria. You can also edit an existing goal plan to add a new set of eligibility profiles to goals.

Eligibility Profiles and Mass Assignment of Goals

You can select eligibility profiles to restrict the goals during mass assignment of goals to individuals who meet the criteria of all required profiles and at least one nonrequired profile, if any.

Eligibility Profiles and Goals Accessibility

You can use eligibility profiles only when you mass assign goals or create and assign goal plans to a target population. Applying eligibility profiles does not control a person's accessibility to goals. You can assign the restricted goals to a worker later from the goal library or from other Oracle Fusion business processes, such as during a talent review meeting, talent pools, or during a performance evaluation. Workers might also inherit the restricted goal as a member of a talent pool that includes the restricted goal.

Scheduling a Process to Update the Status of Incomplete Goals: Explained

An administrator can change the status of incomplete performance or development goals to Overdue by using the Update Goal Status to Overdue process.

This topic explains:

- Why you run the Update Goal Status to Overdue process
- How to schedule the Update Goal Status to Overdue process
- Conditions when a goal status is set to Overdue

Why You Run the Update Goal Status to Overdue Process

When the target completion date of a performance or development goal is reached and it is not completed, the goal status does not automatically update to

Overdue. To track these incomplete goals, administrators can change the status of the goals to Overdue by running the Update Goal Status to Overdue process. HR specialists can then manually copy these overdue goals to a new goal plan so that these goals can be tracked again. After an overdue goal is copied to a new goal plan, its status is set to Not Started in the new goal plan.

How to Schedule the Update Goal Status to Overdue Process

You can run the Update Goal Status to Overdue process manually or schedule it to run at regular intervals (for example, weekly at a specified time.) When you run the Update Goal Status To Overdue process, the HRG_GOALS table is refreshed.

When a Goal Status Is Set to Overdue

The Update Goal Status to Overdue process sets the status of a performance or development goal to Overdue in the following conditions:

- The Target Completion Date of the goal is less than the current date and the goal status is In Progress, Not Started, or Pending Approval.
- The goal has no Target Completion Date, but the end date of the associated goal plan is earlier than the current date and the goal status is In Progress, Not Started, or Pending Approval.

Filtering Goals: Explained

You have the option of filtering goals for a worker from the View menu on the My Goals and My Directs' Goals pages. You can filter goals by a goal plan or a goals list.

Filtering Goals by a Goal Plan

For a particular goal type (performance goals or development goals), if you select a goal plan, then all worker goals associated with that goal plan are displayed.

The following table shows which goals are displayed for each filter option.

Filter Option	Goals Displayed Description
Open Goals	All worker goals with Not Started or In Progress goal status are displayed.
Completed Goals	All worker goals with Completed goal status are displayed.
Current Goals	<p>If goal plans are enabled for the selected goal type, then all worker goals from the current goal plan are displayed. In addition, all goals that are not part of the current goal plan but for which the start, target completion, or actual completion dates are within the start and end dates of the current goal plan are displayed.</p> <p>If goal plans are not enabled for the selected goal type, then all worker goals with start, target completion, or actual completion dates that span the previous year to the following year are displayed.</p>
High Priority Goals	All worker goals with high priority are displayed.

Goals at Risk	All worker goals with their completion percentage less than 75% and target completion date within the next 30 days are displayed. In addition, all worker goals that have no target completion date, but have a completion percentage of less than 75% and the end date of their associated goal plans is within the next 30 days are displayed.
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Note

Goal plans are enabled for performance goals when the Performance Goal Plan Enabled profile option is set to Y. Similarly, for development goals, goal plans are enabled when the Development Goal Plans Enabled profile option is set to Y.

FAQs for Manage Goal Plans, Goal Mass Assignment, and Administer Goals

What's the difference between creating a goal plan and using the mass assign goals process?

Creating a goal plan for workers specifies the time frames in which those workers must work on their goals within the plan. You can assign goals to the workers when creating a goal plan, but you can also create goal plans that do not include any specific goals.

When you use the mass assign goals process, you assign performance or development goals to workers without specifying a goal plan in which to include the goals. If goal plans are used, goals with either a start date or target completion date that is contained within the start and end dates of a goal plan of the same type as the goal (either performance or development) are added to the plan. You can also use the mass assign goals process when you are not using goals plans.

How can I create goal plans for people who are new to the organization?

You can either use the Assign feature to add the individuals to an existing goal plan, or create a new goal plan and assign it to the individuals who are new to the organization. If you add new goals to an existing plan, the new goals are assigned to everyone to whom the goal plan is assigned.

What happens if I create a goal plan that includes goals from a previous goal plan?

When you create a goal plan containing goals from a previous goal plan, all incomplete goals for each worker from the previous plan are included in the new plan with the current status intact. Incomplete goals include those with the status of **Not started** and **In progress**. If a worker completes a goal in the period after you create the new goal plan and before the new plan takes effect, the worker or manager must change the goal status manually.

What's a key goal field?

Primary attribute for performance and development goals that can be configured to require manager approval when workers edit it.

The key goal fields are:

- **Goal Name**
- **Description**
- **Start Date**
- **Target Completion Date**
- **Actual Completion Date**
- **Completion Percentage**
- **Weights**
- **Priority**
- **Success Criteria**
- **Level, Category, Measurements**
- **Related Link**

How can I transfer organization goals from one organization owner to another?

The HR specialist can transfer organization goals from one organization owner to another on the Administer Goals page by selecting organization goals and clicking **Transfer**.

Manage Goal Library

Goal Library: Explained

The goal library is a repository of reusable goals that you create and maintain to manage the enterprise goal-setting process efficiently.

Organization owners, managers, and workers can search the goal library to copy the goals. Managers and HR specialists can assign the goals, either in goal plans, or individually, to a selected population. Using the goal library enables you to define goals consistently and reduce the effort of creating a new goal if similar goals have been previously defined. When adding goals from the goal library, organization owners, managers, and workers can search for goals using different criteria such as category, level, goal type, business unit, and author.

The goal library is maintained as part of the content library in Oracle Fusion Profile Management.

In the goal library, you can:

- Add goals
- Edit goals
- Set the status of goals

Adding Goals

You can add goals to the library, specify their goal type and category, and determine their attributes, including: name, description, success criteria, target

completion date, and more. You can also add target outcomes, if available, to the goal. When managers or workers copy a goal, they can change the goal attributes as appropriate.

Editing Goals

You can edit a goal in the goal library at any time, regardless of whether people have already copied the goal. Changes that you make to goals in the library do not affect those that have been copied and are in current use, because there is no link between the two versions of the goal.

Setting Goal Status

By default, the status of a goal you create is set to **Active** to make it available to copy. You can set the status of a goal to **Inactive**, even if the goal has been copied and is currently being used by workers. When you make a goal inactive, it is no longer available to be copied. You can make the goal inactive, for example, to edit it, then restore it to **Active** status to make the edited goal available again.

Uploading and Assigning Organization Goals Using a Spreadsheet: Explained

Human resource (HR) specialists can upload and assign new organization goals to workers using an application-generated spreadsheet.

To upload and assign new organization goals to workers, you must generate the spreadsheet using the option provided in the application. The application-generated spreadsheet for uploading organization goals contains the following two worksheets:

- **Organization Goals Upload** - Use this worksheet to upload new organization goals.
- **Organization Goal Assignment** - Use this worksheet to assign the new uploaded organization goals to workers.

Generating the Spreadsheet

You can generate the spreadsheet to upload and assign organization goals as follows:

1. In the **Goal Management** work area, click **Administer Goals**.
2. On the **Administer Goals** page, select **Organization Goals** to open the Organization Goals section.
3. Click **Upload** and select the **Upload Organization Goals** action. A File Download dialog box appears.
4. Click **Save**. Select a destination on your local hard disk to save the OrganizationGoalsWorksheet.xlsx spreadsheet.

Entering Data into the Spreadsheet

To upload a new organization goal, specify all the required columns in the Organization Goals Upload worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the new organization goals into the Fusion HCM database.

Note

Ensure that the spreadsheet is not in the protected state before you enter data. If the spreadsheet is protected, click the **Unprotect Sheet** button in the **Changes** group on the **Review** tab.

Using the Spreadsheet to Assign Goals

After you upload organization goals using the application-generated spreadsheet, you must assign them to workers using the Organization Goal Assignment worksheet. To assign goals to workers:

1. In the Organization Goals Upload worksheet, click **Download** to download all the organization goals available in the database to the spreadsheet. The updated spreadsheet now includes the ID for all the uploaded goals.
 2. In the Organization Goal Assignment worksheet, complete all the fields.
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Note

The ID for a goal is displayed on the Goal ID column of the Organization Goals Upload worksheet.

3. Click **Upload**. The data belonging to rows that display the text Row inserted successfully are uploaded into the cache memory.
4. Click **Save** to commit the data into the database. The uploaded organization goals are now displayed on the My Goals page of the worker to whom the goal was assigned.

Using the Organization Goals Upload Worksheet

Use the Organization Goals Upload worksheet to upload to the database organization goals that human resource (HR) specialists can then assign to workers. If you do not complete each required column for a goal, then the application either assigns a default value to the column or displays an error message about data missing for a column in the Status column for that goal.

The columns in the worksheet shown in the following table accept only the listed valid values.

Column name	Description
Goal ID	The unique identifier of the goal.
	Note Leave this column blank.
Priority	The priority of the goal. The valid values are: <ul style="list-style-type: none">• HIGH• MEDIUM• LOW

Status	<p>The status of the goal. The valid values are:</p> <ul style="list-style-type: none"> • NOT_STARTED • IN_PROGRESS • COMPLETED <hr/> <p>Note</p> <p>If no data is provided, then the value NOT_STARTED is assigned by default.</p>
Created By	<p>The person ID of the user who created the goal or assigned the goal, or both. The valid value is the person ID of a line manager who is also the organization owner.</p> <hr/> <p>Note</p> <p>If no data is provided, then the ID of the logged-in user is assigned by default.</p>
Published	<p>The goal is published or not. The valid values are:</p> <ul style="list-style-type: none"> • Y • N
Completion Percentage	<p>The percentage completion of the goal. The valid values are:</p> <ul style="list-style-type: none"> • 0 • 25 • 50 • 75 • 100
Goal Version Type	<p>The type of goal version. The valid value is ACTIVE.</p>

Using the Organization Goal Assignment Worksheet

You can use the Organization Goal Assignment worksheet to assign organization goals that you uploaded using the Organization Goals Upload worksheet, thereby enabling workers to access their organization goals.

The columns in the worksheet shown in the following table accept only the listed valid values.

Column name	Description
Goal ID	<p>The organization goal ID.</p> <hr/> <p>Note</p> <p>The goal ID is displayed on the Goal ID column of the Organization Goals Upload worksheet.</p>

Allow Workers to Update Goals	Whether the worker must be allowed to edit key fields, including goal name, description, and target completion date. The valid values are: <ul style="list-style-type: none"> • Y • N
Key	The goal key. <div> <div>Note</div> <div>The goal key is displayed on the Key column of the Organization Goals Upload worksheet.</div> </div>

Uploading and Updating Worker Goals Using a Spreadsheet: Explained

Human resource (HR) specialists can upload and assign new performance and development goals to workers using an application-generated spreadsheet. They can also update existing goals assigned to a worker using this spreadsheet.

To upload new goals or update existing goals, you must generate the spreadsheet using the option provided in the application. The application-generated spreadsheet for worker goals contains a single worksheet: Worker Goals Upload. You can use this spreadsheet to upload new worker goals or update existing worker goals.

Generating the Spreadsheet

You can generate the spreadsheet to upload and assign goals to a worker or to update existing goals for a worker as follows:

1. In the **Goal Management** work area, click **Administer Goals**.
2. On the **Administer Goals** page, select **Workers' Goals** to open the Workers' Goals section.
3. Click **Upload** and select the **Upload Worker Goal Data** action. A File Download dialog box appears.
4. Click **Save**. Select a destination on your local hard disk to save the WorkerGoalsWorksheet.xlsx spreadsheet.

Uploading a New Goal for a Worker

To upload a new goal for a worker, specify all the required columns in the Worker Goals Upload worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the new goals into the Fusion HCM database. The new goal is displayed on the worker's My Goals page.

Note

Ensure that the spreadsheet is not in the protected state before you enter data. If the spreadsheet is protected, click the **Unprotect Sheet** button in the **Changes** group on the **Review** tab.

Update an Existing Goal Assigned to a Worker

To update an existing goal assigned to a worker, specify goal attributes in the Search region of the Worker Goals Upload worksheet and click **Download** to download the goal into the spreadsheet. You can then update the goal and click **Upload**. After you click **Upload**, click **Save** to commit the updated goals into the Fusion HCM database. The updated goal is displayed on the worker's My Goals page.

Using the Worker Goals Upload Worksheet

Use the Worker Goals Upload worksheet to upload new and updated worker goals to the database. If you do not complete each required column for a goal, then the application either assigns a default value to the column or displays an error message about data missing for a column in the Status column for that goal.

The columns in the worksheet shown in the following table accept only the listed valid values.

Column name	Description
Goal Type	The type of goal. The valid values are: <ul style="list-style-type: none">• DEVELOPMENT• PERFORMANCE
Priority	The priority of the goal. The valid values are: <ul style="list-style-type: none">• HIGH• MEDIUM• LOW
Status	The status of the goal. The valid values are: <ul style="list-style-type: none">• NOT_STARTED• IN_PROGRESS• COMPLETED
Created By	<div>The ID of the user who created the goal or assigned the goal, or both. The valid value is the person ID of a line manager who is also the organization owner.</div> <div>Note</div> <div>If no data is provided, then the ID of the logged-in user is assigned by default.</div>
Source	The designation of the user who created the goal or assigned the goal, or both. The valid values are: <ul style="list-style-type: none">• WORKER• HR• MANAGER• ORG_OWNER

Category	<p>The category of the goal.</p> <p>For performance goals the valid values are:</p> <ul style="list-style-type: none"> • SKILL • REVENUE • CUST_SATISFN • EDUCATION • CAREER • NEW_CUSTOMERS • FINANCIAL • SOCIAL • OTHER <p>For development goals the valid values are:</p> <ul style="list-style-type: none"> • SHORT_TERM • MEDIUM_TERM • LONG_TERM
Measure Type	<p>The type of measurement. The valid values are:</p> <ul style="list-style-type: none"> • QUALITATIVE • QUANTITATIVE
Private	<p>Whether the goal is hidden from the worker's manager. The valid values are:</p> <ul style="list-style-type: none"> • Y • N
Completion Percentage	<p>The percentage completion of the goal. The valid values are:</p> <ul style="list-style-type: none"> • 0 • 25 • 50 • 75 • 100
Share with My Direct Reports	<p>Whether the goal is shared with all reports. The valid values are:</p> <ul style="list-style-type: none"> • Y • N

Allow Workers to Update Goals	<p>Whether the worker must be allowed to edit key fields, including goal name, description, and target completion date. The valid values are:</p> <ul style="list-style-type: none"> • Y • N
Enable Inclusion into Performance Document	<p>Whether the goal must be included in performance documents. The valid values are:</p> <ul style="list-style-type: none"> • Y • N

Define Questionnaires

Questionnaires: Explained

You can create questionnaires to add to gather feedback from respondents using question and responses you configure.

Questionnaires enable you to:

- Capture information from respondents
- Use templates to maintain consistency and configure specific audiences
- Specify the questionnaire presentation
- Configure question and responses in the question library
- Control access

Capturing Information from Respondents

You can create questionnaires to gather information from, and about, employees in applications that are set up to accommodate questionnaires. For example, you can use questionnaires to collect participant feedback in a performance evaluation, or rate worker potential in an assessment for a talent review.

Using Templates to Maintain Consistency and Configuring for Specific Audiences

You must create templates to use as the basis for questionnaires. With templates, you can maintain consistency for questionnaires, and configure them for:

- Specific applications
- General audiences, such as an entire organization, or all internal customers
- Specific purposes, such as providing feedback for performance evaluation periods
- Targeted audiences, such as particular roles (managers or peers, for example) or organizations

Note

Questionnaires used for talent reviews, called potential assessments, are predefined and do not require a template.

Specifying the Questionnaire Presentation

You control how the questionnaire appears in the subscriber application. Specify whether the questionnaire appears on one page or across multiple pages, for example. You can add sections to separate questions by type or other classification and specify which questions are required to be answered.

Configuring Questions and Responses in the Question Library

You configure questions and responses in the question library to add to the questionnaire. You can create four types of questions: text field, single select choice, multiple select choice, and no response. For each question type you also configure specific responses, and select the presentation method to determine how the response appears. For example, for the single select question type, you can specify either that the possible responses appear in a single select choice list or as radio buttons.

Controlling Access

Set privacy options to control access to the questionnaire or template. You can permit either anyone with access to a questionnaire or template to edit it, or only the specified owner.

Creating a Questionnaire: Points to Consider

To create a questionnaire, you must first create the template. You can edit the configuration settings in the questionnaire that were inherited from the template.

When creating a questionnaire template or questionnaire:

- Determine the intended audience for the questionnaire
- Format basic information
- Add and format content

When you conclude setting up the questionnaire or template, use the **Preview** button on the Review page to view and confirm the configuration.

Determining the Intended Audience for the Questionnaire

You set up questionnaires to apply for particular subscriber applications, and you can target a general and widespread population, or specific audiences. For example, you can create questionnaires for:

- All participants who provide feedback for all performance documents, or to all performance documents for a specific evaluation period
- A more targeted audience, such as for a specific role like manager, peer, or internal customer

Formatting Basic Information

Specify the basic information for the questionnaire template or questionnaire, to make searching and categorization easier and control access.

ID and Folder

An ID containing only numbers is generated automatically for each questionnaire template and questionnaire. However, you can change it to any unique combination of numbers or characters you need to make it easier to search for or identify. You must also provide a name for the questionnaire or template.

Select the folder in which to store the questionnaires (not available for templates). You can create the folders to categorize questionnaires and to enhance searching for them.

Owner Name

To control access to the questionnaire or template, select the name of an owner whom you want to have access, and set the **Privacy** setting to **Private**. Only the owner can then edit the questionnaire or template. If you set the **Privacy** setting to **Public**, anyone with permission to access the questionnaire or template can edit it.

Subscriber

In the template, select the application that will use the questionnaire. For example, to add a questionnaire to performance documents, select **Performance 360**. The template can be used only for the subscriber you select.

Instruction Text and Attachments

Instruction text appears at the top of the first page of the questionnaire. You can add additional introductory text for each section you create. You can also add to a section a No Response question type that contains instruction text, and requires no response.

You can add file or URL attachments to a questionnaire. The attachment appears as a link at the top of the questionnaire, and below the instruction text if it is present.

Adding and Formatting Content

You control how the various sections in the template appear by specifying sequence, appearance, and formatting for questions and responses.

Questionnaire Content: Explained

You specify the content that is contained in a questionnaire and how to display it.

In the questionnaire template, and the questionnaires created from it, you can:

- Specify section order and presentation

- Specify question and response order
- Specify response types
- Add and format sections
- Add and format questions and responses

Specifying Section Order and Presentation

If you add multiple sections to the questionnaire, then you can specify the section order as **Sequential** so that the sections appear in the order you specify, or **Random** so that the order changes whenever the questionnaire is accessed.

This table lists how each section presentation selection affects a questionnaire.

Section Presentation	Effect
No sections	One required section appears that contains all questions.
Stack regions	Sections are arranged from top to bottom.

Specifying Question and Response Order

Select **Vertical** for the question and response order in the template to maintain the order you specify in the actual questionnaire. When you select **Random**, the order for the questions or responses changes whenever the questionnaire is accessed. This prevents respondents from using an answer key for the questions or responses. Responses can vary only for single and multiple choice question types.

For the template, you can also specify whether to allow changes to formatting options, sections, or questions and responses. If you select the check box for any of these, that aspect of a questionnaire created from the template can be edited.

Specifying Response Types

In the template, you select the response types that can appear in questionnaires created from the template. Only questions of the types associated with the response types you select are eligible to appear in the questionnaire.

For example, if you select options for multiple choice selection, such as **Check multiple choices** and **Multiple choices from list**, but do not select any for single select choices, such as **Single choice from list** or **Radio button list**, you can add multiple choice questions, but not single choice, to the questionnaire. If, however, you select **Check multiple choices** and **Single choice from list**, but not **Multiple choices from list** or **Radio button list**, you can add both multiple choice and single choice questions, but are restricted to the selected response types for each question type.

Adding and Formatting Sections

Add sections, and then add questions to the sections. At least one section is required for a questionnaire. You can use sections to group questions by type, category, or any other classification.

Select **Additional Questions** to create a section that will include only questions added in the subscriber application by people with the roles that have permission to edit questionnaires. For performance documents, for example, that could be managers or workers. For talent reviews, a human resource (HR) specialist who is a meeting facilitator has that role.

Select **Vertical** to display the questions within the section vertically in the order you specify, or **Random** to change the order whenever the questionnaire is accessed.

You also specify whether the questions in the section are required so that respondents must answer them.

Note

The requirement to answer all required questions is also determined by the subscriber application.

When you select **New Page**, the section appears on a separate page than the other sections. When the number of questions on a page or section exceeds the setting you specified in the **Maximum Number of Questions per Page** field, the questions that exceed the specified number appear on the next page. If you enter 6 as the maximum number, for example, but the section contains 10 questions, the section continues on a new page.

Adding, Creating, and Formatting Questions and Responses

You can add questions to the section from the question library, or create new questions. You can add or remove questions, and drag and drop them to the desired order in the section. The order is maintained in the questionnaire if the question order is set to **Vertical** for the section. If you create a new question, you specify the folder to store the question. Questions stored in question folders will be available to use in other questionnaires.

If you create new questions, you also configure the responses. Questions you add from the question library already have existing responses. However, you can change the response presentation. For example, if the question is a single select type associated with a single choice from list response type, you can change the response type to radio buttons. You can add questions of any type to a section. If the section is not set to required, then you can specify which individual questions are required to be answered in the questionnaire by respondents.

Questionnaire Question and Response Types: Explained

You can create questions from any of four question types to add to the question library, and ultimately, to questionnaires. Along with the questions, you also specify the responses and how the responses are presented in the questionnaire. You can specify whether to allow respondents to add attachments to the response.

The available question types are:

- Text

- Single choice
- Multiple choice
- No response

Text

For the text question type, a respondent enters a response in a text field. Answers can be any text, such as single words or sentences, or characters. You specify a maximum number of characters the response can contain, and you can optionally specify a minimum number the respondent must enter.

For the response text field, you specify to utilize either plain text, or rich text, to let respondents format their responses using bold, underline, and other characteristics.

Single Choice

With the single choice question type, you create a question and respondents select one response from a list you provide. You select whether to display the responses as either a single select choice list, or radio buttons.

Respondents can select from either responses that you create, or from a rating model. When you associate a rating model with the response type, the possible responses are drawn automatically from the values of the rating model. For example, if the rating model contains five rating levels, the short description and the name associated with the level for all levels, are added directly as responses from which the respondent can choose.

Multiple Choice

Use the multiple choice question type to create a question and permit respondents to provide one or more answers. Create the responses and specify whether the responses are presented as check boxes or a choice list. You can optionally set both a minimum and maximum number of required responses.

No Response

Use the no response question type to add a question with no accompanying responses. You can use it to add additional instructions or information in the section, or let respondents add attachments as a response.

Using Questionnaires in Performance Documents: Explained

You can create questionnaires to add to performance documents to gather feedback from participants, other than direct managers, who have been requested to provide feedback about workers. Managers can use the feedback to help them evaluate workers.

Questionnaires enable you to:

- Capture feedback in performance documents
- Collect information on a worker other than competencies and goals
- Configure questions for specific audiences and periods

Capturing Feedback in Performance Documents

Using questionnaires allows your organization to get feedback from multiple sources to provide a more rounded evaluation and view of a worker's performance. You can use questionnaires to capture feedback from the worker being evaluated, the worker's manager, peers, colleagues, other managers, internal customers, or any other role in the organization. Participant feedback captured in a performance document cannot be used to rate workers in the performance document, but managers can use it to help determine how to rate workers.

Respondents access questionnaires in the performance documents. Managers, workers, or both, manage participant feedback to select participants, and assign them roles to determine which questionnaires they respond to.

Collecting Information on a Worker Other than Competencies and Goals

You can use questionnaires to gather data about workers that is not specifically about competencies and goals, thus extending the range of information concerning the worker's performance and development.

For example, you can ask the manager or worker to:

- Identify strengths of the worker, or areas where more development is required
- Describe the top three achievements of the worker during the previous year
- Discuss the worker's satisfaction in the current role

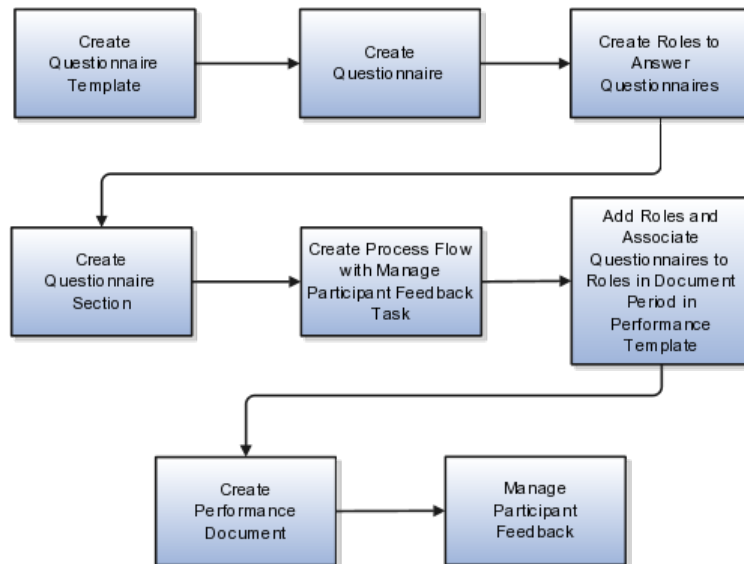
Configuring Questions for Specific Audiences and Periods

You can configure questionnaires to target general audiences, or specific groups, such as managers, workers, peers or other roles. You must associate questionnaires with performance template periods, and assign the roles that respond to the questionnaire. This enables you to create questionnaires that concentrate on specific periods, or can be used over multiple periods.

Performance Documents and Questionnaires: How They Work Together

You can add questionnaires to performance documents to enable participants to provide feedback during a performance evaluation. To add questionnaires to performance documents, you must first create questionnaire templates and questionnaires, and configure the elements that make up a performance template to include questionnaires.

This figure illustrates the steps required to add questionnaires to performance documents and track feedback.



Create Questionnaire Template

You must create a questionnaire template from which to create a questionnaire and assign Performance 360 as a subscriber application to make it available in performance documents. In the template, you can format the layout and questions to include in the questionnaires made from it. You can create as many questionnaire templates as necessary for your business process.

Questionnaire

Create the questionnaire from an available template. You can create as many questionnaires as required for your business process. For example, if your organization requires feedback from multiple roles, such as other managers, peers, or internal customers, you may need a different questionnaire for each role. You may also require different questionnaires for each performance evaluation period, or that cover all periods. You can edit questionnaires created from the template as required.

Roles

You must create all the roles that will access questionnaires in a performance document, with the exception of manager and worker, which are default roles. Roles are associated with the questionnaire in the performance template to make them available to the role. Managers, workers, or both, select the roles that apply to each participant when managing participant feedback to determine which questionnaire a participant uses.

Process Flow

To make participant feedback available in a performance document, you must create a process flow that includes the Manage Participant Feedback task. You can specify whether managers, workers or both, can manage and track participant feedback.

Section

Create a Questionnaire section to include in the performance document. The Questionnaire section is the only section type that can contain questionnaires. The questionnaire appears as a tab in the performance document, as do other sections, such as Goals or Overall Summary. You must add all the roles that will access the questionnaire to the section.

Performance Template

In the performance template you add the roles, process flow, and Questionnaire section that you created for the questionnaire. To the document periods you add the roles that you want to be able to access the questionnaire, and specify the questionnaire to associate with each role. Managers and workers can also be requested to answer questionnaires. To do so, you must add them to the document period.

In the template, you can also specify the minimum number of participants required to answer the questionnaire for each role, and a total minimum number of participants for each document. These settings are used as guidelines and are not enforced.

Performance Document and Participant Feedback

After the manager, worker, or human resource specialist creates the performance document the manager, worker, or both, can select participants, send requests for feedback, and manage the feedback. Depending on the settings in the questionnaire, managers or workers can add additional questions to the questionnaire. The ability to manage participant feedback is determined by the process flow settings.

Participants, other than workers and managers, can access the Questionnaire section of the performance document. They can also add provide comments that appear in the Overall Summary section, if the performance template is configured to allow them to do so, that managers and workers can view. Workers and managers can access the Questionnaire section to view participant feedback, if the process flow is configured to allow them to do so.

When the manager submits the performance document, the participant feedback is locked and participants cannot add or edit feedback. Any feedback they saved before the document is locked is retained. If the questionnaire contains sections or questions that are required, the feedback that is complete is accepted. If a section is required, and includes five required questions, for example, and a participant answers four of the questions, the feedback is recorded for those that are answered, in spite of the section being incomplete. The incomplete questions are ignored.

FAQs for Define Questionnaires

What happens if I edit a questionnaire that is in use?

You are prompted to either create a new version of the questionnaire, or update the existing questionnaire. When you create a new version of the questionnaire

you can configure it as you would any newly-created questionnaire. When you update an existing questionnaire, the new version replaces the older one. Respondents will access the latest version wherever it appears.

If no one has submitted a response to the questionnaire yet, you can add new sections and questions, and specify those that are required. If at least one respondent has submitted a response, you can add new sections and questions, but you cannot specify that either are required.

Define Worker Performance

Performance Document Components: How They Work Together

To create a performance document you need a performance template. The performance template contains a document type, template sections, and a process flow. You can either create these when creating the performance template, or select previously-configured ones.

Document Types

Document types categorize the types of performance documents that are valid for an organization, such as an annual evaluation, a semiannual evaluation, a project evaluation, and any others you require. You set the dates to determine the time period that a document type is valid.

Performance Template Sections

Sections form the structure of a performance document. In the sections you configure the types of content that can be rated and the processing options for ratings. You also determine the sources of content, and how the performance documents integrate with profiles and Oracle Fusion Goal Management goals. Sections can also contain options for managers and workers to provide final feedback about the evaluation.

You can configure up to five different section types. Your organization may require an annual performance evaluation that includes any or all of these sections:

- Profile Content to rate worker competencies
- Goals to rate worker goals
- Overall Summary to provide the overall rating of the worker
- Worker Final Feedback
- Manager Final Feedback

Each of these requires separate sections that you add to a performance template to support the process flow used by the template.

Process Flows

Create process flows to determine which tasks workers and managers perform as part of the evaluation process. For example, you can include tasks to set goals, managers to evaluate workers, and workers to evaluate themselves. You can create as many process flows as needed to correspond to the different evaluation requirements of your enterprise.

The process flow dictates which sections are required for the performance template. For example, if the process flow includes the task for managers to rate workers, you must set up Profile Content or Goals sections where managers can rate workers on competencies or goals, or an Overall Summary section where managers provide an overall rating.

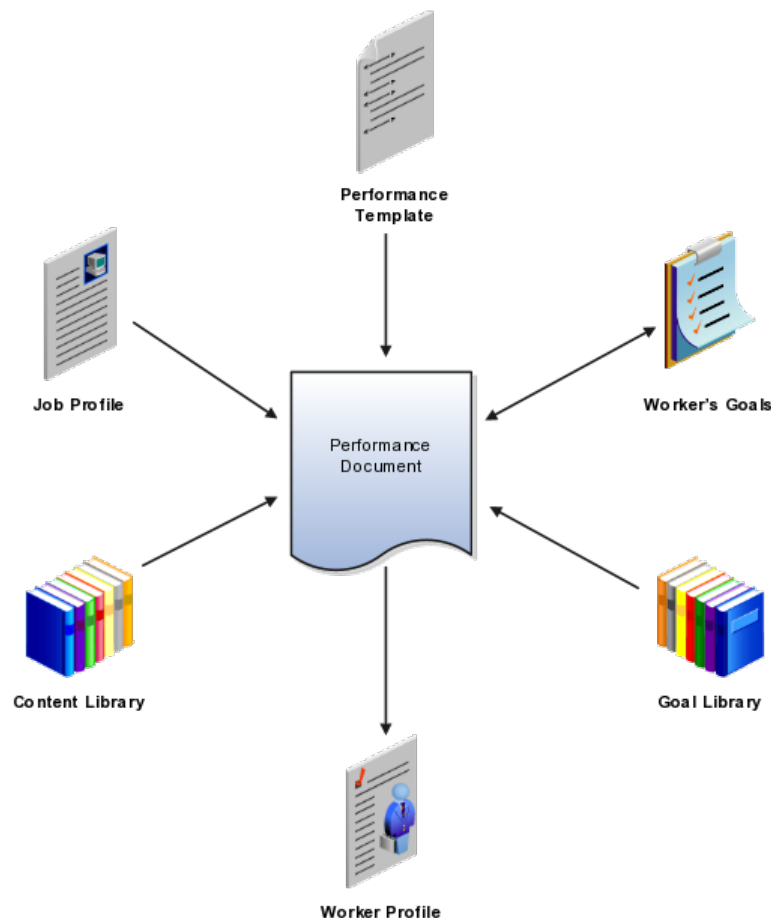
Performance Templates

Performance templates bring together the information that is used to create performance documents. In the performance template, you select the roles that can access the performance documents created from the template, specify the processing rules for the document, and enter the periods for which the performance documents are valid. You also select the document type, sections, and process flows to use, and any additional content on which to rate workers. You can edit sections as required in the template.

Performance Documents: How They Work with Profiles and Goals

During a performance evaluation, the line manager or worker can update a performance document to include competencies from the worker's job profile and content library, and performance goals. Goals can be created directly in the performance document, or additionally, if Oracle Fusion Goal Management is used, added from the goal library and worker's goals. When the performance document is completed the worker's person profile is updated to reflect competency proficiency levels in the performance document. Workers and managers can maintain goals either in the performance document or using the Goal Management business process, and the goals are updated in both locations.

This figure illustrates the sources of competencies and goals for the performance document, and how profiles and goals are updated from the performance document.



Adding and Updating Content in the Performance Document

When created, the performance document may contain competencies and goals that the performance template is configured to provide. These can include competencies from the content library or from the worker's job profile. If Goal Management is used, goals from the template may include the worker's own goals and others selected from the goal library. During the evaluation process workers and managers can add additional competencies from the content library, create new goals, and add goals from the goal library. They can also update the performance document to transfer any changes in job competencies, or goals from the Goal Management pages, to the document to ensure that they have the most recent content. The ability to add and update competencies and goals from these sources depends on the settings for the template used to generate the performance document.

To update the competencies and goals in the performance document, they use the **Update Goals and Competencies** action on the pages used to evaluate the worker or set document content.

When adding competencies by updating from the job profile, only those that are associated with the job to which the performance document applies are added. Competencies associated with profiles for which the worker has another active performance document are not added. However, managers and workers can add these competencies directly to the performance document by adding them from the content library.

Managing Goals in Two Locations

If Goal Management is enabled, any goals that managers or workers create in the performance document or add from the goal library are also added to the pages used to manage goals when they save the performance document. When goal plans are used, these goals are added to the active performance goal plan that contains the goal start date. If goal plans are not used, the goals are added to the worker's performance goal list.

Goals that they edit in the performance document are updated in Goal Management so that the primary goal information is consistent in both locations. They can update the goal name, description, status, and dates in the performance document, which are captured in the pages used to manage goals when they save the performance document. Weights added to a goal in Goal Management are transferred to the performance document only when the goal is added to the performance document. Changes to the weight in Goal Management after the initial transfer are not reflected in the performance document. Goal weights are never updated from the performance document to Goal Management. Comments added to goals in the My Goals or Goal Details pages appear in the performance document; those made in the performance document do not appear in Goal Management pages. Goal ratings appear only in the performance document, however. Goals can have additional attributes that display in the Goal Management pages but do not appear in the performance document.

When managers or workers edit the worker's existing goals in Goal Management, the changes are reflected in the performance document when it is opened, or when they perform the Update Goals and Competencies action. To copy new goals into the performance document from the goal management business process they must use the Update Goals and Competencies action in the performance document.

Updating Profiles from a Completed Evaluation

When the performance document is completed the application updates the worker's profile to include the changes made in the performance document, if the performance document is configured to do so. Updated content includes the competencies and their rating levels provided by the manager. The ratings provided by the worker are not included. After the performance document is completed, it becomes a static document, and any changes to the job competencies are not reflected in the performance document.

Completing Goals in the Performance Document

When the performance document is completed the goals are updated in Goal Management. After that process concludes, managers and workers can no longer update goals in the performance document either directly, or by using Goal Management. They can continue add or update goals in Goal Management, but those changes are not reflected in the performance document.

FAQs for Define Worker Performance

How can I diagnose any issues with Oracle Fusion Performance Management data?

After populating the Oracle Fusion Performance Management data tables, you can run the Performance Management Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Performance Management, the test validates six categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Field Level Validation:** Field level attributes must match the business rules set up in Performance Management.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.
- **Setup Data Validation:** Data in the setup tables must match the business rules set up in Performance Management.
- **Process Data Validation:** Data in the document tables must match the business rules set up for evaluations in performance documents.

Manage Worker Performance Descriptive Flexfields

Descriptive Flexfields for Oracle Fusion Performance Management

You can use descriptive flexfields to add custom attributes for a Oracle Fusion Performance Management entity, and define validation and display properties for them. For example, you can create a descriptive flexfield for a performance document to ask workers if they are willing to be a mentor.

Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for Performance Management. You can add more information related to a Performance Management entity, such as document type, section, performance template, performance template section, and evaluation detail of a performance document.

There are five descriptive flexfields available in Performance Management.

Descriptive Flexfield	Description
HRA_DOC_TYPES_B	Fields for document type displayed on the Create and Edit Performance Document Type pages.
HRA_SECTION_DEFNS_B	Fields for section details displayed in the Details region of the Create and Edit Performance Template Section pages.
HRA_TMPL_DEFNS_B	Fields for performance template details displayed on the General tab of the Create and Edit Performance Template pages.
HRA_TMPL_SECTIONS	Fields for performance template section details displayed on the Structure tab in the Additional Information region of the Create and Edit Performance Template pages.
HRA_EVALUATIONS	Fields for evaluation details used in a performance evaluation displayed in the Additional Information region of a performance document.

Note

Descriptive flexfields HRA_EVAL_ITEMS and HRA_EVAL_RATINGS in Performance Management are not currently in use.

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment. For more information on using flexfields for custom attributes, see the Oracle Fusion Applications Extensibility Guide.

Manage Worker Performance Profile Option Values

Oracle Fusion Performance Management Profile Options: Critical Choices

Set the profile options for Oracle Fusion Performance Management to define the rating model that is used in analytics and worker comparisons, and the range of years of performance documents to display. You can only change the Site Level settings for each.

Default Rating Model for Performance Management Analytics

Specify the Default Rating Model for the Performance Management Analytics profile value to define the rating model that is used in performance documents to provide the ratings that display in analytics and comparisons of workers. The worker's overall rating for the latest performance document using the profile value will be displayed on the pages of other business processes and can be used to make comparisons between workers or a worker's past and present ratings.

The ratings and comparisons can appear in the:

- Performance tab on the line manager dashboard.
- Performance and Potential box chart on the line manager dashboard, the human resource (HR) Specialist dashboard, and the Promotion business process.
- Performance and Potential box chart on the Oracle Fusion Talent Review meeting dashboard.

- My Organization Rating Distribution analytic on the line manager dashboard.
- Rating History analytic on the Experience and Qualifications profile card.
- Comparison feature in the Oracle Fusion Workforce Lifecycle Manager business process.
- Performance information that authorized users can see in the person gallery.

Note

The overall ratings that appear in the Performance and Potential box chart, the My Organization Rating Distribution analytic, and the My Organization Performance Summary table on the My Organization tab of the Performance Manager Overview page are those taken from the performance document that the manager selects to view, and may not use the profile option rating model. The Rating History analytic that appears on the performance document pages displays the history for the other performance documents using the same performance template as the performance document.

Number of Years of Performance Documents to Display

Specify the number of years of performance documents that appear on choice lists where workers, managers, and HR specialists access performance documents. By specifying a low number, you can prevent workers and managers from having to sort through a long list of past and future documents.

You specify two different profile options to determine the number of years of performance documents to display. The table shows the two settings and the effects of specifying the values.

Profile Option	Effect	Default
Number of future years from the current date	Determines how many years ahead of the current date to display performance documents. This includes all performance documents with a start or end date that is within the range of the future date. For example, if the value is 2, and the current date is January 1, 2013, documents with an end date equal to or before January 1, 2015, can appear on the list.	2
Number of past years from the current date	Determines how many years ahead of the current date to display performance documents. This includes all performance documents with a start or end date that is within the range of the past date. For example, if the value is 3, and the current date is January 1, 2013, documents with an end date equal to or after January 1, 2010, can appear on the list.	3

The performance document choice lists appear on the following pages:

- Manager Overview
- Worker Overview
- Manage Eligibility Batch Process
- Manage Performance Document Eligibility

Regardless of your settings, the maximum number of performance documents that appear in the performance document choice lists is 10. Other performance documents can still be accessed using the Search function.

Manage Performance Roles

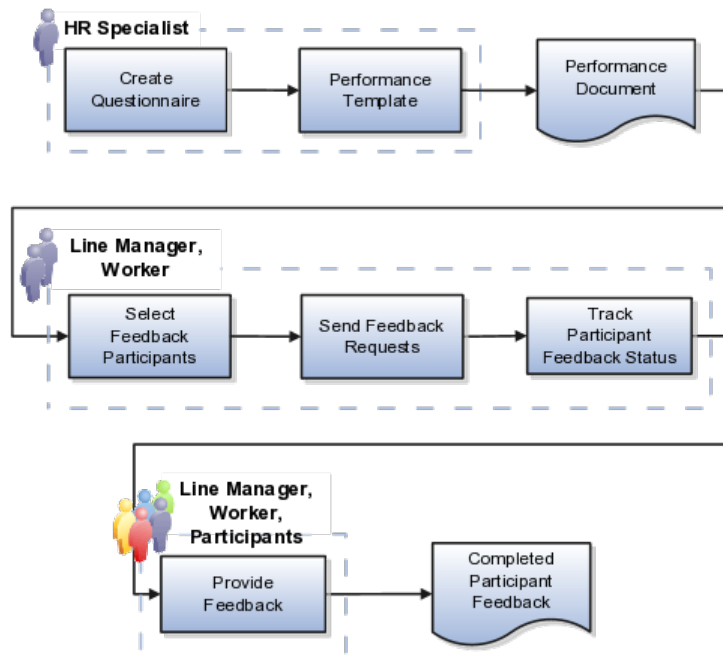
Participant Feedback: Explained

The Manage Participant Feedback task enables individuals other than the manager and worker to provide direct feedback into the worker's performance document using a questionnaire. Participant feedback is recorded as part of the official performance evaluation. Additional roles providing feedback might include peers, mentors, customers, and other managers. The additional roles providing feedback are called participants. By including a variety of participants who have worked to some capacity with the worker, the manager can obtain a broader view of the worker's performance to assist in the evaluation.

The Participant Feedback process provides the ability to:

- Specify who can request and track participant feedback
- Provide feedback according to role
- Use questionnaires to provide feedback
- View participant names and feedback
- Submit feedback and complete the Participant Feedback process
- Print feedback

The following figure shows the steps for gathering participant feedback.



Specifying Who Can Request and Track Participant Feedback

The human resource (HR) specialist configures the process flow to specify whether managers, workers, or both, can select participants to provide feedback, add questions to the questionnaire, and track feedback request and completion status. Managers and workers use their respective versions of the Manage Participant Feedback page to perform the participant feedback tasks.

When the manager or worker requests feedback, participants receive workflow notifications of the request. Participants access the performance document on the Performance Manager Overview or Performance Worker Overview pages or from links on their worklist.

Managers and workers can track participant feedback to monitor its status to see whether it is started, in progress, or completed. Depending on configuration, workers can also see the feedback itself and the names of the participants who provided the feedback.

Managers and workers can remove a participant from a performance evaluation, or change the role (for example, change a mentor to a peer), provided the participant has not yet provided feedback.

Providing Feedback by Role

Managers and workers, if permitted, can select participants of varying roles to provide feedback, allowing them to gather responses from a variety of perspectives within the organization. HR specialists create the roles and in the performance template select which roles are available to provide feedback for the performance document. They can associate separate questionnaire templates, with different questions, to each role.

Managers and workers can add the same participant more than once to a performance document. They can select the same role or a different one for the participant. The participant responds to the questionnaires associated with the roles, even if the questionnaires are the same.

Using Questionnaires to Provide Feedback

Participants, as well as managers and workers, provide feedback by answering questions about the worker on a questionnaire that the HR specialist adds to the performance document in the performance template. The questionnaire is a performance template section, and appears as a tab in the performance document, just as do other sections, such as the Goals or Overall Summary sections.

The manager and worker, if allowed, can add questions they create to the questionnaire that is provided for the performance document. They can add questions only to the questionnaires that are associated with the participant roles they select. The questionnaire must also be configured to allow them to add additional questions.

The HR specialist creates the template using the Define Questionnaires feature of the Oracle Fusion Profile Management business process.

Viewing Participant Names and Feedback

Managers, and workers, if allowed, can view the names of the requested participants, along with the feedback they provided. You can configure the performance template so that participants can provide overall comments about the worker instead of answering questions on the questionnaire.

Submitting Feedback and Completing the Participant Feedback Process

Managers, workers, or both, can view feedback when the participant submits the questionnaire. Participants can continue to provide feedback until the manager either locks the feedback process or completes the Manager Evaluation of Workers task and submits the performance document to continue the performance evaluation process.

Printing Feedback

Managers and workers can print participant feedback, as they can with other performance document content. They can, however, only print the content which their role is configured to see. For example, if the performance process flow is configured so the worker cannot view participant feedback, the worker cannot print it.

Performance Roles: Explained

Create roles to expand the scope of the performance evaluation to include feedback from participants other than the worker and the worker's manager. To implement multi-participant feedback, you must first define the roles that can participate in the process.

To make roles eligible to provide feedback, you must:

- Define performance roles
- Provide a description for the role
- Make roles available for the performance document
- Associate questionnaires to the roles

Defining Performance Roles

You can create as many roles as required for the evaluation process that your organization employs. For example, you might have roles such as peer, mentor, or colleague. Every role that you create is classified as a participant role type.

The manager and worker roles are required; you cannot delete or edit them. You can, however, create performance templates that do not require either the manager or worker role to answer a questionnaire, though you must add the role names to the template to permit the manager or worker to view feedback.

Providing a Role Description

Along with the role name, you can add a description for the role. The description appears on the Manage Participant Feedback pages to assist users in determining which role to assign to each participant.

Making Roles Available to Access the Performance Document

The participant roles you create, along with the manager and worker roles, are eligible to access the performance document to provide feedback. The manager and workers roles are also eligible to provide ratings and comments on other content, such as goals or competencies. You must select the roles in the performance template to make them available to access the performance document.

Associating Questionnaires to Roles

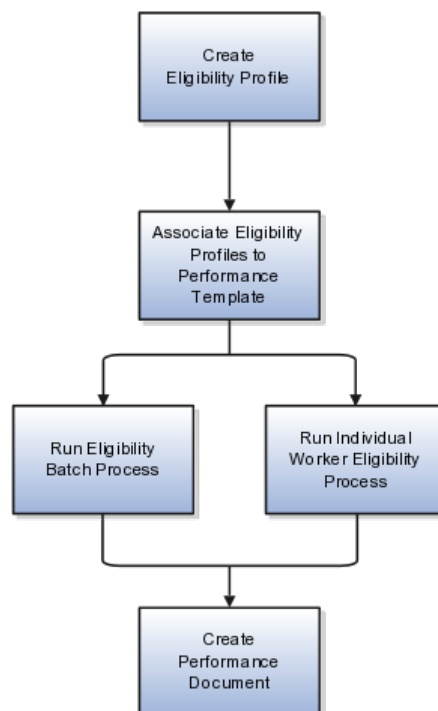
Each role is eligible to respond to only one questionnaire for each performance document within performance period. You associate roles to the questionnaires that the role uses in the performance template.

Manage Eligibility Profiles

Using Eligibility Profiles with Performance Documents: Explained

You can use eligibility profiles to restrict availability of performance documents to a specific population based on criteria you set up. If you do not associate eligibility profiles with a performance document, the document is accessible by everyone in the organization.

This figure shows the steps required to set up and use eligibility profiles for performance documents.



Creating Eligibility Profiles

You create eligibility profiles to match the business requirements for your performance evaluation business process. For example, you can create eligibility profiles to evaluate workers in a specific department, job, location, or other criteria. You can also combine criteria, so that for example, you can create a performance document to evaluate every person in the Sales department who is a manager level 3, and located in California. You can either create one eligibility profile with those three criteria, or create three separate profiles with each criterion.

When creating an eligibility profile for performance documents, you can select any profile usage. However, because eligibility for a performance document is determined by assignment, you must select **Specific assignment** as the assignment to use. **Specific assignment** is automatically selected if you first select **Performance** as the profile usage. Then, when the eligibility process is run, it evaluates every assignment for a worker to determine which, if any, performance documents the worker is eligible to use for each assignment.

Associating Eligibility Profiles with Performance Templates

You select eligibility profiles to associate with performance templates at the template level and on performance document periods. When you select eligibility profiles, the performance documents made from the template are available only to the workers who meet the criteria.

You can associate eligibility profiles for any profile usage to a performance template. However, only those with the assignment to use set to **Specific assignment** are available to associate with performance templates.

Eligibility profiles can either be required, or not required, and can be used in combination so that workers must match some, or all criteria.

Running the Eligibility Process

To determine which workers are eligible for performance documents that use eligibility profiles, you must run the eligibility process.

You run a batch process to analyze a large worker population to determine who is eligible for performance documents based on the parameters entered. You can also process eligibility for a single worker to determine which documents the worker is eligible to use. When necessary, you can also change the worker's eligibility for a document to override the eligibility profile criteria.

You can run the batch eligibility process on demand, or schedule it to run at a later time or on a recurring interval. For a single worker, you can run the process whenever required, such as when a worker transfers to a new organization after the batch process was run, or when any other job or profile change occurs.

Accessing the Performance Documents

When a worker is eligible for a performance document, it appears on the **Performance Document** choice list on the Manager Overview page of that

worker's direct manager, along with documents that are not associated with eligibility profiles. Managers can view performance documents for which their direct or indirect reports, or workers for whom they are the document manager (such as for a project), are eligible. The document also appears on the **Performance Document** choice list on the Worker Overview page. Both the worker and manager can access the document.

If the worker has created that performance document and the eligibility process is run again, but now the worker is ineligible, that document remains on the list for both the worker and manager. Both can continue to access the document.

However, if the worker did not create the performance document and the eligibility process is run again, making the worker no longer eligible for the document, that document disappears from the choice list on the Worker Overview page for that worker. Neither the worker nor the manager can access that document for the worker. If other direct reports of that worker's manager are still eligible for the document, it remains available on the Manager Overview page.

On the My Directs tab of the Manager Overview page, managers continue to see a list of all their direct reports. If the document they select has some workers who are eligible to access it and others who are not, the manager cannot take any actions on that document for workers who are not eligible. Workers who are not eligible for a document appear with an icon denoting they are not eligible.

Accounting for Eligibility Profiles in Analytics and Tables

Eligibility profiles are taken into consideration when determining the values that appear in performance management analytics and tables.

The table shows how eligibility profiles affect the analytics and tables for active performance documents.

Analytic	Effect of Eligibility Profile
Rating Distribution Task Completion Status	Calculates values only for workers who are eligible for the selected performance document. The Manager choice list only displays managers who have workers who are eligible for the selected performance document.
Performance and Potential	Displays only the ratings for workers who are eligible for the selected performance document, and who have both performance and potential ratings.
My Organization Performance Summary Task Completion Summary per Manager	Displays all managers and workers who are direct and indirect reports of the person accessing the tables; an icon appears next to the names of managers who have no direct reports who are eligible for the selected performance document.

When a past performance document is selected, the calculated analytics and tables display values and names only for those eligible workers who are in the current assignment hierarchy of the manager. Say, for example, Thomas Henry just transferred departments and is now a direct report of Susan Fong. Thomas was not eligible for performance documents from previous years in Susan's organization, but is eligible this year. When Susan selects performance

documents from previous years, Thomas does not appear in the tables, and the analytics do not include values for him.

Using Eligibility Profiles with Performance Documents: Examples

With eligibility profiles, you can target performance documents to evaluate a specific population of workers. These scenarios illustrate how scenarios in which human resource (HR) specialists create eligibility profiles and run the eligibility process to make the documents available to workers and managers.

Creating Eligibility Profiles and Running a Batch Process for an Organization

The organization wants to create a performance document to compare how the sales force is performing across all departments in the US. The HR specialist creates an eligibility profile, called US Sales Team, and selects **Performance** for the profile usage. The assignment to use value automatically becomes **Specific assignment**. The HR specialist selects criteria for all active workers who are not on leave, are located in the US, and are employed in the Sales job family.

The HR specialist creates a performance template, with a performance document period for the current evaluation period named US Sales Annual Evaluation. Then the HR specialist adds the US Sales Team eligibility profile to the document period. The HR specialist then runs the eligibility batch process to find all eligible salespeople to make the US Sales Annual Evaluation performance document available to them and their managers to start the evaluations.

Adding Eligibility when a Worker Transfers to an Organization

A new worker, Lee Smith, is hired into the Sales department under manager John Hsing after the batch process was already run and performance documents were created for the Sales team. Lee is not initially eligible for the US Sales Annual Evaluation period document, but should be, since she joined Sales midway through the evaluation period. The HR specialist navigates to the Manage Worker Eligibility page, and selects Lee Smith. Then the HR specialist selects US Sales Annual Evaluation as the single document to process for Lee. Lee and John can then access the performance document to begin the evaluation at the appropriate time.

Forcing Eligibility when a Worker Transfers from an Organization

Taylor Wong transfers from the US Sales department to the Hong Kong Sales department midway through the period covered by the US Sales Annual Evaluation performance document. The HR specialist has run the batch eligibility process for the last time after Taylor transferred, making Taylor ineligible to use the US Sales Annual Evaluation performance document. However, the organization process requires that Taylor be evaluated using performance documents for both his old and new locations.

The HR specialist navigates to the Manage Worker Eligibility page, and selects Taylor Wong. Then the HR specialist clicks the Change Eligibility button, selects the US Sales Annual Evaluation performance documents, and specifies to force it eligible. Even though Taylor no longer meets the eligibility criteria, he and his new manager can access the performance document to perform the evaluation.

Manage Eligibility Batch Process

Performance Document Eligibility Batch Process: Explained

The human resource (HR) specialist runs the eligibility batch process to determine which performance documents a population of workers is eligible to use for their performance evaluation. When the process is complete, the documents are available to workers and their managers to begin the evaluation. Use the batch process to process eligibility for all workers in an organization, and either indeterminate or specific documents, for a specific date or date range.

How the Batch Process Works

The batch process evaluates the worker population for a selected date and matches workers with the performance documents for which they are eligible based on the eligibility profile criteria. The eligibility profiles used to determine eligibility for a performance document are those associated with the performance document period in the performance template. The batch process only analyzes the worker population to which the HR specialist has data security access.

The batch process analyzes the worker population based on the worker assignment for the selected date. Workers with more than one assignment, for example, could be eligible for a different performance document for each assignment.

Filtering Performance Documents

You can set parameters to filter performance documents to process all those available for a selected date, a specific document, or all documents of a selected type.

You can set filtering parameters to process:

- Performance documents that fall between the specified performance document start and end dates
- Specific performance documents
- All documents of a selected type that are active on the selected date

This table describes the parameter options available for the batch process.

Parameter	Description
Effective as of Date	This required date is used to determine: <ul style="list-style-type: none">• Worker assignments on that date.• When a performance document appears in the performance document list of values on the Worker and Manager Overview pages. When you enter a future date, the performance document will not appear in the list of values until that date.
Document Type	Select a document type in this optional field to restrict the performance documents that appear in the Performance Document Name list to those of the selected document type.

Performance Document Name	<p>Select this optional parameter to specify a specific document to process and match to workers who meet the eligibility criteria. If you do not specify a document, you must select a date range, which matches workers to all documents with start and end dates within the selected range.</p> <p>The documents that appear in the list are those that have eligibility profiles associated with them, and fit within the date range provided in these Oracle Fusion Performance Management profile options:</p> <ul style="list-style-type: none"> • Number for future years from the current date • Number of past years from the current date <p>For example, if the profile options for your organization specify a range of three years--one past and two future--you will see only documents ranging from the previous year to two in the future.</p>
Performance Document Start Date	<p>If you do not specify a performance document, you must enter a start date. The process will include all performance documents that have a start date on or after the performance documents start date that is entered.</p>
Performance Document End Date	<p>Enter this optional parameter, along with the start date, to process all performance documents with start and end dates equal to or within the specified dates.</p>

When to Run the Batch Process

The eligibility batch process can be run on demand or scheduled to run at a later time or on a recurring interval.

Run the batch process, for example when:

- A new performance evaluation period begins
- Eligibility profiles are added to or removed from a performance document period
- There are changes to an eligibility profile associated with a performance document period
- Worker status changes for criteria that are part of the eligibility profile, such as job, or location

Manage Process Flow Definitions

Performance Process Flow Setup: Points to Consider

Set up the process flow to include the tasks, and their sequence, used by the performance template for performance evaluations. You can create as many templates as you need, and each template supports an evaluation type, such as annual or semiannual evaluation, project evaluation, and so on. Your decisions determine the:

- Tasks and subtasks to include

- Task sequence
- Task names

Tasks and Subtasks

A process flow can contain up to 10 tasks. Some of the tasks contain subtasks. The following table shows the tasks, along with whether the task includes a subtask, which roles can perform the tasks, and a description of the task function.

Task	Subtask	Role that Performs Task	Task Function
Set Goals		Worker, manager, or both	<p>Add content to rate, such as competencies and performance goals, to the performance document. Include this task to let workers and managers determine the content the worker is evaluated on, and expectations for the worker, for example, at the beginning of an evaluation period. If this task is not included, managers and workers can still add content in the Worker Self-Evaluation and Manager Evaluation of Worker tasks.</p> <p>This task is required if the Set Next Period Goals task is included in the process flow for the preceding evaluation period.</p>
Worker Self-Evaluation	<p>Subtask 1: Track Worker Self-Evaluation</p> <p>Subtask 2: Worker Self-Evaluation</p>	<p>Subtask 1: Manager</p> <p>Subtask 2: Worker</p>	<p>Worker evaluates self. Worker can also add content to be rated to the performance document. The manager can track the worker self-evaluation to view any changes the worker makes to the performance document, but cannot view the ratings and comments the worker provides until the worker completes the subtask.</p>
Manager Evaluation of Worker		Manager	<p>Manager evaluates worker. Manager can also add content to be rated to the performance document.</p>

Manage Participant Feedback		Manager, worker, or both	Select participants to gather feedback about worker performance on questionnaires. Send requests to the participants, add questions to questionnaires, and track participant feedback to monitor the status of the request and feedback.
First Approval		Manager	Approve the performance document of the worker.
Second Approval		Manager	Approve the performance document of the worker.
Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Acknowledge Document	Subtask 1: Manager Subtask 2: Worker	The manager shares the document so that the worker can view the manager's ratings, and the worker acknowledges viewing the ratings. The setting to determine whether the worker can view the manager ratings is made when defining the performance template sections.
Confirm Review Meeting Held	Subtask 1: Conduct Meeting Subtask 2: Acknowledge Review Meeting	Subtask 1: Manager Subtask 2: Worker	After the worker and manager meet to discuss the evaluation, the manager indicates that the meeting was conducted, then the worker acknowledges that the meeting took place.
Provide Final Feedback	Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Worker Subtask 2: Manager	Worker and manager can provide final comments about the evaluation. The Worker Provides Final Feedback subtask is required to use digital signatures to require workers to verify that they are the people submitting the performance document.

Set Next Period Goals		Manager, worker, or both The roles are those specified for the Set Goals task for the performance document for the subsequent period.	Set goals for the period following the active performance document.
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Task Sequence

After you select the tasks to include as part of the process flow, you can change the task sequence. Some tasks are logical in sequence. For example, it is likely that you would place the Set Goals task before the Worker Self-Evaluation and Manager Evaluation of Worker tasks, and those before the First Approval task. However, you may choose not to use all of those tasks. Your enterprise may not require the Set Goals task, and let workers and managers add goals and competencies to the performance document as part of the evaluation tasks.

Other tasks have more flexibility. For example, you may want to schedule the Share Document task either before, or after, the First Approval task, depending on when you prefer to let workers see the manager ratings.

During the performance evaluation, all tasks, with the exception of Set Next Period Goals and Manage Participant Feedback, must be completed by the role that performs the task before the next task can be started, even if the same role performs both tasks. The Set Next Period Goals task can also be performed at any time, as long as the performance document template for the subsequent period is available and the document can be created.

Workers can perform the Manage Participant Feedback and Worker Self-Evaluation tasks concurrently, but only after the Set Goals task is complete, if it is part of the process flow. Managers can perform the Manage Participant feedback at the same time as the worker does the self-evaluation, or when performing the Evaluate Worker task.

Task Names

You can configure the task and subtask names for both the manager and worker roles. The names you configure appear on the application pages. You must configure task names separately for each process flow you set up.

Participant Feedback Task Options: Points to Consider

You can include the Manage Participant Feedback task as part of the process flow to gather feedback from participants on a questionnaire as part of a multi-participant evaluation. You can configure the Manage Participant Feedback task so that managers, workers, or both, can:

- Select participants
- Request feedback
- Add questions to the questionnaire

- Track participants

Including the Manage Participant Feedback Task

When you include this task, you enable others, such as peers, colleagues, or other managers, to answer a questionnaire in the performance document to gather feedback to help a manager evaluate a worker. You create the template in the Define Questionnaires feature of the Oracle Fusion Profile Management business process, and add the questionnaire to the performance template as a section.

Selecting Participants

You can specify to let managers, workers, or both, select participants to provide feedback. They also select the participant role, which determines which questionnaire is available to the participant. Questionnaires are associated with particular roles in the performance template.

Requesting Feedback

Managers can always request feedback by sending a request directly to a participant, who is notified by e-mail of the request. However, you can specify whether to permit workers also to request feedback directly to a participant without manager approval. If you do not select the **Worker can request feedback** option, the worker can still add a participant to the list of potential participants, but when the worker sends the request, the manager receives notification that the worker has added a participant. The manager can then send the request directly to the participant if the manager supports the request.

Adding Questions to the Questionnaire

Specify whether to allow managers, workers, or both, to add questions they create to the questionnaire. The questionnaire must also be configured to allow managers and workers to add questions. They can add questions only to the section of the questionnaire that is configured to allow questions to be added.

Performance Process Flows: Examples

You create process flows that are referenced by performance templates to create specific evaluations. The following examples illustrate how to use process flows for some common review situations.

Creating a Process Flow for an Annual Review

ABC Company has an annual evaluation for all employees. The company policy requires that the employees and managers collaborate on adding content to the performance document. Both workers and managers also are required to rate the worker, and the manager is required to request and receive participant feedback from at least two sources to help evaluate the worker. After completing the evaluation the manager must seek approval for the completed performance document. Once the document is approved, managers must conduct a formal meeting with the worker to discuss the evaluation, which the worker must acknowledge. After the meeting, the worker can comment on the performance evaluation or the process, which the manager can then rebut, if necessary. Finally, workers and managers can begin to set the content for the following

period's evaluation. ABC will change the default names of the tasks and subtasks to reflect the company nomenclature.

The tasks and subtasks in the following table constitute the process flow you create to include in the performance template used to create the performance documents for the evaluation.

Task Order	Default Task Name	New Task Name	Default Subtask Name	New Subtask Name	Roles
10	Set Goals	Set Competencies and Goals			Worker Manager
20	Worker Self-Evaluation		Subtask 1: Track Worker Self-Evaluation Subtask 2: Worker Self-Evaluation	Subtask 1: Track Employee Evaluation Subtask 2: Evaluate Yourself	Subtask 1: Manager Subtask 2: Worker
30	Manager Evaluates Worker	Evaluate Employee			Manager
40	Manage Participant Feedback	Request Feedback			Manager
50	First Approval	Approve Evaluation			Manager
60	Confirm Review Meeting Held		Subtask 1: Conduct Meeting Subtask 2: Worker Acknowledges Review Meeting	Subtask 1: Confirm Meeting Subtask 2: Acknowledge Meeting	Subtask 1: Manager Subtask 2: Worker
70	Provide Final Feedback		Subtask 1: Worker Provides Final Feedback Subtask 2: Manager Provides Final Feedback	Subtask 1: Provide Feedback to Manager Subtask 2: Provide Final Feedback	Subtask 1: Worker Subtask 2: Manager
80	Set Next Period Goals	Set Next Period Competencies and Goals			Worker Manager

Creating a Process Flow for a Project Review

The company has a special project for a group of workers to deliver a new module within six months for their existing mobile application to beat a competitor. ABC Company wants to perform a simplified review of the workers who worked on this important project. The workers will also be subject to the annual performance evaluation in a few months.

For the project review, the managers will provide all the goals and the reviews as part of the Manager Evaluates Worker task. The workers will not provide any goals or perform a self-evaluation on the project so they can continue to concentrate on their work responsibilities. The manager evaluations must be approved, after which the managers must share the documents with the workers because the workers are required to acknowledge that they reviewed the manager ratings. No meetings are required, since those can be combined with the meetings following the annual review. ABC will use the default names of the tasks and subtasks.

The following table shows the tasks, along with who performs them, and their order that are required to create the process flow.

Task Order	Task	Subtask	Roles
10	Manager Evaluates Worker		Manager
20	First Approval		Manager
30	Share Performance Document	Subtask 1: Share Performance Document Subtask 2: Worker Acknowledges Document	Subtask 1: Manager Subtask 2: Worker

Performance Document Completion Status: How It Is Determined

You define the tasks and subtasks that are included in a performance document in the process flow. The process flow is used by a performance template to create performance documents. The status of tasks and subtasks determines the completion status of the entire performance document.

Settings That Affect Performance Document Completion Status

Each task and subtask has a status. For example, the Set Goals task can be not started, in progress, or completed. When a task has subtasks, its status derives from the status of its subtasks. The status of a performance document derives from the status of all tasks in the document's process flow.

The following table shows the task statuses.

Task	Roles	Valid Statuses	Has Subtasks?
Set Goals	Worker Manager	Not started In progress Completed	No
Worker Self-Evaluation	Worker	Not started In progress Completed	No

Manager Evaluation of Worker	Manager	Not started In progress Completed	No
Manage Participant Feedback	Worker Manager	Not started In progress Completed	Yes
First Approval	Manager as Requester	Not started Approved	No
Second Approval	Manager as Requester	Not started Approved	No
Share Performance Document	Worker Manager	Not started In progress Completed	Yes
Conduct Meeting	Worker Manager	Not started In progress (visible only to the manager after sharing the document with the worker, before the worker acknowledges the meeting) Completed	Yes
Final Feedback	Worker Manager	Not started In progress Completed	Yes
Set Next Period Goals	Worker Manager	Not started In progress Completed	No

Note

The Manage Participant Feedback Task can be performed concurrently with the Worker Self-Evaluation and Manager Evaluation of Worker tasks, and is completed when the manager submits the performance document or locks the feedback to prevent any participants from providing additional feedback. The application permits the Manage Participation Feedback task to be completed whether or not any participants submitted feedback.

For subtasks, the status changes from Not started to In progress when the person performing the subtask saves a performance document. When that person submits the performance document, or uses an equivalent action, such as sharing or acknowledging the performance document, the subtask status changes to

Completed. The following table shows a summary of the possible subtask statuses:

Task	Subtask	Roles	Valid Statuses
Share Performance Document	Share Performance Document	Manager	Not started In progress Completed
Share Performance Document	Share Performance Document	Worker	Not started Completed
Conduct Meeting	Confirm Review Meeting Held	Manager	Not started Completed
Conduct Meeting	Confirm Review Meeting Held	Worker	Not started Completed
Final Feedback	Provide Final Feedback	Worker	Not started In progress Completed
Final Feedback	Provide Final Feedback	Manager	Not started In progress Completed

How Completion Status Is Calculated

The performance document status is derived from the task status, which is derived from the status of any subtasks within the task. For tasks that have subtasks, the status is Completed when all the subtasks within the task are completed.

The performance document statuses and the condition leading to each status for all available tasks are shown in the following table.

Document Status	What the Status Means
Not started	No tasks are started
In progress	At least one of the following tasks are in progress or completed: Set Goals, Worker Self-Evaluation, Manager Evaluation of Worker, Manage Participant Feedback
Submitted	Manager submitted the performance document for approval
Approved	Approver approved the performance document
Document shared with worker	Manager completed the Share Performance Document subtask
Document acknowledged	Worker completed the Share Performance Document subtask

Review meeting held	Manager completed the Confirm Review Meeting Held subtask
Review meeting acknowledged	Worker completed the Confirm Review Meeting Held subtask
Worker final feedback provided	Worker submitted final feedback
Manager final feedback provided	Manager submitted final feedback
Completed	All tasks and subtasks are completed, excluding Set Next Period Goals
Canceled	Human Resources (HR) specialist or the manager canceled the performance document

On the Performance Manager Overview page, you can see the number of documents where a task (for example, Set Goals) is in a particular status (for example, Completed) expressed as a percentage of the number of performance documents for a population.

Relationship of Subtask Status to Task Status for One Subtask

If the process flow includes a task that has subtasks but only one subtask is configured, then the task status is the same as the subtask status.

Relationship of Subtask Status to Task Status for Two Subtasks

The process flow definition includes the Final Feedback task. Both subtasks are configured: Worker Final Feedback and Manager Final Feedback. The Manager Final Feedback subtask cannot begin until the Worker Final Feedback task is completed.

Subtask Status: Worker Final Feedback	Subtask Status: Manager Final Feedback	Task Status: Final Feedback
Not started	Not started	Not started
In progress	Not started	In progress
Completed	Not started	In progress
Completed	In progress	In progress
Completed	Completed	Completed

Manage Sections

Performance Template Section: Critical Choices

You must create a section for each task that requires a section used in the process flow.

To create a section, you must specify the section type, and depending on the section type, also specify:

- Whether the section is rated or weighted
- Which calculation method to use to determine worker ratings, if using calculated ratings

- Which rating model to use to rate workers
- Content item processing options
- Content items to include

Once created, the sections are available for you to use in the performance template. In the performance template, you can create new sections or select and edit previously-created sections.

Section Types

The section types are:

- Profile Content
- Goals
- Questionnaire
- Overall Summary
- Worker Final Feedback
- Manager Final Feedback

You must define a section for the tasks that appear in the process flow that require a section. Each section appears as a tabbed page in the performance document. Only one section of each type can appear in a performance document. The tasks that require a section, and the sections they require, appear in the following table.

Task	Required Section
Set Goals Set Next Period Goals	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals
Worker Self-Evaluation Manager Evaluations of Workers	At least one of: <ul style="list-style-type: none"> • Profile Content • Goals • Overall Summary
Manage Participant Feedback	Questionnaire
Worker Provides Final Feedback	Worker Final Feedback
Manager Provides Final Feedback	Manager Final Feedback

Section Ratings and Weighting

For the Profile Content, Goals, and Overall Summary sections, you can select whether to enable section ratings. When you enable section ratings, managers and workers can select a rating for the section. For the Profile Content and Goals sections, they can rate the section separately from the individual evaluation items contained within the section. For the Profile Content section, the evaluation items include competency type content items. The Goals section contains goal items.

The rate section setting also enables the application to calculate a rating for the section. Managers and workers can use the calculated ratings as a guide to manually select their ratings. For Profile Content and Goals sections, the application calculates ratings based on worker and manager ratings on individual items in the section. For the Overall Summary section, the application calculates ratings using the Profile Content and Goals section ratings.

You can select to weight a section, or items, in a section to place more or less importance on the section or item. The application uses the weights to calculate section and overall ratings.

Calculation Rules

In the Overall Summary, Profile Content, and Goals sections, you can have the application calculate the employee's performance rating in addition to having workers and managers manually enter ratings. For the Overall Summary section, the calculation rule you select is used to determine overall ratings for performance based on the calculations for the Profile Content and Goals sections. Select one of the following calculation methods:

- Average
- Sum
- Band

Rating Models

In the Overall Summary, Profile Content, and Goals sections, you use rating models to rate the workers. Rating models are determined in Profile Management. If you use a particular rating model to rate the items in a section, you can use the same rating model to rate the section itself, or you can select a different model to rate the section.

Important

For the Overall Summary section, you must select the default Profile Option rating model for the overall ratings to appear where performance ratings are compared between workers, or between a worker's past and present ratings, except for Performance Manager Overview page. The ratings that appear on the My Organization tab of the Performance Manager Overview page are those taken from the performance document that the manager selects to view, and may not use the profile option rating model.

Content Item Processing

For the Profile Content and Goals sections, you select the ratings and calculation rules to use to determine rating scores for the evaluation items, if your organization uses calculated ratings. If you use performance rating models for the items--either because you selected the **Proficiency and performance**, or **Performance**, rating type for the Profile Content section, or it is a Goals section--you can select different rating models to rate individual items separately from the rest of the items in the section. The calculation rules will be applied to each item, then combined using the calculation rule you selected for the section to determine the section rating.

Important

For the Profile Content section, you must select a rating type of either **Proficiency** or **Proficiency and performance** to use a proficiency rating model so the rating (proficiency level) results from the performance evaluation can be updated to the worker's person profile.

Section Content Items

In the Profile Content and Goals sections, you can specify the source of evaluation items that appear in the section. You can also designate additional items to appear in the section.

For the Profile Content section, you can specify competencies to be delivered from the profile related to the worker's job data, or another specific profile that you select. Profiles are maintained in Oracle Fusion Profile Management. When you create the performance template, you can pull the items from the selected profile into it. Workers and managers can also pull updated profile content into the performance document by using the update action to receive any content changes made between the time the performance document was created or last updated and rating the content.

For the Goals section, you can specify whether to use goals from Oracle Fusion Goal Management. Performance goals that workers or managers add to the Goal Management pages that are configured to included in performance documents are added to the document when they:

- Save the goals in Goal Management
- Perform the update action in the performance document

The specific evaluation items you add to the section can be pulled into the performance template when you add the section to it, and into the performance document when it is created.

Calculated Ratings: Explained

You can enable the application to calculate a worker's overall performance rating in the Overall Summary section, and section ratings in the Profile Content, and Goals sections. Calculated ratings appear in addition to the ratings provided manually by managers and workers. In the performance template, you specify whether to use calculated ratings and the calculation rules that determine the ratings.

Where Calculated Ratings Appear

Calculated ratings can appear on the performance document, where managers and workers can use them as a guide to determine the ratings they provide for the section. You can specify not to display the calculated ratings in the performance document to the worker, manager, or both, and show only the ratings they provide.

Calculated overall ratings, along with overall ratings provided by managers, can be used by Oracle Fusion Compensation Management. The settings to determine whether they appear there are available in the Compensation Management business process.

The rating that appears in the Overall Summary section is the rating level description for the calculated rating, not the numerical calculated rating value or star ratings. The rating is rounded to the closest rating level value as determined by the rounding and mapping settings.

The calculated ratings that appear in the Profile Content and Goals sections, and Compensation Management, are the actual numerical calculated values.

Calculated Ratings Roll Up

You can set up the template so that any or all of the sections use calculated ratings. When you enable calculated ratings in the Profile Content or Goals sections, the application uses the ratings that managers and workers provide on individual items in the section, and automatically performs roll-up calculations to determine the rating for the respective section. The application uses the calculated ratings for the Profile Content and Goals sections to determine the overall calculated rating in the Overall Summary section.

Calculation Rules

To use calculated ratings in a section, you must select the type of calculation rules to use for rating the section. The options are: **Average**, **Sum**, and **Band**. You can specify the calculation rules either in the performance template section or the performance template.

You can select different calculation rules for each section within a performance template. The application uses the calculation rules for the Overall Summary section to determine the calculated overall rating.

For the Average method, you can weight sections and items within the sections to place more or less importance on particular sections, or items.

Decimal Places

You can select the number of decimal places, up to a maximum of two, that appear in the performance document or Compensation Management pages for the calculated rating.

Decimal Rounding Rules

In the performance template, you select the rounding rules to determine how the calculated rating is rounded to the final value. The rounding is applied to the rounding decimal, which is the last decimal set in the Decimal Places field. For example, if you set the Decimal Places value at **2**, the rounding is applied to the second decimal. If you do not select a rounding rule, the calculated rating is truncated to the final decimal that is displayed, though the calculated ratings are determined using the entire decimal.

The table shows the available rounding rules, the effects of selecting each rule, and examples of how the rules are used to determine calculated ratings.

Rounding Rule	Effect	Example
Standard	Rounds up when the rounding decimal is 5 or greater, and down when the rounding decimal is 4 or less.	If the calculated rating is 3.4867, and the decimal place setting is 2, the final calculated rating is 3.49. If the calculated rating is 3.4849, and the decimal places setting is 2, the final calculated rating is 3.48.

Up	The value always rounds up.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.50. If the calculated rating is 3.49 and the decimal place setting is 2, the final calculated rating is 3.50
Down	The value always rounds down.	If the calculated rating is 3.4940 or 3.4960 and the decimal place setting is 2, the final calculated rating is 3.49.

Mapping Method

Use mapping methods to determine the rating when there is no exact match between the calculated rating and a rating level from the rating model used in the section. When rounding rules are used, the calculated rating value is taken after the rounding rule is applied.

The table shows the available mapping methods and the effects of selecting each one.

Mapping Method	Effect
Highest	Uses the next rating point greater than the calculated average.
Lowest	Uses the next rating point less than the calculated average.
Nearest	Uses the rating point closest to the calculated average.

For example, assume the rating model has the following entries:

- 1--Weak
- 2--Poor
- 3--Average
- 4--Good
- 5--Excellent

If the application calculates a rating of 3.2 (between Good and Average, but closer to Average), the mapping method tells the system which entry to pick:

- Highest yields the next numerically highest rating--in this case 4, or Good.
- Lowest yields the next numerically lowest rating--in this case 3, or Average.
- Nearest yields the numerically closest rating--in this case 3, or Average.

If the calculated rating falls exactly halfway between two ratings in the rating model, the application assigns the numerically higher of the two ratings.

Performance Template Section Calculation Rules: Critical Choices

To use calculated ratings, you must select the type of calculation rules to use for rating Profile Content, Goals, and Overall Summary sections of a performance template section. The options are:

- Average
- Sum
- Band

You can change the calculation rule for the section selected in the performance template where the section is used.

Average Method

To use this method, the rating models that are associated with the section and its content items must define numeric ratings that correspond to the rating descriptions. The application calculates the average of the item ratings to determine the section rating, and then the application calculates the average of the section ratings to determine the overall rating. The application uses the numeric ratings to calculate a weighted average if weights exist; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, using the rating model.

Sum Method

To use this method, the rating models that are associated with the section and its items must define review points. The rating model for the section must also define point ranges (from points and to points). The application converts ratings to review points as defined in the rating model, calculates the total review points, and converts this total into the corresponding review rating for the section by using the point range on the rating model. Weights, and any items without ratings, are ignored.

When using the sum method for the overall rating, section rating calculation rules can be sum or average only.

Band Method

This method is similar to the sum method, but is available only for the Overall Summary section of a performance document. The Profile Content and Goals sections, however, use the average or sum method. To use the band method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). During the calculation process, the application computes the total review points across all sections and converts this total into the equivalent rating on the document band.

Item Processing: Critical Choices

When you enable content items for a section, you specify the:

- Rating type
- Item calculation
- Properties

Rating Type

Rating types determine the rating models that are available for workers and managers to use to select the content item ratings in the performance document and to calculate the item ratings.

For Profile Content sections, the available rating types are:

- Proficiency: Workers and managers can select the proficiency level for items on the performance document. The rating model and descriptions used to rate the item are those set in the content library for the item.
- Performance: Workers and managers can select the performance rating on the performance document.
- Proficiency and Performance: Workers and managers can select both a proficiency level and a performance rating on the performance document.

For Goals sections, only the Performance rating type is available.

When you select either Performance or Proficiency and Performance rating types, you can use the same rating model for content items that the section uses, or select another. You can also select different performance rating models for individual content items. This enables your organization to rate some goals that may be specific to a department using a different rating model than that used for organization-wide goals, for example.

Proficiency levels are published to Oracle Fusion Profile Management when the performance document is completed. Performance ratings for competencies and goals are not published to Profile Management.

Item Calculation

The item calculation method determines how the item is rated.

When the rating type is Proficiency and Performance, you can select:

- Proficiency: Proficiency ratings are used to calculate the score for a specific item.
- Performance: Performance ratings are used to calculate the score for a specific item.
- Proficiency multiplied by performance: The application multiplies the proficiency point value by the performance point value to calculate the score for a specific item.

When the rating type is either Proficiency or Performance, the default values for the item calculation method are the same and cannot be changed.

Properties

You can select the attributes that you want to make available for items.

The effects of selecting the properties are shown in the table.

Property	Effect
Target Proficiency Level	Target proficiency levels appear for the items in the performance document. The target proficiency level that appears is the target proficiency level for the item from the most specific profile type used for the section, if one exists. For example, if you select job profile as the profile type used by the section, the target proficiency levels in the performance document are those for the competencies belonging to the worker's job profile.
Target Performance Rating	You can select target performance ratings for the items you add to the section or the performance template. In the performance document, workers can select target performance ratings for the items that they add to the document, and managers can select target performance ratings for the items that they, or the workers, add to the document.
Weight	You can enter weights for items in the section and the performance template to determine the relative importance of the items within the section. In the performance document, managers and workers can change weights for the items they add to the document, or goals added from Oracle Fusion Goal Management. When using calculated ratings, this is available only when you select the Average calculation rule for the section.
Minimum Weight	You can enter minimum weights for items in the performance template. In the performance document, managers can edit the minimum weights.
Required	In the performance template section or the performance template, select the Required check box to prevent workers and managers from editing or deleting the item in the performance document. You can use the Required setting to create a performance template that contains standard competencies and goals, for example, that can be used to rate workers on the competencies for a particular job profile type.

Performance Ratings Using the Average Method: How They Are Calculated

The application can calculate ratings for each section and the overall rating using the average calculation rule. The average rule can be used to calculate ratings using various rating models and apply weighting, when weighting is implemented.

Settings That Affect Average Rating Calculations

The factors that determine average rating calculations are the:

- Rating models that are selected for each section and content item

- Weighting, which is optional, and can vary between sections and content items

How Performance Ratings Are Calculated

In the average method, the application calculates the average of the content item ratings to work out the section rating, and then calculates the average of the section ratings to determine the overall rating. The application calculates ratings using precise values throughout the calculation process, and applies rounding at the end. Rounded values can appear in the performance document for the sections and overall ratings. The number of decimals displayed is determined in the performance template.

Average Method Without Weighting

ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections, with no weighting. The rating model has five points in the scale, and the numeric values are 1, 2, 3, 4 and 5. Assume that all content items use the same rating model. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places.

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating/Maximum Rating)
Teamwork	4	5	0.8
Leadership	3	5	0.6
Communication	2	5	0.4
Analytical Skills	4	5	0.8
Ethics	5	5	1.0
Conceptual Thinking	4	5	0.8

The sum of the decimal scores is 4.4, from a possible maximum of 6.0. The 4.4 must be converted to a value on the rating model for the section. The section maximum rating is 5, so the formula to calculate the section rating is:

(Total Decimal Score) / (Total Maximum Decimal Score) x (Maximum Rating from Section Rating Model), or in this example: $(4.4 / 6) \times 5 = 3.67$.

In this example the section rating for competencies is 3.67 out of 5.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Increase sales revenue	5	5	1.0
Cut expenses	3	5	0.6
Grow business in Asia	5	5	1.0
Participate in mentoring	5	5	1.0

The sum of the decimal scores is 3.6, from a possible maximum of 4.0. The 3.6 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is: $(3.6 / 4) \times 5 = 4.5$.

In this example the section rating for goals is 4.5 out of 5.

To determine the overall rating, the application calculates the average of the two sections. The overall rating calculation is: $(3.67 + 4.5) / 2 = 4.085$. When the rounding rules and decimal settings are applied, the final overall rating is 4.09.

Average Method with Weighting

The following year, ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections as in the previous example, but applies weights to the sections and individual content items. The weights determine the relative value of one section compared to another section, or content items to one another. Any content items that do not have weights are ignored in the calculations. The application validates that the sum of the weights for content items within a section is 100, and the sum of the sections that contain content items (that is, the Competencies and Goals sections) within a performance document is also 100. No rounding rules are applied in the performance template, but the ratings are set to display to two decimal places.

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0
Leadership	3	5	0.6	5	3.0
Communication	2	5	0.4	10	4.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	5	0.8	20	16.0

The sum of the weighted scores is 77.0, from a possible maximum of 100.0. The 77.0 must be converted to a value on the rating model for the section. The section maximum rating is 5, so the formula to calculate the section rating is:

$(\text{Weighted Score}) / (\text{Total Maximum Weighted Score}) \times (\text{Maximum Rating from Section Rating Model})$, or in this example: $(77.0 / 100.0) \times 5 = 3.85$.

In this example the section rating for competencies is 3.85 out of 5.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
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			Maximum Rating)		
Increase sales revenue	5	5	1.0	30	30.0
Cut expenses	3	5	0.6	30	18.0
Grow business in Asia	5	5	1.0	25	25.0
Participate in mentoring	5	5	1.0	15	15.0

The sum of the weighted scores is 88.0, from a possible maximum of 100.0. The 88.0 must be converted to a value on the rating model for the section, just as for the Competencies section. The section maximum rating is 5, so using the same formula to calculate the section rating as for competencies, the section rating is: $(88.0 / 100.0) \times 5 = 4.40$.

In this example the section rating for goals is 4.40 out of 5.

To determine the overall rating, the application calculates the sum of the two weighted sections, then converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Goals section weight to 60. First, the application calculates the decimal scores of the weighted sections:

- Competencies: $3.85 / 5 = 0.77$
- Goals: $4.40 / 5 = 0.88$

The application then calculates the weighted scores for each section, then adds them together. The total weighted scores is out of a possible 100.0 points:

- Competencies: $0.77 \times 40 = 30.8$
- Goals: $0.88 \times 60 = 52.8$
- Total Competencies and Goals: $30.8 + 52.8 = 83.6$

The application converts the scores to the rating model scale to determine the overall rating: $(83.6 / 100.0) \times 5 = 4.18$.

Average Method with Weighting and Rating Model Variations

For a performance evaluation for a specific project, ABC Company uses various rating models for the Competencies, Goals, and Overall Summary sections. The application applies the maximum rating from each rating model to calculate the scores. Different weights are also applied to the content items. Section weights are also applied. The performance template is set up to use the standard rounding rule, and the overall rating is set to display to two decimal places.

The following table shows the ratings for the Competencies section, which uses different rating models with different maximum ratings for the individual competencies. The section rating model differs from the those used for the individual competencies, and the rating model maximum rating is 7.

Competency	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Teamwork	4	5	0.8	35	28.0

Leadership	3	3	0.6	5	5.0
Communication	2	4	0.5	10	5.0
Analytical Skills	4	5	0.8	20	16.0
Ethics	5	5	1.0	10	10.0
Conceptual Thinking	4	4	1.0	20	16.0

The sum of the weighted scores is 84.0, from a possible maximum of 100.0. The 84.0 must be converted to a value on the rating model for the section. The section maximum rating is 7, so the formula to calculate the section rating is:

(Weighted Score) / (Total Maximum Weighted Score) × (Maximum Rating from Section Rating Model), or in this example: $(84.0 / 100.0) \times 7 = 5.88$.

In this example the section rating for competencies is 5.88 out of 7.

The following table shows the ratings for the Goals section. As with the Competencies section, the individual goals use different rating models with different maximum ratings. The Goals section itself uses a rating model with a maximum rating of 6.

Goal	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)	Weight	Weighted Score (Decimal Score x Weight)
Increase sales revenue	5	5	1.00	30	30.0
Cut expenses	3	4	0.75	30	22.5
Grow business in Asia	4	5	0.80	25	20.0
Participate in mentoring	4	6	0.67	15	10.0

The sum of the weighted scores is 82.5, from a possible maximum of 100.0. Because the maximum for the section rating model is 6, the section rating is: $(82.5 / 100.0) \times 6 = 4.95$.

To determine the overall rating, the application calculates the sum of the two weighted sections, then converts the score to the rating model scale. ABC sets the Competencies section weight to 40, and the Goals section weight to 60. The overall summary section uses a rating model with a maximum score of 9.

First, the application calculates the decimal scores of the weighted sections:

- Competencies: $3.85 / 5 = 0.77$
- Goals: $4.40 / 5 = 0.88$

The application then calculates the weighted scores for each section, then adds them together. The section weight for the Competencies section is 40, and for the Goals section it is 60. The total weighted scores is out of a possible 100.0 points:

- Competencies: $0.84 \times 40 = 33.6$
- Goals: $0.825 \times 60 = 49.5$

- Total Competencies and Goals: $33.6 + 49.5 = 83.1$

The application converts the scores to the rating model scale to determine the overall rating: $(83.1 / 100.0) \times 9 = 7.479$. When the rounding rules and decimal places are applied, overall rating is 7.48.

Performance Ratings Using the Sum and Band Methods: How They Are Calculated

The application can calculate ratings for each section and the overall rating using the sum calculation rule. The sum method can be used to calculate ratings using any rating model. It can also be used to calculate the overall rating when either the Profile Content or Goals section uses the average method, and the other uses the sum method. Weights, however, are not used in a section, or for calculating the overall rating, when using the sum method.

Settings That Affect Sum and Band Rating Calculations

The factors that determine sum and band rating calculations are the rating models that are selected for each section and content item, and the review points assigned to each rating level. Items without ratings are not counted when calculating the ratings. For the band method, the review points must be associated to a points range. The rounding rules and mapping methods must also be set in the performance template for the rating models.

How Performance Ratings Are Calculated

In the sum method, the section rating is the sum of the review points from the rating level for each content item. The overall rating is the sum of the section ratings.

For the band method, as in the sum method, the application calculates the sum of the section ratings, but for the overall rating, converts the review point score from the sections to the points range associated to that review point score.

Sum Method with Sum Sections

ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections which have five points in the scale, and the numeric values are 1, 2, 3, 4 and 5. Assume that all content items also use the same rating model. The following table shows the rating levels and the review points assigned to each level.

Rating Level	Review Points
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Review Points
Teamwork	4	4
Leadership	3	3
Communication	2	2
Analytical Skills	4	4
Ethics	5	5
Conceptual Thinking	4	4

The score for the Competencies section is: $4 + 3 + 2 + 4 + 5 + 4 = 22$.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Review Points
Increase sales revenue	5	5
Cut expenses	3	3
Grow business in Asia	4	4
Participate in mentoring	4	4

The score for the Goals section is: $5 + 3 + 4 + 4 = 16$.

To determine the overall rating, the application adds the Competencies and Goals sections: $22 + 16 = 38$.

Sum Method with Sum Sections with Review Points Variation

The following year, ABC Company uses the same rating model for the Competencies, Goals, and Overall Summary sections as in the previous example, but applies different review points for each rating level.

Note

The rating model selected for the Overall Summary section must contain all possible expected values for the sum.

The following table shows the rating levels and the new review points assigned to each level.

Rating Level	Review Points
1--Weak	1
2--Poor	3
3--Average	5
4--Good	7
5--Excellent	9

The following table shows the ratings for the Competencies section.

Competency	Item Rating	Review Points
Teamwork	4	7
Leadership	3	5

Communication	2	3
Analytical Skills	4	7
Ethics	5	9
Conceptual Thinking	4	7

The score for the Competencies section is: $7 + 5 + 3 + 7 + 9 + 7 = 38$.

The following table shows the ratings for the Goals section.

Goal	Item Rating	Review Points
Increase sales revenue	5	9
Cut expenses	3	5
Grow business in Asia	4	7
Participate in mentoring	4	7

The score for the Goals section is: $9 + 5 + 7 + 7 = 28$.

To determine the overall rating, the application adds the Competencies and Goals sections: $38 + 28 = 66$.

Sum Method with Average and Sum Sections

For a performance evaluation for a specific project, ABC Company sets up a performance template that uses the sum method for the Overall Summary and Goals sections, but the Competencies section uses the average method. In the Competencies section, the content items use a rating model with different review points assigned to each rating level than that of the section itself. The Goals section uses the same rating model for content items as the Competencies section, which assigns the same review points for each rating level.

The following table shows the rating levels and the review points assigned to each level for the individual content items in the Competencies section.

Rating Level	Review Points
1--Weak	1
2--Poor	2
3--Average	3
4--Good	4
5--Excellent	5

The following table shows the rating levels and the review points assigned to each level for the Competencies section itself.

Rating Level	Review Points
1--Weak	10
2--Poor	20
3--Average	30
4--Good	40

5--Excellent	50
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The following table shows the worker ratings for the Competencies section, which uses different rating models with different maximum ratings for the individual competencies. The section rating model differs from the those used for the individual competencies, and the rating model maximum rating is 7.

Competency	Item Rating	Maximum Rating from Rating Model	Decimal Score (Item Rating / Maximum Rating)
Teamwork	4	5	0.8
Leadership	3	5	0.6
Communication	2	5	0.4
Analytical Skills	4	5	0.8
Ethics	5	5	1.0
Conceptual Thinking	4	5	0.8

The application calculates the average of the item rating scores: $(0.8 + 0.6 + 0.4 + 0.8 + 1.0 + 0.8) / 6 = 3.67$. To determine the section rating, the application uses the mapping rules for the rating model assigned in the performance template. In this example, the mapping rule is Nearest, which assigns the section a rating level of 4. The application uses the section rating model to determine how many review points to assign to the section for a rating level of 4. The previous table showed that a rating level of 4 would equate to 40 review points for the section.

The following table shows the ratings for the Goals section, which uses the sum method, and the review points for each goal.

Goal	Item Rating	Review Points
Increase sales revenue	5	5
Cut expenses	3	3
Grow business in Asia	4	4
Participate in mentoring	4	4

The score for the Goals section is: $5 + 3 + 4 + 4 = 16$.

To determine the overall rating, the application calculates the sum of the Competencies and Goals sections: $40 + 16 = 56$

Band Method

ABC Company sets up a performance template in which the section ratings are calculated using exactly the same parameters as in the previous example, but the band method is used for the Overall Summary section to calculate the overall rating.

The following table shows the review point ranges set up for the Overall Section rating model to assign the rating level for the overall rating.

From Points	To Points	Rating Level
0	11	E

12	24	D
25	40	C
41	58	B
59	70	A

To determine the overall rating, add the section review point scores from the previous example. The Competencies section point score is 40; the Goals sections point score is 16. The total is: $40 + 16 = 56$. Using the total number of review points and applying the ranges shown in the table, the total score of 56 for the sections lies in the range of 41 to 58. The worker's overall rating is B.

Creating a Profile Content Performance Template Section: Worked Example

This example demonstrates how to create a Profile Content section that will be used to rate competencies in the performance document and use calculated ratings to determine the overall rating.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Profile Content section, for competencies
Will the section rating be calculated? What calculation rule will be used?	Yes, the section uses the Average calculation rule
Which section rating model will be used?	Any
Will the section be weighted?	Yes, the weight will complement the Goals section weight so the sum of the sections is 100
Will content items be enabled for the section?	Yes
Will content items be rated?	Yes, using the proficiency rating type, and section rating model
What properties are included with the content items?	Weight, Required, Target Proficiency Level
What is the source of competencies for the content items?	Worker job profile
Do you require any content items to be added to the section?	Yes, one content item is required

Create a Profile Content performance template section.

1. Enter the section details.
2. Enter section processing details.
3. Enter item processing details.
4. Enter section content details.

Entering the Section Details

1. On the **Set Up Workforce Development** work area, click **Manage Performance Template Sections** to open the **Manage Performance Template Sections** page.

2. Click **Create**.
3. On the **Create Performance Template Section** page, in the **Section Details** region, complete the fields, as shown in this table.

Field	Value
Name	Competencies
Description	This section is used to rate competencies and calculate section ratings as part of the overall ratings. The section weight section is 40 to complement the Goals section.
From Date	01/01/2011
To Date	12/31/2015
Status	Active

4. Click **Save**.

Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
Section Type	Profile Content
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any
Weight section	Select
Item Weight	40

2. Click **Save**.

Entering Item Processing Details

1. In the **Item Processing** region, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Rate items	Select
Rating Type	Proficiency
Use section rating model for performance rating	Select
Item Calculation	Proficiency

Weight	Select
Required	Select
Target Proficiency Level	Select

2. Click **Save**.

Entering Section Content Details

1. In the **Section Content** region, complete the fields, as shown in this table.
Use the default values except where indicated.

Field	Value
Use profile related to worker's job data	Select
Profile Type	Job profile type
Use specific content items	Select

2. In the **Content Items** region, click **Add**.
3. In the **Content Items** region, complete the fields, as shown in this table.
Use the default values except where indicated.

Field	Value
Item Name	Any
Target Proficiency Level	Any
Weight	Any
Required	Select

4. Click **Save**.

Creating a Goals Performance Template Section: Worked Example

This example demonstrates how to create a Goals section that will be used to rate goals in the performance document and use calculated ratings to determine the overall rating.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of section is this?	Goals
Will the section rating be calculated? What calculation rule will be used?	Yes, the section uses the Average calculation rule
Which section rating model will be used?	Any
Will the section be weighted?	Yes, the weight will complement the Competencies section weight so the sum of the sections is 100
Will content items be enabled for the section?	Yes

Will workers and Managers have the opportunity to add goals during the Set Goals task, if that task is included in the process flow?	Yes
Will content items be rated?	Yes, using the Performance rating type, and the same rating model as the section uses
What properties are included with the content items?	Weight, Required, Target Performance Level
What is the source of goals for the content items?	Oracle Fusion Goal Management
Will content items be added to the section?	Yes, one content item will be added

Create a Goals performance template section.

1. Enter the section details.
2. Enter section processing details.
3. Enter item processing details.
4. Enter section content details.

Entering the Section Details

1. On the **Set Up Workforce Development** work area, click **Manage Performance Template Sections** to open the **Manage Performance Template Sections** page.
2. Click **Create**.
3. On the **Create Performance Template Section** page, in the **Section Details** region, complete the fields, as shown in this table.

Field	Value
Name	Goals
Description	This section is used to rate goals and calculate section ratings as part of the overall ratings. The section weight section is 60 to complement the Competencies section.
From Date	01/01/2011
To Date	12/31/2015
Status	Active

4. Click **Save**.

Entering Section Processing Details

1. In the **Section Processing** region, complete the fields, as shown in this table.

Field	Value
Section Type	Goals
Rate Section	Select
Calculation Rule for Section	Average

Section Rating Model	Any
Weight section	Select
Section Weight	60

2. Click **Save**.

Entering Item Processing Details

1. In the **Item Processing** region, complete the fields, as shown in this table.
Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Rate items	Select
Use section rating model for performance rating	Select
Target Performance Level	Select
Weight	Select
Required	Select
Description	Select

2. Click **Save**.

Entering Section Content Details

1. In the **Section Content** region, complete the fields, as shown in this table.
Use the default values except where indicated.

Field	Value
Use worker's goals	Select
Use specific content items	Select

2. In the **Content Items** region, click **Add**.
3. In the **Content Items** region, complete the fields, as shown in this table.
Use the default values except where indicated.

Field	Value
Item Name	Any
Performance Rating Model	Any
Target Performance Rating	Any
Weight	Any
Required	Select

4. Click **Save**.

Manage Performance Templates

Setting Up the Performance Template: Critical Choices

Performance templates are used to create the performance documents that managers and workers use to evaluate workers' performance for a given time period or project. The performance template brings together the process flow definition, the section definitions and the document type. The performance template can also contain static content, such as competencies and goals. When creating the performance template, you need to determine:

- Document types and eligibility profiles
- Participant roles
- Process flow
- Calculation rules and processing options
- Structure
- Content
- Periods

Document Types and Eligibility Profiles

Select or create a document type to identify the type of evaluation that the performance template supports, such as annual evaluation, or project evaluation.

Associate eligibility profiles to the overall template, or to the document periods, to restrict the performance documents made from the template to those who meet the eligibility criteria. Specify profiles as required to limit access to the document to workers who meet all required profiles and one that is not selected as required, if any. Workers must meet the profile criteria for at least one of the not-required profiles to use the document.

Participant Roles

Specify whether managers, workers, or both are able to view and add ratings to the performance document and which participant roles can provide feedback on a questionnaire about workers' performance. For example, if you set up the performance template so that only managers rate workers, but workers can see the results, then you must select both roles as participants. If, however, the manager rates workers without the workers participating in the performance evaluation process or viewing results, then you can select only the manager role.

Process Flow

The process flow determines which tasks are included in the performance template. You can select a previously-defined process flow or create a new one as you create the template.

The process flow also determines which sections you can add to the performance template. If the performance template is intended to create performance documents used to rate workers, set goals, and let workers and managers provide final feedback on the evaluation, then the process flow you select must include all those tasks. You can only add sections to the performance template that are required by the process flow. For example, if the process flow does not include the Worker Final Feedback task, you cannot add that section to the performance template.

Calculation Rules, Processing Options, and Participant Options

Select whether to calculate ratings and display the calculated ratings for performance template sections. The sections included in the performance template must be set up to use calculated ratings to use this feature.

Use processing options to select the following features:

- Designate whether managers and workers can select star ratings to rate items and sections. For star ratings, the number of stars correspond to the rating descriptions set for each star. For example, one star may represent the Foundation rating description, two stars may represent the Intermediate rating description, and so on. Star ratings can be used only for rating models that use 10 or fewer rating levels. If you specify not to use star ratings, workers and manager choose the rating descriptions from a choice list. The rating description displays no numerical rating, but the description corresponds to a rating number set up for the rating model. The number that corresponds to the rating description selected by the worker or manager is used to calculate ratings.
- Include digital signature to require workers to verify that they are the people submitting the performance document as part of the Worker Final Feedback task.
- Display kudos on the nonprint versions of the performance document to use them as a guide to rate workers while the evaluation is in progress. The Kudos section appears on the Profile Content, Goals, and Overall Summary tabs of the performance document. The kudos section is not part of the official evaluation, so it does not appear on the completed performance document.
- Let workers select a manager other than their direct managers to manage and rate them. This approach can be used, for example, when workers are assigned special projects working for managers other than their direct manager.

Participant options let you determine whether participant feedback is required for the performance document, which is not enforced but serves as a guideline for managers and workers. You also specify whether to let workers view participants selected by the manager to provide feedback.

Structure

Add previously-defined sections or create new ones that are required for the process flow selected for the template. You must select or create one of each type of the sections that are required for this particular template. You can

edit previously-defined sections to suit the template requirements, including processing options, properties and content.

For each section, you must select which roles have access to the section in the performance document to view and if applicable, provide ratings.

Content

For each section that contains content that can be rated, you can add content items directly to the performance template so they appear on the performance document. For both Goals and Profile Content sections you can load content that was included in the previously-defined section. For a Profile Content section, such as competencies, you can also copy content from whatever profile the section uses as a source for content items, if profiles are set up to be used as a source.

This lets you target this performance template as broadly or narrowly as you need. You can decide to load content items from the section, for example, that apply to everyone who is rated using the performance document created from this template. But you may decide not to copy content directly from a profile in the template because the population being evaluated has varied profiles. The workers and managers can then copy profile content on the performance document itself (if the process flow is set up to let them). In this case, the profile content is specific to the worker.

Periods

You can create a single, or multiple periods, within a performance template. Adding multiple periods allows you to create performance documents from the same template for different periods that are treated as distinct documents, but contain the same process flows, sections, and processing rules. For example, you can create a template for an annual evaluation to use every year. The content will be updated for each worker because the competencies are pulled from the selected profile type, and goals are pulled from Oracle Fusion Goal Management. Managers and workers can add additional content to the performance document as well. The dates for periods can overlap, but cannot be identical for the same template. Within each period, you need to set the due date for each task that is included in the process flow used by the performance template.

When using participant feedback, you also specify within a period which questionnaire to associate with each participant role, including the manager and worker roles. The role then has access to the appropriate questions on which to provide feedback in the performance document.

Defining Processing Roles for Performance Template Sections: Points to Consider

You must add roles to performance template sections so that managers, workers, and participants providing feedback can access the sections, and define the processing settings for each role. You must decide:

- Which roles to add to each section
- Whether to share manager ratings

- Whether to update worker profiles with ratings and content items
- Which roles can access questionnaires and feedback

Adding Roles to Sections

You must add all the roles that need to access the section, whether to provide ratings or feedback, or view the section. For example, if your organization requires only managers to rate goals, but workers can see the goals and ratings, then you must add both the manager and worker roles to the Goals section.

If the section type is used by a specific role to provide ratings or feedback, you must still add that role. For example, workers provide feedback on the Worker Final Feedback section type. However, you must add the worker role to the Worker Final Feedback section so the worker can access it. For the manager to be able to view worker comments on the Worker Final Feedback section, you must also add the manager role.

The roles that are available to add to the section are those you added in the **Participation** region of the **General** tab of the performance template.

Sharing Manager Ratings and Comments

After adding the role, specify whether the ratings or comments that managers provided in the Profile Content, Goals, or Overall Summary sections are available to workers. In the Manager Final Feedback and Worker Final Feedback sections, specify whether workers can view the manager comments. Ratings and comments provided by workers are always visible to all managers who have access to the performance documents.

Updating Worker Profiles with Ratings and Content Items

For the Profile Content section type, you can specify whether to update the worker profile with the ratings provided by the manager and worker, and any content items that were added to the performance document that do not already exist in the worker profile. For the Overall Summary section, specify whether to update the worker profile with the overall performance rating. The worker profile is updated when the document is completed. You must select the person profile type to which the information is updated.

If you elect to update profiles, you can also specify the instance qualifier to identify that the source of the ratings and content items is the performance document. Instance qualifiers must be set up and maintained in Oracle Fusion Profile Management to use this feature.

Accessing Questionnaires and Feedback

When the Manage Participant Feedback task is included in the process flow used by the template, you can configure settings to allow which roles can see the questionnaires used to provide feedback. These include determining whether:

- Managers can see questionnaires and feedback provided by workers and participants, including the participant names.
- Workers can see questionnaires and feedback provided by the manager and participants, including the participant names.

If you configure the template so that workers cannot view participant feedback, you can set the **Participant Role Can Enter Comments Visible to Worker** setting to **Yes** for a participant role, so that participants can add overall comments to the questionnaire that managers and workers can both view.

Associating Eligibility Profiles with Performance Templates: Points to Consider

Add eligibility profiles to a performance template to associate the profiles with the performance documents to restrict access to the documents made from the templates. When associating eligibility profiles to performance templates, you must decide whether to:

- Use eligibility profiles
- Add eligibility profiles at the template-level or period-level
- Require eligibility profiles
- Add or remove eligibility profiles when the template is in use

Using Eligibility Profiles

Add eligibility profiles to performance templates to target performance documents to a specific population of workers. This allows you to create an array of performance documents that are appropriate for specific review purposes. For example, you can add an eligibility profile to performance documents that are appropriate for the Sales team, and another for the Information Technology department.

Adding Eligibility Profiles to the Template General Tab and the Document Periods

You can add existing eligibility profiles to either, or both, the performance template on the General tab and the document periods on the Document Periods tab. You can add as many profiles as required to either the General tab or document periods.

Eligibility profiles you add to the General tab are inherited by the document periods when periods are added to the template. You can add, remove, or change the eligibility profiles for the document periods, and change the required status as well. Only the eligibility profiles associated with a document period are used to determine eligibility for documents created for that period.

Requiring Eligibility Profiles

You can specify whether or not an eligibility profile is required.

When you select eligibility profiles as required for the document period, workers must satisfy all required profiles and at least one that is not required, if any are added, to be eligible for the performance document.

When only eligibility profiles that are not required are added to the document period, workers must satisfy the criteria for at least one of those eligibility profiles to be eligible for the performance document.

Adding or Removing Eligibility Profiles when the Template is in Use

You can add or remove eligibility profiles from a template or document period even if the template or period is in use. When you add an eligibility profile to a template, any previously-existing periods do not inherit the new eligibility profile.

You can remove all eligibility profiles from the Eligibility Profiles region of the General tab. However, if any eligibility profiles exist at the template level, you cannot delete all eligibility profiles from the document periods; you must leave at least one associated with each document period. If the eligibility process is already run for a document period, you cannot delete all the eligibility profiles associated with the period; at least one eligibility profile must be associated with that period.

Creating a Performance Template: Worked Example

This example demonstrates how to create a performance template that will be used to create performance documents containing most tasks in a process flow, and rating workers.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of performance template is this?	This will be used for an annual performance evaluation
Will eligibility profiles be added to either the template or performance document periods, and will they be required?	Yes, the same eligibility profile will be added to both the template and the performance document periods, and be specified as required; an additional eligibility profile will be added to one period, and not be specified as required
Will section ratings and the overall rating be calculated? What calculation rule will be used?	Yes, the sections use the Average calculation rule
Which section rating model will be used?	Any
Will the sections be weighted?	Yes, the Profile Content section weight will be 40, and the Goals section weight will be 60
Will content items be enabled for the section? Will the sections include content added to the performance template?	Yes, content items will be enabled for the Profile Content and Goals sections; a content item will be added to each section in the template
Will participant feedback be required, and is there a minimum requirement for participants?	Yes, feedback is required with a minimum number of participants; a Questionnaire section must be added to the template to capture participant feedback
What roles will be enabled to provide feedback?	Manager, worker, colleague
Will managers share ratings with workers?	Yes, managers will share their ratings with workers
Will the ratings be used to update the worker profile?	Yes, manager ratings will be used to update the worker profile
Will the performance template be used for more than one period?	Yes, two performance document periods will be set up

Create a performance template.

1. Enter general information.

2. Enter process details.
3. Enter structure details.
4. Load and add content to the Profile Content and Goals sections.
5. Add two document periods, one for each half of an annual evaluation.
6. Review template settings.

Prerequisites

1. Create a document type that can be used for an annual evaluation.
2. Create a performance role for Colleague.
3. Create a process flow with the following tasks and subtasks, in the following order: Set Goals, Worker Self-Evaluation, Manager Evaluation of Workers, Manage Participant Feedback, First Approval, Share Documents, Worker Must Acknowledge Document, Conduct Review Meetings, Worker Must Acknowledge Review Meetings, Worker Final Feedback, Manager Final Feedback.
4. Create the following sections: Profile Content, Goals, Questionnaire, Overall Summary, Worker Final Feedback, Manager Final Feedback.

Entering General Information

1. On the **Set Up Workforce Development** work area, click **Manage Performance Templates** to open the **Manage Performance Templates** page.
2. Click Create.
3. On the **Create Performance Template** page, in the **General** region, complete the fields, as shown in this table.

Field	Value
Name	Annual Performance Evaluation
Comments	This template is used for an annual performance evaluation.
From Date	01/1/11
To Date	12/31/15
Status	Active
Document Type	Any that can be used for an annual evaluation

4. In the **Eligibility Profile** region, click **Add**.
5. In the **Eligibility Profile** region, complete the fields as shown in this table.

Field	Value
Eligibility Profile	Any
Required	Select

6. In the **Participation** region, click **Add**.

7. Select **Manager**.
8. In the **Participation** region, click **Add**.
9. Select **Worker**.
10. In the **Participation** region, click **Add**.
11. Select **Colleague**.
12. In the **Participation** region, complete the fields as shown in this table.

Field	Value
Set the minimum number for each role check box	Select
Total minimum number of participants required in the document	2
Minimum Number of Participants Required Per Role	2

13. Click **Save**.

Entering Process Details

1. On the **Process** tab, complete the fields, as shown in this table. Use the default values except where indicated.

Field	Value
Process Flow	The process flow you created as a prerequisite for this task.
Calculate ratings	Select
Decimal Places	2
Rounding Rule	Any
Mapping Method	Any
Display star ratings	Select
Include digital signature	Select
Display kudos	Select
Participant feedback is required	Select
Worker can view participants added by manager	Select

2. Click **Save**.

Entering Structure Details

Add an available section of each type to the performance template, edit the existing settings for the sections, and add the manager and worker roles to each section.

1. Enter structure details for the Profile Content section.
2. Enter structure details for the Goals section.

3. Enter structure details for the Questionnaire section.
4. Enter structure details for the Overall Summary section.
5. Enter structure details for the Final Feedback sections.

1. Enter structure details for the Profile Content section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Profile Content section that you created as a prerequisite for this task.
3. In the **Section Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Profile Content
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any
Weight section	Select
Section Weight	40

4. In the **Item Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Enable ratings for items	Select
Use section rating model for performance rating	Select
Item Calculation	Any
Target Performance Rating	Select
Weight	Select
Required	Select
Target Proficiency Level	Select

5. In the **Processing by Role** region, click **Add**.
6. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Ratings	Yes
Share Comments	Yes

Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	Any
Instance Qualifier	Any

7. In the **Processing by Role** region, click **Add**.
8. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Click **Save**.

2. Enter structure details for the Goals section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Goals section that you created as a prerequisite for this task.
3. In the **Section Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Goals
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any
Weight section	Select
Section Weight	60

4. In the **Item Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Enable items	Select
Add and remove items during task to set goals	Select
Enable ratings for items	Select
Use section rating model for performance rating	Select
Item Calculation	Any
Target Performance Rating	Select
Weight	Select
Required	Select

5. In the **Processing by Role** region, click **Add**.
6. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	Any
Instance Qualifier	Any

7. In the **Processing by Role** region, click **Add**.
8. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

9. Click **Save**.

3. Enter structure details for the Questionnaire section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Questionnaire section that you created as a prerequisite for this task.
3. In the **Section Processing** region, select Questionnaire as the section type.
4. In the **Processing by Role** region, click **Add**.
5. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Manager Questionnaire Can Be Viewed by the Role	Yes
Worker Questionnaire Can Be Viewed by the Role	Yes
Participant Questionnaire Can Be Viewed by the Role	Yes
Participant Name Can Be Viewed by the Role	Yes
Show Role on Feedback Review Page	Yes

6. In the **Processing by Role** region, click **Add**.
7. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker
Manager Questionnaire Can Be Viewed by the Role	No
Worker Questionnaire Can Be Viewed by the Role	Yes
Participant Questionnaire Can Be Viewed by the Role	No
Participant Name Can Be Viewed by the Role	No
Show Role on Feedback Review Page	Yes

8. In the **Processing by Role** region, click **Add**.
9. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Participant
Participant Role Can Enter Comments Visible to Worker	Yes

10. Click **Save**.

4. Enter structure details for the Overall Summary section

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Overall Summary section that you created as a prerequisite for this task.
3. In the **Section Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Overall Summary
Rate Section	Select
Calculation Rule for Section	Average
Section Rating Model	Any

4. In the **Processing by Role** region, click **Add**.
5. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Ratings	Yes
Share Comments	Yes
Update Profile	Yes
Person Profile Type	Any
Instance Qualifier Set	Any
Instance Qualifier	Any

6. In the **Processing by Role** region, click **Add**.
7. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

8. Click **Save**.

5. Enter structure details for the Final Feedback sections

1. On the **Structure** tab, in the Sections region, click **Add**.
2. In the **Section Name** region, select the name of the Worker Final Feedback section that you created as a prerequisite for this task.
3. In the **Section Processing** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Section Type	Worker Final Feedback

4. In the **Processing by Role** region, click **Add**.
5. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager
Share Comments	Yes

6. In the **Processing by Role** region, click **Add**.
7. In the **Processing by Role** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Role	Worker

8. In the **Section Name** region, select the name of the Manager Final Feedback section that you created as a prerequisite for this task.
9. In the **Section Processing** region, complete the fields as shown in this table.

Field	Value
Section Type	Manager Final Feedback

10. In the **Processing by Role** region, click **Add**.
11. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Manager

12. In the **Processing by Role** region, click **Add**.
13. In the **Processing by Role** region, complete the fields as shown in this table.

Field	Value
Role	Worker

14. Click **Save**.

Loading and Adding Content to Sections

1. On the **Content** tab, complete the fields as shown in this table.

Field	Value
Section Name	The name of the Profile Content section you created as a prerequisite for this task.

2. In the **Section Items** region, click **Load Items from Section**.
3. In the **Section Items** region, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

4. In the **Details** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Target Proficiency Level	Any
Performance Rating Model	Any

Required	Select
-----------------	--------

5. On the **Content** tab, complete the fields as shown in this table.

Field	Value
Section Name	The name of the Goals section you created as a prerequisite for this task.

6. In the **Section Items** region, click **Load Items from Section**.
7. In the **Section Items** region, click **Add**, then complete the fields as shown in this table.

Field	Value
Item Name	Any

8. In the **Details** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Performance Rating Model	Any
Target Performance Rating	Any
Required	Select

9. Click **Save**.

Adding Document Periods

1. On the **Document Periods** tab, in the **Document Periods** region, click **Add**.
2. In the **Document Periods** region, complete the fields as shown in this table.

Field	Value
Name	2011 Performance Evaluation First Half
From Date	1/1/11
To Date	6/30/11
Short Name	Any

3. In the **Eligibility Profile for the Period** region, complete the fields as shown in this table. Use the default values except where indicated.

Field	Value
Eligibility Profile	Any

4. In the **Due Date-** region, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	6/24/11
Worker Self-Evaluation	7/1/11
Manager Evaluation of Workers	7/8/11
First Approval	7/15/11
Share Performance Documents	7/20/11
Conduct Meetings	7/25/11
Provide Final Feedback	7/30/11
Set Next Period Goals	8/30/11

5. In the **Questionnaires for the Period** region, click **Add**.
6. In the **Questionnaires for the Period** region, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

7. Repeat steps 5 and 6, substituting Worker and Colleague for Manager.
8. On the **Document Periods** tab, in the **Document Periods** region, click **Add**.
9. In the **Document Periods** region, complete the fields as shown in this table.

Field	Value
Name	2011 Performance Evaluation Second Half
From Date	7/1/11
To Date	12/31/11
Short Name	Any

10. In the **Due Dates** region, complete the due date for each task as shown in this table.

Task	Due Date
Set Goals	12/23/11
Worker Self-Evaluation	1/8/11
Manager Evaluation of Workers	1/15/11
First Approval	1/18/11
Share Performance Documents	1/21/11

Conduct Meetings	1/24/11
Provide Final Feedback	1/31/11
Set Next Period Goals	12/31/11

11. In the **Questionnaires for the Period** region, click **Add**.
12. In the **Questionnaires for the Period** region, complete the fields as shown in this table.

Field	Value
Template Role	Manager
Questionnaire Name	Any

13. Repeat steps 11 and 12, substituting Worker and Colleague for Manager.
14. Click **Save**.

Reviewing Template Settings

1. On the **Summary** tab, review the settings you entered for the template.
2. Click **Save**.

FAQs for Manage Performance Templates

What happens if I duplicate a performance template?

You have the option to copy all document period information, if it exists, including eligibility profiles, from the original template. Edit the document period name and short period name on the Document Periods tab to avoid having **Copy** in the title. If you copy periods, the new template opens, otherwise the template appears in the search results list, from where you can open it.

If the template you duplicate is in use, the **In Use** status of the copied template is set to **No** so you can edit it before making it available. When eligibility profiles are used, documents made from the template are not available until eligibility is processed.

What's a participation role in the performance template?

A role that can access the performance document created from the performance template. You must add to the template every role that is required to participate in viewing or providing ratings in the performance document. For example, if the process flow used by the template requires that managers rate workers and share the performance document, but workers do not provide ratings, you must add both the manager and worker roles.

Manage Target Ratings Distribution

Rating Model Distributions: Explained

Create a rating model distribution to set target percentages for worker overall performance ratings that your organization prefers for each rating level of a

rating model. The comparison of the target rating model distribution to the actual distribution of overall ratings managers give their workers on completed performance documents appears in the **Rating Distribution** analytic that appears on the Performance Manager Overview page. The analytic displays the number of performance documents for each overall rating provided by the manager next to the number targeted by the rating model distribution. If you do not create a rating model distribution, the **Rating Distribution** analytic appears only with the number of performance documents for each overall rating the managers provide.

When creating a rating model distribution, you specify the:

- Performance template to associate with the rating model distribution
- Percentages for each rating level in a rating model
- Dates that the rating model distribution is active

Associating a Performance Template with the Rating Model Distribution

Select a performance template to associate the rating model distribution with a particular performance template so managers can compare the overall ratings to the same rating distribution for all completed performance documents created from the template. The rating model you use for the rating model distribution is the one used by the Overall Summary section of the performance template. You can associate the rating distribution with multiple performance templates.

Important

Before creating the rating model distribution, you must create a rating model and a performance template to associate with the rating model distribution.

Defining Percentages for Each Rating Level

Define the distribution percentage of performance documents that your organization targets to achieve each overall rating level for the rating model used by the performance template. The total percentage must be 100. The table shows an example of a rating model distribution for a rating model with five levels.

Rating Level	Distribution Percentage
1	5
2	24
3	41
4	24
5	5

The application calculates the percentage of documents for the direct and indirect reports of the manager that would be expected for each rating level. Using the figures in the table as an example, consider an organization in which manager Chris Black has 200 direct and indirect reports. The table shows the overall ratings Chris awarded the reports, and the targeted number of performance documents with those rating levels according to the rating

model distribution. These are the figures that are represented in the **Rating Distribution** analytic.

Rating Level	Number of Performance Documents with Manager Ratings at Each Level	Target Number of Performance Documents for Each Rating Level
1	8	20
2	28	48
3	104	82
4	32	48
5	28	20

In this example, Chris has a lower number of performance documents than targeted for rating levels 1, 2, and 4, and a higher number of performance documents for rating levels 3 and 5.

Specifying Date Limits

Select the **From Date** to determine when the rating model distribution becomes available. You can optionally select a **To Date** to set an expiration date for the model if you want to replace it with another or discontinue using a rating model distribution. To replace it with another, select a **From Date** for the new rating model distribution later than the **To Date** of the one that expired. If you do not replace an expired rating model distribution with another, the rating model distribution does not appear in the Rating Distribution analytic, although the overall ratings the manager provides do appear.

Manage Performance and Potential Box Chart Labels

Performance and Potential Box Chart: Explained

The Performance and Potential box chart analytic gives managers a graphical view of the potential and performance ratings for their workers, enabling them to compare the workers they manage, and distinguish high and low performers. The analytic appears on both the manager dashboard and the Performance Manager Overview page.

This topic discusses describes the key points of the box chart:

- Rating models
- Performance and potential data sources
- Box cell labels
- Analytic viewing options

Rating Models

To create the box labels for the Performance and Potential box chart, you must first select the performance rating model to associate with the box chart. Select

the rating model specified in the performance templates for the overall rating of the Overall Summary section to ensure that the box chart displays the data from the performance documents created from the templates. The default performance rating model is the one selected in the **Default Rating Model for Performance Management Analytics** profile option. Use this rating model to ensure that the data appears in the analytic on the manager dashboard.

If you create a performance template that uses another rating model for the Overall Summary section, you must associate another box chart to that rating model, and create labels for that box chart, to ensure that the data appears in the analytic on the Performance Manager Overview page.

The performance rating model you select is used along the x-axis to plot performance ratings. The analytic graph uses the potential rating model defined in Oracle Fusion Profile Management for the y-axis to plot potential ratings.

The number of cells that appear on the analytic depends on the rating categories defined for the rating models you use in the analytic. The number of cells is calculated by multiplying the number of rating categories defined for the potential rating model by the number of rating categories for the performance rating model. For example, if each rating model has three rating categories, the total number of cells is: 3 x 3, or 9. If the potential rating model has four rating categories and the performance rating model has three, the total of cells is: 4 x 3, or 12.

Performance and Potential Data Sources

Performance ratings are collected from performance documents. The performance rating is the overall rating supplied by the manager in the Overall Summary section of the most recently completed performance document.

Managers rate worker potential ratings using the Career Planning portrait card and during a talent review, which could be the most recent potential rating in the worker's profile. Performance and potential ratings are maintained in Oracle Fusion Profile Management.

Box Cell Labels

You can optionally label each cell in the grid with names that describe the level. For example, if the performance and potential rating models used for the graphic display low ratings in the lower left of the grid, you could name the lower left cell Novice. The upper right cell that contains highest performers, on the other hand, could be called Top Talent.

Manager Viewing Options

On the manager dashboard, managers will see the performance and potential ratings for all workers for the most recent completed performance documents that used the performance rating model selected in the Profile Options. If a worker completed a performance document for 2010, for example, but not in 2011, the 2010 ratings appear in the analytic. If the same worker completed a performance document in 2011 that used a different rating model than the Profile Options rating model, the 2010 ratings appear in the analytic.

On the Performance Manager Overview page, managers can select the performance document for which they want to view the ratings in the analytic.

Managers can filter the view to display the data for all their reports or just their direct reports.

Define Talent Review

Talent Review: Explained

The talent review process is centered around one or more talent review meetings intended to evaluate organizational trends, assess strengths, and address areas of risk for an entire organization. The people invited to participate in the meeting, who are generally managers within the organization that is being reviewed, can review and evaluate existing profile, performance, goals, and compensation data for individuals within the organization and calibrate the data before and during the talent review meeting. The human resource (HR) specialist (or other designated HR business partner) is responsible for organizing and facilitating the meeting in conjunction with the organizational business leader.

During the talent review process, you can:

- View talent across an entire organization or filter to view population segments.
- Calibrate performance and potential ratings.
- Evaluate risk and impact of loss.
- Evaluate compensation plans.
- Create goals for workers.
- Identify, assign, and track actions throughout the review process.
- Manage talent pools and succession plans.

Data from the meeting is retained so that it can be used in future meetings to compare worker progress between talent reviews.

View Talent Across an Entire Organization or Filter to View Population Segments

During the talent review meeting participants can view a box chart representing any level of the organization to distinguish between high performers who do their job well, those with high potential who may be ready for new opportunities, and those who are performing below expectations. Participants can view them as an aggregate, or compare groups within the organization by filtering according to job, location, or other categories. Drill down to view an

individual's data, including performance and potential ratings, the worker's experience, education, licenses, certifications, and willingness to relocate.

Calibrate Performance and Potential Ratings

Based on discussions during the meeting you can create new, calibrated performance and potential ratings for a worker. This has the effect of leveling differences in evaluations between managers to give a clearer picture of the strengths and weaknesses of workers across an organization.

The performance and potential updates captured in the meeting are stored as part of the worker profile data and can be marked with the talent review as the source to distinguish it from a performance evaluation or other source.

Evaluate Risk and Impact of Loss

Compare the risk and impact of loss ratings provided by participants for workers to ensure workers in key positions can be retained. Managers can use the data to develop development plans or incentives for valuable workers who are likely to leave or whose loss would be significant. Participants can create individual development plans for workers and specific action plans to promote workers or adjust compensation.

Evaluate Compensation Plans

Review current compensation information for workers, including salary, last increase, and stock options to determine if they are compensated fairly and adequately.

Create Goals for Workers

View current goals of workers, and create performance goals that can become part of their performance evaluations, or development goals that are added to their development plans to help them increase their skill set. The goals can be tracked and updated by workers and managers on the pages where they manage their goals.

Identify, Assign and Track Actions Throughout the Review Process

Create action items and capture notes for individuals or the organization to address issues that are identified at the talent review meeting. Participants can also create special assignments for workers who are likely to leave or whose loss would be significant. Track action items using the action plan to ensure completion.

Manage Talent Pools and Succession Plans

Review talent pools and succession plans that you have added to the talent review. You can move workers to talent pools and succession plans, and update the readiness level of the workers in succession plans. You can also create new talent pools and succession plans.

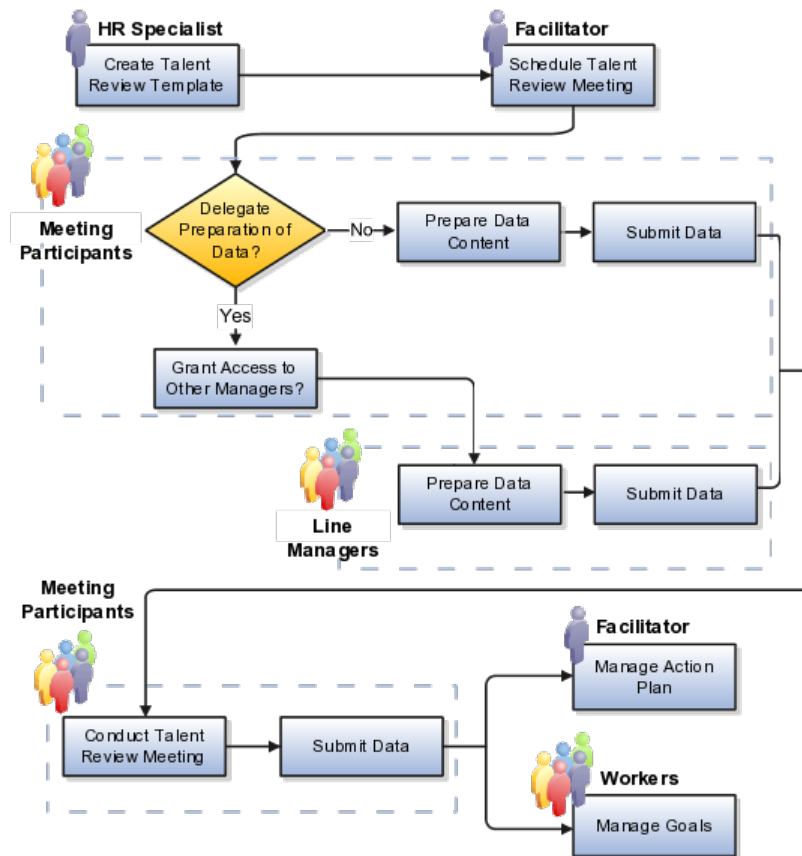
Talent Review Life Cycle: Explained

The life cycle of a talent review spans tasks from creating the meeting template through the completion of the meeting, and follow-through tasks after the meeting concludes.

The talent review life cycle includes the following tasks:

- Creating the meeting template
- Creating and scheduling the talent review meeting
- Preparing and submitting content
- Conducting the talent review meeting
- Reviewing the action plan and working on goals

The following figure shows the life cycle of the talent review. The responsibilities for the task start with the human resource (HR) specialist who begins the process, followed by a meeting facilitator and managers who provide data and participate in the meeting, and finally concluding with the facilitator, managers, and workers addressing actions or goals created in the meeting.



Creating the Meeting Template

The HR specialist creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings. On the template the HR specialist selects the rating models used to compare the ratings stored on the workers' profile record. The HR specialist also selects which data options to include in the meeting. These data options include population filters which can be used to change the population of workers showing in the meeting box chart according to characteristics such as job and location, and whether meeting participants can review workers' profile or compensation information. Data

options also include which actions can be used in the meeting, such as adding goals or using the Holding Area, and which profile data can be viewed.

Creating and Scheduling a Meeting

The individuals who are assigned to be meeting facilitators create and schedule the meeting based on one of the templates. Only people with the HR specialist role can be meeting facilitators. As part of the process, a facilitator can edit the content available to be reviewed in the meeting from the data options selected in the template. The facilitator also selects the participants who attend the meeting, and designates them as either reviewers or participants. A meeting can have multiple facilitators, any of whom can perform the required facilitator tasks.

Preparing and Submitting Content

Reviewers update and submit content about the population being reviewed before the meeting. The content, which is then available for the meeting, consists of profile data, such as performance and potential ratings, and talent scores, risk of loss and impact of loss ratings if those are used. The reviewers can use existing data, or edit it to reflect more recent information.

Reviewers can submit the data for their direct and indirect reports, or they can grant access to other managers below them in their hierarchy to submit data about their own direct reports. When reviewers submit the data, the reviewed worker profiles are updated with any changes to their profile data.

The facilitator can track the reviewers' content submission progress to be certain that they are on track to meet the submission deadline, and notify them when the deadline is approaching. Workers for whom no one submitted current data appear in the meeting Holding Area, if it is enabled. Their data can be updated during the meeting.

Conducting the Talent Review Meeting

On the scheduled date, the facilitator starts the meeting. The facilitator performs all the actions during the meeting, based on the direction of the participants. During the meeting, participants can view the box chart that plots workers according to their performance and potential scores, or talent score, and drill down to show profile and compensation details of individual workers. They can update a worker's performance or potential data, which changes the worker's location on the box chart, and compare current data to that from previous meetings. Using the Compare feature, they can compare one worker to another or to a job profile. Participants use the available population filters to view workers according to job, location, or whatever filters are enabled in the template. They can select color displays to differentiate workers according to various categories, and use the color and shape underlays to distinguish workers by impact of loss, risk of loss, and mobility ratings. They can also access the Organization chart to get the overall hierarchical view of the organization under review.

The participants can assign performance and development goals to workers, if the Oracle Fusion Goal Management business process is available. They can also add notes for further action and assign tasks to anyone in the organization as part of an action plan. They can save the meeting to continue it later, or submit it to freeze the data. Once submitted, the profile changes are updated on the workers' profile record. Goals, notes, and tasks are saved immediately when they

are created. The meeting is also autosaved periodically, and when participants perform an action that exists the Talent Review work area, such as selecting a goal to enter the Oracle Fusion Goal Management work area.

Reviewing the Action Plan and Working on Goals

After the meeting, the facilitator can review the action plan to manage and monitor the tasks. Workers can access goals assigned to them in their goal management pages.

Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation

HR specialists can set up the talent review template to allow talent reviews to integrate with:

- Profiles
- Goals
- Performance documents
- Compensation

Profiles

Talent reviews use rating models and worker profile data to plot the individuals you are reviewing on a box chart according to their performance and potential rating level scores from their individual profiles. To conduct a talent review, you must select a performance and a potential rating model in the template to set up the box chart. You can also set up a talent review to include the following rating model types: talent score, impact of loss, and risk of loss. If you use a talent score, workers are plotted according to their talent scores on the same box chart as the performance and potential scores. Participants can specify whether to view either the workers' talent scores or their performance and potential scores. Workers' impact of loss and risk of loss scores appear with other worker details.

You can set up the talent review template to include profile data from worker Experience and Qualifications cards, including competencies, degrees, languages, areas of expertise, and mobility rating.

Performance data includes the most recent rating, either from the overall rating of a performance document, or the updated rating provided before the meeting by a participant, or from the Career Planning card.

Updates made during the talent review process are also recorded on the profile record. Managers and participants can update data before the meeting as well as during the meeting. The updated data is recorded on the worker profile, and marked as provided by the talent review using instance qualifiers.

Goals

In a talent review, participants can view the current performance and development goals of the individuals being reviewed, if Oracle Fusion Goal

Management is available. Participants can create and assign new goals during the talent review meeting, or select and assign goals from the goal library. The workers, and their managers, can view their assigned goals on their goal management pages, where they can add performance goals to performance documents, and add development goals to development plans.

Performance Documents

You can set up the talent review template to include performance details so that participants can view the worker's overall ratings and comments provided by the manager in the performance document for the most recent performance evaluation. Participants can also view a history of the three most recent performance documents, and open the completed documents directly from the talent review.

Compensation

You can set up the talent review template to make worker compensation data available to view in the meeting. The compensation data that appears includes salary, variable compensation, and stock grant information.

FAQs for Define Talent Review

How can I diagnose any issues with Oracle Fusion Talent Review data?

After populating the Oracle Fusion Talent Review data tables, you can run the Talent Review Integrity Validations test from the **Help - Supportability** menu. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Talent Review, the test validates three categories of data integrity:

- **Business Group Validation:** The test checks to ensure that the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Row Count Validation:** The row count on the setup tables must be greater than 0.

Configure Talent Review Dashboard Options

Talent Review Template: Explained

The talent review template controls the layout of the box chart used to display worker ratings and the data elements and actions available during the talent review meeting. The human resource (HR) specialist creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings.

Using templates for a talent review enables you to:

- Create templates targeted for specific enterprise requirements
- Specify the maximum number of person records
- Select rating models to determine design and layout of the box chart
- Select data options to make available for a meeting

Creating Templates Targeted for Specific Enterprise Requirements

You can create as many templates as required for your enterprise. If your enterprise uses a standardized process for your talent review meetings across organizations and regions, you may require only one template that can be used for multiple meetings. If your enterprise employs a decentralized talent review processes, you can configure templates to customize talent review meetings by industry, region, or organization.

Use the following questions to determine when more than one template may be required:

- Does your enterprise use a standard set of rating models for performance, potential, risk of loss, impact of loss, and talent score? If so, then a single template may suffice. If different rating models are used within organizations or geographic regions, then separate templates are required.
- Do you use a standard configuration for the box chart throughout the enterprise? If so, you can use one template. When different configurations are required, for example, by separate organizations or geographic regions, separate templates are required. This would be the case, for example, if one organization used a nine-box configuration, while another used a six-box configuration.
- Do industry or legislative rules governing the use of data related to age, gender, ethnicity, or religious affiliation, vary by organization or geographic region? If so, then separate templates are required to cover the rules for each organization or region.
- Does your enterprise review compensation data at certain levels of the organization or for some talent review meetings, but not at others? If so, then separate templates are required.

Specify the Maximum Number of Records

The value for the maximum number of records represents the number of workers in the review population, multiplied by the number of meetings that are available to view in the meeting. The maximum number of meetings you can view in a meeting is three: the current meeting, and up to two prior meetings. You must enter a value to accommodate all the workers in the expected review population for meetings created using the template. If you enter a value that is too low, you will restrict the number of workers you can select in the review population. For example, if you plan to use the template to evaluate an organization of 500 workers and view two prior meetings, enter a value of at least 1500 for the maximum number of records.

Select Rating Models to Determine Design and Layout of the Box Chart

On the template you select the rating models used in the box chart to compare the performance and potential ratings stored on the workers' profile record. The number of rating categories associated with your performance and potential rating models determines the dimensions of the box chart, for example a nine-box or six-box configuration. If your organization has set up a talent score rating model and uses it to rate workers, you can also select to include talent scores to compare workers in the meeting.

After selecting the rating models, you can enter labels for each cell in the box chart to help categorize workers with similar ratings who appear in each cell.

Select the Data Options to Make Available for a Meeting

When creating the template, you select which data options to make available for a meeting. These data options include filters which can be used to change the population of workers showing in the meeting box chart according to characteristics such as job and location, and whether meeting participants can review workers' performance evaluation, goal, profile or compensation information. Data options also include which actions can be used in the meeting, such as adding goals or using the Holding Area or potential assessment, and which diversity-related information, such as ethnicity, gender, and age, can be viewed. When creating a meeting from the template, the facilitator can choose to make some of the data options unavailable for the meeting.

Selecting Rating Models for the Talent Review: Critical Choices

To configure a talent review, you must select both a performance and potential rating model to display, evaluate, and calibrate worker ratings. You can also use additional rating models to rate workers. You must decide which rating models to use for:

- Performance and potential
- Talent score
- Risk of loss and impact of loss

Note

You must set up rating models in Oracle Fusion Profile Management to make them available for the talent review.

Performance and Potential

You must select both a performance and potential rating model to associate with the talent review template. The performance and potential rating models are used in the talent review meeting to plot worker ratings on the Performance and Potential box chart. The rating models you select are used in any talent reviews created using the template.

When you select rating models that were used to provide current worker ratings, any workers who were rated using the same rating models you selected for the template appear on the Performance and Potential box chart. For example, a worker for whom a manager provided an overall performance score on a performance document using the same performance rating model as the talent review, and also a potential score on the **Career Planning** card using the same potential rating model as the talent review, appears on the box chart.

Any workers who were rated using a different rating model, or those for whom no ratings exist, do not appear on the box chart, but in the Holding Area of the talent review. These could include, for example, a worker who recently transferred from one organization that uses one performance rating model to another organization within your enterprise that uses a different performance rating model.

Showing Progress Between Meetings

When creating a meeting, the facilitator can set it up to show progress for worker ratings between this meeting and previous meetings. Only meetings facilitators create from templates that use the same performance and potential rating models are available to show progress between meetings.

Updating Worker Ratings to Appear on the Box Chart

Before the talent review meeting, participating managers who are designated as reviewers can update worker ratings on the **Prepare Review Content** page to provide any ratings that are missing or were provided using a different rating model than that used for the talent review. On that page, reviewers also have the opportunity to update the talent score, risk of loss, and impact of loss ratings. The revised performance, potential, and talent review ratings are used in the talent review to plot the workers on the box chart. Meeting participants can also rate workers during the talent review meeting.

Determining the Box Chart Dimensions

You can set the performance and potential rating models to appear either on the Y-axis or X-axis. The number of rating categories contained in each rating model, along with which axis you select to place the rating model on, determines the box chart dimensions and how the cells are arranged.

For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six cells (2 x 3). The box chart is two cells wide (the performance rating model) and three cells tall (the potential rating model).

Talent Score

The talent score is useful to differentiate and score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, learning agility, or whatever criteria your enterprise uses to rate workers beyond their performance and potential. The talent score is optional in the talent review.

Worker talent scores appear separately from performance and potential scores on the box chart. Because talent scores are tied to a single rating value they are

mapped to a specific box on the box chart and do not require a rating category. However, the number of rating levels available in the talent score rating model must match the number of cells in the Performance and Potential box chart. For example, if the Performance and Potential box chart has nine cells, the talent score must have nine rating levels so that the talent scores and cells can map in a one-to-one correspondence.

Once you select the talent score rating model, you select the rating value to place in each cell. If your Performance and Potential box chart has nine cells, for example, and talent scores ranging from 1 (lowest) to 9 (highest), you can select rating level 1 for the lower left cell of the chart, and rating level 9 for the upper right. You must determine which talent scores to place in the cells based on your organization's business rules.

Risk of Loss and Impact of Loss

Select either, or both, risk of loss and impact of loss rating models to enable you to specify these values to be included as analytic options in the talent review template and available in the meeting. The ratings appear in the details displayed for each worker, and also appear on the Performance and Potential box chart with different colors or shapes to distinguish each worker's value.

Talent Review Data Options: Points to Consider

You determine which data and actions to make available to participants in a talent review meeting by setting it up in the template used to create the meeting. The facilitator can further restrict most template options when creating and scheduling a meeting.

When you decide which data options and actions to make available in a template, consider what information you want to expose to the meeting participants. For example, for a meeting of high-level managers, you may want to show compensation data, but not in meetings that include lower-level managers. Your organization may also have policies requiring that certain data, such as age or religion, not be exposed to others. You must decide the options and actions to include from the following types:

- Analytic
- Detail-on-demand
- Population filters
- Action
- Color code

Analytic Options

Analytic layers provide visual representations, using shapes and colors, of key data points tied to a worker's risk of loss, impact of loss, and mobility on the performance and potential box chart. Up to two of these can be selected at one time during the meeting.

These options are available only if rating models exist for risk of loss and impact of loss, and a mobility content type exists to show the worker's willingness or ability to relocate. There are seeded values for each of these in Oracle Fusion Profile Management.

Detail-on-Demand Options

The details-on-demand appear in a dialog that the facilitator can open during the meeting. The details show data for the individuals being reviewed and allow actions to be taken on goals and notes. The table shows the effect of selecting the options.

Detail-on-Demand Option	Effect
Notes	Meeting participants can view notes created by the worker's manager during the content preparation phase before the talent review, and capture and use notes during the meeting.
Compensation Plan Details	Meeting participants can view details about a worker's compensation, including salary, last increase, compa-ratio, stock options, and more. Oracle Fusion Compensation Management must be available to use this option.
Development Plan	Meeting participants can view and edit a worker's current performance and development goals and add additional goals either from the goal library or those created ad hoc. Workers and managers can access the pages on their goal management pages. Oracle Fusion Goal Management must be available to use this option.
Kudos	Meeting participants can view kudos received by a worker from others in the organization.
Performance Details	Meeting participants can view the overall performance ratings for the three most recent performance documents of a worker.
Profile Details	Meeting participants can view profile data from the worker's Experience and Qualifications profile card. These include areas of expertise, competencies, accomplishments, degrees, hobbies and pastimes, and languages.

Population Filters

Population filters let meeting participants control the number of workers who appear on the box chart during the talent review meeting. They can use the filters to view segments of large review populations, and focus on critical segments, such as workers in key jobs or locations.

Action Options

Select action options to make actions and tasks available on the Actions section of the talent review dashboard. The table describes the available options and the consequences of selecting them.

Action Options	Effect
Add Task	The facilitator can assign tasks to meeting participants or others in the organization. The tasks become visible as part of the action plan the facilitator uses after the meeting to follow up on the assigned tasks. The tasks also appear on the work list of the person to whom the task is assigned.
Add Goal	The facilitator can assign goals from the goal library, or create ad-hoc goals, during the review meeting, for the workers being reviewed. Oracle Fusion Goal Management must be available to use this option.
Enable Holding Area	The Holding Area displays workers who have no ratings for performance, potential, or both, at the start of the meeting. During the meeting, participants can also move workers to the Holding Area who are plotted on the box chart. If you do not enable the Holding Area, workers who are not rated at the start of the talent review meeting will not be included in the review.
Enable Compare	With the Compare feature, a worker can be compared to other workers or a job profile.
Enable Organization Chart	Participants can access the Organization chart to get the overall hierarchical view of the organization under review.
Enable Potential Assessment	Reviewers can use the potential assessment, created and edited by the facilitator, as an alternative to selecting a numeric value for the potential rating by responding to detailed questions. The potential rating is calculated automatically based on the responses. Reviewers access the potential assessment on the Prepare Review Content page before the meeting.

Color Code Options

Color code options allow participants to highlight specific segments of the review population according to the selected options, and show the average performance and potential ratings and talent scores for all workers within that option.

For example, if you select **Location** on the template, participants will see blue icons representing individual workers in one location, while workers in another location are shown as red, and still another location as green. If you select the **Show average** check box, a blue marker appears on the box chart representing the average performance and potential for all workers in one location, and red and green markers appear representing the average for workers in those locations.

Potential Assessment: Explained

Talent review meeting reviewers can use a potential assessment to rate the potential of workers who are part of the review population of a talent review.

Reviewers can use the potential assessment as an alternative to selecting a numeric value for the potential rating by responding to detailed questions you create to help assess workers. The potential rating is calculated based on the responses. Reviewers access the potential assessment on the Prepare Review Content page before the meeting, and the potential ratings are available to view during the meeting.

The reviewer can use the calculated rating, select a different rating, or complete the potential assessment again to calculate a new rating. The rating is updated in the worker profile when the reviewer submits the Prepare Review Content page.

Calculating the Potential Rating with the Potential Assessment

To calculate the worker potential rating, the potential assessment uses two predefined rating models. The Potential Assessment rating model is used to determine the value for each response. The Potential rating model determines the final potential rating based on the total value of the responses.

The potential assessment contains a set of questions with responses associated with the Potential Assessment rating model. The Potential Assessment rating model contains three rating levels, one for each possible response to the questions. Each rating level has a numeric rating. The predefined responses and their values are:

- Strongly Agree: 3
- Agree: 2
- Disagree: 1

The Potential rating model also has three rating levels. Each rating level is associated with a range of review points. This table shows the rating levels for the Potential rating model, the short description that describes the rating level, and the review points for each level.

Rating Level	Short Description	Points Range: From Points	Points Range: To Points
1	High	21	99
2	Medium	14	20
3	Low	0	13

When the reviewer completes the potential assessment, the total value of the selected responses is calculated using the Potential Assessment rating model levels. The calculated total is compared to the range of review points in the Potential rating model to determine which rating level it maps to. The final potential rating is the rating level that corresponds to the total review points.

For example, assume the potential assessment has eight questions. Since every question must be answered for the potential assessment to be valid and the lowest possible rating value for each question is 1, the minimum score is 8. The maximum score is 24. If the sum of the reviewer's selections is 16, that corresponds to the points range of 14-20. The associated rating level is 2 for that points range, so the final potential rating is **2-Medium**.

Enabling the Potential Assessment

On the talent review template, you select whether to enable reviewers to access the potential assessment.

Creating and Editing Potential Assessments

The potential assessment is a predefined questionnaire with eight questions and responses already configured. However, you can edit the existing potential assessment, or create a new one, to create, add or remove questions and responses. You access the potential assessment from the Facilitator Overview page. Only questions that allow a single response (radio button or single choice) and the Potential Assessment rating model can be used in a potential assessment.

You can also edit the predefined rating models to add or change rating levels or review points. To edit the rating models, use the Manage Profile Rating Models task in the Setup and Maintenance work area.

To create or edit a potential assessment or the associated rating models do the following:

1. (Optional) Edit the Potential Assessment rating model to add, remove, or update rating levels.
2. On the Facilitator Overview page, click the **Manage Potential Assessment** link to access the Potential Assessment. On the dialog that appears, select the option to either create a new questionnaire, or update the existing one.
3. On the Edit Questionnaire Basic Information page, edit the questionnaire attributes as required.
4. On the Edit Questionnaire Contents page, create, add or remove questions, and edit the short descriptions or other page attributes as required. To create a question, select the row below which you want to insert the question, then click **Create**. To change question order, select a question and drag it to the desired location. If you changed the number of rating levels in the Potential Assessment rating model, you must remove all the questions and create or add new ones to associate with the updated rating levels.
5. If you updated or created a potential assessment so it contains a different number of questions than the existing potential assessment, review the Potential rating model review points. You may need to edit the review points range for each rating level to reflect the number of questions and possible maximum and minimum scores in the potential assessment.

Define Succession Management

Succession Management: Explained

Succession management enables your organization to develop and maintain succession plans to determine who will eventually replace personnel currently in key positions. You can also track and manage employees in talent pools. Using the Oracle Fusion Succession Management business process, you can determine who is ready to transition to positions before the positions are vacant to ensure a smooth transition, and provide visibility to the appropriate individuals to manage the process.

Selecting the Succession Plan Type

You can create two types of succession plans: Job or Position, or Incumbent.

The Job or Position plan type allows you to create plans to ensure one or more potential candidates have been identified to fill a key role or position. You can create a plan to cover a particular job in a specific business unit of department, or throughout an entire organization.

Use the Incumbent plan type to create a plan to replace a particular individual.

Determining Candidate Readiness

Succession plans give you the ability to specify a candidate's readiness to assume a job or position. You can use criteria such as time frames or number of experiences, depending on how your organization determines candidate readiness. You select a readiness level based on your knowledge of the candidate and whether the candidate has gaps between their current competencies and the skills required for the new position. By selecting time frames or other criteria for candidates, you can determine the bench strength for the position and your organization. You can add additional candidates if you have too narrow a pipeline.

Associating Talent Pools with Succession Plans

You can associate talent pools with succession plans to track and manage the development of candidates. Because you can add development goals to a talent

pool, associating one with a succession plan enables you to create goals for the candidates that will help prepare them for the job or position for which the plan has been created. You can associate a succession plan with multiple talent pools. A talent pool can also be associated with multiple succession plans. You are not restricted to adding members to a plan only from associated pools.

Accessing Succession Plans

Succession plans can be viewed and edited in the Succession Plans work area, or in a talent review meeting. To view or edit a particular plan in the Succession Plans work area, you must be an owner. Owners for a plan are selected when the succession plan is created or edited.

Talent review meeting facilitators can configure meetings to enable succession plans and talent pools to be available in the meeting. In the meeting, facilitators, taking direction from meeting participants, can create new succession plans, and view and edit plans to add candidates and determine their readiness. They can also view talent pools and add members to the plans.

Creating and Updating Succession Plans: Examples

Use succession plans to ensure the smooth transition from one incumbent in a position to the next. These examples illustrate scenarios for creating and managing succession plans for different circumstances.

Creating a Succession Plan for a Job

A vice-president of InFusion Corporation informs you that the current Channel Sales vice-president of the North American division, Janson Ma, is being groomed to be promoted within a year. On the Organization chart, you see that the Channel Sales vice-president position has no current succession plan. As the human resource specialist, you are charged with creating a succession plan for the Channel Sales VP of North America position. Your organization requires that only current sales directors are eligible to succeed Janson.

On the Succession Management Overview page you create a plan to reflect this position in North America. For the plan type, you select **Job or position** as the plan type, and select the North America business unit. As per your directive, from the Select Candidates page, you search for and add candidates to the plan who are directors of channel sales from locations throughout the world. You rate the candidates according to their readiness, and note their risk of loss to determine if they are expected to be around long enough to be attractive candidates. For those currently living outside the region, you also note their willingness to relocate, particularly, since they must work in North America. You delete any candidates who are either at high risk of loss or unwilling to relocate.

Creating a Plan for Multiple Positions

InFusion organization has many outlets throughout North America, each of which requires a general manager. Each year the organization loses 10 percent of its general managers as a result of promotion or attrition. As a result, the organization needs a steady supply of candidates to succeed incumbents who

currently occupy the general manager positions. A talent review meeting is coming up for the organization in which candidates will be evaluated and discussed to fill a current opening.

You create a succession plan for the **Job or position** plan type, and select **General Manager** as the job. There is an existing talent pool for general manager position that you associate with your succession plan. You select the option to include plan candidates in the pool to ensure that any new candidates you add are added automatically to the associated talent pool. You add candidates from the existing talent pool, and also select others who are not yet in it. For the candidates with whom you are familiar, you determine both their readiness level and rate their risk and impact of loss. When you schedule the talent review meeting, you associate both the succession plan and talent pool to the meeting so they appear on the meeting dashboard. During the meeting, any candidates who are part of the review population of the meeting will be thoroughly rated, and additional candidates will be added. The meeting participants determine that Elizabeth White is the candidate who is best qualified and decide to offer her the open position. After Elizabeth accepts the offer, you remove her from the plan, but keep it open to add new candidates and update it for future vacancies.

Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

Using talent pools and succession plans with talent review meetings enables you to manage workers' career progressions and plan for vacancies in key jobs and positions.

Talent Pools and Succession Plans

Talent pools enable you to group workers for the purpose of managing their development, training, and other goals. Succession plans enable you to group candidates and track their readiness to move into a specific job, position, or to replace an incumbent. Talent pools can be used either with or without succession plans.

You typically use talent pools without succession plans, so that you can track workers' development, but that development is not tied to a particular role. For example, InFusion Corporation maintains talent pools to track how their high-potential workers are progressing, but the workers will eventually move in various directions at various rates.

You can use talent pools with succession plans in situations where you want to track development progress of workers as potential candidates for a specific job, position, or incumbent. For example, HR specialists at InFusion Corporation maintain a talent pool of sales people who have demonstrated high potential for moving into the role of a sales director. The HR specialists assign goals for training and other development needs to this group of workers and track their progress during talent review meetings each year. When they learn that the incumbent of the Sales Director- Western Region is planning to retire in the next six months, they decide to set up a succession management plan for the incumbent. They add candidates to this plan using members of the talent pool for sales people that they have been managing. When adding the talent pool members to the succession plan, the HR Specialist can assess the readiness

level of each worker and determine the workers who will be the most qualified candidates to replace the incumbent.

Talent Review

When you set up a talent review meeting, you can associate succession plans and talent pools with the meeting. During the meeting, the selected talent pools and succession plans appear on the meeting dashboard, and you can drag and drop workers from the grid to a talent pool or succession plan. You can also add workers to a succession plan or talent pool that is not associated with the meeting. However, the list of available plans or pools is restricted to ones for which the meeting facilitators are listed as the owner.

You can also create new talent pools and succession plans from the meeting dashboard. If you create a new succession plan or talent pool, you must exit the meeting dashboard and add the newly created pool or plan to the meeting for it to appear on the meeting dashboard.

FAQs for Define Succession Management

What happens if I remove a readiness level?

If you remove a readiness level that is in use for succession plan candidates or talent pool members, their readiness level is changed to **No Readiness Available**. Plan or pool owners can change the readiness level to one that is available.

Define Transactional Business Intelligence Configuration

Define Transactional Business Intelligence Configuration: Highlights

Configure Oracle Transactional Business Intelligence for ad hoc reporting, review certain setup objects to be used in Transactional Business Intelligence, and manage the presentation catalog and currency type display.

Defining Transactional Business Intelligence Configuration

- Review details about the Transactional Business Intelligence tasks. Refer to the Oracle Fusion Transactional Business Intelligence Administrator's Guide.

Assigning Security Profiles to Job Roles for Oracle Fusion Transactional Business Intelligence Users: Explained

Users of Oracle Fusion Transactional Business Intelligence (Transactional Business Intelligence) need access to some person data for reporting purposes. To provide this access, you assign a predefined security profile to relevant job or abstract roles using the Oracle Fusion Human Capital Management (HCM) setup task Manage Data Role and Security Profiles. On completion of this task, Oracle Fusion Data Security is updated automatically for roles being used to access Transactional Business Intelligence.

Job or Abstract Roles and Related Security Profiles

The following table identifies, by Oracle Fusion product, the job and abstract roles that need access to person data and the predefined security profile that you assign to each role.

Product	Job or Abstract Role	Security Profile
Oracle Fusion Assets	Asset Accountant	View All Workers
Oracle Fusion Assets	Asset Accounting Manager	View All Workers
Oracle Fusion Enterprise Planning and Budgeting	Budget Analyst	View All Workers

Oracle Fusion Enterprise Planning and Budgeting	Budget Manager	View All Workers
Oracle Fusion Financial Consolidation Hub	Consolidation Accountant	View All Workers
Oracle Fusion Financial Consolidation Hub	Consolidation Manager	View All Workers
Oracle Fusion Financials Common Module	Intercompany Accountant	View All Workers
Oracle Fusion General Ledger	Financial Analyst	View All Workers
Oracle Fusion General Ledger	General Accountant	View All Workers
Oracle Fusion General Ledger	General Accounting Manager	View All Workers
Oracle Fusion Incentive Compensation	Incentive Compensation Participant Manager	View Manager Hierarchy
Oracle Fusion Inventory Management	Warehouse Manager	View All Workers
Oracle Fusion Project Foundation	Project Accountant	View All Workers
Oracle Fusion Project Foundation	Project Administrator	View All Workers
Oracle Fusion Project Foundation	Project Billing Specialist	View All Workers
Oracle Fusion Purchasing	Buyer	View All Workers
Oracle Fusion Sourcing	Category Manager	View All Workers
Oracle Fusion Sourcing	Sourcing Project Collaborator	View All Workers

For example, as part of their Transactional Business Intelligence setup:

- Oracle Fusion Assets implementors must assign the predefined security profile View All Workers to the Asset Accountant and Asset Accounting Manager job roles.
- Oracle Fusion Incentive Compensation implementors must assign the predefined security profile View Manager Hierarchy to the abstract role Incentive Compensation Participant Manager.

The security profiles that HCM roles need to access Transactional Business Intelligence are assigned during the setup of HCM data security: no additional setup is required for Transactional Business Intelligence purposes.

Enabling an Oracle Fusion Transactional Business Intelligence User to Access Person Data: Worked Example

This example shows how to assign a security profile to a job or abstract role to enable users with that role to access person data. This task is required for users of Oracle Fusion Transactional Business Intelligence (Transactional Business Intelligence) who do not also use Oracle Fusion Human Capital Management (HCM).

The following table summarizes key decisions for this scenario. When performing this task, use the job or abstract role for your product and the name of the relevant predefined person security profile in place of those shown here.

Decisions to Consider	In This Example
What is the name of the Transactional Business Intelligence job or abstract role?	Warehouse Manager
What is the name of the person security profile?	View All Workers

Summary of the Tasks

To perform these tasks, you must have the role IT Security Manager.

1. Launch the task Manage Data Role and Security Profiles.
2. Search for the job or abstract role.
3. Assign the relevant predefined security profile to the job or abstract role.

Launching the Task Manage Data Role and Security Profiles

1. On the Overview page of the Setup and Maintenance work area, click the **All Tasks** tab.
2. In the Search region, complete the fields as shown in this table:

Field	Value
Search	Tasks
Name	Manage Data Role and Security Profiles

3. Click **Search**.
4. In the search results, click **Go to Task** for the Manage Data Role and Security Profiles task.

Searching for the Job or Abstract Role

1. On the Manage HCM Data Roles page, enter the job name Warehouse Manager in the **Role** field.
2. Click **Search**.
3. In the search results, highlight the entry for the Warehouse Manager job role.
4. Click **Assign**.

Assigning the Security Profile to the Job Role

1. In the **Person Security Profile** field on the Assign Data Role: Security Criteria page, select the security profile View All Workers.
2. Click **Review**.
3. On the Assign Data Role: Review page, click **Submit**.

Define Predictive Models for Human Capital Management

Managing Predictive Models: Explained

Oracle Fusion Workforce Predictions provides predefined models for the prediction of worker performance and voluntary termination. Each predictive model is based on multiple attributes.

You can:

- Run predictive models to provide up-to-date predictions.
- Remove individual predictive models from the predictions process.
- Remove individual attributes from the predictive models or what-if analyses.
- Create predictive attributes to include in the predefined predictive models or what-if analyses.

Running Predictive Models

When you run a predictive model, the process Collect Data and Perform Data Mining for Predictive Analytics is invoked immediately to:

- Rebuild the selected predictive models.
- Make predictions based on scores derived during the build process.

If the volume of relevant transactions (such as transfers, hires, terminations, and promotions) is high in your enterprise, then you need to schedule the process Collect Data and Perform Data Mining for Predictive Analytics to run weekly. At a minimum, you are recommended to run the process monthly to take account of latest data trends. When scheduled, the process rebuilds and runs all predictive models.

If you add attributes to or remove attributes from a predictive model, and you want to include those changes in predictions immediately, then you need to run the predictive model immediately rather than wait for the next scheduled run of Collect Data and Perform Data Mining for Predictive Analytics.

Removing Predictive Models

To remove a predictive model from the predictions process, you deselect the **Include in Predictions** option for the model. In this case, the model is excluded when you run Collect Data and Perform Data Mining for Predictive Analytics, whether you run it immediately or as a scheduled process. Consequently, related analytics in transactional flows, such as Promote Worker, are empty.

Creating and Editing Predictive Attributes

You can create predictive attributes to include in the predefined predictive models. To derive the value of the new attribute, you create a fast formula database item (DBI) group and select it in the **Formula Function** field. You can also control which predefined and locally created predictive attributes appear in what-if analyses.

In SaaS (Software as a Service) environments, you cannot create formula functions; therefore, you may not be able to create predictive attributes.

You can edit or delete any predictive attribute that you create; you cannot edit or delete predefined predictive attributes. For any attribute, you can edit how the attribute appears in what-if analyses. For example, you can change the minimum and maximum values on a slider scale.

Define Extensions and Page Customizations for Workforce Development

Define Custom Enterprise Scheduler Jobs

Managing Job Definitions: Highlights

Oracle Enterprise Scheduler jobs are run in Oracle Fusion Applications to process data and, in some cases, to provide report output. A job definition contains the metadata that determines what the job does and what options are available to users who run the job. You can create and maintain job definitions for use in Oracle Fusion Applications.

Managing job definitions is fully described in the Oracle Fusion Applications Administrator's Guide. As you read content from that guide, note that the guide describes managing Oracle Enterprise Scheduler, including job definitions, from Oracle Enterprise Manager Fusion Applications Control. You can also access job definitions by starting in the Setup and Maintenance Overview page and searching for the Enterprise Scheduler job tasks for your applications.

Selecting the Appropriate Implementation Task

Each Enterprise Scheduler job definition task uses one Java EE application, which is referenced in the task name. You must use the right task because, to access the product job definition that you want to view or work on, the view objects must be contained in the application. If you do not select the right task, then the job definition will not be displayed properly or function correctly. The application name is usually the same as the product that the job definition belongs to, but not always.

- For example, the Oracle Fusion Payables Java EE application contains the Oracle Fusion Expenses product view objects. To create or maintain a job definition for use in Expenses, you select the Manage Custom Enterprise Scheduler Jobs for Payables and Related Applications task.
- In another example, the Oracle Fusion Payments product view objects are contained in both Oracle Fusion Payables and Oracle Fusion Receivables

Java EE applications. You need to select the task appropriate to the job definition for Payments. Use the Manage Custom Enterprise Scheduler Jobs for Receivables and Related Applications task if the job is for receivables functionality, or the Manage Custom Enterprise Scheduler Jobs for Payables and Related Applications task if the job is for payables functionality.

- Use the task description to see the products that correspond to the Java EE application specified in the task name. For example, the description for the Payables task lists Oracle Fusion Payables, Assets, Expenses, and Payments.
- You can view task descriptions in the help window for the task, if any, or in the generated setup task lists and tasks report from the Getting Started page.
- If you have access to the Manage Task Lists and Tasks page, you can also open the details for specific tasks to see the description.
- For general information about product and Java EE application relationships, use Oracle Enterprise Manager Fusion Applications Control (Fusion Applications Control).

See: Topology Section

Viewing and Creating Job Definitions

- You can access predefined and custom job definitions.

See: Viewing Job Definitions

- You can create jobs based on Java, PL/SQL, or any other supported technology.

See: Creating a Job Definition

- If you are using the Setup and Maintenance work area, then the Enable submission from Enterprise Manager check box is available for the job definition.
- If you do not select this check box, then the job cannot be run from Enterprise Manager.
- If you select this check box, then you can define parameters for this job definition only in Enterprise Manager. Save the rest of your work on the job definition, and then go to Enterprise Manager if you need to define parameters.

Managing List of Values Sources: Highlights

A list of values source for Oracle Enterprise Scheduler job definitions determines where a list of values comes from and what the specific values are. These lists of values are used in parameters and user properties of job definitions. For example, you can use a source of country values for a Country job parameter.

Managing list of values sources is fully described in the Oracle Fusion Applications Administrator's Guide. As you read content from that guide, note that the guide describes managing Oracle Enterprise Scheduler, including

list of values sources, from Oracle Enterprise Manager Fusion Applications Control. You can also access list of values sources by starting in the Setup and Maintenance Overview page and searching for Enterprise Scheduler job tasks.

Registering and Searching for List of Values Sources

- Create list of values sources to register them for use in job definitions.

See: Registering Sources for Lists of Values

- Search for list of values sources to edit or delete, or to make sure a particular source does not already exist before you create it.

See: Searching for List of Value Sources

Customization and Sandboxes

Customizing Pages Using Oracle Composer: Highlights

You can customize dashboards and some work areas, where available, for all or some users based on a selected customization layer, for example only for users in a specific country or with a specific job role. When you select to customize a page from the **Administration** menu in the global area, you invoke Oracle Composer, which enables the customization. The Administration menu is only available if you have appropriate roles.

From the same menu, you can also:

- Customize the global area.
- Access the Customization Manager, which displays a list of components in the current page and details about the layers in which each component is customized.
- Access sandboxes from the Administration menu, to make customizations to a runtime use session before deploying your changes to the mainline.

Customizing pages using Oracle Composer, the Customization Manager, and sandboxes are described in the Oracle Fusion Applications Extensibility Guide.

Editing Pages

- Customizations that you can make to existing pages include adding content and changing layout.

See: Editing a Page in Oracle Composer

- You can also update display and other options for specific components within the page.

See: Editing Component Properties in Oracle Composer

Global Page Template

- Customize the global area at the site layer.

See: Editing the UI Shell Template Used by All Pages

Customization Manager

- Use Customization Manager to analyze and diagnose customization metadata, and to perform customization related tasks that cannot be done in the user interface, for example to revert customizations to a previous version. You can also do direct customization by manipulating the metadata and uploading it back.

See: Using Customization Manager to Manage Runtime Customizations

Sandboxes

- Create or select an appropriate sandbox, and set it as active to capture your customizations using Oracle Composer. When you are ready, you publish the sandbox to make your changes available to users.

See: Using the Sandbox Manager

Sandboxes: Highlights

Use a sandbox to commit customizations to a runtime use session for validation before deploying changes to the mainline. Administrators create and manage sandboxes. An active sandbox isolates changes from the mainline and other users.

Sandboxes can contain the following types of customization changes.

- Metadata, such as non-flexfield UI page customizations
- Data security
- Generated flexfields business components

Metadata changes are captured in a metadata sandbox. Data security changes are additionally captured in a data security enabled sandbox. Changes to a flexfield are captured in a flexfield that is deployed as a single flexfield sandbox. Once you are ready to make sandbox changes available in the mainline, you either publish the metadata or data security sandbox, or deploy the flexfield. Only metadata and data security sandboxes can be downloaded as a sandbox file for import to another Oracle Fusion Applications instance.

The following table lists the differences among the types of sandboxes.

Type of Changes	Type of Sandbox	Method for Making Changes Available in Mainline	Downloadable?
Metadata	Sandbox	Publish sandbox	Yes
Data security	Sandbox enabled for data security changes	Publish sandbox	Yes
Flexfield	Flexfield deployed as a flexfield-enabled sandbox	Deploy flexfield	No

Only one sandbox can be active at a time. Changes made while a sandbox is active are captured in that sandbox.

For more information on using the Sandbox Manager, and customizing and securing pages, business objects, data, and custom objects in a sandbox, see the Oracle Fusion Applications Extensibility Guide.

Managing a Page Customization Sandbox

You can make metadata (MDS) type changes in a sandbox, including menu customizations, changes to the personalization menu, implicit ADF customizations, or changes made with Oracle Composer or CRM Application Composer.

- If you are entitled to do so, manage sandboxes in the Sandbox Manager.

See: Using the Sandbox Manager

- Implement customizations on an existing page to change the metadata of a sandbox before deploying the changes to the mainline.

See: Customizing Existing Pages

- Using CRM Application Composer, customize business objects in a sandbox before deploying the changes to the mainline.

See: Customizing Objects

Managing a Data Security Sandbox

You can create a sandbox for data security testing, or designate an existing sandbox to become enabled for data security testing.

- If you are entitled to do so, manage data security-enabled sandboxes in the Sandbox Manager.

See: Using the Sandbox Manager

- If you customize business objects in CRM Application Composer, you may need to define data security policies to make them accessible to users.

See: Defining Security Policies for Business Objects

- If you create new business objects, you need to secure them.

See: Customizing Security for Custom Business Objects

Managing a Flexfield Sandbox

You create a flexfield-enabled sandbox by deploying one flexfield to a sandbox using the Manage Flexfield task flow. The flexfield sandbox gets its name from the flexfield you deploy. You cannot test two flexfields in the same sandbox. Once you deploy a flexfield as a sandbox, you must sign out and back in to view how the sandbox runtime reflects the flexfield changes, such as new segments. You can redeploy the same flexfield to the same sandbox repeatedly as you make incremental changes to the flexfield setup.

- Since a flexfield sandbox cannot be published, any page customizations or data security in the flexfield sandbox cannot reach the mainline when the flexfield is deployed to the mainline. If you have entitlement to do so, see *Deploying a Flexfield to a Sandbox: Points to Consider*.
- If you are entitled to do so, manage flexfield-enabled sandboxes in the Sandbox Manager.

See: *Using the Sandbox Manager*

Importing and Exporting Setup Data

Configuration Packages: Explained

Almost all Oracle Fusion application implementations require moving functional setup data from one instance into another at various points in the lifecycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations of applications from one application instance into another by exporting and importing Configuration packages from the Manage Configuration Packages page.

A Configuration Package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. When you create a configuration package only the setup export and import definition exists. Once you export the configuration package appropriate setup data is added to the configuration package using the definition. Once a configuration package is exported, the setup export and import definition is locked and cannot be changed.

You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determine the export and import sequence.

Exporting and Importing Setup Data: Explained

A configuration package is required to export setup data. You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data will be identified based on the setup export definition and added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. After the export completes, you can download the configuration package as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it.

Export

You can export a configuration package multiple times by creating multiple versions. While the export definition remains the same in each version, the setup data can be different if you modified the data in the time period between the different runs of the export process. Since each version of the configuration package has a snapshot of the data in the source instance, you can compare and

analyze various versions of the configuration package to see how the setup data changed.

Import

In the target application instance, the setup import process will insert all new data from the source configuration package that does not already exist and update any existing data with changes from the source. Setup data that exists in the target instance but not in source will remain unchanged.

Export and Import Reports

You can review the results of the export and import processes using reports. The results appear ordered by business objects and include information on any errors encountered during the export or import process. If a setup export or import process paused due to errors encountered or for a manual task to be performed outside of the application, then you can resume the paused process.

These reports show what setup data was exported or imported and by which specific process. You can change the reports to validate the setup data as well as to compare or analyze it. A report is generated for each business object. These reports show the same information as the export and import results seen directly in the application.

Process status details are available as text files showing the status of an export or import process including the errors encountered during the process.

Moving Common Reference Objects

Moving Common Reference Objects: Overview

The common reference objects in Oracle Fusion Middleware Extensions for Applications are used by several setup tasks in the Setup and Maintenance work area. The common reference objects become a part of the configuration package that is created for an implementation project. While moving the application content, for example, from the test phase to the production phase of an implementation, you must pay special attention to the nuances of these common reference objects.

Parameters

The common reference objects are represented as business objects. A single object can be referenced in multiple setup tasks with different parameters. In the configuration package that is created for the implementation project, parameters passed to a setup task are also passed to the business objects being moved. As a result, the scope of the setup tasks is maintained intact during the movement.

Dependencies

Common reference objects may have internal references or dependencies among other common reference objects. Therefore, it is necessary that all the dependencies are noted before the movement of objects so that there are no broken references among the objects.

Business Objects for Moving Common Reference Objects: Points to Consider

Common reference objects in Oracle Fusion Functional Setup Manager are represented by business objects. These business objects are the agents that contain the application content and carry them across whenever the application setup is moved from one environment to another, for example, test environment to production environment.

Choice of Parameters

The following table lists the business objects, the corresponding movement details, and the effect of the setup task parameter on the scope of the movement.

Note

Only the translation in the current user language is moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Menu Customization	Customizations to the navigator menu	Movement of navigator menu customizations requires manual effort. For details regarding the manual command, refer to the Oracle Fusion Applications Administrators Guide.
Application Message	Messages and associated tokens	No parameters: all messages are moved. moduleType/moduleKey: only messages belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. messageName/applicationId: only the specified message is moved.
Application Taxonomy	Application taxonomy modules and components	No parameters: all taxonomy modules and components are moved.
Application Attachment Entity	Attachment entities	No parameters: all attachment entities are moved. moduleType/moduleKey: only attachment entities belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.
Application Attachment Category	Attachment categories and category-to-entity mappings	No parameters: all attachment categories and category-to-entity mappings are moved. moduleType/moduleKey: only attachment categories belonging to the specified module and its descendant modules in the taxonomy hierarchy along with the respective category-to-entity mappings are moved.
Application Document Sequence Category	Document sequence categories	No parameters: all categories are moved. moduleType/moduleKey: only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. code/applicationId: only the specified document sequence category code is moved.

Application Document Sequence	Document sequences and their assignments	<p>No parameters: all sequences are moved.</p> <p><code>moduleType/moduleKey</code>: only document sequences belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved</p> <p><code>name</code>: only the specified document sequence is moved.</p>
Application Descriptive Flexfield	Descriptive flexfield registration data and setup data	<p>No parameters: all descriptive flexfields are moved.</p> <p><code>moduleType/moduleKey</code>: only descriptive flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>descriptiveFlexfieldCode/applicationId</code>: only the specified descriptive flexfield is moved.</p> <hr/> <p>Note</p> <p>Importing a flexfield's metadata can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment.</p> <hr/> <p>Note</p> <p>Only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</p> <hr/>

Application Extensible Flexfield	Extensible flexfield registration data and setup data, including categories	<p>No parameters: all extensible flexfields are moved</p> <p><code>moduleType/moduleKey</code>: only extensible flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>extensibleFlexfieldCode/applicationId</code>: only the specified extensible flexfield is moved.</p> <hr/> <p>Note</p> <p>Importing a flexfield's metadata can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment.</p> <hr/> <p>Note</p> <p>Only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</p> <hr/>
Application Key Flexfield	Key flexfield registration data and setup data	<p>No parameters: all key flexfields are moved.</p> <p><code>moduleType/moduleKey</code>: only key flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>keyFlexfieldCode/applicationId</code>: only the specified key flexfield is moved.</p> <hr/> <p>Note</p> <p>Importing a flexfield's metadata can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment.</p> <hr/> <p>Note</p> <p>Only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</p> <hr/>

Application Flexfield Value Set	Value set setup data	<p>No parameters: all value sets are moved.</p> <p><code>moduleType/moduleKey</code>: only value sets belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>valueSetCode</code>: only the specified value set is moved.</p> <hr/> <p>Note</p> <p>Importing a value set's metadata can change the deployment status of flexfields that use the value set, and therefore the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment.</p> <hr/>
Application Reference Currency	Currency data	No parameters: all currencies are moved.
Application Reference ISO Language	ISO language data	No parameters: all ISO languages are moved.
Application Reference Industry	Industry data including industries in territories data	No parameters: all industries are moved.
Application Reference Language	Language data	No parameters: all languages are moved.
Application Reference Natural Language	Natural language data	No parameters: all natural languages are moved.
Application Reference Territory	Territory data	No parameters: all territories are moved.
Application Reference Time zone	Time zone data	No parameters: all time zones are moved.
Application Standard Lookup	Standard lookup types and their lookup codes	<p>No parameters: all standard lookups are moved.</p> <p><code>moduleType/moduleKey</code>: only standard lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>lookupType</code>: only the specified common lookup is moved.</p>

Application Common Lookup	Common lookup types and their lookup codes	<p>No parameters: all common lookups are moved.</p> <p><code>moduleType/moduleKey</code> - only common lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>lookupType</code>: only the specified common lookup is moved.</p>
Application Set-Enabled Lookup	Set-enabled lookup types and their lookup codes	<p>No parameters: all set-enabled lookups are moved.</p> <p><code>moduleType/moduleKey</code>: only set-enabled lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>lookupType</code>: only the specified set-enabled lookup is moved.</p>
Application Profile Category	Profile categories	<p>No parameters: all profile categories are moved.</p> <p><code>moduleType/moduleKey</code>: only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>name/applicationId</code>: only the specified category is moved.</p>
Application Profile Option	Profile options and their values	<p>No parameters: all profile options and their values are moved.</p> <p><code>moduleType/moduleKey</code>: only profile options and their values belonging to the specified module are moved.</p> <p><code>profileOptionName</code>: only the specified profile option and its values are moved.</p>

Application Profile Value	Profile options and their values	<p>No parameters: all profiles and their values are moved.</p> <p><code>moduleType/moduleKey</code>: only profiles and their values belonging to the specified module are moved.</p> <p><code>categoryName/categoryApplicationId</code>: only profiles and their values belonging to the specified category are moved.</p> <p><code>profileOptionName</code>: only the specified profile and its values are moved.</p>
Application Reference Data Set	Reference data sets	No parameters: all sets are moved.
Application Reference Data Set Assignment	Reference data set assignments	<p><code>determinantType</code>: only assignments for the specified determinant type are moved.</p> <p><code>determinantType/referenceGroupName</code>: only assignments for the specified determinant type and reference group are moved.</p>
Application Tree Structure	Tree structures and any labels assigned to the tree structure	<p>No parameters: all tree structures (and their labels) are moved.</p> <p><code>moduleType/moduleKey</code>: only tree structures (and their labels) belonging to the specified module are moved.</p> <p><code>treeStructureCode</code>: only the specified tree structure (with its labels) is moved.</p>
Application Tree	Tree codes and versions	<p>No parameters: all trees are moved.</p> <p><code>moduleType/moduleKey</code>: only trees belonging to the specified module are moved.</p> <p><code>treeStructureCode</code>: only trees belonging to the specified tree structure are moved.</p> <p><code>TreeStructureCode/TreeCode</code>: only trees belonging to the specified tree structure and tree code are moved.</p>

Application Tree Label	Tree structures and any labels assigned to the tree structure	<p>No parameters: all tree structures (and their labels) are moved.</p> <p><code>moduleType/moduleKey</code>: only tree structures (and their labels) belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>treeStructureCode</code>: only the specified tree structure (with its labels) is moved.</p>
Application Data Security Policy	Database resources, actions, conditions, and data security policies	<p>No parameters: all database resources/actions/conditions/policies are moved.</p> <p><code>moduleType/moduleKey</code>: only database resources/actions/conditions/policies belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><code>objName</code>: only the specified database resource along with its actions/conditions/policies is moved.</p> <hr/> <p>Note</p> <ul style="list-style-type: none"> • If the policies being moved contain reference to newly created roles, move the roles before moving the policies. • If the source and target systems use different LDAPs, manually perform the GUID reconciliation after moving the data security policies.
Application Activity Stream Configuration	Activity stream options	No parameters: all activity stream options are moved.

Moving Related Common Reference Objects: Points to Consider

Certain common reference objects may use other common reference objects creating dependencies among the objects. During the movement of common reference objects, these dependencies or references need to be taken care of.

Dependencies

The dependencies among the common reference objects may be caused by any of the following conditions.

- Flexfield segments use value sets

- Value sets may make use of standard, common, or set-enabled lookups
- Key flexfields may have an associated tree structure and key flexfield segments may have an associated tree code
- Tree codes and versions may be defined over values of a value set
- Data security policies may be defined for value sets that have been enabled for data security

You may choose to move one, some, or all of the business objects by including the ones you want to move in your configuration package. For example, you may choose to move only value sets and not lookups, or you may choose to move both value sets and their lookups as part of the same package. Whatever be the combination, it is recommended that during the movement of objects, you follow an order that maintains the dependencies among the objects.

While moving the business objects, adhere to the guidelines and exactly follow the order as listed below.

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, attachments, reference data sets, document sequences, messages, and data security.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.

Note

In scenarios where there may be dependencies on other objects, you must move the dependencies before moving the referencing object. For example, if data security policies being moved have dependencies on newly created security roles, you must move the security roles before moving the security policies.

Using Seed Data Framework to Move Common Reference Objects: Points to Consider

To move the common reference objects, you can use the Seed Data Framework (SDF). You can also use the command line interface of SDF to move the object setup data. For more information about seed data loaders including common reference object loaders, see Oracle Fusion Applications Developer's Guide.

Movement Dependencies

The seed data interface moves only the setup metadata. For example, if you use SDF to import flexfield metadata, the flexfield setup metadata is imported into your database. However, you must invoke the flexfield deployment process separately after seed data import to regenerate the runtime flexfield artifacts in the target environment. Similarly, if you use SDF to import data security metadata, you must first move any new referenced roles and then manually run the GUID reconciliation where required.

To ensure that the reference data is not lost during the movement, certain guidelines are prescribed. It is recommended that you perform the movement of object data exactly in the order given below.

Note

Only the translation in the current user language is moved.

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, attachments, reference data sets, document sequences, messages, and data security.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.
8. Move created reference data sets before moving any objects that reference them, such as reference data set assignments and set-enabled lookups.
9. Move created document sequence categories before moving any objects that reference them, such as document sequences.
10. Move created tree labels before moving any objects that reference them, such as trees.
11. Move created data security objects and policies before moving any objects that reference them, such as value sets.
12. Move created value sets before moving any objects that reference them, such as flexfields.
13. Move created trees before moving any objects that reference them, such as key flexfields.

Glossary

abstract role

A description of a person's function in the enterprise that is unrelated to the person's job (position), such as employee, contingent worker, or line manager. A type of enterprise role.

accounting flexfield

The chart of accounts that determines the structure, such as the number and order of individual segments, as well as the corresponding values per segment.

action

Tracks changes to certain Human Capital Management (HCM) records, for example, changes to employment and assignment records. You can create your own actions and associate them with the predefined action types. You can optionally associate action reasons with actions.

action

The kind of access named in a security policy, such as view or edit.

action reason

Action reasons provide further explanation to actions, for example, an action of transfer could have reasons such as reorganization or career progression.

ADF

Acronym for Application Developer Framework. A set of programming principles and rules for developing software applications.

aligned goals

Two goals that have a relationship with each other where one goal supports the other. It is not necessarily a parent-child relationship although aligning a goal typically means aligning up to an organizational or manager goal.

application identity

Predefined application level user with elevated privileges. An application identity authorizes jobs and transactions for which other users are not authorized, such as a payroll run authorized to access a taxpayer ID while the user who initiated the job is not authorized to access such personally identifiable information.

application role

A role specific to applications and stored in the policy store.

Applications Core

Abbreviation for Oracle Fusion Middleware Extensions for Applications. The technical product code is FND.

assignment

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

balancing segment

A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

band

A specified range of values. For example, an age band defines a range of ages, such as 25 to 30, used to determine a person's eligibility.

beneficiary

A person or organization designated to receive benefits from a compensation plan on the death of the plan participant.

benefits object hierarchy

A structure that enables benefits that share similar attributes to be defined and managed efficiently. The four object types used to structure benefits offerings are programs, plan types, plans, and options.

benefits offering

Any of an organization's non salary components of employee benefits packages, such as health, savings, life insurance, recreation, goods, or services.

BPEL

Business Process Execution Language; a standard language for defining how to send XML messages to remote services, manipulate XML data structures, receive XML messages asynchronously from remote services, manage events and exceptions, define parallel sequences of execution, and undo parts of processes when exceptions occur.

business function

A business process, or an activity that can be performed by people working within a business unit and describes how a business unit is used.

business object

A resource in an enterprise database, such as an invoice or purchase order.

business unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

calculation factor

A data-driven rule for calculating a deduction or exemption.

calendar event

A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

candidate

Person identified to fill a particular job or role or replace a specific incumbent on a succession plan.

ceiling step

Highest step within a grade that a worker may progress to.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

compensation objects

Any of an organization's workforce compensation plans and components or individual compensation plans and options for allocating salary, bonus, stock options, and so on.

competency

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

condition

An XML filter or SQL predicate WHERE clause in a data security policy that specifies what portions of a database resource are secured.

content item

An individual quality, skill, or qualification within a content type that you track in profiles.

content library

A repository of the content types and individual content items that can be associated with person profiles and profiles for workforce structures such as jobs and positions.

content type

An attribute such as a skill, quality, or qualification that is added to a profile.

context

A grouping of flexfield segments to store related information.

context segment

The flexfield segment used to store the context value. Each context value can have a different set of context-sensitive segments.

context-sensitive segment

A flexfield segment that may or may not appear depending upon a context such as other information that has been captured. Context-sensitive segments are custom attributes that apply to certain entity rows based on the value of the context segment.

contingent worker

A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.

corporate rate type

Rate you define to standardize rates used in conversion of one currency to another over a period of time. This rate is generally a standard market rate determined by senior financial management for use throughout the organization.

cost center

A unit of activity or group of employees used to assign costs for accounting purposes.

cost organization

A grouping of inventory organizations that indicates legal and financial ownership of inventory, and which establishes common costing and accounting policies.

country holding company

A legal entity that acts on behalf of several divisions within an enterprise, and is the legal employer in a country.

data dimension

A stripe of data accessed by a data role, such as the data controlled by a business unit.

data instance set

The set of human capital management (HCM) data, such as one or more persons, organizations, or payrolls, identified by an HCM security profile.

data role

A role for a defined set of data describing the job a user does within that defined set of data. A data role inherits job or abstract roles and grants entitlement to access data within a specific dimension of data based on data security policies. A type of enterprise role.

data role template

A template used to generate data roles by specifying which base roles to combine with which dimension values for a set of data security policies.

data security

The control of access to data. Data security controls what action a user can taken against which data.

data security policy

A grant of entitlement to a role on an object or attribute group for a given condition.

database resource

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

deduction card

A mechanism for capturing values required for calculating payroll deductions at the level of a payroll statutory unit, tax reporting unit, or payroll relationship. At the payroll relationship level, this is called a personal deduction card.

deduction range

A table that holds the rate, amount, or other items used to calculate a deduction and the range of values to which they apply.

department

A division of a business enterprise dealing with a particular area of activity.

dependent

A person who has a personal relationship with a participant in a compensation plan whom the participant designates to receive coverage through the plan.

derived factor

Calculated eligibility criterion that changes over time, such as age or length of service.

descriptive flexfield

Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as customer cases. Information collection and storage may be configured to vary based on conditions or context.

determinant

A value that determines which reference data set will be used in a specific business context.

determinant type

Designates the field within transactional columns that controls how data is shared across organizations such as business unit, asset book, cost organization or project unit. The type determines the reference data sets that would be used in a transaction.

determinant type

An additional and optional field within transactional columns (besides category and application) that is used to assign document sequences. The available determinant types are Business Unit, Ledger, Legal Entity, and Tax Registration.

determinant value

A value specific to the determinant type dimension of a document sequence. The determinant value is relevant in a document sequence assignment only if the document sequence has a determinant type. If Ledger is the determinant type for a document sequence, the determinant value is the specific ledger number whose documents are numbered by the document sequence.

development goal

A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

disability organization

An organization with which employee disabilities are registered.

division

A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

DML

Data Manipulation Language, a family of languages used to insert, delete, and update data in a database.

document category

A high level grouping of person documents such as visas, licences, and medical certificates. Document subcategories provide further grouping of document categories.

document sequence

A unique number that is automatically or manually assigned to a created and saved document.

document type

A categorization of person documents that provides a set of options to control what document information to retain, who can access the documents, whether the documents require approval, and whether the documents are subject to expiry. A document type exists for a combination of document category and subcategory.

duty role

A group of function and data privileges representing one duty of a job. Duty roles are specific to applications, stored in the policy store, and shared within an Oracle Fusion Applications instance.

educational establishment

A school, college, university, or other learning institution.

effective as-of date

A date value used for filtering the search results in searches for date-effective objects. For any object that matches the search criteria, the search results include the physical record that is in effect on the specified effective as-of date.

element

Component in the calculation of a person's pay. An element may represent a compensation or benefit type, such as salary, wages, stock purchase plans, pension contributions, and medical insurance.

element template

Predefined questions asked when creating an element based on the element classifications selected. When the questionnaire is submitted, the template automatically generates the element and all associated balances, feeds, input values, formulas, and related elements required for payroll processing.

eligibility profile

A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

emergency contact

Any of a person's contacts whom the enterprise can call in an emergency.

employment terms

A set of information about a nonworker's or employee's job, position, pay, compensation, working hours, and work location that all assignments associated with the employment terms inherit.

enterprise

An organization with one or more legal entities under common control.

enterprise role

Abstract, job, and data roles are shared across the enterprise. An enterprise role is an LDAP group. An enterprise role is propagated and synchronized across Oracle Fusion Middleware, where it is considered to be an external role or role not specifically defined within applications.

entitlement

Grants of access to functions and data. Oracle Fusion Middleware term for privilege.

event trigger point

The point within the life cycle of an HCM data object or process at which control can be taken and used to evaluate event conditions and potentially invoke event processing.

extensible flexfield

Customizable expansion space, as with descriptive flexfields, but able to capture multiple sets of information within a context and multiple contexts grouped to appear in a named region of a user interface page. Some extensible flexfields allow grouping contexts into categories.

fast formula

A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons you want to repeat with different input values.

feature choice

A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

fixed rate type

Rate you set between two currencies that remains constant. For example, a rate set between the euro currency and each Economic and Monetary Union (EMU) currency during the conversion to the euro currency.

flexfield

Grouping of extensible data fields called segments, where each segment is an attribute added to an entity for capturing additional information.

flexfield segment

An extensible data field that represents an attribute on an entity and captures a single atomic value corresponding to a predefined, single extension column in the Oracle Fusion Applications database. A segment appears globally or based on a context of other captured information.

free-form content type

A content type that contains a code, name, and description only, and does not contain any properties until you add it to a profile type.

FTE

Full-time equivalent, such as .5 for half-time work.

function security

The control of access to a page or a specific widget or functionality within a page. Function security controls what a user can do.

gallery

A searchable collection of portraits that combines the functions of the person directory with corporate social networking and self-service applications for both workers and managers.

generic organization hierarchy

An organization hierarchy that includes organizations of all classifications.

global area

The region across the top of the user interface. It provides access to features and tools that are relevant to any page you are on.

global name

A person's name in a format and language that can be understood throughout a multinational enterprise.

goal

A performance objective, also known as a quota. The best practice is to make it specific, measurable, achievable, and time based (SMART). Define your goal (optional), by providing a target number and the unit of measure (either amount or quantity).

goal library

A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

goal plan

A collection of performance or development goals that are grouped by common characteristics, such as a specified time frame or a particular department that must work on them.

goal task

An action added to a goal that a worker plans to undertake to help achieve the goal.

grade

A component of the employment model that defines the level of compensation for a worker.

grade ladder

A hierarchy used to group grades and define their sequence.

grade rate

Used to define pay values for grades in a legislative data group.

grade step

A level of increment within a grade.

Groovy

An object-oriented programming language for the Java Platform as an alternative to the Java programming language. Groovy can also be used dynamically as a scripting language. For more information, see <http://groovy.codehaus.org>.

HCM

Abbreviation for Human Capital Management.

HCM data role

A job role, such as benefits administrator, associated with specified instances of Oracle Fusion Human Capital Management (HCM) data, such as one or more positions or all persons in a department.

HCM securing object

An HCM object that secures access to both its own data and data in other, related objects. For example, access to a specified set of person records can allow access to data secured by person records, such as goal plans and evaluations.

headcount

A work measure recorded on an assignment. By default, the headcount of an organization is the total of primary assignments in primary work relationships.

holding area

Displays workers who are selected for review in a talent review meeting but not rated by their managers, or who were rated using different rating models. It also shows workers who are removed from the box chart during the meeting.

HR

Abbreviation for human resource.

HR status

Tracks worker's progress through the assignment, whether the assignment is active, suspended, or inactive.

identity

A person representing a worker, supplier, or customer.

impact of loss

A value assigned to a worker for the real or perceived effects on an organization when the worker leaves. Managers assign the impact of loss on the Career Planning profile card, and managers and talent review participants can assign an additional value specifically for a talent review.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

interface table

A database table used for transferring data between applications or from an external application or data file.

inventory organization

An organization that tracks inventory transactions and balances, and can manufacture or distribute products.

item master

A collection of data that describes items and their attributes recorded in a database file.

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

job family

A group of jobs that have different but related functions, qualifications, and titles. For example, a trust analyst and an operations analyst may be grouped into the Analyst job family.

job role

A role for a specific job consisting of duties, such as an accounts payable manager or application implementation consultant. A type of enterprise role.

key flexfield

Configurable key consisting of multiple parts or segments, each of which may be meaningful individually or in combination with the others. Key flexfields are commonly implemented to represent part numbers and account numbers.

key flexfield segment instance

A single occurrence of a key flexfield segment in a key flexfield structure instance.

key flexfield structure

The arrangement of segments in a key flexfield. In some cases, multiple structures can be defined for a single key flexfield.

key flexfield structure instance

A single occurrence of a key flexfield structure that shares the same order of segments as every other instance of the key flexfield structure, but uses different value sets to validate the segments.

LDAP

Abbreviation for Lightweight Directory Access Protocol.

legal authority

A government or legal body that is charged with powers such as make laws, levy and collect fees and taxes, and remit financial appropriations for a given jurisdiction.

legal employer

A legal entity that employs people.

legal entity

An entity is identified and given rights and responsibilities under commercial law, through the registration with the country's appropriate authority.

legal jurisdiction

A physical territory, such as a group of countries, single country, state, county, parish, or city, which comes under the purview of a legal authority.

legal reporting unit

The lowest level component of a legal structure that requires registrations. Used to group workers for the purpose of tax and social insurance reporting or represent a part of your enterprise with a specific statutory or tax reporting obligation.

legislative data group

A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

line of business

Set of one or more highly related products which service a particular customer transaction or business need. Refers to an internal corporate business unit.

local name

A person's name in a format and language that are readily understood by users in a single country but that may not be understood throughout a multinational enterprise.

lookup code

A value available for lookup within a lookup type such as the code BLUE within the lookup type COLORS.

lookup type

A set of lookup codes to be used together as a list of values on a field in the user interface.

mainline

A branch of data that serves as a single source of truth.

managed person

In Oracle Fusion Human Capital Management security, a person for whom the user can maintain some information. For example, line managers can maintain information about their direct and indirect reports, and workers can maintain information about themselves, their dependents, and their beneficiaries.

model profile

A collection of the work requirements and required skills and qualifications of a workforce structure, such as a job or position.

natural account

Categorizes account segment values by account type, asset, liability, expense, revenue, or equity, and sets posting, budgeting, and other options.

node

A logical term that refers to the actual data in a specific data source such as a product-specific table or a storage entity that has been established by the tree management solution.

nonworker

A person, such as a volunteer or retiree, who is not engaged in the core businesses of the enterprise or legal employer but who may receive payments from a legal employer. Any person who has a nonworker work relationship with a legal employer is a nonworker.

offering

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

organization goal

A performance goal published by any level of an organization, such as a corporation, division, or department, that defines the overall objectives of the organization.

organization owner

Manager of an organization who adds and manages goals for the organization to support objectives and strategy of the enterprise.

OWLCS

Abbreviation for Oracle WebLogic Communication Services. Offers the TPCC service to Fusion applications and sets up the calls via SIP integration with the telephony network.

participant

Person other than the manager who provides feedback about a worker's performance or development upon request.

participant feedback

Responses to questions about an individual by people other than the direct manager or a designated performance manager of the individual. Participants provide responses on questionnaires that are part of the performance document and are saved as part of the official evaluation.

party

A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

payroll action parameters

System-level information that controls aspects of payroll batch processes. The system reads values from the PAY_ACTION_PARAMETERS table on startup. If specific parameter values are not specified, the system may provide the appropriate defaults. The effects of setting values for specific parameters may be system wide.

payroll flow

An occurrence of a payroll flow pattern that you monitor from the Payroll Dashboard and manage from the Payroll Checklist work area. The data security for your role determines which flows you can submit and access.

payroll status

Indicates if the assignment is processed by payroll. Valid values are Process and Do not Process.

payroll statutory unit

A legal entity registered to report payroll tax and social insurance. A legal employer can also be a payroll statutory unit, but a payroll statutory unit can represent multiple legal employers.

pending worker

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

performance document

The online document used to evaluate a worker for a specific time period. The document contains the content on which the worker can be evaluated, which could include goals and competencies. Workers and managers can provide ratings and comments if the document is configured to allow them to do so.

performance document content

The criteria, such as competencies and goals, contained in a performance document on which an individual is evaluated. For example, the performance document content includes the competencies Java Skills and Business Planning on which the worker must be rated.

performance goal

A results-oriented goal, often using specific targets, to assess the level of a worker's achievement.

performance process flow

The tasks, and the order in which those tasks are performed, in a performance evaluation. The process flow is included in the performance template and applied to all performance documents generated using this template.

person number

A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person's work and person-to-person relationships.

person profile

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

person type

A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the employment-terms or assignment level.

personal goal

A goal that workers can use to increase their skills, for example, or as draft goals that they can copy to their performance or development goals. Managers cannot see the personal goals of workers.

personally identifiable information

Any piece of information that can potentially be used to uniquely identify, contact, or locate a single person. Within the context of an enterprise, some PII data can be considered public, such as a person's name and work phone number, while other PII data is confidential, such as national identifier or passport number.

PL/SQL

Abbreviation for procedural structured queried language.

portrait

A selection of information about a worker or nonworker, including contact details, social connections, and activities and interests, that can be viewed and edited. Both the amount and type of information and the available actions depend on the role of the portrait user.

position

A specific occurrence of one job, fixed within one department, also often one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

primary ledger

Main record-keeping ledger.

primary work schedule

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

privilege

A grant or entitlement of access to functions and data. A privilege is a single, real world action on a single business object.

profile option

User preferences and system configuration options consisting of a name and a value, that can be set at hierarchical levels of an enterprise. Also called a profile or user option.

profile option level

A level at which profile option values are defined. Site, product, and user are predefined levels.

profile option level hierarchy

The ordering of profile option levels. The order of the levels in the hierarchy determines which levels take precedence.

profile option value

The value portion of a profile option's name and value. A profile option may have multiple values set at different levels, such as site or user.

profile type

A template that defines the content sections of a profile, role access for each section, and whether the profile is for a person, or for a workforce structure such as a job or position.

project expenditure organization

An organization that can incur expenditures and hold financial plans for projects.

PSTN

Abbreviation for public switched telephone network which is the network of the world's public circuit-switched telephone networks.

public person

In Oracle Fusion Human Capital Management security, a person for whom some basic information is publicly available. For example, users typically access the contact details of public persons, such as phone numbers and locations, using the person gallery.

question library

A central repository of reusable questions that are available to add to questionnaires.

questionnaire

A set of questions that respondents are asked to complete that are presented in a specific order and format. It can include open-ended question or items with selection lists.

rating model

A scale used to measure the performance and proficiency of workers.

reference data

Data in application tables that is not transactional and not high-volume such as sales methods, transaction types, or payment terms, and can be shared and used across organizational boundaries.

reference data set

Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

reference group

A logical grouping of tables that correspond to logical entities such as payment terms defined across multiple tables or views. Grouping establishes common partitioning requirements across the entities causing them to share the same set assignments.

registration

The record of a party's identity related details with the appropriate government or legal authorities for the purpose of claiming and ensuring legal and or commercial rights and responsibilities.

reporting establishment

An organization used in the production of human resources (HR) reports that are required by government agencies.

risk of loss

A value assigned to a worker to rate the likelihood of the worker leaving the company. Managers assign the risk of loss on the Career Planning profile card, and managers or talent review participants can assign an additional risk of loss value specifically for a talent review.

role

Controls access to application functions and data.

role deprovisioning

The automatic or manual removal of an abstract role, a job role, or a data role from a user.

role hierarchy

Structure of roles to reflect an organization's lines of authority and responsibility. In a role hierarchy, a parent role inherits all the entitlement of one or more child roles.

role mapping

A relationship between one or more job roles, abstract roles, and data roles and one or more conditions. Depending on role-mapping options, the role can be provisioned to or by users with at least one assignment that matches the conditions in the role mapping.

role provisioning

The automatic or manual allocation of an abstract role, a job role, or a data role to a user.

salary basis

A set of characteristics associated with a worker's base pay that identifies the payroll details used to pay base earnings, the period of time in which base pay is quoted, the factor used to annualize base pay, any components used to attribute base pay adjustments to different reasons, and any associated grade rate for salary validation.

salary component

Change reasons that enable itemization of salary adjustments by entering amounts or percentages for one or more components, such as merit or cost of living adjustment.

sandbox

A runtime session that commits changes out of reach of mainline users.

security profile

A set of criteria that identifies one or more human capital management (HCM) objects of a single type for the purposes of securing access to those objects. Security profiles can be defined for persons, organizations, positions, countries, LDGs, document types, payrolls, payroll flows, and workforce business processes.

security reference implementation

Predefined function and data security in Oracle Fusion Applications, including role based access control, and policies that protect functions, data, and segregation of duties. The reference implementation supports identity management, access provisioning, and security enforcement across the tools, data transformations, access methods, and the information life cycle of an enterprise.

segregation of duties

An internal control to prevent a single individual from performing two or more phases of a business transaction or operation that could result in fraud.

set

Reference data that is organized into groups appropriate to organizational entities, to enable reference data sharing.

set enabled

An entity, such as a lookup, customer, location, organization, or document attachment, that is allowed to participate in reference data sharing by drawing on the data of a reference data set.

SOA

Abbreviation for service-oriented architecture.

SOA

Service-oriented architecture, a design methodology aimed at maximizing the reuse of application services.

spot rate type

Rate you enter to perform conversion based on this rate as of a specific date. This rate applies to the immediate delivery of a currency.

SQL predicate

A type of condition using SQL to constrain the data secured by a data security policy.

succession plan

A strategy for ensuring one or more potential candidates have been identified to fill a key role or position, or in some cases, succeed a specific incumbent.

system person type

A fixed name that the application uses to identify a group of people.

talent pool

A group of workers for whom you want to track training, readiness, or development.

talent pool owner

An HR specialist who can manage the talent pool.

talent review

A meeting or series of meetings in which managers analyze organizational trends and potential areas of risk for the company, calibrate performance and potential ratings across the organizational hierarchy, review compensation,

and discuss leadership development and succession planning. Depending on configuration, managers can also assign goals to workers.

talent review facilitator

Human resource specialist who schedules a talent review meeting, manages the content preparation by reviewers before the meeting, launches the talent review dashboard, and manages action items after the meeting. A talent review meeting can have multiple facilitators.

talent review participant

Person who is invited to attend a talent review meeting.

talent review reviewer

Manager who is assigned to update profile content for direct and indirect reports before the talent review meeting. Reviewers can assign their direct reports who are also managers to update content for their direct and indirect reports.

talent score

An assessment of a worker's overall value to the organization using a rating model your organization defines. The talent score values are mapped to specific cells on the talent review box chart.

target outcome

A specific skill, competency, or certification added to a goal that can be achieved or acquired by the successful completion of the goal.

tax reporting unit

A legal entity that groups workers for the purpose of tax and social insurance reporting.

territory

A legally distinct region that is used in the country field of an address.

transfer

The movement of a person within the same legal employer.

tree

Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

tree node

Corresponds to a primary key in a view object of data.

tree structure

Characteristics applied to trees, such as what data to include or how the tree is versioned and accessed.

tree version

An instance of a tree. If a tree is associated with a reference data set, all versions belong to one set. Includes life cycle elements such as start and end date and a status indicator whether the tree is active or not.

user rate type

Rate you enter at journal entry time to convert foreign currency transactions to your functional currency.

user-defined criteria

Custom factors used to determine eligibility for objects such as benefits offerings and rates, compensation plans, and checklist tasks.

value set

A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

variable coverage profile

A set of attributes that define the coverage amount for a benefit offering that varies based on one or more factors.

variable rate profile

A set of attributes that define the cost of a benefit offering that varies based on one or more factors.

work relationship

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

work schedule exception

An event that impacts the normal working pattern in a work schedule.

worker type

A classification selected on a person's work relationship, which can be employee, contingent worker, pending worker, or nonworker.

workflow

An automated process in which tasks are passed from a user, a group of users, or the application to another for consideration or action. The tasks are routed in a logical sequence to achieve an end result.

workforce business process

A defined sequence of tasks, registered for the enterprise, that delivers a major business goal. The tasks may be allocated to multiple roles across multiple products.

XML filter

A type of condition using XML to constrain the data secured by a data security policy.