Oracle® Fusion Applications Coexistence for HCM 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.

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.
Functional Setup Manager User 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. **Note** Limited content applicable to Oracle Cloud implementations.

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 details on 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 Oracle Enterprise Repository 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.

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Note
The content of Oracle Enterprise Repository reflects the latest release of Oracle Fusion Applications.

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.

1

Overview

Coexistence for HCM Offering: Overview

Using the Coexistence for HCM offering, you can integrate your existing Oracle Human Capital Management (HCM) Applications with a hosted Oracle Fusion HCM implementation: you can use Oracle Fusion Workforce Compensation and Oracle Fusion Talent Management functionality alongside of your existing applications.

Before you begin, use the Getting Started page in the Setup and Maintenance work area to access reports for the 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.

Create one or more implementation projects for the offering to generate task lists for each project. The application implementation manager can customize the task list and assign and track each task.

Task List Groups

The generated task list for this offering contains the following groups of tasks

Task List	Description
Define Synchronization of Users and Roles from LDAP	Run a process to populate the product tables containing user and role information with the users and roles held in LDAP. This process is always the first implementation task but can also run periodically to keep the product tables synchronized with subsequent updates to LDAP.
Define Implementation Users	Create implementation users and roles. Provision implementation users with job and data roles.
Review Enterprise Information	Review the employment model, enterprise name, and other information required in an HCM coexistence implementation between Oracle Fusion Applications and a source application, such as Oracle PeopleSoft HRMS.
Define HCM Configuration for Coexistence	Define the configuration between a source application and Oracle Fusion Applications.
Define Reference Data Sharing	Specify how reference data in the application should be partitioned and shared.

Define Legal Jurisdictions and Authorities for Human Capital Management	For HCM coexistence, create the address a legal entity uses to register with a legal authority. Legal entities can use different addresses for different authorities; therefore, they may have more than one registered address. The legal address must be located within the territory entered.
Define Currencies and Currency Rates	Define the currencies and currency rates in which your organization does business.
Define Legal Entities for Human Capital Management	Access your companies or other registered legal entities and specify attributes relevant to Oracle Fusion Human Capital Management. Create and maintain information for legal entities and legal reporting units for business activities handled by the Oracle Fusion applications.
Define Legal Reporting Units for Human Capital Management	Define legal reporting units, also known as tax reporting units in HCM, for the enterprise to report on tax and social insurance for employee records.
Define Lookups	Review and manage sets of codes and their displayed meanings in applications.
Define Human Resource Records for Coexistence	Define human resource records required in a coexistence implementation between Oracle Fusion Applications and a source application.
Define Data Mapping for Coexistence	Define data mapping between your source application and Oracle Fusion Applications in a coexistence implementation.
Load Coexistence Data for Work Structures Records	Load work structures records from your source application to Oracle Fusion Applications in a coexistence implementation.
Define Business Units for Human Capital Management	Access your business units and specify units and attributes relevant to Oracle Fusion Human Capital Management. Create and maintain information on units of an enterprise to allow for flexible implementation, to provide a consistent entity for controlling and reporting on transactions, and to be an anchor for the sharing of sets of reference data across applications.
Load Coexistence Data for People	Load person data from your source application to Oracle Fusion Applications in a coexistence implementation.
Load Coexistence Data for Employment	Load employment data from your source application to Oracle Fusion Applications in a coexistence implementation.
Run Post-Data-Load Processes for HCM Person and Employment	Run processes to enable successful deployment of person and employment data in Oracle Fusion.
Define Security for Human Capital Management for Coexistence	Define security for Human Capital Management for a coexistence implementation.
Define Data Security for Human Capital Management	Define data security for Human Capital Management.
Define Users for Human Capital Management for Coexistence	Define users for Human Capital Management for a coexistence implementation.
Define Help Configuration	Define what users can see and do in a local deployment of Oracle Fusion Applications Help.

Load Coexistence Data for Workforce Compensation	Load workforce compensation records from your source application to Oracle Fusion Applications in a coexistence implementation.
Run Post-Data-Load Processes for Workforce Compensation	Run processes to enable successful deployment of workforce compensation data in Oracle Fusion.
Load Coexistence Data for Talent Management	Load talent records from your source application to Oracle Fusion Applications in a coexistence implementation.
Load Coexistence Data for Profile Management	Load profiles records from your source application to Oracle Fusion Applications in a coexistence implementation.
Configure Oracle Fusion Global Human Resources, Talent Management, and Workforce Compensation	Complete the implementation in Oracle Fusion of Oracle Fusion Talent Management and Oracle Fusion Workforce Compensation.

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 for comparable Oracle Fusion applications 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.

- Achieve 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.

The following documentation resources are 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.

HCM Coexistence: Explained

HCM coexistence enables you to integrate your existing Oracle Human Resource (HR) applications with specific Oracle Fusion Human Capital Management (HCM) features so that you can benefit from those features without migrating fully to Oracle Fusion HCM. The interface between your source application and

Oracle Fusion is prebuilt, fully supported, and leverages Oracle's integration framework and guidelines.

The Oracle Fusion HCM features that you can use in the HCM coexistence scenario are:

- Talent Review

- Worker Goal Setting

- Worker Performance

- Workforce Compensation

- Social Networking

The Oracle Applications Unlimited applications that you can integrate with Oracle Fusion Applications are:

- Oracle PeopleSoft Enterprise HRMS 8.9

- Oracle PeopleSoft Enterprise HRMS 9.0

- Oracle PeopleSoft Enterprise HCM 9.1

- Oracle E-Business Suite HRMS 11i

- Oracle E-Business Suite HRMS 12.1

The following figure summarizes key components of the HCM coexistence scenario.
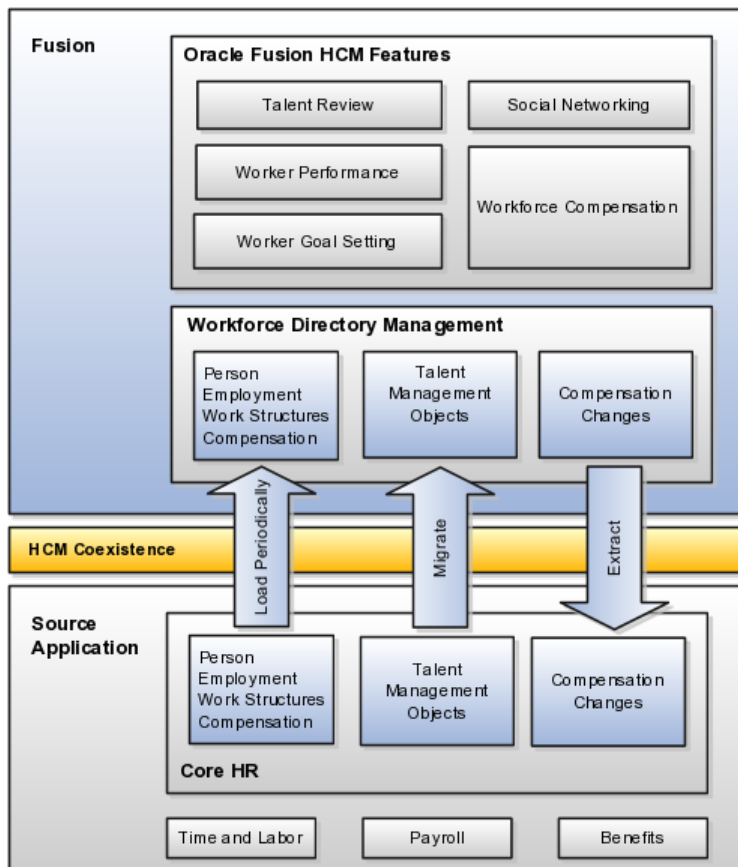
Core HR Data

Most core HR data (person, employment, workforce structures, and compensation data) is owned by the source application but uploaded periodically to Oracle Fusion. The source application remains the source of truth for this data, and you maintain the data in the source application.

Talent Management Data

Talent management data is migrated to Oracle Fusion. Thereafter, Oracle Fusion is the source of truth for this data: you maintain this data in Oracle Fusion.

Workforce Compensation Data

Although compensation data is owned by the source application, changes to compensation data made using the Workforce Compensation for Coexistence feature are extracted following a compensation-review cycle and returned to the source application for further processing, such as payment via the payroll application.

HCM Coexistence Interface

The HCM coexistence interface manages data loads and data extracts between your source application and Oracle Fusion. It enables you to synchronize business object data between your source application and Oracle Fusion HCM applications based on data maps, which you create.

Workforce Directory Management

Oracle Fusion Workforce Directory Management (WDM) provides HR functionality in the HCM coexistence environment. It also provides Oracle Fusion users with access to the Oracle Fusion HCM Person Gallery.

A Hosted Solution

In the HCM coexistence scenario, Oracle Fusion HCM features are hosted by a service provider, such as Oracle On Demand. The service provider sets up the connection between your source application and Oracle Fusion; you work with the service provider to configure the Oracle Fusion environment prior to performing the initial data load.

Note that HCM coexistence should not be considered an interim stage in a full migration to Oracle Fusion Applications: HCM coexistence is designed to work permanently alongside your existing Oracle Applications Unlimited applications.

Oracle Fusion Workforce Directory Management in the HCM Coexistence Environment: Explained

Oracle Fusion Workforce Directory Management (WDM) provides access to a subset of Oracle Fusion Human Capital Management (HCM) functions in the HCM coexistence environment. This topic summarizes any limitations on

the Person Gallery, Manager Resources dashboard, and Human Resources dashboard functions for HCM coexistence users.

Person Gallery

All Person Gallery tabs (Person Gallery, Organization Chart, My Portrait, and dynamic portrait tabs) are available to HCM coexistence users.

Most Person Gallery features are available. Therefore, user roles may need to be customized (by removing duty roles) to prevent users from performing transactions that update data for which Oracle Fusion is not the system of record. For example, a user can update his or her address from the My Portrait tab; however, the user must make that change in the source application, from where it will be uploaded to Oracle Fusion.

If Oracle Fusion Talent Management is installed, transactions that update talent-related data can be initiated from the Person Gallery.

Portrait Cards

A person's portrait comprises multiple portrait cards, each of which is populated with relevant data. For example, a portrait can include Contact Information, Employment, Development and Growth, and User Account Details cards.

Cards appear in the portrait only when the underlying function is available. For example, the Compensation card appears only if you use Oracle Fusion Workforce Compensation, and the Career Planning card appears only if you use Oracle Fusion Talent Management.

The following portrait cards never appear because the underlying functions are not available in the HCM coexistence environment:

- Availability
- Payroll
- Benefits

Manager Resources Dashboard

The Manager Resources dashboard provides analytics of interest to line managers. In the HCM coexistence environment, some analytics do not appear because the relevant data is not available. The following table shows the analytics that are available in the HCM coexistence environment and identifies any Oracle Fusion product dependencies. For example, the Compensation tab in the My Organization region of the dashboard appears only if you use Oracle Fusion Workforce Compensation.

Dashboard Analytic	Requires
My Organization, General tab	
My Organization, Employment tab	
My Organization, Compensation tab	Oracle Fusion Workforce Compensation
My Organization, Performance tab	Oracle Fusion Talent Management
Promotion Potential	Oracle Fusion Workforce Compensation Oracle Fusion Talent Management

Performance and Potential	Oracle Fusion Talent Management
My Organization Rating Distribution	Oracle Fusion Talent Management
Task Completion Status	Oracle Fusion Talent Management

Human Resources Dashboard

The Human Resources dashboard provides analytics of interest to human resource specialists. In the HCM coexistence environment, some analytics do not appear because the relevant data is not available. The following analytics are available in the HCM coexistence environment:

- Service Anniversaries

- Work Structures with No Assignments

- Grade Salary Ranges

- Assignments with No Manager

2

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.

3

Define Implementation Users

Implementation Users for HCM Coexistence: Explained

The following tasks are relevant to the creation of implementation users who can complete the setup of HCM coexistence:

1. Create Implementation Users

2. Create Data Role for Implementation Users

3. Provision Roles to Implementation Users

To perform these tasks, you must have the IT security manager role. Depending on how you are implementing HCM coexistence, a local security administrator or your service provider (for example, Oracle On Demand) may perform these tasks.

Creating Implementation Users

The implementation user is a user name and password for the person or people who will be performing the setup tasks for the HCM coexistence offering. Implementation users do not need to be associated with HCM person records.

Creating Data Roles for Implementation Users

By default, the application implementation consultant job role has view-all access to all HCM data resources that are relevant to the job role. You do not need to create an HCM data role for the application implementation consultant job role. The application implementation consultant job role is sufficient for the implementation of HCM coexistence.

Provisioning Roles to Implementation Users

Implementation users cannot perform the setup tasks for HCM coexistence until relevant roles are provisioned to them.

You provision the following roles to implementation users:

- IT security manager job role

- Application implementation consultant job role

Important

When the implementation of HCM coexistence is complete, you are strongly recommended to revoke these roles from implementation users. The level of access that they provide to HCM data is generally unnecessary outside the implementation phase and may constitute a security exposure.

4

Define HCM Configuration for Coexistence

HCM Configuration for Coexistence Parameters

The HCM Configuration for Coexistence parameters determine how the Load Batch Data process operates. These parameters apply whether you run the process independently or as part of the Load HCM Data for Coexistence process. In general, you set these parameters during implementation and do not need to alter them later, unless for a specific purpose such as error correction.

To set these parameters, you perform the task Manage HCM Configuration for Coexistence.

Unless otherwise indicated, you cannot override the values of these parameters for individual data-load processes.

Oracle On Demand Parameters

Parameter Name	Default Value	Can Be Overridden?
On Demand FTP Root Directory	Null	No

On Demand FTP Root Directory

Name of the Oracle On Demand server's mounted root directory.

Oracle Data Integrator Parameters

Parameter Name	Default Value	Can Be Overridden?
ODI Context	DEVELOPMENT	No
ODI Log Level	2	No
ODI NLS Language	AMERICAN_AMERICA.WE8ISO88	No
ODI Password	Null	No
ODI Root Directory	Null	No
ODI User	Null	No
ODI Work Repository	FUSIONAPPS_WREP	No

ODI Context

The logical name of the group of logical-to-physical mappings for connections in Oracle Data Integrator (ODI).

ODI Log Level

A numerical value between 1 and 5, where 5 is high, indicating the level of detail included in the ODI log file. Do not change the default value unless requested to do so by Oracle Support.

ODI NLS Language

The ODI import file language and encoding settings.

ODI Password

The password for the ODI user name.

ODI Root Directory

The file system directory where ODI creates work and log files.

ODI User

The ODI user name.

ODI Work Repository

The ODI repository that contains ODI-related code definitions.

Loader Parameters

Parameter Name	Default Value	Can Be Overridden?
Allow Talent Data Increment Load	N	No
Enable Keyword Crawler	N	No
Load HCM Data Files Automatically	N	No
Loader Cache Clear Limit	500	No
Loader Chunk Size	100	Yes
Loader Maximum Errors Allowed	100	Yes
Loader Number of Processes	1	Yes
Loader Save Size	1	No

Allow Talent Data Increment Load

Determines whether incremental loads of talent-management data overwrite existing Oracle Fusion records. If you set this parameter to **N** (the default value), then any talent-management data uploaded after the first load overwrites existing records. If you set this parameter to **Y**, then only new talent-management records are processed: records that already exist in Oracle Fusion are ignored.

Typically, talent-management data is migrated to Oracle Fusion; after the initial load, you maintain existing records and create new records in Oracle Fusion.

However, if you need to create new talent-management records in your source environment, then you can upload them to Oracle Fusion. In this case, you set Allow Talent Data Increment Load to **Y** to ensure that only the new records are uploaded.

Enable Keyword Crawler

Determines whether person-search keywords are updated during the load process for individual person business objects. If you set this parameter to **Y**, then the load process slows. Instead, you are recommended to run the process Update Person Search Keywords during post-load processing for HCM person and employment data.

Load HCM Data Files Automatically

Indicates, for the enterprise, whether the Load HCM Data for Coexistence process runs automatically on receipt of a zipped data file from a source application. If you leave this parameter set to **N**, then you must run Load HCM Data for Coexistence manually.

Loader Cache Clear Limit

The number of logical business objects to be processed before the Load Batch Data process clears the cache. Do not change this value unless requested to do so by Oracle Support.

Loader Chunk Size

The number of logical business objects 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 when processing 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.

Loader Save Size

The number of logical business objects to be processed before committing the objects to the database. Do not change this value unless requested to do so by Oracle Support.

User Name Parameters

Parameter Name	Default Value	Can Be Overridden?
User Name Expression	Null	No

User Name Expression

By default, the user name of an HCM coexistence user is the person's e-mail address. You can set the user name to either the person number or an assignment number by entering one of the following expressions in the User Name Expression field:

- loaderCtx.getPersonAttr("PersonNumber")
- loaderCtx.getAssignmentAttr("AssignmentNumber")

Initializing HCM Coexistence: Explained

Once your source application is configured for use with Oracle Fusion and connections are established between the two systems, you are ready to perform the initial load of business objects from the source application to Oracle Fusion.

The following figure summarizes the initial data-load process.
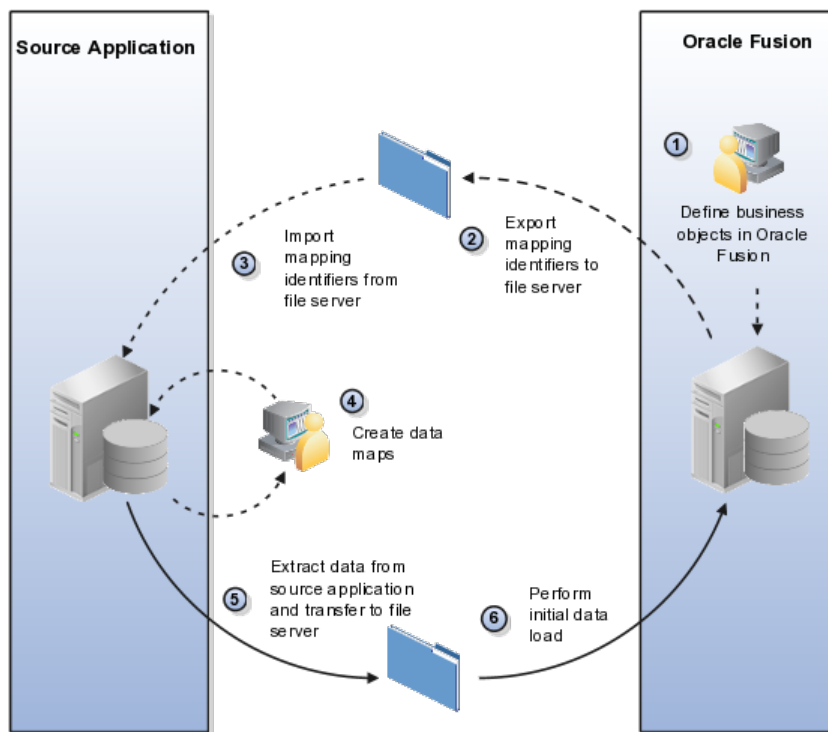
Define Business Objects in Oracle Fusion

You define the following business objects in Oracle Fusion by performing the associated tasks in the order specified by the Oracle Fusion Functional Setup Manager.

Business Object	Task
Application Reference Data Set	Manage Reference Data Sets
Employment Action	Manage Actions
Employment Action Reason	Manage Action Reasons
Enterprise	Manage Enterprise HCM Information

Legal Employer Organization Payroll Statutory Unit Organization	Manage Legal Entity HCM Information
Legal Entity	Manage Legal Entity
Legislative Data Group	Manage Legislative Data Groups
Payroll Element Input Value	Manage Elements
Payroll Element Type	Manage Elements
Person Assignment Status Type	Manage Assignment Status
Person Type	Manage Person Types

You define the following objects only if you use Oracle Fusion Talent Management for Coexistence.

Business Object	Task
Talent Profile Content Type	Manage Profile Content Types
Talent Profile Type	Manage Profile Types
Talent Instance Qualifier	Manage Instance Qualifiers
Talent Instance Qualifier Set	Manage Instance Qualifiers

Generate and Export Mapping Identifiers from Oracle Fusion

After completing the definition of business objects in Oracle Fusion, you generate and export mapping identifiers for them by performing the Manage HCM Configuration for Coexistence task. The mapping identifiers are placed automatically in a zipped data file that is written to the file server, from where the system administrator for the source application can retrieve it.

Create Data Maps in the Source Application

Once the mapping identifiers for the Oracle Fusion business objects are retrieved from the file server and imported to the source application, you map business objects in the source application to Oracle Fusion objects so that data can be exchanged between the two data models.

The detail of this task depends on the source application. For more information, see the following documents on My Oracle Support:

- Integrating PeopleSoft HRMS 8.9 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480967.1)

- Integrating PeopleSoft HRMS 9.0 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480995.1)

- Integrating PeopleSoft HCM 9.1 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480996.1)

- HCM Coexistence - Integrating EBS HCM 11i and Fusion Talent Management and Workforce Compensation (Document ID 1460869.1)

- HCM Coexistence - Integrating EBS HCM R12.1 and Fusion Talent Management and Workforce Compensation (Document ID 1460868.1)

Extract Data from the Source Application

When the data-mapping task is complete, you extract data for upload to Oracle Fusion from the source application and transfer it to the file server.

The detail of this task depends on the source application. For more information, see the following documents on My Oracle Support:

- Integrating PeopleSoft HRMS 8.9 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480967.1)

- Integrating PeopleSoft HRMS 9.0 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480995.1)

- Integrating PeopleSoft HCM 9.1 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480996.1)

- HCM Coexistence - Integrating EBS HCM 11i and Fusion Talent Management and Workforce Compensation (Document ID 1460869.1)

- HCM Coexistence - Integrating EBS HCM R12.1 and Fusion Talent Management and Workforce Compensation (Document ID 1460868.1)

Perform the Initial Data Load

You load data to Oracle Fusion by performing the Load HCM Data for Coexistence task. For the initial data load, you perform the task once for each of the following groups of business objects:

1. Work structures records
2. Person records
3. Employment records
4. Workforce compensation records
5. Talent management records

You perform the initial data load in the order in which the data-load tasks appear in the Oracle Fusion Functional Setup Manager. In addition, you load the business objects within each group in a specified order to respect dependencies between them.

Synchronize Data After Initial Data Load

After the initial data load completes successfully and you begin to use Oracle Fusion, you must take steps to keep data synchronized between your source application and Oracle Fusion.

In particular:

- Talent management records are migrated to Oracle Fusion Talent Management, which becomes the source of truth for that data; however, all other uploaded data is managed in the source application. Therefore, you must upload it to Oracle Fusion regularly to ensure that data in the two environments remains synchronized. The frequency of incremental data loads (also performed using the Load HCM Data for Coexistence

task) depends on the frequency of changes to the source data and on your use of Oracle Fusion.

- Traffic between the source application and Oracle Fusion is not one-way: you must extract data updated by Oracle Fusion Workforce Compensation and return it to the source application for further processing. For example, a worker's salary amount is returned to the source application for payment by the payroll system. To extract data from Oracle Fusion, you perform the Extract HCM Data for Coexistence task. You must upload data to Oracle Fusion again only after loading the compensation changes in the source application.

5

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 for HCM Coexistence: Points to Consider

When you set up an HCM coexistence environment, you must identify the reference data sets you need. Reference data sets provide a mechanism for

separating and sharing definitions of specific business objects among business units. The set-enabled business objects that are relevant to all uses of HCM coexistence are locations, grades, jobs, and departments. Performance templates, which are relevant to Oracle Fusion Talent Management, are also set-enabled. You must create reference data sets before you load data from your source application. The approach you take varies with the source application; however, in all cases the aim is to reflect your source configuration of relevant business objects as efficiently as possible in Oracle Fusion.

Oracle PeopleSoft Enterprise

If your source application is Oracle PeopleSoft Enterprise, you can:

- Create the same reference data sets that you use in PeopleSoft Enterprise.

  This approach enables you to map any set-enabled data to a corresponding reference data set in Oracle Fusion.

- Map all set-enabled data in PeopleSoft Enterprise to the common set provided in Oracle Fusion.

Which approach you adopt depends on how you want to partition your data in Oracle Fusion.

Oracle E-Business Suite

If your source application is Oracle E-Business Suite, you map each business group to a business unit and identify a reference data set for each business unit. The mapping between a business group, a business unit, and a reference data set must be one-to-one to ensure that jobs, grades, locations, and departments are unique within a reference data set. If you use the predefined common reference data set for all business groups, errors may occur during data loading; however, you can use the predefined common set for your global location and competency values.

6

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	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. 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.
Unchecked	General Ledger calculates the inverse rate but you can change the rate and update the daily rates table without the corresponding rate being updated.

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 your 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.

7

Define Legal Entities for Human Capital Management

Enterprise Structures for HCM Coexistence: Points to Consider

For HCM coexistence, you do not need to specify Oracle Fusion enterprise structures in as much detail as you would for a full install. This topic identifies the HCM coexistence requirements for enterprise structures.

Enterprise

The enterprise is defined by your service provider. You can change the enterprise name, if appropriate; however, all other enterprise values must be left as specified by the service provider. In particular, you must use the two-tier multiple-assignment employment model when using HCM coexistence.

Legislative Data Groups

Create a legislative data group for each currency in which you pay workers. (If you use Oracle Fusion Workforce Compensation, you later define a set of elements for each legislative data group.)

Legal Entities

The minimum requirement is to create a legal entity for each country in which you pay workers. You must define each legal entity as both a legal employer and a payroll statutory unit (PSU), and associate the relevant legislative data group with the PSU. (Any attempt to load element entries will fail if you do not define the legal entity as a PSU.) Do not change employment-model settings inherited from the enterprise.

If you are using Oracle E-Business Suite HRMS, you specify a default legal entity for each business group when mapping data between your source application and Oracle Fusion. You cannot map multiple business groups to a single legal entity.

Departments

Departments are uploaded from the source application when you perform the task Load HCM Data for Coexistence to load work structures. Each E-Business Suite HR Organization is uploaded to Oracle Fusion as a department.

Business Units

Business units (for sharing reference data sets among organizations) are uploaded from the source application when you perform the task Load HCM Data for Coexistence to load work structures records. There is a one-to-one correspondence between business groups in E-Business Suite HRMS and business units: you identify a business unit for each business group during the data-mapping phase prior to uploading data to Oracle Fusion.

Note

If you use another Oracle Fusion product that shares business units with HCM coexistence, then the business unit may be updated outside the context of HCM coexistence. You must coordinate such updates and ensure that any changes are applied also in the source application to avoid conflict.

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.

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.

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.

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 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 Legal Reporting Unit 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.

8

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.

For more information on the predefined lookups and lookup codes, see assets with the Lookup type in the Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

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.

Understanding the Transaction Table

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 codesof 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.

9

Define Human Resource Records for Coexistence

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.

Actions and Action Reasons for HCM Coexistence: Explained

Actions track changes to Human Capital Management (HCM) data, such as employment and compensation records. When you create or update a record, the action value identifies the cause of the record creation or change. Action reasons, which are optional, provide additional information about the action. Oracle Fusion Workforce Compensation uses workforce compensation components and salary components, in addition to compensation actions and action reasons, to track changes to compensation records.

Values that are predefined in both Oracle Fusion and your source application are already mapped. If you have created additional action and action reason values in the source application, you must ensure that they are mapped to values in Oracle Fusion. You can:

- Map them to predefined Oracle Fusion values.

- Create new actions, action reasons, workforce compensation components, or salary components in Oracle Fusion, as appropriate, and map your source-application values to these new values.

You must complete this task before you load data from your source application to Oracle Fusion.

Note

If your source application is Oracle E-Business Suite HRMS, you must map leaving reasons and salary component codes to Oracle Fusion actions and action reasons. For all other relevant transactional changes, the default Oracle Fusion action (Assignment Change, Hire, or Add Contingent Worker, as appropriate) is used automatically.

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.

Assignment Statuses for HCM Coexistence: Explained

In Oracle Fusion, the predefined assignment status values indicate whether an assignment is active, inactive, or suspended and whether the assignment is eligible for payroll processing.

If you have defined assignment status values in your source application, you need to map them to equivalent values in Oracle Fusion. To support this task, in Oracle Fusion you can:

- Rename the user status values associated with the predefined assignment status values

- Create new assignment status values

You must complete the setup of assignment statuses in Oracle Fusion and map your source values to Oracle Fusion values before you can load data from the source application.

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 Types for HCM Coexistence: Explained

Person records for employees and contingent workers only are extracted from your source application for upload to Oracle Fusion. Before performing the initial data load, you must define as user person types in Oracle Fusion any employee and contingent worker person types that exist in your source application. The person types that you define in Oracle Fusion must include any that were predefined in the source application and any that you defined.

Ensure that you select the correct system person type for the user person type you are creating. For example, select the employee system person type when you create employee user person types in Oracle Fusion. Person types other than employee and contingent worker are not supported in the HCM coexistence environment.

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.

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.

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.

Elements for HCM Coexistence: Explained

HCM coexistence uses elements to hold basic compensation data that you transfer from your source application for use by Oracle Fusion Workforce Compensation during a review cycle. Elements are also used to send compensation bonus amounts from Oracle Fusion back to Oracle PeopleSoft HRMS variable compensation plans, so that bonus payments can be made using the PeopleSoft HRMS payroll application. If you are using Workforce Compensation as part of your HCM coexistence implementation, you must set up elements so that you can transfer compensation data from your source application to Oracle Fusion.

Simplified Element Setup

This section describes the simplest way for you to set up the elements you need for HCM coexistence. For each currency in which you pay workers, you create the set of elements described in the following table and associate the elements with the relevant legislative data groups. For example, if you pay workers in the United States, the United Kingdom, Ireland, France, and Germany, you need one set of elements in US Dollars, one in GB Pounds, and one in Euros.

Name	Base Pay	Bonus	Allowance
Type	Recurring	Recurring	Recurring
Classification	Information	Information	Information
Input Currency	Local	Local	Local

Allow multiple entries in same period	No		Yes			Yes	

For HCM coexistence, the emphasis is on simplicity of setup, which means that the recommended approach is very different from the approach you would use if Oracle Fusion were your system of record. All you need to create is a simple element to hold the compensation information you transfer from your source application. The recommendation in Oracle Fusion is to use an element of type **Recurring** with the classification **Information**.

Element Input Values

The following table summarizes the recommended approach to setting up input values for your elements. For base pay elements, you typically specify either a rate input value (for hourly pay) or an amount input value (for salaried pay). Similarly, for the bonus element you usually specify an amount input value only. You must select the special purpose of **Primary Input Value** for the **Amount** input value to include the values in compensation history. You can complete the remaining fields as required by your enterprise.

Element Name	Input Value Name	Entry Sequence	Special Purpose	UOM	Displayed	Allow User Entry	Create Database Item
Base Pay	Rate	1	Rate	Money	Y	Y	Y
	Amount	2	Primary Input Value	Money	Y	Y	Y
Bonus	Percentage	1	Percentage	Money	Y	Y	Y
	Amount	2	Primary Input Value	Money	Y	Y	Y
Allowance	Amount	1	Primary Input Value	Money	Y	Y	Y

Element Eligibility

You must create element eligibility for each of your elements. The recommended approach is to create open eligibility: you create element eligibility with a name but no criteria, so that the elements are available in all circumstances.

FAQs for Define Human Resource Records for Coexistence

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.

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.

Why do I need to use grade rates in HCM coexistence?

You need to use grade rates if you want to see compa-ratio values in Oracle Fusion Workforce Compensation; otherwise, grade rates are not required.

Why do I need to use salary bases in HCM coexistence?

HCM coexistence uses salary bases to link base pay and grade rates for the calculation of compa-ratio values in Oracle Fusion Workforce Compensation.

10

Define Data Mapping for Coexistence

Generating Mapping Identifiers for HCM Business Objects: Explained

After you define all required business objects in Oracle Fusion, you must generate and export mapping identifiers for these objects. The mapping identifiers are an essential input to the data-mapping process.

To generate and export the business-object mapping identifiers, you run the Generate Mapping File for HCM Business Objects process from the Manage HCM Configuration for Coexistence page. This process creates .dat files containing Global Unique Identifiers (GUIDs) for each business object. The .dat files are packaged automatically in a zipped data file that is written to the file server. The system administrator for your source application retrieves and imports the zipped data file so that you can create data mappings in the source application.

Note

If you create additional records in Oracle Fusion for the mapped business objects, you must rerun the Generate Mapping File for HCM Business Objects process to generate additional GUIDs. The system administrator for your source application can then update the mappings with the new values.

Mapping PeopleSoft HRMS Data for HCM Coexistence: Explained

You use Domain Value Maps (DVMs) to map Oracle PeopleSoft HRMS objects to Oracle Fusion objects. Only when this mapping is complete can you import PeopleSoft HRMS data into Oracle Fusion. This topic provides a summary of the DVM review and completion tasks. You can find complete instructions in the following documents on My Oracle Support:

- Integrating PeopleSoft HRMS 8.9 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480967.1)

- Integrating PeopleSoft HRMS 9.0 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480995.1)

- Integrating PeopleSoft HCM 9.1 with Fusion Talent Management and Fusion Workforce Compensation (Document ID 1480996.1)

Understanding System Data Codes in DVMs

PeopleSoft HRMS (and HCM) supply multiple DVMs. Each of the supplied DVMs has a system data code that identifies whether the DVM contains system

data values (equivalent to predefined values in Oracle Fusion). The system data code also specifies how to complete the DVM definition such that:

- Every PeopleSoft HRMS data value has a corresponding Oracle Fusion data value.
- Every Oracle Fusion data value is accounted for in the mapping.

Unless you review and complete the DVMs, data cannot be imported successfully to Oracle Fusion.

Completing the DVM Definitions

For this activity you work in both PeopleSoft HRMS and Oracle Fusion. You also need the .dat files from the Generate Mapping File for HCM Business Objects process in Oracle Fusion.

The following table summarizes how to complete the DVM for each system data code.

System Data Code	Meaning
PF	The DVM contains both PeopleSoft HRMS system data values and their corresponding Oracle Fusion values. No action is required unless you need to modify any of the delivered values.
P	The DVM contains PeopleSoft HRMS system data values only. You must: 1. Verify the delivered values. 2. Review the equivalent Oracle Fusion values in Oracle Fusion. 3. Add PeopleSoft HRMS values that have no existing Oracle Fusion equivalents to the Oracle Fusion lookup type. For example, for the DVM PERSON_HIGHEST_EDU_LEVEL_CODE, review the PeopleSoft HRMS values in the DVM and compare them with the values in the Oracle Fusion lookup type HIGHEST_EDUCATION_LEVEL. You add PeopleSoft HRMS values that have no existing Oracle Fusion equivalents to the Oracle Fusion HIGHEST_EDUCATION_LEVEL lookup. To complete the mapping you add all of the Oracle Fusion values to the DVM, including any that you added to the lookup type, using the PeopleSoft HRMS Populate Domain Value Maps page.
M	The DVM contains neither PeopleSoft HRMS nor Oracle Fusion system data values. This system data code identifies values such as action and action reason codes that exist in Oracle Fusion only. To populate this DVM, you need to import the Oracle Fusion values. You: 1. Review and manually modify the file of mapping identifiers (the .dat file) that was created by running the Oracle Fusion Generate Mapping File for HCM Business Objects process. 2. Save the modified .dat file as a .csv file, and import the values into the DVM using the PeopleSoft HRMS Import Value Maps page.

N	The DVM contains neither PeopleSoft HRMS nor Oracle Fusion system data values. The PeopleSoft HRMS values exist, but not as system data values. To populate the DVM, you: 1. Retrieve the PeopleSoft HRMS values using the SQL script supplied in the DVM. 2. Compare the PeopleSoft HRMS values to those in the corresponding Oracle Fusion lookup. 3. Add PeopleSoft HRMS values that have no existing Oracle Fusion equivalents to the Oracle Fusion lookup. For example, for the DVM PERSON_ETHNICITY_CODE, you retrieve the PeopleSoft HRMS values using the supplied SQL script and compare them to the values in the Oracle Fusion lookup type PER_ETHNICITY. You add PeopleSoft HRMS values that have no existing Oracle Fusion equivalents to the PER_ETHNICITY lookup. To complete the mapping, you add both sets of values to the DVM using the PeopleSoft Populate Domain Value Maps page.
X	The DVM contains neither PeopleSoft HRMS nor Oracle Fusion data. Steps for completing this DVM are identical to those for completing DVMs with the system data code M, except that you must add specific values to these DVMs.

Note

Job codes imported to Oracle Fusion HCM must not be more than 25 characters.

Mapping Oracle E-Business Suite HRMS Data for HCM Coexistence: Explained

You use Web Applications Desktop Integrator (Web ADI) spreadsheets to map Oracle E-Business Suite Human Resources Management Systems (HRMS) objects to Oracle Fusion objects. Only when this mapping is complete can you import E-Business Suite HRMS data into Oracle Fusion. This topic provides a summary of the Web ADI spreadsheet review and completion tasks, for which you use the E-Business Suite HRMS responsibility HCM Coexistence Manager. You can find complete instructions in the following documents on My Oracle Support:

- HCM Coexistence - Integrating EBS HCM 11i and Fusion Talent Management and Workforce Compensation (Document ID 1460869.1)

- HCM Coexistence - Integrating EBS HCM R12.1 and Fusion Talent Management and Workforce Compensation (Document ID 1460868.1)

Identifying Business Groups for Integration

You perform the task Identify Business Groups for Integration. In the Web ADI spreadsheet invoked by this task, you indicate, for each business group in the E-Business Suite HRMS instance, whether its data is to be integrated with Oracle Fusion.

Once this task is complete, you can import cross-reference data from Oracle Fusion and complete the mapping task.

Mapping E-Business Suite HRMS Data to Oracle Fusion

You perform the Define Mapping task (Release 12.1) or the Setup: Mapping function (Release 11i).

The purpose of the mapping task is to ensure that:

- Every E-Business Suite HRMS data value has a corresponding Oracle Fusion data value.

- Every Oracle Fusion data value is accounted for in the mapping.

The mapping activity comprises several mapping substasks, for each of which you complete a Web ADI spreadsheet. The following table summarizes the mapping substasks.

Mapping Subtask	Description
Map business group defaults	For a specified business group, you select the name of a default reference data set and a default legal employer. You also enter the name of the business unit to be created for the business group, and optionally select an eligibility profile to filter person data. You perform this task for every business group identified for integration.
Map HR organizations to legal employers	For each HR organization in a specified business group, you can select the name of the legal employer in Oracle Fusion to which the HR organization maps. You perform this subtask only if you want to map HR organizations to legal employers.
Map key flexfield segments for job, position, grade, and competency flexfields	In E-Business Suite HRMS, key flexfields are used to hold job, position, grade, and competency definitions. In Oracle Fusion, the code and name attributes for job, position, grade, and competency are stored in the base tables rather than in key flexfields. Therefore, the data captured in segments for these entities in E-Business Suite HRMS must be mapped to the code and name values in Oracle Fusion. **Note** Job codes imported to Oracle Fusion HCM must not be more than 25 characters.
Map user defined lookups	For each lookup type in E-Business Suite HRMS, the Oracle Fusion equivalent lookup type is preselected. For each lookup code, you enter the Oracle Fusion equivalent value.
Map EBS person types to Fusion person types	For each person type in a specified business group, you select an equivalent in Oracle Fusion.
Map actions and action reasons	For E-Business Suite HRMS entities such as employee leaving reasons and salary components, you select equivalent actions and action reasons in Oracle Fusion.

Map qualification type category to content type (for Oracle Fusion Talent Management)	For each qualification type category in E-Business Suite HRMS, you select a content type in Oracle Fusion from the imported list of values.
Map elements (for Oracle Fusion Workforce Compensation)	For each element and associated element input value in a specified business group, you select an equivalent in Oracle Fusion.

Once the mapping subtasks are complete, you perform the task Process and Validate to ensure that the mapping selections made for specific subtasks are valid.

Once the mapping is successfully validated, you can extract E-Business Suite HRMS data for delivery to Oracle Fusion. For this task, you use the E-Business Suite HRMS responsibility HCM Coexistence Integrator.

11

Load Coexistence Data for Work Structures Records

HCM Data for Coexistence: How It Is Loaded

To transfer data from a source application, such as Oracle PeopleSoft HRMS or Oracle E-Business Suite HRMS, to Oracle Fusion, you use the Load HCM Data for Coexistence process. You run Load HCM Data for Coexistence manually from the Data Exchange work area.

Settings That Affect the Load HCM Data for Coexistence Process

The following parameters to the Load HCM Data for Coexistence process control its operation.

Parameter Name	Description
File Name	The zipped data file to be loaded.
Business Object to Import	The business object to be loaded. To load all business objects in the zipped data file, select **All**. For an initial load, process business objects individually. For incremental loads, you can select **All**.
Loader Run Type	Indicate whether to import the data or both import and load the data. If you select **Import**, then you must load the data subsequently using the Load Batch Data process. For an initial data load, you are recommended to select **Import** so that you can identify and resolve any issues as they occur. For incremental data loads, select **Import and Load Batch Data**, unless you have reasons for performing the steps separately.
Batch Name	A name that identifies the data load.
Loader Maximum Errors Allowed	The maximum number of errors in a thread before processing terminates. If an error occurs when processing 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.

Loader Chunk Size	The number of logical business objects a single Load Batch Data thread processes in a single action.

How HCM Data for Coexistence Is Loaded

The Load HCM Data for Coexistence process retrieves the zipped file of source data from the Oracle Data Integrator (ODI) root directory on the Oracle Fusion Application Server, validates the data, and loads it into Oracle Fusion. The process has three phases, as summarized in the following figure.

During the first phase, the Load HCM Data for Coexistence process:

- Decompresses the data file

- Checks the file for basic errors

Note

The pipe character (|) is not supported in data values.

During the second phase, for each business object, the Load HCM Data for Coexistence process:

- Maps the data from the source application to the Oracle Fusion data model

- Identifies new, changed, and deleted data

Important

All incremental data loads must contain the same set of data as the initial data load. The data-import process identifies any differences between latest data and data already loaded to Oracle Fusion and performs an incremental load of the changes. If you omit data from the data load (for example, by changing the export filter settings), then Oracle Fusion identifies it as data to be deleted.

- Imports business objects to stage tables

During the final phase, for each business object, the Load HCM Data for Coexistence process:

- Validates the data in the stage tables against relevant business rules in Oracle Fusion

- Loads each business object that is processed successfully to the Oracle Fusion application tables

- Reports any errors in the Data Exchange work area

Note

In an incremental data load, you cannot upload date-effective changes to terminated work relationships. You must apply such changes manually to the Oracle Fusion data using the Oracle Fusion interface before attempting an incremental data load. Otherwise, the data load to Oracle Fusion will fail.

When you run Load HCM Data for Coexistence, the Loader Run Type parameter determines whether both the import and load phases of the process are run. If you set Loader Run Type to **Import** (for example, to complete checks for basic errors before attempting to load the data), then you must run the load phase manually using the Load Batch Data process.

Loading HCM Data for Coexistence Automatically

During implementation of HCM coexistence, you can specify that the Load HCM Data for Coexistence process is to run automatically for the enterprise. In this case:

- All loading of data to HCM coexistence occurs automatically. You cannot override this setting for individual data loads, nor can you schedule the process to run at a particular time.

- Values for the parameters to the Load HCM Data for Coexistence process are as follows:

Parameter Name	Value
File Name	The name of the zipped data file to be loaded.
Business Object to Import	All
Loader Run Type	Import and Load Batch Data
Batch Name	Generated automatically by concatenating the loader batch ID with the business object name. For example, 12345:Work Relationship.
Loader Maximum Errors Allowed	As specified for the enterprise during implementation.
Loader Number of Processes	As specified for the enterprise during implementation.
Loader Chunk Size	As specified for the enterprise during implementation.

Loading Business Objects in the Required Order: Explained

To load business objects from a source application to Oracle Fusion, you perform the Load HCM Data for Coexistence task. You invoke this task from the Oracle Fusion Functional Setup Manager when you load HCM data for the first time. For subsequent or incremental loads, you perform the Load HCM Data for Coexistence task in the Data Exchange work area.

Business Object Load Order

When you load business objects, whether for the first time or subsequently, you must respect the general load order shown in the following table so that dependencies between business objects are satisfied. For example, you must load all work structure records before salary bases. Within the work structure records grouping, you must load locations before business units, business units before grades, grades before grade rates, and so on. All business objects to be loaded can be in the same zip file.

Note

For the initial data load, you are recommended to load one business object at a time, following the load order shown in the following table, and select the **Loader Run Type** value **Import** rather than **Import and Load.** This approach enables you to diagnose any loading issues as they occur and fix them before loading the next business object.

For incremental data loads, you can load all business objects at once (select the **All** option) and specify the **Loader Run Type** value **Import and Load**. When you load all business objects at once, the data-load process automatically loads them in the appropriate order. The automated loading process (where the Load HCM Data for Coexistence process runs automatically on receipt of a file) can be used for incremental data loads.

Order	Business Object Group	Business Object
1	Work Structures	1. Locations 2. Business units 3. Grades 4. Grade rates 5. Job families 6. Jobs
2	Workforce Compensation	1. Salary bases
3	Talent Management	1. Establishments 2. Rating models 3. Content items 4. Content item relationships
4	Person	1. Persons 2. Person documentation 3. Departments 4. Department trees 5. Positions

5	Employment	1. Work relationships
6	Workforce Compensation	1. Salary elements 2. Element entries
7	Profile Management	1. Profiles

Note

After loading business units, you need to open each one using the Oracle Fusion Manage Business Unit Set Assignment task and save the default reference data set assignments; otherwise, set-enabled data may not be visible to users.

The next sections of this topic provide details of the dependencies between business objects. By following the general load order described above you will respect these dependencies.

Dependencies Between Business Objects for Workforce Compensation

The following figure illustrates dependencies between business objects relevant to workforce compensation.

These dependencies determine the order in which you must load the business objects. For example, positions require jobs and departments to be loaded first, and work relationships require persons and positions to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

Dependencies Between Business Objects for Talent Management

The following figure illustrates dependencies between business objects relevant to talent management.

These dependencies determine the order in which you must load the business objects. For example, profiles require work relationships, establishments, and content items to be loaded first, and content items require rating models to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

Person   Location   Business Unit   Job Family   Grade

Person Documents   Department   Job   Grade Rate

Department Tree   Position   Rating Model

Work Relationship   Profile   Content Item

Establishment   Content Item Relationship

System-of-Record Considerations

After the initial load, Oracle Fusion Applications are the system of record for business objects that are specific to talent management; therefore, for incremental loads you do not load establishments, rating models, content items and relationships, or profile data. In effect, the initial load migrates talent-management business objects from the source application to Oracle Fusion Applications. Thereafter, you create any new records directly in Oracle Fusion.

Note

If you include talent-management objects in incremental loads, then they overwrite existing Oracle Fusion records. If you need to create new talent-management records in your source environment, then set the configuration parameter Allow Talent Data Increment Load to **Y**. This setting ensures that only new records are processed during incremental uploads; existing records are ignored.

For all data other than talent-management data, the source application remains the system of record: you maintain the data in the source application and upload it periodically to Oracle Fusion Applications.

Loading Batch Data into Oracle Fusion HCM: Explained

The Load Batch Data process, which you run from the Data Exchange work area, imports data into Oracle Fusion Human Capital Management (HCM) 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 Load Batch Data stage 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.

Using Oracle Fusion Transactional Business Intelligence Reports to Validate Uploaded Data: Explained

You can use Oracle Fusion Transactional Business Intelligence (OTBI) reports to validate data that you upload to Oracle Fusion. The following table identifies predefined reports that are most relevant in the HCM coexistence environment. You can edit these reports and create additional reports.

Type	Report Name	Product Folder	Description
Workforce Compensation	Salary Basis Report	**Compensation - Transactional Analysis Samples - Salary Basis**	Displays details of salary bases that are active in a specified period.
Workforce Compensation	Salary Components	**Compensation - Transactional Analysis Samples - Salary Components**	Displays total adjustment amounts by salary component, the percentage of total salaries the component comprises, and the number of workers who received an adjustment for a specific component.
Workforce Compensation	Salary Detail Report	**Compensation - Transactional Analysis Samples - Salary Detail Report**	Displays salary details for a set of workers, including salary basis, currency, and current salary amount.
Workforce Compensation	Stock Detail Report	**Compensation - Transactional Analysis Samples - Stock Detail Report**	Displays award details by grant, including the grant price, total shares granted, exercise price, and expiration date.
Global Human Resources	Absence Details	**Workforce Management - Transactional Analysis Samples - Absence Details**	Displays absence details by worker.
Global Human Resources	Assignment Details	**Workforce Management - Transactional Analysis Samples - Assignment Details**	Displays assignment details by worker.

Global Human Resources	Assignment Headcount by Department	**Workforce Management - Transactional Analysis Samples - Assignment Headcount by Department**	Displays the assignment headcount for each department.
Global Human Resources	Department Details	**Workforce Management - Transactional Analysis Samples - Department Details**	Displays departments available between specified dates.
Global Human Resources	Grade Details	**Workforce Management - Transactional Analysis Samples - Grade Details**	Displays grades with their start and end dates.
Global Human Resources	Job Details	**Workforce Management - Transactional Analysis Samples - Job Details**	Displays jobs with their start and end dates.
Global Human Resources	Location Details	**Workforce Management - Transactional Analysis Samples - Location Details**	Displays location codes and addresses.
Global Human Resources	Position Details	**Workforce Management - Transactional Analysis Samples - Position Details**	Displays positions with their start and end dates.
Worker Performance	Identify Risk of Loss Reasons	**Career - Performance - Transactional Analysis Samples - Identify Risk of Loss Reasons**	Displays the most common leaving reason during a specific period for workers with high performance ratings.
Worker Performance	Identify Top Talent (using Performance and Potential)	**Career - Performance - Transactional Analysis Samples - Identify Top Talent (using Performance and Potential)**	Displays workers with both high performance and high potential in a specified period.

Running and Creating OTBI Reports

To run predefined OTBI reports, navigate to the Reports and Analytics work area and select a report from the relevant product-area folder under **Shared Folders** - **Human Capital Management** .

To create new reports, click **Create** in the Reports and Analytics work area to access Oracle BI Publisher.

For more information, see the Oracle Fusion Transactional Business Intelligence Administrator's Guide.

Security Considerations

The job role HR Analyst has the duty roles required to run the predefined OTBI reports for Global Human Resources and Worker Performance. The job role Compensation Analyst has the duty roles required to run the predefined reports for Workforce Compensation. The user running any of these reports must also have security access to the data in the report.

For more information, see the Oracle Fusion Applications Human Capital Management Security Reference Manual.

FAQs for Load Coexistence Data for Work Structures Records

What happens if I delete source records that have been processed by Load HCM Data for Coexistence?

When you run the Load HCM Data for Coexistence process, differences between the data in the load and any data previously loaded into Oracle Fusion are identified. The differences, including any deletions, are applied to the Oracle Fusion data.

Deletions are applied to the Oracle Fusion data if:

- The object record has been deleted in the source application.

- The object record has been changed such that it fails the export filter.

- The export filter settings have been changed.

Note

You are recommended not to change the export filter settings once you have performed an upload to Oracle Fusion. Files must contain all records, both changed and unchanged, that were included in the initial data load.

If a deleted person or employment record (such as an assignment) is detected during the Load HCM Data for Coexistence process, an exception is created and the deletion is not applied to the Oracle Fusion data. You must delete any such records manually (or inactivate them, if deletion is not possible) using the Oracle Fusion user interface.

Why did some complex business objects fail validation by the Load HCM Data for Coexistence process?

A complex business object is a logical business object comprising multiple related entities. For example, a person business object comprises a basic person entity and multiple child entities, such as person address details, person e-mail addresses, person national IDs, and so on. Together, these entities constitute the person logical business object.

The data loader processes each logical business object as a single item: all parent and child entities belonging to the logical business object must be validated successfully before the object can be loaded to Oracle Fusion. If any single entity fails validation, then the logical business object itself is in error. For example, if the address details in a person record contain a data error, then the person record itself is in error. You can view details of such errors and determine how to correct them.

What happens if I cancel a Load HCM Data for Coexistence process?

If you cancel the process while it is performing a data import, the import completes but the data is not loaded into Oracle Fusion.

If you cancel the process while it is performing a data load, then the loading of all business objects currently in progress completes, but no further objects are loaded.

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.

How can I confirm that data was loaded successfully to HCM coexistence?

Start by reviewing the results of the data load in the Data Exchange work area. You can see the status of the load process, its results once it completes, and the details of any errors. After a successful data load, you can validate the results in relevant Oracle Fusion user interfaces. For example, you can review worker details in the worker's portrait. You can also use Oracle Fusion Transactional Business Intelligence (OTBI) reports to confirm that uploaded data is as expected.

When do I load business objects for HCM coexistence?

The initial load of business objects from your source application to Oracle Fusion occurs during implementation of HCM coexistence. The frequency of subsequent loads (referred to as incremental loads) depends on both how you are using Oracle Fusion and the frequency of changes made to your source data. Your data-load schedule must ensure that activities planned for Oracle Fusion Talent Management and Oracle Fusion Workforce Compensation have access to the latest data.

If you are using Oracle Fusion Talent Management infrequently (for example, for yearly or occasional performance reviews), then you load business objects to Oracle Fusion immediately prior to those activities. If you are using Oracle Talent Management more frequently, and your source data is also changing frequently, then you may need to upload business objects weekly or monthly.

If you are using Oracle Fusion Workforce Compensation to perform compensation reviews at specific times (for example, at year end), then you load business objects to Oracle Fusion immediately before the review starts; otherwise, managers may not have access to the latest information about their workers. If you need to load updated business objects to Oracle Fusion after a compensation review cycle has started, you run the Refresh Workforce Compensation Data process in Oracle Fusion Workforce Compensation after the latest objects are successfully loaded.

Note

You load establishments, rating models, content items, and profile data during the initial implementation of Oracle Fusion Talent Management and not subsequently. For all other business objects, files to be uploaded must contain all records, changed and unchanged, that they contained during the initial upload.

Once a compensation review cycle is complete, you must extract the updated results and send them to the source application (where they must be successfully loaded) before performing further data loads to Oracle Fusion.

How can I delete HCM stage data and files for coexistence?

To delete data from the stage tables, you perform the Delete HCM Stage Data and Files for Coexistence task in the Data Exchange work area. Once you have selected data batches to delete, you submit the Delete HCM Stage Data and Files for Coexistence process to perform the deletion.

The deletion process also deletes zip files and directory structures from the Oracle Fusion Application Server, provided that all batches associated with the zip files have been deleted from the stage tables. The zip files must also have been imported to the stage tables during the period that you specify on input to the process.

You can also submit the process Delete HCM Stage Data and Files for Coexistence directly from the Scheduled Processes work area; however, with this approach you cannot review the batches before you submit the deletion request.

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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.

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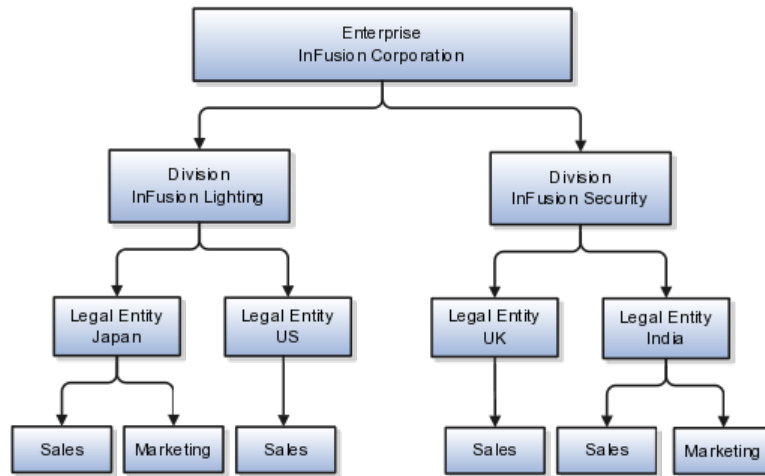
When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- 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.

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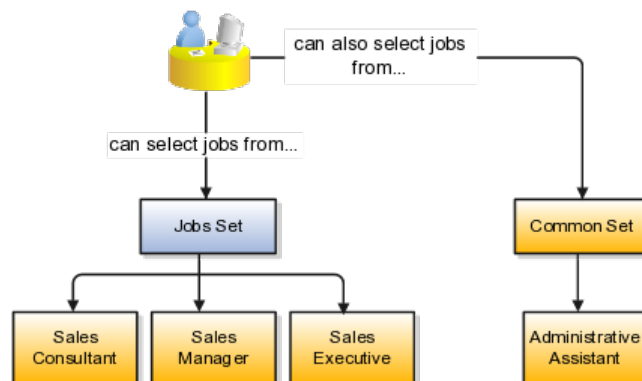
Load Coexistence Data for People and Employment

HCM Data for Coexistence: How It Is Loaded

To transfer data from a source application, such as Oracle PeopleSoft HRMS or Oracle E-Business Suite HRMS, to Oracle Fusion, you use the Load HCM Data for Coexistence process. You run Load HCM Data for Coexistence manually from the Data Exchange work area.

Settings That Affect the Load HCM Data for Coexistence Process

The following parameters to the Load HCM Data for Coexistence process control its operation.

Parameter Name	Description
File Name	The zipped data file to be loaded.
Business Object to Import	The business object to be loaded. To load all business objects in the zipped data file, select **All**. For an initial load, process business objects individually. For incremental loads, you can select **All**.
Loader Run Type	Indicate whether to import the data or both import and load the data. If you select **Import**, then you must load the data subsequently using the Load Batch Data process. For an initial data load, you are recommended to select **Import** so that you can identify and resolve any issues as they occur. For incremental data loads, select **Import and Load Batch Data**, unless you have reasons for performing the steps separately.
Batch Name	A name that identifies the data load.
Loader Maximum Errors Allowed	The maximum number of errors in a thread before processing terminates. If an error occurs when processing 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.

Loader Chunk Size	The number of logical business objects a single Load Batch Data thread processes in a single action.

How HCM Data for Coexistence Is Loaded

The Load HCM Data for Coexistence process retrieves the zipped file of source data from the Oracle Data Integrator (ODI) root directory on the Oracle Fusion Application Server, validates the data, and loads it into Oracle Fusion. The process has three phases, as summarized in the following figure.

During the first phase, the Load HCM Data for Coexistence process:

- Decompresses the data file

- Checks the file for basic errors

Note

The pipe character (|) is not supported in data values.

During the second phase, for each business object, the Load HCM Data for Coexistence process:

- Maps the data from the source application to the Oracle Fusion data model

- Identifies new, changed, and deleted data

Important

All incremental data loads must contain the same set of data as the initial data load. The data-import process identifies any differences between latest data and data already loaded to Oracle Fusion and performs an incremental load of the changes. If you omit data from the data load (for example, by changing the export filter settings), then Oracle Fusion identifies it as data to be deleted.

- Imports business objects to stage tables

During the final phase, for each business object, the Load HCM Data for Coexistence process:

- Validates the data in the stage tables against relevant business rules in Oracle Fusion

- Loads each business object that is processed successfully to the Oracle Fusion application tables

- Reports any errors in the Data Exchange work area

Note

In an incremental data load, you cannot upload date-effective changes to terminated work relationships. You must apply such changes manually to the Oracle Fusion data using the Oracle Fusion interface before attempting an incremental data load. Otherwise, the data load to Oracle Fusion will fail.

When you run Load HCM Data for Coexistence, the Loader Run Type parameter determines whether both the import and load phases of the process are run. If you set Loader Run Type to **Import** (for example, to complete checks for basic errors before attempting to load the data), then you must run the load phase manually using the Load Batch Data process.

Loading HCM Data for Coexistence Automatically

During implementation of HCM coexistence, you can specify that the Load HCM Data for Coexistence process is to run automatically for the enterprise. In this case:

- All loading of data to HCM coexistence occurs automatically. You cannot override this setting for individual data loads, nor can you schedule the process to run at a particular time.

- Values for the parameters to the Load HCM Data for Coexistence process are as follows:

Parameter Name	Value
File Name	The name of the zipped data file to be loaded.
Business Object to Import	All
Loader Run Type	Import and Load Batch Data
Batch Name	Generated automatically by concatenating the loader batch ID with the business object name. For example, 12345:Work Relationship.
Loader Maximum Errors Allowed	As specified for the enterprise during implementation.
Loader Number of Processes	As specified for the enterprise during implementation.
Loader Chunk Size	As specified for the enterprise during implementation.

Loading Business Objects in the Required Order: Explained

To load business objects from a source application to Oracle Fusion, you perform the Load HCM Data for Coexistence task. You invoke this task from the Oracle Fusion Functional Setup Manager when you load HCM data for the first time. For subsequent or incremental loads, you perform the Load HCM Data for Coexistence task in the Data Exchange work area.

Business Object Load Order

When you load business objects, whether for the first time or subsequently, you must respect the general load order shown in the following table so that dependencies between business objects are satisfied. For example, you must load all work structure records before salary bases. Within the work structure records grouping, you must load locations before business units, business units before grades, grades before grade rates, and so on. All business objects to be loaded can be in the same zip file.

Note

For the initial data load, you are recommended to load one business object at a time, following the load order shown in the following table, and select the **Loader Run Type** value **Import** rather than **Import and Load.** This approach enables you to diagnose any loading issues as they occur and fix them before loading the next business object.

For incremental data loads, you can load all business objects at once (select the **All** option) and specify the **Loader Run Type** value **Import and Load**. When you load all business objects at once, the data-load process automatically loads them in the appropriate order. The automated loading process (where the Load HCM Data for Coexistence process runs automatically on receipt of a file) can be used for incremental data loads.

Order	Business Object Group	Business Object
1	Work Structures	1. Locations 2. Business units 3. Grades 4. Grade rates 5. Job families 6. Jobs
2	Workforce Compensation	1. Salary bases
3	Talent Management	1. Establishments 2. Rating models 3. Content items 4. Content item relationships
4	Person	1. Persons 2. Person documentation 3. Departments 4. Department trees 5. Positions

5	Employment	1. Work relationships
6	Workforce Compensation	1. Salary elements 2. Element entries
7	Profile Management	1. Profiles

Note

After loading business units, you need to open each one using the Oracle Fusion Manage Business Unit Set Assignment task and save the default reference data set assignments; otherwise, set-enabled data may not be visible to users.

The next sections of this topic provide details of the dependencies between business objects. By following the general load order described above you will respect these dependencies.

Dependencies Between Business Objects for Workforce Compensation

The following figure illustrates dependencies between business objects relevant to workforce compensation.

These dependencies determine the order in which you must load the business objects. For example, positions require jobs and departments to be loaded first, and work relationships require persons and positions to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

Dependencies Between Business Objects for Talent Management

The following figure illustrates dependencies between business objects relevant to talent management.

These dependencies determine the order in which you must load the business objects. For example, profiles require work relationships, establishments, and content items to be loaded first, and content items require rating models to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

System-of-Record Considerations

After the initial load, Oracle Fusion Applications are the system of record
for business objects that are specific to talent management; therefore, for
incremental loads you do not load establishments, rating models, content items
and relationships, or profile data. In effect, the initial load migrates talent-
management business objects from the source application to Oracle Fusion
Applications. Thereafter, you create any new records directly in Oracle Fusion.

Note

If you include talent-management objects in incremental loads, then they
overwrite existing Oracle Fusion records. If you need to create new talent-
management records in your source environment, then set the configuration
parameter Allow Talent Data Increment Load to **Y**. This setting ensures that
only new records are processed during incremental uploads; existing records are
ignored.

For all data other than talent-management data, the source application remains
the system of record: you maintain the data in the source application and upload
it periodically to Oracle Fusion Applications.

Loading Batch Data into Oracle Fusion HCM: Explained

The Load Batch Data process, which you run from the Data Exchange work
area, imports data into Oracle Fusion Human Capital Management (HCM) 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 Load Batch Data stage 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.

Using Oracle Fusion Transactional Business Intelligence Reports to Validate Uploaded Data: Explained

You can use Oracle Fusion Transactional Business Intelligence (OTBI) reports to validate data that you upload to Oracle Fusion. The following table identifies predefined reports that are most relevant in the HCM coexistence environment. You can edit these reports and create additional reports.

Type	Report Name	Product Folder	Description
Workforce Compensation	Salary Basis Report	**Compensation - Transactional Analysis Samples - Salary Basis**	Displays details of salary bases that are active in a specified period.
Workforce Compensation	Salary Components	**Compensation - Transactional Analysis Samples - Salary Components**	Displays total adjustment amounts by salary component, the percentage of total salaries the component comprises, and the number of workers who received an adjustment for a specific component.
Workforce Compensation	Salary Detail Report	**Compensation - Transactional Analysis Samples - Salary Detail Report**	Displays salary details for a set of workers, including salary basis, currency, and current salary amount.
Workforce Compensation	Stock Detail Report	**Compensation - Transactional Analysis Samples - Stock Detail Report**	Displays award details by grant, including the grant price, total shares granted, exercise price, and expiration date.
Global Human Resources	Absence Details	**Workforce Management - Transactional Analysis Samples - Absence Details**	Displays absence details by worker.
Global Human Resources	Assignment Details	**Workforce Management - Transactional Analysis Samples - Assignment Details**	Displays assignment details by worker.

Global Human Resources	Assignment Headcount by Department	**Workforce Management - Transactional Analysis Samples - Assignment Headcount by Department**	Displays the assignment headcount for each department.
Global Human Resources	Department Details	**Workforce Management - Transactional Analysis Samples - Department Details**	Displays departments available between specified dates.
Global Human Resources	Grade Details	**Workforce Management - Transactional Analysis Samples - Grade Details**	Displays grades with their start and end dates.
Global Human Resources	Job Details	**Workforce Management - Transactional Analysis Samples - Job Details**	Displays jobs with their start and end dates.
Global Human Resources	Location Details	**Workforce Management - Transactional Analysis Samples - Location Details**	Displays location codes and addresses.
Global Human Resources	Position Details	**Workforce Management - Transactional Analysis Samples - Position Details**	Displays positions with their start and end dates.
Worker Performance	Identify Risk of Loss Reasons	**Career - Performance - Transactional Analysis Samples - Identify Risk of Loss Reasons**	Displays the most common leaving reason during a specific period for workers with high performance ratings.
Worker Performance	Identify Top Talent (using Performance and Potential)	**Career - Performance - Transactional Analysis Samples - Identify Top Talent (using Performance and Potential)**	Displays workers with both high performance and high potential in a specified period.

Running and Creating OTBI Reports

To run predefined OTBI reports, navigate to the Reports and Analytics work area and select a report from the relevant product-area folder under **Shared Folders** - **Human Capital Management** .

To create new reports, click **Create** in the Reports and Analytics work area to access Oracle BI Publisher.

For more information, see the Oracle Fusion Transactional Business Intelligence Administrator's Guide.

Security Considerations

The job role HR Analyst has the duty roles required to run the predefined OTBI reports for Global Human Resources and Worker Performance. The job role Compensation Analyst has the duty roles required to run the predefined reports for Workforce Compensation. The user running any of these reports must also have security access to the data in the report.

For more information, see the Oracle Fusion Applications Human Capital Management Security Reference Manual.

FAQs for Load Coexistence Data for People and Employment

What happens if I delete source records that have been processed by Load HCM Data for Coexistence?

When you run the Load HCM Data for Coexistence process, differences between the data in the load and any data previously loaded into Oracle Fusion are identified. The differences, including any deletions, are applied to the Oracle Fusion data.

Deletions are applied to the Oracle Fusion data if:

- The object record has been deleted in the source application.

- The object record has been changed such that it fails the export filter.

- The export filter settings have been changed.

Note

You are recommended not to change the export filter settings once you have performed an upload to Oracle Fusion. Files must contain all records, both changed and unchanged, that were included in the initial data load.

If a deleted person or employment record (such as an assignment) is detected during the Load HCM Data for Coexistence process, an exception is created and the deletion is not applied to the Oracle Fusion data. You must delete any such records manually (or inactivate them, if deletion is not possible) using the Oracle Fusion user interface.

Why did some complex business objects fail validation by the Load HCM Data for Coexistence process?

A complex business object is a logical business object comprising multiple related entities. For example, a person business object comprises a basic person entity and multiple child entities, such as person address details, person e-mail addresses, person national IDs, and so on. Together, these entities constitute the person logical business object.

The data loader processes each logical business object as a single item: all parent and child entities belonging to the logical business object must be validated successfully before the object can be loaded to Oracle Fusion. If any single entity fails validation, then the logical business object itself is in error. For example, if the address details in a person record contain a data error, then the person record itself is in error. You can view details of such errors and determine how to correct them.

What happens if I cancel a Load HCM Data for Coexistence process?

If you cancel the process while it is performing a data import, the import completes but the data is not loaded into Oracle Fusion.

If you cancel the process while it is performing a data load, then the loading of all business objects currently in progress completes, but no further objects are loaded.

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.

How can I confirm that data was loaded successfully to HCM coexistence?

Start by reviewing the results of the data load in the Data Exchange work area. You can see the status of the load process, its results once it completes, and the details of any errors. After a successful data load, you can validate the results in relevant Oracle Fusion user interfaces. For example, you can review worker details in the worker's portrait. You can also use Oracle Fusion Transactional Business Intelligence (OTBI) reports to confirm that uploaded data is as expected.

When do I load business objects for HCM coexistence?

The initial load of business objects from your source application to Oracle Fusion occurs during implementation of HCM coexistence. The frequency of subsequent loads (referred to as incremental loads) depends on both how you are using Oracle Fusion and the frequency of changes made to your source data. Your data-load schedule must ensure that activities planned for Oracle Fusion Talent Management and Oracle Fusion Workforce Compensation have access to the latest data.

If you are using Oracle Fusion Talent Management infrequently (for example, for yearly or occasional performance reviews), then you load business objects to Oracle Fusion immediately prior to those activities. If you are using Oracle Talent Management more frequently, and your source data is also changing frequently, then you may need to upload business objects weekly or monthly.

If you are using Oracle Fusion Workforce Compensation to perform compensation reviews at specific times (for example, at year end), then you load business objects to Oracle Fusion immediately before the review starts; otherwise, managers may not have access to the latest information about their workers. If you need to load updated business objects to Oracle Fusion after a compensation review cycle has started, you run the Refresh Workforce Compensation Data process in Oracle Fusion Workforce Compensation after the latest objects are successfully loaded.

Note

You load establishments, rating models, content items, and profile data during the initial implementation of Oracle Fusion Talent Management and not subsequently. For all other business objects, files to be uploaded must contain all records, changed and unchanged, that they contained during the initial upload.

Once a compensation review cycle is complete, you must extract the updated results and send them to the source application (where they must be successfully loaded) before performing further data loads to Oracle Fusion.

How can I delete HCM stage data and files for coexistence?

To delete data from the stage tables, you perform the Delete HCM Stage Data and Files for Coexistence task in the Data Exchange work area. Once you have selected data batches to delete, you submit the Delete HCM Stage Data and Files for Coexistence process to perform the deletion.

The deletion process also deletes zip files and directory structures from the Oracle Fusion Application Server, provided that all batches associated with the zip files have been deleted from the stage tables. The zip files must also have been imported to the stage tables during the period that you specify on input to the process.

You can also submit the process Delete HCM Stage Data and Files for Coexistence directly from the Scheduled Processes work area; however, with this approach you cannot review the batches before you submit the deletion request.

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Run Post-Load Processes for HCM Person and Employment Data

Processes Required After Loading Data for HCM Coexistence: Explained

After the successful completion of an initial or incremental data load, you must run a set of processes to complete data setup in the Oracle Fusion environment. You run these processes from the Scheduled Processes work area.

The following table describes the purpose of each of the post-data-load processes. Run the processes in the order in which they appear in the table.

Process	Description
Synchronize Person Records	When you run the Synchronize Person Records process, changes to person and assignment details that have occurred since the last data load are communicated to consuming applications, such as Oracle Fusion Trading Community Model and Oracle Identity Management (OIM), in the Oracle Fusion environment.
Update Person Search Keywords	Several attributes of person, employment, and profile records are used as person-search keywords. This process copies keyword values from the originating records to the PER_KEYWORDS table, where they are indexed to improve search performance. 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.
Calculate Relationship Strength	Gallery search results can appear 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. You run the Calculate Relationship Strength process after each data load to update stored relationship-strength information.

Refresh Manager Hierarchy	For performance reasons, 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 with latest information after each data load.
Send Pending LDAP Requests	This process sends bulk requests to OIM to create, suspend, and re-enable user accounts, as appropriate.

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, then the process runs for the system date (today's date), and events are raised for changes that become current on that date.

If changes occur to person records daily, you are recommended to schedule Synchronize Person Records to run daily for the system date (that is, without specifying start and end dates).

Note

In the Coexistence for HCM environment, you run Synchronize Person Records after you upload person records to Oracle Fusion for the first time. For this run of the process, enter the start date of the oldest person record as the start date and leave the end date as the system date. When you load person records subsequently, run Synchronize Person Records for the system date (without specifying start and end dates). Do not schedule the process 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.

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*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.

8. 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.

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.

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Define Security for Human Capital Management for Coexistence

Defining Security for Human Capital Management for Coexistence: Explained

This topic explains the HCM coexistence tasks Manage Job Roles and Manage Duties. These tasks are available to a user with the role IT Security Manager. They are performed during implementation using the Oracle Fusion Functional Setup Manager and can be performed subsequently in the Oracle Fusion Human Capital Management (HCM) Setup and Maintenance work area.

Reviewing the Security Reference Implementation

Oracle Fusion HCM provides a comprehensive set of predefined security data, known as the security reference implementation, which includes multiple instances of each of the components in the following table.

Security Reference Implementation Component	Example
Job role	Human Resource Specialist
Abstract role	Employee
Duty role	Worker Work Relationship Termination Duty
Privilege	Terminate Work Relationship
Data security policy	A Human Resource Specialist can terminate work relationship for persons and assignments in their person and assignment security profile
Security profile	View All Workers

For more information on the security reference implementation for Oracle Fusion HCM, see:

- Oracle Fusion Applications Human Capital Management Security Reference Manual

- Oracle Fusion Applications Common Security Reference Manual

You review the security reference implementation to determine whether the predefined components, in particular the job and duty roles, meet enterprise requirements.

Managing Job Roles

If the enterprise job or abstract roles do not exist in the security reference implementation, you may need to create new job or abstract roles. (Having predefined job or abstract roles that the enterprise does not use is not a problem because you do not have to provision those roles to users.)

Job and abstract roles are implemented using Oracle Identity Management (OIM), and you manage them using the Manage Job Roles task. If the security reference implementation contains all enterprise job and abstract roles, you do not need to perform this task.

Managing Duties

The security reference implementation provides one or more duty roles for every function in Oracle Fusion Applications; therefore, you need to create new duty roles only if you create custom functions. Typically, you perform the Manage Duties task to manage the duty-role hierarchy. For example, if you create new job or abstract roles, you use Manage Duties to assign duties to those roles. You also need to consider removing unused duty roles from abstract and job roles; otherwise, HCM coexistence users will have access to functions (for example, in menus) that are not relevant to them.

You are most likely to need to remove duty roles from the following predefined roles, because these roles are not specific to a single feature of the HCM coexistence offering:

- Contingent worker
- Employee
- Human Capital Management Application Administrator
- Human Resource Analyst
- Human Resource Specialist
- Human Resource Vice President
- Line manager

For example, the predefined job role Human Resource Specialist inherits the duty role Worker Work Relationship Termination Duty. In the HCM coexistence environment, work relationships must be terminated in the source application; therefore, the Worker Work Relationship Termination Duty is an unused duty role that needs to be removed from the job role.

You manage duty roles in the Oracle Fusion Middleware Authorization Policy Manager (APM) using the Manage Duties task. For guidance about the duty roles that you may need to remove from job and abstract roles, see the Oracle Fusion Applications Human Capital Management Security Reference Manual.

FAQs for Define Security for Human Capital Management for Coexistence

How do I create new job roles for HCM coexistence users?

If the enterprise job roles do not exist in the security reference implementation, you:

1. Create the new job roles in Oracle Identity Management (OIM).

Note

If you create new job or abstract roles, do not add them to the predefined role categories (HCM - Job Roles and HCM - Abstract Roles). Instead, create your own categories and ensure that the category names end with "Job Roles" or "Abstract Roles", as appropriate. For example, you could create a new category for job roles called ABC - Job Roles.

---

2. Attach duty roles to the new job roles in the Oracle Fusion Middleware Authorization Policy Manager (APM).

3. Run the Oracle Fusion Human Capital Management (HCM) process Retrieve Latest LDAP Changes to ensure that the new job roles are visible in the Oracle Fusion HCM Create Data Role interface.

   If you add custom job or abstract roles to role categories that do not end with "Job Roles" or "Abstract Roles", they do not appear in the list of jobs in Create Data Role.

4. Perform the Oracle Fusion HCM task Manage Data Role and Security Profiles to create HCM data roles for the new job roles.

5. Perform the Oracle Fusion HCM task Manage Role Mappings to create role mappings for the new data roles so that the roles can be provisioned to users.

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Define Data Security for Human Capital Management

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.

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 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.
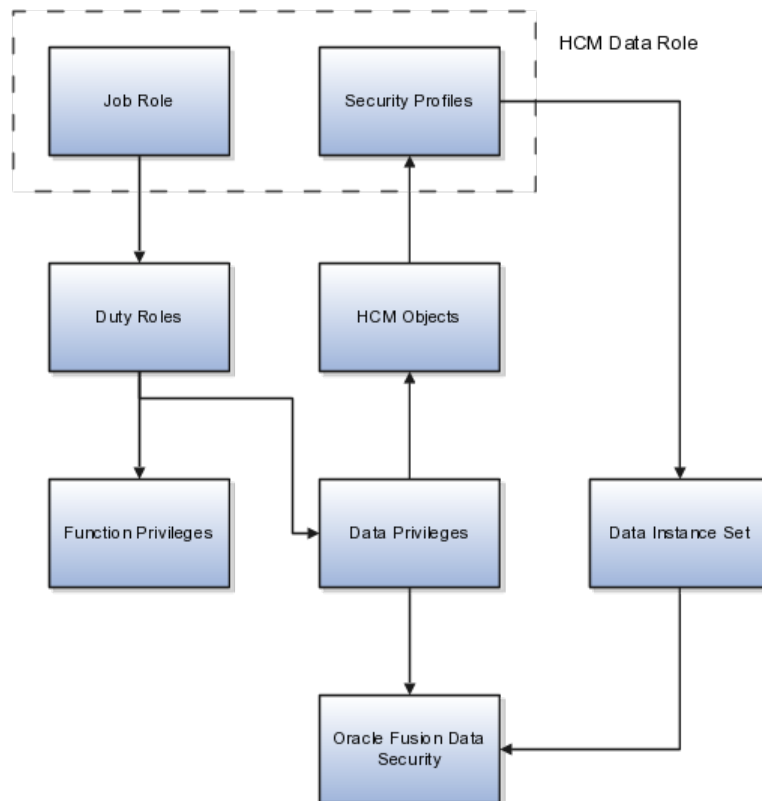
For example, the human resource specialist job role inherits the employee hire and worker promotion duty roles, among many others. The inherited duty roles provide both function privileges, such as Hire Employee, Rehire Employee, and Promote Workers, and data privileges to HCM objects, such as person 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.

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.

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.
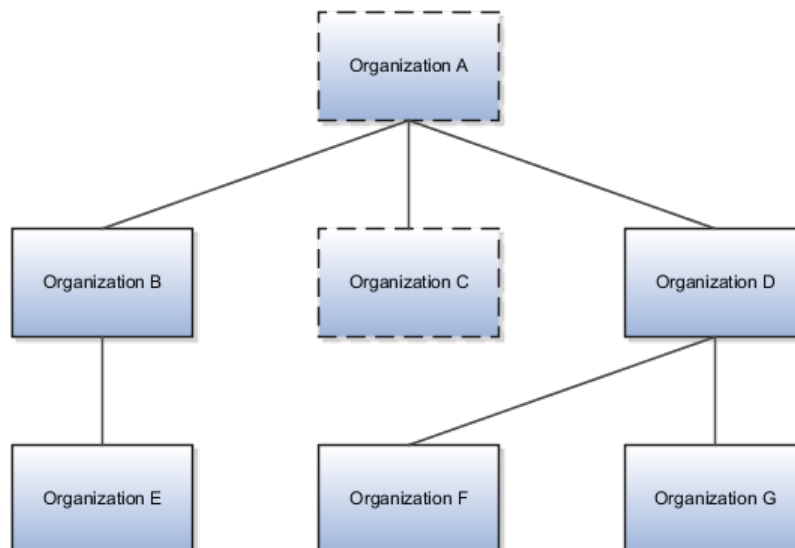
Creating Person Security Profiles: Examples

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.

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.
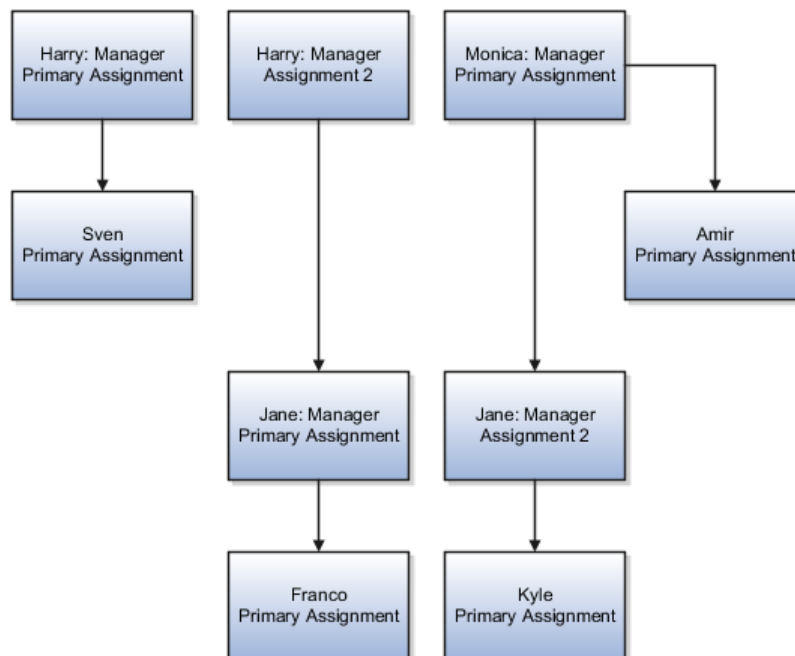
Person-Level Manager Hierarchy

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.
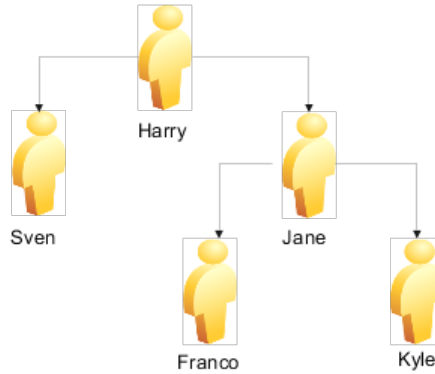
In a person-level manager hierarchy, Monica's data instance set includes the person records for Jane, Franco, Kyle, and Amir.
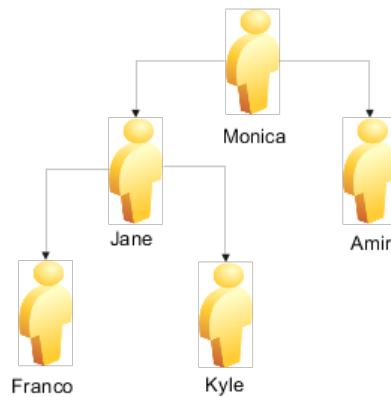
In a person-level manager hierarchy, Jane's data instance set includes the person records for Franco and Kyle.
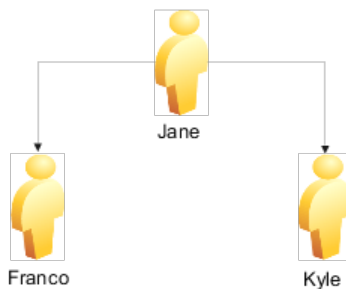
When you include the person security profile in an HCM data role and assign the data role to a manager, the person-level hierarchy ensures that the signed-on manager can access the person record and all assignment records of every person in his or her manager hierarchy (subject to any other criteria 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.
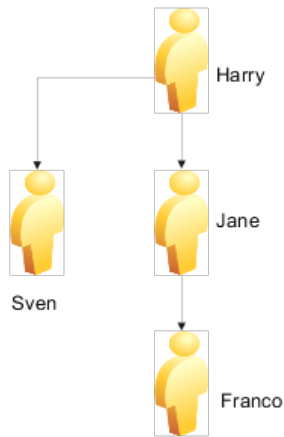
In an assignment-level manager hierarchy, Monica's data instance set includes Jane, Kyle, and Amir. It does not include Franco, because Franco reports to an assignment that Harry manages.
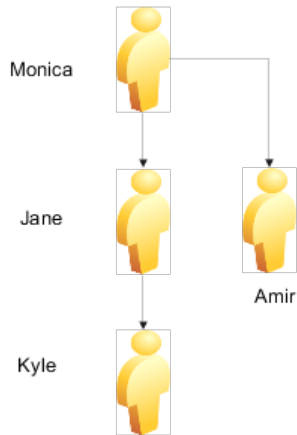
In an assignment-level manager hierarchy, Jane's data instance set includes Franco and Kyle.
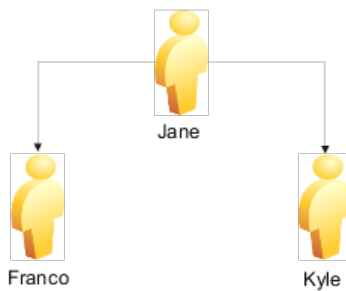
An assignment-level manager hierarchy is not the same as assignment-level security, which would secure access to individual assignments: you cannot secure access to individual assignments.

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.

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'))
```

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.

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.

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: • 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.

Summary of the Tasks

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.

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 for Coexistence

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.

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Define Users for Human Capital Management for Coexistence

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

Creating Users and Provisioning Roles for HCM Coexistence: Explained

A user is created automatically for each worker record that you load into Oracle Fusion from your source application. User accounts are created and maintained in a Lightweight Directory Access Protocol (LDAP) directory local to Oracle Fusion by Oracle Identity Management (OIM). You must work with your service provider to configure items such as identity policy and password policy in OIM. Users have a user name and password that are specific to their use of Oracle Fusion applications.

The process for creating users and provisioning roles to them varies according to whether you are performing an initial or incremental data load.

Creating Users and Provisioning Roles for an Initial Data Load

To create users and provision roles to them during the initial data load, you:

1. Create the role provisioning rules required by your enterprise.

   User access to functions and data is determined entirely by the roles that users have, and roles must be provisioned to users. To manage both automatic and manual provisioning of roles to users, you create role mappings. For example, you create role mappings to provision abstract

roles, such as employee and line manager, automatically to all employees and line managers. If you create data roles for particular job roles, you must create role mappings to manage the provisioning of those roles to eligible users. A typical user has multiple roles. To create role mappings, you perform the Manage HCM Role Provisioning Rules task.

Note

If your initial data load includes large volumes of person and employment data, you are recommended to perform step 1 (this step) after step 3.

2. Load person and employment data.

   For the initial data load, you perform the Oracle Fusion Functional Setup Manager task Load HCM Data for Coexistence.

Note

OIM does not support duplicate e-mail addresses. As duplicate e-mail addresses are not identified during import and load, you must ensure that user e-mail addresses are unique in your source person records. You can perform the Manage Users task to change a duplicate e-mail address to a unique value so that OIM can create a user account. However, you must also change the source value to ensure that the new e-mail address is not overwritten when you next load person records.

3. Run the Send Pending LDAP Requests process.

   This process sends bulk requests to OIM to create, suspend, and re-enable user accounts, as appropriate.

4. Apply autoprovisioning, using the Manage Role Mappings task, to assign all roles with the **Autoprovision** option selected to eligible workers.

5. Manually assign roles, as appropriate.

   Roles identified in your role provisioning rules as **Requestable** can be assigned to other workers by managers and human resource specialists who satisfy the role mapping conditions. Workers who satisfy the role mapping conditions can request for themselves roles identified in your role provisioning rules as **Self-requestable**.

Note

Once users are created in OIM, you must not delete them from OIM.

Creating Users and Provisioning Roles for an Incremental Data Load

When you load person and employment data after the initial data load, the process for managing users and role provisioning is as follows:

1. Update role provisioning rules, if necessary.

   The role mappings that you created for the initial data load may be sufficient; however, you are recommended to validate the existing

mappings and make any changes before you perform an incremental data load.

2. Load person and employment data using the Load HCM Data for Coexistence task in the Data Exchange work area.

3. Run the Send Pending LDAP Requests process.

   You can schedule this process to run automatically. For example, you could schedule this process to run daily.

4. Manually assign requestable roles, as appropriate.

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.
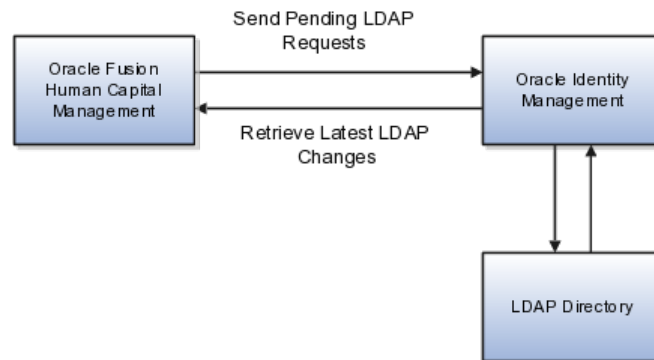
Settings That Affect Synchronization of User and Role Information

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.

User Details System Extract Report

The Oracle BI Publisher User Details System Extract Report includes details of some or all Oracle Fusion Applications user accounts.

To run this report, you must have an HCM data role that provides view-all access to person records for the Human Capital Management Application Administrator job role.

To run the report:

1. Navigate to **Tools** - **Reports and Analytics.**

2. In the Contents pane of the Reports and Analytics work area, navigate to **Shared Folders** - **Human Capital Management** - **Workforce Management** - **Human Resources Dashboard.**

3. Select the User Details System Extract report.

4. In the report window, click **More**.

5. On the Oracle Business Intelligence page for the report, select **Open** to run the report immediately or **Schedule** to schedule the report.

Parameters

User Population

Enter one of the following values to identify the group of user accounts to include in the report.

Value	Description
HCM	User accounts with an associated HCM person record.
TCA	User accounts with an associated TCA party account.
OIM	Accounts for users in the PER_USERS table who do not have an associated person number or party ID. OIM users are also referred to as implementation users.
ALL	HCM, TCA, and OIM users accounts.

From Date

Accounts for HCM and OIM users created on or after this date are included in the report. If you specify no **From Date** value, then accounts with any creation date are included, subject only to any **To Date** value that you specify.

From and to dates do not apply to the TCA user population; the report includes all TCA users if you include them in the report's user population.

To Date

Accounts for HCM and OIM users created on or before this date are included in the report. If you specify no **To Date** value, then accounts with any creation date are included, subject only to any **From Date** value that you specify.

From and to dates do not apply to the TCA user population; the report includes all TCA users if you include them in the report's user population.

User Active Status

Enter one of the following values to identify the user-account status.

Value	Description
A	Include active accounts, which belong to users with current roles.
I	Include inactive accounts, which belong to users with no current roles.
All	Include both active and inactive user accounts.

Report Results

The output is an XML-formatted file where user accounts are grouped by type, as follows:

- Group 1 (G_1) includes HCM user accounts.
- Group 2 (G_2) includes TCA party user accounts.
- Group 3 (G_3) includes OIM user accounts.

The information provided in the extract varies with the account type.

HCM User Accounts

Business Unit Name

The business unit from the primary work relationship.

Composite Last Update Date

The date when any one of a number of values, including assignment managers, location, job, and person type, was last updated.

Department

The department from the primary assignment.

Worker Type

The worker type from the user's primary work relationship.

Generation Qualifier

The user's name suffix (for example, Jr., Sr., or III).

Hire Date

The enterprise hire date.

Role Name

A list of roles currently provisioned to workers whose work relationships are all terminated. This value appears for active user accounts only.

Title

The job title from the user's primary assignment.

TCA User Accounts

Organizations

A resource group.

Roles

A list of job, abstract, and data roles provisioned to the user.

Managers

The manager of a resource group.

OIM User Accounts

Start Date

The date from when the account existed.

Created By

The user name of the user who created the account.

FAQs for Define Users for Human Capital Management for Coexistence

Can I extract details of all Oracle Fusion Applications users?

Yes. The Oracle BI Publisher User Details System Extract report includes details of all user accounts or a specified subset. For example, you can produce a report showing inactive user accounts, accounts created between specified dates, or accounts associated with TCA parties only.

To run the report, you must have an HCM data role that provides view-all access to person records for the Human Capital Management Application Administrator job role.

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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. For Oracle Cloud, always leave this feature choice selected so that your users can access the Cloud Learning Center.

Important

For non-Cloud implementations only: 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 system administrator must download the library from Oracle Technology Network (http://www.oracle.com/technetwork/documentation/fusion-apps-doc-1508435.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. Only users with job roles containing the Application Help Text Administration duty role have access to customize help.

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 Application 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.

Note

Use the full URL, for example http://www.oracle.com, when creating links.

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 Application 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 Application 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 Types: Explained

Oracle Fusion Applications Help contains various types of help content, including demos, examples, FAQs, glossary terms, help topics, and PDF guides. A business process or product can be supported by some or all of these help types.

Demo

Demos are Oracle User Productivity Kit (UPK) topics that visually demonstrate how to use the application to complete a short task or portion of a task. Demos can also provide an introduction to complex dashboards and work areas.

Example

Examples provide real use cases of features to illustrate how and when to use the feature, or scenarios to illustrate abstract concepts. Worked examples show exactly what you need to do to achieve a specific result, emphasizing decisions that you make and values that you enter.

FAQ

FAQs, or frequently asked questions, provide brief answers to questions that you might have regarding a task or page. For example, they can briefly explain what a term means, why something happened, how you can perform an action, or what happens if you perform the action.

Glossary

Glossary terms provide definitions for words or phrases used in help. You can search or browse glossary terms in the Glossary tab of Oracle Fusion Applications Help. Where the links are available, you can also see the definition when you hover over the term in help content for other help types.

Help Topic

Help topics explain key concepts, illustrate how application components work together, or assist in decision-making by explaining points to consider or the options you have. Help topics can also provide reference, overview, and other information.

PDF Guide

PDF guides present a collection of help content from the other help types, except demos, in an organized and logical format. For example, there are guides addressing specific business processes and setup offerings. You can see lists of all guides from the **Guides** menu in Oracle Fusion Applications Help.

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_RECORDE_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.

Note

Use the full URL, for example http://www.oracle.com, when creating links.

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 `&QUOT`. 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: • 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, `http://<your domain>.com/ UPKcontent/PlayerPackage`.

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. Refer to the Customizing or Adding Static Instructions, In-Field Notes, and Terminology Definitions section.

  See: Oracle Fusion Applications Extensibility Guide

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Load Coexistence Data for Workforce Compensation

HCM Data for Coexistence: How It Is Loaded

To transfer data from a source application, such as Oracle PeopleSoft HRMS or Oracle E-Business Suite HRMS, to Oracle Fusion, you use the Load HCM Data for Coexistence process. You run Load HCM Data for Coexistence manually from the Data Exchange work area.

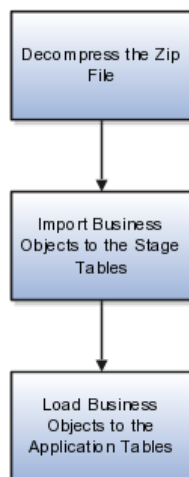## Settings That Affect the Load HCM Data for Coexistence Process

The following parameters to the Load HCM Data for Coexistence process control its operation.

Parameter Name	Description
File Name	The zipped data file to be loaded.
Business Object to Import	The business object to be loaded. To load all business objects in the zipped data file, select **All**. For an initial load, process business objects individually. For incremental loads, you can select **All**.
Loader Run Type	Indicate whether to import the data or both import and load the data. If you select **Import**, then you must load the data subsequently using the Load Batch Data process. For an initial data load, you are recommended to select **Import** so that you can identify and resolve any issues as they occur. For incremental data loads, select **Import and Load Batch Data**, unless you have reasons for performing the steps separately.
Batch Name	A name that identifies the data load.
Loader Maximum Errors Allowed	The maximum number of errors in a thread before processing terminates. If an error occurs when processing 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.

Loader Chunk Size	The number of logical business objects a single Load Batch Data thread processes in a single action.

How HCM Data for Coexistence Is Loaded

The Load HCM Data for Coexistence process retrieves the zipped file of source data from the Oracle Data Integrator (ODI) root directory on the Oracle Fusion Application Server, validates the data, and loads it into Oracle Fusion. The process has three phases, as summarized in the following figure.

During the first phase, the Load HCM Data for Coexistence process:

- Decompresses the data file

- Checks the file for basic errors

Note

The pipe character (|) is not supported in data values.

During the second phase, for each business object, the Load HCM Data for Coexistence process:

- Maps the data from the source application to the Oracle Fusion data model

- Identifies new, changed, and deleted data

Important

All incremental data loads must contain the same set of data as the initial data load. The data-import process identifies any differences between latest data and data already loaded to Oracle Fusion and performs an incremental load of the changes. If you omit data from the data load (for example, by changing the export filter settings), then Oracle Fusion identifies it as data to be deleted.

- Imports business objects to stage tables

During the final phase, for each business object, the Load HCM Data for Coexistence process:

- Validates the data in the stage tables against relevant business rules in Oracle Fusion

- Loads each business object that is processed successfully to the Oracle Fusion application tables

- Reports any errors in the Data Exchange work area

Note

In an incremental data load, you cannot upload date-effective changes to terminated work relationships. You must apply such changes manually to the Oracle Fusion data using the Oracle Fusion interface before attempting an incremental data load. Otherwise, the data load to Oracle Fusion will fail.

When you run Load HCM Data for Coexistence, the Loader Run Type parameter determines whether both the import and load phases of the process are run. If you set Loader Run Type to **Import** (for example, to complete checks for basic errors before attempting to load the data), then you must run the load phase manually using the Load Batch Data process.

Loading HCM Data for Coexistence Automatically

During implementation of HCM coexistence, you can specify that the Load HCM Data for Coexistence process is to run automatically for the enterprise. In this case:

- All loading of data to HCM coexistence occurs automatically. You cannot override this setting for individual data loads, nor can you schedule the process to run at a particular time.

- Values for the parameters to the Load HCM Data for Coexistence process are as follows:

Parameter Name	Value
File Name	The name of the zipped data file to be loaded.
Business Object to Import	All
Loader Run Type	Import and Load Batch Data
Batch Name	Generated automatically by concatenating the loader batch ID with the business object name. For example, 12345:Work Relationship.
Loader Maximum Errors Allowed	As specified for the enterprise during implementation.
Loader Number of Processes	As specified for the enterprise during implementation.
Loader Chunk Size	As specified for the enterprise during implementation.

Loading Business Objects in the Required Order: Explained

To load business objects from a source application to Oracle Fusion, you perform the Load HCM Data for Coexistence task. You invoke this task from the Oracle Fusion Functional Setup Manager when you load HCM data for the first time. For subsequent or incremental loads, you perform the Load HCM Data for Coexistence task in the Data Exchange work area.

Business Object Load Order

When you load business objects, whether for the first time or subsequently, you must respect the general load order shown in the following table so that dependencies between business objects are satisfied. For example, you must load all work structure records before salary bases. Within the work structure records grouping, you must load locations before business units, business units before grades, grades before grade rates, and so on. All business objects to be loaded can be in the same zip file.

Note

For the initial data load, you are recommended to load one business object at a time, following the load order shown in the following table, and select the **Loader Run Type** value **Import** rather than **Import and Load.** This approach enables you to diagnose any loading issues as they occur and fix them before loading the next business object.

For incremental data loads, you can load all business objects at once (select the **All** option) and specify the **Loader Run Type** value **Import and Load**. When you load all business objects at once, the data-load process automatically loads them in the appropriate order. The automated loading process (where the Load HCM Data for Coexistence process runs automatically on receipt of a file) can be used for incremental data loads.

Order	Business Object Group	Business Object
1	Work Structures	1. Locations 2. Business units 3. Grades 4. Grade rates 5. Job families 6. Jobs
2	Workforce Compensation	1. Salary bases
3	Talent Management	1. Establishments 2. Rating models 3. Content items 4. Content item relationships
4	Person	1. Persons 2. Person documentation 3. Departments 4. Department trees 5. Positions

5	Employment	1. Work relationships
6	Workforce Compensation	1. Salary elements 2. Element entries
7	Profile Management	1. Profiles

Note

After loading business units, you need to open each one using the Oracle Fusion Manage Business Unit Set Assignment task and save the default reference data set assignments; otherwise, set-enabled data may not be visible to users.

The next sections of this topic provide details of the dependencies between business objects. By following the general load order described above you will respect these dependencies.

Dependencies Between Business Objects for Workforce Compensation

The following figure illustrates dependencies between business objects relevant to workforce compensation.

These dependencies determine the order in which you must load the business objects. For example, positions require jobs and departments to be loaded first, and work relationships require persons and positions to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

Dependencies Between Business Objects for Talent Management

The following figure illustrates dependencies between business objects relevant to talent management.

These dependencies determine the order in which you must load the business objects. For example, profiles require work relationships, establishments, and content items to be loaded first, and content items require rating models to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

System-of-Record Considerations

After the initial load, Oracle Fusion Applications are the system of record for business objects that are specific to talent management; therefore, for incremental loads you do not load establishments, rating models, content items and relationships, or profile data. In effect, the initial load migrates talent-management business objects from the source application to Oracle Fusion Applications. Thereafter, you create any new records directly in Oracle Fusion.

Note

If you include talent-management objects in incremental loads, then they overwrite existing Oracle Fusion records. If you need to create new talent-management records in your source environment, then set the configuration parameter Allow Talent Data Increment Load to **Y**. This setting ensures that only new records are processed during incremental uploads; existing records are ignored.

For all data other than talent-management data, the source application remains the system of record: you maintain the data in the source application and upload it periodically to Oracle Fusion Applications.

Loading Batch Data into Oracle Fusion HCM: Explained

The Load Batch Data process, which you run from the Data Exchange work area, imports data into Oracle Fusion Human Capital Management (HCM) 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 Load Batch Data stage 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.

Using Oracle Fusion Transactional Business Intelligence Reports to Validate Uploaded Data: Explained

You can use Oracle Fusion Transactional Business Intelligence (OTBI) reports to validate data that you upload to Oracle Fusion. The following table identifies predefined reports that are most relevant in the HCM coexistence environment. You can edit these reports and create additional reports.

Type	Report Name	Product Folder	Description
Workforce Compensation	Salary Basis Report	**Compensation - Transactional Analysis Samples - Salary Basis**	Displays details of salary bases that are active in a specified period.
Workforce Compensation	Salary Components	**Compensation - Transactional Analysis Samples - Salary Components**	Displays total adjustment amounts by salary component, the percentage of total salaries the component comprises, and the number of workers who received an adjustment for a specific component.
Workforce Compensation	Salary Detail Report	**Compensation - Transactional Analysis Samples - Salary Detail Report**	Displays salary details for a set of workers, including salary basis, currency, and current salary amount.
Workforce Compensation	Stock Detail Report	**Compensation - Transactional Analysis Samples - Stock Detail Report**	Displays award details by grant, including the grant price, total shares granted, exercise price, and expiration date.
Global Human Resources	Absence Details	**Workforce Management - Transactional Analysis Samples - Absence Details**	Displays absence details by worker.
Global Human Resources	Assignment Details	**Workforce Management - Transactional Analysis Samples - Assignment Details**	Displays assignment details by worker.

Global Human Resources	Assignment Headcount by Department	**Workforce Management - Transactional Analysis Samples - Assignment Headcount by Department**	Displays the assignment headcount for each department.
Global Human Resources	Department Details	**Workforce Management - Transactional Analysis Samples - Department Details**	Displays departments available between specified dates.
Global Human Resources	Grade Details	**Workforce Management - Transactional Analysis Samples - Grade Details**	Displays grades with their start and end dates.
Global Human Resources	Job Details	**Workforce Management - Transactional Analysis Samples - Job Details**	Displays jobs with their start and end dates.
Global Human Resources	Location Details	**Workforce Management - Transactional Analysis Samples - Location Details**	Displays location codes and addresses.
Global Human Resources	Position Details	**Workforce Management - Transactional Analysis Samples - Position Details**	Displays positions with their start and end dates.
Worker Performance	Identify Risk of Loss Reasons	**Career - Performance - Transactional Analysis Samples - Identify Risk of Loss Reasons**	Displays the most common leaving reason during a specific period for workers with high performance ratings.
Worker Performance	Identify Top Talent (using Performance and Potential)	**Career - Performance - Transactional Analysis Samples - Identify Top Talent (using Performance and Potential)**	Displays workers with both high performance and high potential in a specified period.

Running and Creating OTBI Reports

To run predefined OTBI reports, navigate to the Reports and Analytics work area and select a report from the relevant product-area folder under **Shared Folders** - **Human Capital Management** .

To create new reports, click **Create** in the Reports and Analytics work area to access Oracle BI Publisher.

For more information, see the Oracle Fusion Transactional Business Intelligence Administrator's Guide.

Security Considerations

The job role HR Analyst has the duty roles required to run the predefined OTBI reports for Global Human Resources and Worker Performance. The job role Compensation Analyst has the duty roles required to run the predefined reports for Workforce Compensation. The user running any of these reports must also have security access to the data in the report.

For more information, see the Oracle Fusion Applications Human Capital Management Security Reference Manual.

FAQs for Load Coexistence Data for Workforce Compensation

What happens if I delete source records that have been processed by Load HCM Data for Coexistence?

When you run the Load HCM Data for Coexistence process, differences between the data in the load and any data previously loaded into Oracle Fusion are identified. The differences, including any deletions, are applied to the Oracle Fusion data.

Deletions are applied to the Oracle Fusion data if:

- The object record has been deleted in the source application.

- The object record has been changed such that it fails the export filter.

- The export filter settings have been changed.

Note

You are recommended not to change the export filter settings once you have performed an upload to Oracle Fusion. Files must contain all records, both changed and unchanged, that were included in the initial data load.

If a deleted person or employment record (such as an assignment) is detected during the Load HCM Data for Coexistence process, an exception is created and the deletion is not applied to the Oracle Fusion data. You must delete any such records manually (or inactivate them, if deletion is not possible) using the Oracle Fusion user interface.

Why did some complex business objects fail validation by the Load HCM Data for Coexistence process?

A complex business object is a logical business object comprising multiple related entities. For example, a person business object comprises a basic person entity and multiple child entities, such as person address details, person e-mail addresses, person national IDs, and so on. Together, these entities constitute the person logical business object.

The data loader processes each logical business object as a single item: all parent and child entities belonging to the logical business object must be validated successfully before the object can be loaded to Oracle Fusion. If any single entity fails validation, then the logical business object itself is in error. For example, if the address details in a person record contain a data error, then the person record itself is in error. You can view details of such errors and determine how to correct them.

What happens if I cancel a Load HCM Data for Coexistence process?

If you cancel the process while it is performing a data import, the import completes but the data is not loaded into Oracle Fusion.

If you cancel the process while it is performing a data load, then the loading of all business objects currently in progress completes, but no further objects are loaded.

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.

How can I confirm that data was loaded successfully to HCM coexistence?

Start by reviewing the results of the data load in the Data Exchange work area. You can see the status of the load process, its results once it completes, and the details of any errors. After a successful data load, you can validate the results in relevant Oracle Fusion user interfaces. For example, you can review worker details in the worker's portrait. You can also use Oracle Fusion Transactional Business Intelligence (OTBI) reports to confirm that uploaded data is as expected.

When do I load business objects for HCM coexistence?

The initial load of business objects from your source application to Oracle Fusion occurs during implementation of HCM coexistence. The frequency of subsequent loads (referred to as incremental loads) depends on both how you are using Oracle Fusion and the frequency of changes made to your source data. Your data-load schedule must ensure that activities planned for Oracle Fusion Talent Management and Oracle Fusion Workforce Compensation have access to the latest data.

If you are using Oracle Fusion Talent Management infrequently (for example, for yearly or occasional performance reviews), then you load business objects to Oracle Fusion immediately prior to those activities. If you are using Oracle Talent Management more frequently, and your source data is also changing frequently, then you may need to upload business objects weekly or monthly.

If you are using Oracle Fusion Workforce Compensation to perform compensation reviews at specific times (for example, at year end), then you load business objects to Oracle Fusion immediately before the review starts; otherwise, managers may not have access to the latest information about their workers. If you need to load updated business objects to Oracle Fusion after a compensation review cycle has started, you run the Refresh Workforce Compensation Data process in Oracle Fusion Workforce Compensation after the latest objects are successfully loaded.

Note

You load establishments, rating models, content items, and profile data during the initial implementation of Oracle Fusion Talent Management and not subsequently. For all other business objects, files to be uploaded must contain all records, changed and unchanged, that they contained during the initial upload.

Once a compensation review cycle is complete, you must extract the updated results and send them to the source application (where they must be successfully loaded) before performing further data loads to Oracle Fusion.

How can I delete HCM stage data and files for coexistence?

To delete data from the stage tables, you perform the Delete HCM Stage Data and Files for Coexistence task in the Data Exchange work area. Once you have selected data batches to delete, you submit the Delete HCM Stage Data and Files for Coexistence process to perform the deletion.

The deletion process also deletes zip files and directory structures from the Oracle Fusion Application Server, provided that all batches associated with the zip files have been deleted from the stage tables. The zip files must also have been imported to the stage tables during the period that you specify on input to the process.

You can also submit the process Delete HCM Stage Data and Files for Coexistence directly from the Scheduled Processes work area; however, with this approach you cannot review the batches before you submit the deletion request.

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Run Post-Load Processes for HCM Workforce Compensation Data

Processes Required After Loading Workforce Compensation Data for HCM Coexistence: Explained

After loading workforce compensation data to Oracle Fusion, you need to run processes to populate and maintain the workforce compensation tables. You run these processes from the Scheduled Processes work area.

The following table describes the purpose and frequency of each of the post-data-load processes.

Process	Description
Start Compensation Cycle	The Start Compensation Cycle process copies data from the HR tables into the workforce compensation tables. It also creates the reporting hierarchy, budget sheets, and worksheets that managers will use. You run Start Compensation Cycle once only, after the initial load of workforce compensation data has completed successfully and you have created the compensation plan.
Refresh Workforce Compensation Data	The Refresh Workforce Compensation Data process updates the workforce compensation tables so that up-to-date data is used in the compensation cycle. You run Refresh Compensation Data after every incremental data load. You must also run Refresh Workforce Compensation Data if you change your compensation-plan setup.

Extracting HCM Coexistence Data: Explained

Once you have completed a compensation review cycle in Oracle Fusion Workforce Compensation, you must extract the results of the review and return them to your source application. If salary data was loaded to Oracle Fusion Workforce Compensation as separate components, then you are recommended

to return it to the source application as separate components. The returned data must be successfully loaded in the source application, where it is usually subject to further processing. For example, bonus and salary information from a completed compensation review in Oracle Fusion Workforce Compensation may be included in person and employment records and used to pay employees from the payroll system in the source environment.

To perform the data extract, you run the Extract HCM Data process from the Data Exchange work area. Each business object change (assignment, salary, and bonus) for the selected compensation cycle process is reported in separate XML files that are added to a single zip file. The zip file is placed in the outgoing directory on the file server, from where you can retrieve it and load it into the source application.

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Load Coexistence Data for Talent and Profile Management

HCM Data for Coexistence: How It Is Loaded

To transfer data from a source application, such as Oracle PeopleSoft HRMS or Oracle E-Business Suite HRMS, to Oracle Fusion, you use the Load HCM Data for Coexistence process. You run Load HCM Data for Coexistence manually from the Data Exchange work area.

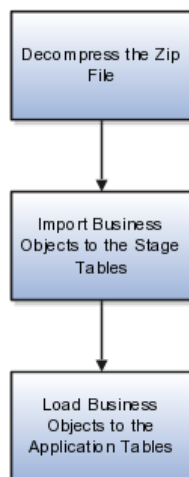## Settings That Affect the Load HCM Data for Coexistence Process

The following parameters to the Load HCM Data for Coexistence process control its operation.

Parameter Name	Description
File Name	The zipped data file to be loaded.
Business Object to Import	The business object to be loaded. To load all business objects in the zipped data file, select **All**. For an initial load, process business objects individually. For incremental loads, you can select **All**.
Loader Run Type	Indicate whether to import the data or both import and load the data. If you select **Import**, then you must load the data subsequently using the Load Batch Data process. For an initial data load, you are recommended to select **Import** so that you can identify and resolve any issues as they occur. For incremental data loads, select **Import and Load Batch Data**, unless you have reasons for performing the steps separately.
Batch Name	A name that identifies the data load.
Loader Maximum Errors Allowed	The maximum number of errors in a thread before processing terminates. If an error occurs when processing 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.

Loader Chunk Size	The number of logical business objects a single Load Batch Data thread processes in a single action.

How HCM Data for Coexistence Is Loaded

The Load HCM Data for Coexistence process retrieves the zipped file of source data from the Oracle Data Integrator (ODI) root directory on the Oracle Fusion Application Server, validates the data, and loads it into Oracle Fusion. The process has three phases, as summarized in the following figure.

During the first phase, the Load HCM Data for Coexistence process:

- Decompresses the data file

- Checks the file for basic errors

Note

The pipe character (|) is not supported in data values.

During the second phase, for each business object, the Load HCM Data for Coexistence process:

- Maps the data from the source application to the Oracle Fusion data model

- Identifies new, changed, and deleted data

Important

All incremental data loads must contain the same set of data as the initial data load. The data-import process identifies any differences between latest data and data already loaded to Oracle Fusion and performs an incremental load of the changes. If you omit data from the data load (for example, by changing the export filter settings), then Oracle Fusion identifies it as data to be deleted.

- Imports business objects to stage tables

During the final phase, for each business object, the Load HCM Data for Coexistence process:

- Validates the data in the stage tables against relevant business rules in Oracle Fusion

- Loads each business object that is processed successfully to the Oracle Fusion application tables

- Reports any errors in the Data Exchange work area

Note

In an incremental data load, you cannot upload date-effective changes to terminated work relationships. You must apply such changes manually to the Oracle Fusion data using the Oracle Fusion interface before attempting an incremental data load. Otherwise, the data load to Oracle Fusion will fail.

When you run Load HCM Data for Coexistence, the Loader Run Type parameter determines whether both the import and load phases of the process are run. If you set Loader Run Type to **Import** (for example, to complete checks for basic errors before attempting to load the data), then you must run the load phase manually using the Load Batch Data process.

Loading HCM Data for Coexistence Automatically

During implementation of HCM coexistence, you can specify that the Load HCM Data for Coexistence process is to run automatically for the enterprise. In this case:

- All loading of data to HCM coexistence occurs automatically. You cannot override this setting for individual data loads, nor can you schedule the process to run at a particular time.

- Values for the parameters to the Load HCM Data for Coexistence process are as follows:

Parameter Name	Value
File Name	The name of the zipped data file to be loaded.
Business Object to Import	All
Loader Run Type	Import and Load Batch Data
Batch Name	Generated automatically by concatenating the loader batch ID with the business object name. For example, 12345:Work Relationship.
Loader Maximum Errors Allowed	As specified for the enterprise during implementation.
Loader Number of Processes	As specified for the enterprise during implementation.
Loader Chunk Size	As specified for the enterprise during implementation.

Loading Business Objects in the Required Order: Explained

To load business objects from a source application to Oracle Fusion, you perform the Load HCM Data for Coexistence task. You invoke this task from the Oracle Fusion Functional Setup Manager when you load HCM data for the first time. For subsequent or incremental loads, you perform the Load HCM Data for Coexistence task in the Data Exchange work area.

Business Object Load Order

When you load business objects, whether for the first time or subsequently, you must respect the general load order shown in the following table so that dependencies between business objects are satisfied. For example, you must load all work structure records before salary bases. Within the work structure records grouping, you must load locations before business units, business units before grades, grades before grade rates, and so on. All business objects to be loaded can be in the same zip file.

Note

For the initial data load, you are recommended to load one business object at a time, following the load order shown in the following table, and select the **Loader Run Type** value **Import** rather than **Import and Load.** This approach enables you to diagnose any loading issues as they occur and fix them before loading the next business object.

For incremental data loads, you can load all business objects at once (select the **All** option) and specify the **Loader Run Type** value **Import and Load**. When you load all business objects at once, the data-load process automatically loads them in the appropriate order. The automated loading process (where the Load HCM Data for Coexistence process runs automatically on receipt of a file) can be used for incremental data loads.

Order	Business Object Group	Business Object
1	Work Structures	1. Locations 2. Business units 3. Grades 4. Grade rates 5. Job families 6. Jobs
2	Workforce Compensation	1. Salary bases
3	Talent Management	1. Establishments 2. Rating models 3. Content items 4. Content item relationships
4	Person	1. Persons 2. Person documentation 3. Departments 4. Department trees 5. Positions

5	Employment	1. Work relationships
6	Workforce Compensation	1. Salary elements 2. Element entries
7	Profile Management	1. Profiles

Note

After loading business units, you need to open each one using the Oracle Fusion Manage Business Unit Set Assignment task and save the default reference data set assignments; otherwise, set-enabled data may not be visible to users.
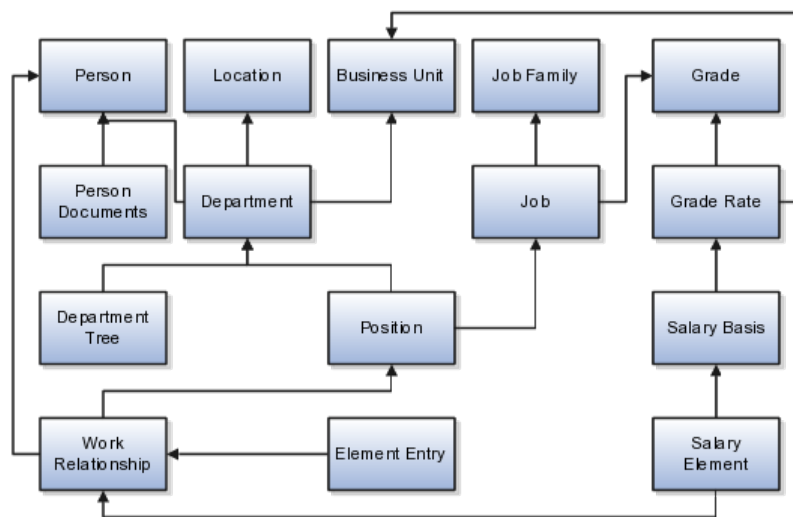

The next sections of this topic provide details of the dependencies between business objects. By following the general load order described above you will respect these dependencies.

Dependencies Between Business Objects for Workforce Compensation

The following figure illustrates dependencies between business objects relevant to workforce compensation.

These dependencies determine the order in which you must load the business objects. For example, positions require jobs and departments to be loaded first, and work relationships require persons and positions to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

Dependencies Between Business Objects for Talent Management

The following figure illustrates dependencies between business objects relevant to talent management.

These dependencies determine the order in which you must load the business objects. For example, profiles require work relationships, establishments, and content items to be loaded first, and content items require rating models to be loaded first. Arrows point from business objects to other business objects that they are dependent on.

System-of-Record Considerations

After the initial load, Oracle Fusion Applications are the system of record for business objects that are specific to talent management; therefore, for incremental loads you do not load establishments, rating models, content items and relationships, or profile data. In effect, the initial load migrates talent-management business objects from the source application to Oracle Fusion Applications. Thereafter, you create any new records directly in Oracle Fusion.

Note

If you include talent-management objects in incremental loads, then they overwrite existing Oracle Fusion records. If you need to create new talent-management records in your source environment, then set the configuration parameter Allow Talent Data Increment Load to **Y**. This setting ensures that only new records are processed during incremental uploads; existing records are ignored.

For all data other than talent-management data, the source application remains the system of record: you maintain the data in the source application and upload it periodically to Oracle Fusion Applications.

Loading Batch Data into Oracle Fusion HCM: Explained

The Load Batch Data process, which you run from the Data Exchange work area, imports data into Oracle Fusion Human Capital Management (HCM) 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 Load Batch Data stage 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.

Using Oracle Fusion Transactional Business Intelligence Reports to Validate Uploaded Data: Explained

You can use Oracle Fusion Transactional Business Intelligence (OTBI) reports to validate data that you upload to Oracle Fusion. The following table identifies predefined reports that are most relevant in the HCM coexistence environment. You can edit these reports and create additional reports.

Type	Report Name	Product Folder	Description
Workforce Compensation	Salary Basis Report	**Compensation - Transactional Analysis Samples - Salary Basis**	Displays details of salary bases that are active in a specified period.
Workforce Compensation	Salary Components	**Compensation - Transactional Analysis Samples - Salary Components**	Displays total adjustment amounts by salary component, the percentage of total salaries the component comprises, and the number of workers who received an adjustment for a specific component.
Workforce Compensation	Salary Detail Report	**Compensation - Transactional Analysis Samples - Salary Detail Report**	Displays salary details for a set of workers, including salary basis, currency, and current salary amount.
Workforce Compensation	Stock Detail Report	**Compensation - Transactional Analysis Samples - Stock Detail Report**	Displays award details by grant, including the grant price, total shares granted, exercise price, and expiration date.
Global Human Resources	Absence Details	**Workforce Management - Transactional Analysis Samples - Absence Details**	Displays absence details by worker.
Global Human Resources	Assignment Details	**Workforce Management - Transactional Analysis Samples - Assignment Details**	Displays assignment details by worker.

Global Human Resources	Assignment Headcount by Department	**Workforce Management - Transactional Analysis Samples - Assignment Headcount by Department**	Displays the assignment headcount for each department.
Global Human Resources	Department Details	**Workforce Management - Transactional Analysis Samples - Department Details**	Displays departments available between specified dates.
Global Human Resources	Grade Details	**Workforce Management - Transactional Analysis Samples - Grade Details**	Displays grades with their start and end dates.
Global Human Resources	Job Details	**Workforce Management - Transactional Analysis Samples - Job Details**	Displays jobs with their start and end dates.
Global Human Resources	Location Details	**Workforce Management - Transactional Analysis Samples - Location Details**	Displays location codes and addresses.
Global Human Resources	Position Details	**Workforce Management - Transactional Analysis Samples - Position Details**	Displays positions with their start and end dates.
Worker Performance	Identify Risk of Loss Reasons	**Career - Performance - Transactional Analysis Samples - Identify Risk of Loss Reasons**	Displays the most common leaving reason during a specific period for workers with high performance ratings.
Worker Performance	Identify Top Talent (using Performance and Potential)	**Career - Performance - Transactional Analysis Samples - Identify Top Talent (using Performance and Potential)**	Displays workers with both high performance and high potential in a specified period.

Running and Creating OTBI Reports

To run predefined OTBI reports, navigate to the Reports and Analytics work area and select a report from the relevant product-area folder under **Shared Folders** - **Human Capital Management** .

To create new reports, click **Create** in the Reports and Analytics work area to access Oracle BI Publisher.

For more information, see the Oracle Fusion Transactional Business Intelligence Administrator's Guide.

Security Considerations

The job role HR Analyst has the duty roles required to run the predefined OTBI reports for Global Human Resources and Worker Performance. The job role Compensation Analyst has the duty roles required to run the predefined reports for Workforce Compensation. The user running any of these reports must also have security access to the data in the report.

For more information, see the Oracle Fusion Applications Human Capital Management Security Reference Manual.

FAQs for Load Coexistence Data for Talent and Profile Management

What happens if I delete source records that have been processed by Load HCM Data for Coexistence?

When you run the Load HCM Data for Coexistence process, differences between the data in the load and any data previously loaded into Oracle Fusion are identified. The differences, including any deletions, are applied to the Oracle Fusion data.

Deletions are applied to the Oracle Fusion data if:

- The object record has been deleted in the source application.

- The object record has been changed such that it fails the export filter.

- The export filter settings have been changed.

Note

You are recommended not to change the export filter settings once you have performed an upload to Oracle Fusion. Files must contain all records, both changed and unchanged, that were included in the initial data load.

If a deleted person or employment record (such as an assignment) is detected during the Load HCM Data for Coexistence process, an exception is created and the deletion is not applied to the Oracle Fusion data. You must delete any such records manually (or inactivate them, if deletion is not possible) using the Oracle Fusion user interface.

Why did some complex business objects fail validation by the Load HCM Data for Coexistence process?

A complex business object is a logical business object comprising multiple related entities. For example, a person business object comprises a basic person entity and multiple child entities, such as person address details, person e-mail addresses, person national IDs, and so on. Together, these entities constitute the person logical business object.

The data loader processes each logical business object as a single item: all parent and child entities belonging to the logical business object must be validated successfully before the object can be loaded to Oracle Fusion. If any single entity fails validation, then the logical business object itself is in error. For example, if the address details in a person record contain a data error, then the person record itself is in error. You can view details of such errors and determine how to correct them.

What happens if I cancel a Load HCM Data for Coexistence process?

If you cancel the process while it is performing a data import, the import completes but the data is not loaded into Oracle Fusion.

If you cancel the process while it is performing a data load, then the loading of all business objects currently in progress completes, but no further objects are loaded.

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.

How can I confirm that data was loaded successfully to HCM coexistence?

Start by reviewing the results of the data load in the Data Exchange work area. You can see the status of the load process, its results once it completes, and the details of any errors. After a successful data load, you can validate the results in relevant Oracle Fusion user interfaces. For example, you can review worker details in the worker's portrait. You can also use Oracle Fusion Transactional Business Intelligence (OTBI) reports to confirm that uploaded data is as expected.

When do I load business objects for HCM coexistence?

The initial load of business objects from your source application to Oracle Fusion occurs during implementation of HCM coexistence. The frequency of subsequent loads (referred to as incremental loads) depends on both how you are using Oracle Fusion and the frequency of changes made to your source data. Your data-load schedule must ensure that activities planned for Oracle Fusion Talent Management and Oracle Fusion Workforce Compensation have access to the latest data.

If you are using Oracle Fusion Talent Management infrequently (for example, for yearly or occasional performance reviews), then you load business objects to Oracle Fusion immediately prior to those activities. If you are using Oracle Talent Management more frequently, and your source data is also changing frequently, then you may need to upload business objects weekly or monthly.

If you are using Oracle Fusion Workforce Compensation to perform compensation reviews at specific times (for example, at year end), then you load business objects to Oracle Fusion immediately before the review starts; otherwise, managers may not have access to the latest information about their workers. If you need to load updated business objects to Oracle Fusion after a compensation review cycle has started, you run the Refresh Workforce Compensation Data process in Oracle Fusion Workforce Compensation after the latest objects are successfully loaded.

Note

You load establishments, rating models, content items, and profile data during the initial implementation of Oracle Fusion Talent Management and not subsequently. For all other business objects, files to be uploaded must contain all records, changed and unchanged, that they contained during the initial upload.

Once a compensation review cycle is complete, you must extract the updated results and send them to the source application (where they must be successfully loaded) before performing further data loads to Oracle Fusion.

How can I delete HCM stage data and files for coexistence?

To delete data from the stage tables, you perform the Delete HCM Stage Data and Files for Coexistence task in the Data Exchange work area. Once you have selected data batches to delete, you submit the Delete HCM Stage Data and Files for Coexistence process to perform the deletion.

The deletion process also deletes zip files and directory structures from the Oracle Fusion Application Server, provided that all batches associated with the zip files have been deleted from the stage tables. The zip files must also have been imported to the stage tables during the period that you specify on input to the process.

You can also submit the process Delete HCM Stage Data and Files for Coexistence directly from the Scheduled Processes work area; however, with this approach you cannot review the batches before you submit the deletion request.

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Delete HCM Stage Data and Files for Coexistence

Deleting HCM Stage Data and Files for Coexistence: Explained

Data that you upload to Oracle Fusion Human Capital Management (HCM) is imported first to the Load Batch Data stage tables. Following validation against Oracle Fusion business rules, data is loaded from the stage tables to the application tables.

Whenever you upload changed data to Oracle Fusion HCM, you must resend all of the original data for a business object type. For example, if you update one person's home address, then you must upload all person records again. If you regularly upload changes for several types of business objects, then the Load Batch Data stage tables can grow very quickly. This topic explains how to delete data batches from the Load Batch Data stage tables. It also describes the circumstances in which the associated zip files and directory structures are deleted from the Oracle Fusion Application Server.

Identifying Batches for Deletion

To identify batches for deletion from the Load Batch Data stage tables, you perform the Delete HCM Stage Data and Files for Coexistence task in the Data Exchange work area.

On the Delete HCM Stage Data and Files for Coexistence page, you search for batches to delete by entering **From Date**, **To Date**, and **Batch Status** values. If you specify no **From Date** value, then 01/01/0001 is used.

Batches with both the specified status and a processing time stamp that falls in the specified date range appear in the search results. For example, you could search for all **Completed** batches for the previous week or all **Not Processed** batches for today.

A batch's processing time stamp is derived as follows:

- If an attempt has been made to load a batch to the application tables, then the processing time stamp records when the attempt was made.

- If no attempt has been made to load a batch to the application tables, then the processing time stamp records when the batch was generated in the stage tables.

You cannot delete batches that are in progress.

Submitting the Deletion Process

All batches that appear in the Search Results region are deleted when you submit the deletion process. To remove batches from these results, you must adjust the search criteria and search again.

When you are ready to proceed, you schedule the Delete HCM Stage Data and Files for Coexistence process; the search criteria are carried forward automatically to the Schedule Process page.

Use the process ID to monitor the process in the Scheduled Processes work area.

Deleting the Files Associated with Batches

In some circumstances, the Delete HCM Stage Data and Files for Coexistence process also deletes the following items from the Oracle Fusion Application Server:

- The original zip file associated with a batch

- The decompressed file and its directory structure

Files that were imported to the stage tables within the specified dates and for which no associated batches remain are deleted. However, if any of the associated batches remains and will not be removed by the deletion process, then no file or directory deletion occurs.

Security Considerations

To perform the task Delete HCM Stage Data and Files for Coexistence, you must have the HCM Co-Existence Management Duty role. By default, the Application Implementation Consultant and Human Capital Management Application Administrator job roles have this duty role.

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.

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.

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.

beneficiary

A person or organization designated to receive benefits from a compensation plan on the death of the plan participant.

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.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

compa-ratio

Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.

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.

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.

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.

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.

determinant

A value that determines which reference data set will be used in a specific business context.

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.

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.

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 eligibility

The association of an element to one or more components of a person's employment record. It establishes a person's eligibility for that element. Persons whose assignment components match the components of the element eligibility are eligible for the element.

element entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

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.

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.

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.

grade

A component of the employment model that defines the level of compensation for a worker.

grade rate

Used to define pay values for grades in a legislative data group.

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.

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.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

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.

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 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.

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.

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.

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.

party

A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

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.

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 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.

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.

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 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.

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.

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.

reporting establishment

An organization used in the production of human resources (HR) reports that are required by government agencies.

resource

People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

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 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.

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 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.

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.

system person type

A fixed name that the application uses to identify a group of people.

tax reporting unit

A legal entity that groups workers for the purpose of tax and social insurance reporting.

user person type

A name, derived from a system person type, that you can configure to your requirements to identify a group of people.

user rate type

Rate you enter at journal entry time to convert foreign currency transactions to your functional currency.

value set

A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

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.

worker type

A classification selected on a person's work relationship, which can be employee, contingent worker, pending worker, or nonworker.

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

Abbreviation for eXtensible markup language.

XML filter

A type of condition using XML to constrain the data secured by a data security policy.