

Oracle Talent Management Cloud

Implementing Talent Management Base

22A



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Contents

Get Help	i
1 Overview	1
Implementing Talent Management Base: Guide Overview	1
2 Geographies for HCM	5
Overview of Geographies	5
Best Practices for Managing Geography Mismatches	27
Overview of Zone Types and Zones	29
Import Geographies and Zones	30
Set Up Geocoding	55
How You Set up Address Cleansing	59
FAQs for Loqate Support	60
FAQs for Define Geographies	62
3 Currencies and Currency Rates	69
Manage Currencies	69
FAQs for Manage Currencies	70
Manage Conversion Rate Types	71
FAQs for Manage Conversion Rate Types	74
Manage Daily Rates	74
4 Enterprise Structures	77
Overview	77
Model Your Enterprise Management Structure	80
Guidelines for Configuring Global Enterprises	83
Design an Enterprise Configuration	84
Enterprise Information for Non-HCM Users	85
5 Legal Entities, Business Units, and Reference Data Sets	87
Overview of Legal Entities, Business Units, and Divisions	87

Overview	87
Model Legal Entities	88
Overview of Legal Jurisdiction and Authorities	91
Jurisdictions	91
Legal Authorities	92
Create Legal Jurisdictions, Addresses and Authorities	92
Create Legal Entities, Registrations, and Reporting Units	94
Legislative Data Groups	95
How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units	96
Examples of HCM Organization Models	97
Examples of Creating Calculation Cards for Deductions at Different Levels	102
Business Units	103
How Business Units Work with Reference Data Sets	104
Associate Business Unit with Legal Employer	106
FAQs for Legal Entities, Business Units, and Reference Data Sets	108
6 Enterprise Structures Configurator (ESC)	113
How You Establish Enterprise Structures Using the Enterprise Structures Configurator	113
Configuration Workbench	114
How You Create Legal Entities in the Enterprise Structures Configurator	115
Considerations for Creating Business Units in the Enterprise Structures Configurator	116
How You Create Reference Data Sets in the Enterprise Structures Configurator	120
How You Roll Back an Enterprise Structure Configuration	120
FAQs for Enterprise Structures Configurator	121
7 Divisions, Departments, Worker Unions, Locations, and Trees	123
Guidelines for Using Single or Multiple Classifications for an Organization	123
Add Organizations to Restructure your Business	123
Disability Organizations	128
Divisions	128
Example of Adding a New Division After Acquiring a Company	129
Departments	131
Cost Centers and Departments	133
Department Classifications	134
How You Create a Chart of Account to Create a Department	135
How You Configure the Department Title	142
Worker Union Management	142

Collective Agreement Flexfields	148
Locations	149
Associate Legal Employers with Locations	150
HCM Trees	152
FAQs for Divisions, Departments, Worker Unions, Locations, and Trees	154

8 Jobs and Positions 157

Jobs	157
Examples of Jobs	158
Examples of Positions	159
Considerations for Using Jobs and Positions	161
Job and Position Structures	163
Position Synchronization	165
Set Up Position Synchronization	167
How Assignment Values Are Inherited from Position	168
HCM Position Hierarchy	169
Graphical Position Hierarchy	169
Considerations for Using Position or Position Hierarchy for Synchronizing Assignment Manager	170
Synchronize Assignment Flexfields From Position Flexfields	171
Considerations for Flexfield Mapping in Position Synchronization	172
Synchronize Person Assignment from Position Process	173
Workforce Structures Code Generation Methods	174
Upload Workforce Structures Using a Spreadsheet	175
FAQs for Jobs and Positions	176

9 Grades, Grade Rates, and Grade Ladders 179

Grades	179
Grade Rates	181
Grade Ladders	182
How Grades, Grade Rates, and Sets Work with Legislative Data Groups	183
How You Set Up Grade Ladders for Pay Scale Requirements	185
Example of Setting Up Grade Ladders for Spine Point Requirements	189
FAQs for Grades, Grade Rates, and Grade Ladders	192

10 Workforce Structures - Configuraton Options 195

Workforce Structures Enterprise-Level Configuration	195
Workforce Structures Profile Options	197

Workforce Structures Lookups	199
Workforce Structures Flexfields	200
Parameters for Work Structure Extensible and Descriptive Flexfields	201

11 Person 207

Person Number Generation Methods	207
Person Types	208
Person Names and Languages	209
Person Name Styles	210
Person Name Formats	211
How You Specify Work Phones	213
Apply Name Formats to Person Names, Keywords, and LDAP	214
How You Update Person Search Keywords	215
Person-Record Keyword Searches	215
How You Optimize Person Search Keywords	217
How You Communicate Person and Assignment Changes to Consumer Applications	218
Person Lookups	219
Use Gender Lookup Type in the EEO Report	223
Considerations for Duplicate Checks When Importing Person Records	224
Considerations for Loading Person Photos	225
How You Cache Person Photos	226
How National Identifiers are Validated	226
User and Role-Provisioning Setup Options	228
The Manager Hierarchy: How It's Maintained	229
FAQs for Person	230

12 Workforce Records 235

Overview of Workforce Records	235
Document Records	235
Overview of Work Schedules	262
Calendar Events and Geographic Hierarchy	266
Calendar Event Setup Examples	273
Work Schedules	276
FAQs for Workforce Records	283

13 Responsive User Experience Setup 285

Deep Links	285

Quick Actions	285
Search Logic Profile Options for Client List of Values in Global Human Resources	286
Displayed, Conditionally Displayed, and Hidden Fields in Global Human Resources	287
HCM Experience Design Studio	288
Use Transaction Design Studio to Configure Field Displays	289
Create Rule to Configure Promote Action	289
How You Configure List of Values (LOVs)	290
FAQs for Responsive User Experience Setup	296

14 Workforce Profiles 299

Overview of Profile Management	299
Oracle Fusion Profile Management Components: How They Work Together	300
Rating Models	302
Content Types and Content Items	306
Talent Profiles	322
Content Sections	327
Lookups	334
Writing Assistant	338
Questionnaires	340
Anytime Feedback	360
Contextual Notes	365
FAQs for Workforce Profiles	375

15 Workflow Notifications and Approvals 379

Overview of Notifications and Approvals	379
Roles That Give Workflow Administrators Access	379
Search for Workflow Tasks to Configure	383
Disable or Enable Workflow Notifications	383
Synchronize Notifications in the Global Header and Home Page with Workflow Tasks	384
How You Define Approvals for Human Capital Management	386
How You Manage HCM Approval Transactions	387
Assignments and Routing	388
Define the Due Date and Expiration Policies for Workflow Tasks	408
Approval Management Configuration Options for Oracle Fusion Human Capital Management	411
Guidelines for Managing Approval Rules	412
Approver Types	414
HCM Approval Rules	415

Management Hierarchy Approval-Rule Attributes	416
Position Hierarchy Approval-Rule Attributes	418
How You Define an HCM Approval Policy	420
How You Modify Approval Notifications Using Page Composer	424
Example of Modifying an Approval Notification Using Page Composer	425
FAQs for Approvals	427
Workflow Email Notification Setup	429
Configurable Workflow Notifications	437
Workflow Task Life Cycle Setup	493
Monitor and Troubleshoot	497

16 Alerts Composer **503**

Overview	503
Define Alert Notifications	511
Process Alert Notifications	513
Configure Resource Alerts	515
Configure Event Alerts	517
Resolve Alert Run Errors	518
Purge Alerts	519

17 Application Toolkit Configuration **521**

Set Watchlist Options	521

18 Help Configuration **525**

Set Up Help	525
Hide or Show Help Icons	525
Give People Access to Create and Edit Help	526
Create Groups to Limit Access to Added Help	526

19 Common Reference Objects **529**

Why can't I edit setup data?	529
Set General Preferences for All Users	529
Set Value Formats for Regional Preferences for All Users	530
Set a Banner Message in the Global Header	531
How can I determine which languages appear in the Translation Editor?	531
How do I define whether the user image, name, or initials display in the global header?	532

Set CSV as the Default Option for Exporting Table Data	532
Define Application Taxonomy	533
Define Reference Data Sharing	535
Define ISO Reference Data	539
FAQs for Define ISO Reference Data	541
Manage Oracle Social Network Objects	544
FAQs for Manage Oracle Social Network Objects	547
Search Extension Framework	549
Define Global Search	551

20 Enterprise Scheduler Job Definitions and Job Sets **553**

Overview of Managing Job Definitions and Job Sets	553
Manage List of Values Sources	553
Manage Job Definitions	555
Manage Job Sets	563
Assign Roles for Access to Manage Scheduled Processes	567
Allow Updates to Scheduled Process Priority	570
FAQs	570

21 Audit Policies **573**

Audit Policies	573
Audit Configuration for Business Object Attributes	573
Overview of Audit Configuration	574
Impersonation Audit	575
How You Audit Talent Management Business Objects	576
Audit Payroll Business Objects	577

22 Applications Core Configuration **579**

Import Flexfields, Lookups, or Profile Values Using Web Services	579
Define Lookups	584
FAQs for Define Lookups	594
Manage Messages	596
Define Document Sequences	603
Define Profile Options	606
Define Attachments	612
FAQs for Define Attachments	616

23	Trees Setup	617
	Overview of Trees	617
	Manage Tree Structures	618
	Manage Tree Labels	626
	Manage Trees and Tree Versions	626
24	HCM Flexfields Setup	631
	Overview of Flexfields	631
	Flexfield Components	632
	Overview of Flexfield Configuration	633
	Flexfields at Runtime	635
	Flexfield Modification Using Page Composer	636
	How Flexfields Work with Oracle Application Cloud Architecture	637
	Flexfield Management	639
	FAQs for Flexfield Management	655
	Flexfield Deployment	657
	Manage Value Sets	662
	FAQs for Manage Value Sets	686
25	HCM Flexfields Maintenance	689
	Manage Descriptive Flexfields	689
	Manage Extensible Flexfields	703
	FAQs for Manage Extensible Flexfields	719
	Manage Key Flexfields	719
26	Eligibility Profiles	739
	How Eligibility Works With Other Objects	739
	Derived Factors	740
	Examples of Derived Factors	741
	Options for Using Age to Determine Eligibility	745
	User-Defined Criteria	746
	Examples of User-Defined Criteria	747
	Example of Using Range of Scheduled Hours	749
	Eligibility Profiles	750
	Single or Multiple Eligibility Profiles	755
	Examples of Eligibility Profiles	756

Create a Participant Eligibility Profile	758

27 Predictive Models for HCM **763**

Guidelines for Managing Predictive Models	763

28 Other Setup and Maintenance Tasks **765**

Set Up the Mapping Service for Contextual Addresses	765
Home Page Setup	765
Set Privacy Statement URL	769
Set Up Sender Policy Framework	769
Guidelines for Setting Up General Troubleshooting	770
Set Up the Worklist Region on My Dashboard	770
Deep Links	771

29 Moving Common Reference Objects **775**

Overview of Moving Common Reference Objects	775
Business Objects for Moving Common Reference Objects	775
Guidelines for Moving Related Common Reference Objects	781
Guidelines for Moving Common Reference Objects Using the Seed Data Framework	782

Get Help

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**.

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1 Overview

Implementing Talent Management Base: Guide Overview

Before you start using any of the Oracle Fusion services in Oracle Talent Management Cloud, you must set up the base functional areas in the Workforce Development offering. This guide describes how to set up these functional areas to implement Talent Management Base. This topic explains the scope of this guide and summarizes the contents of each chapter.

The following table lists the task lists within Workforce Development that are covered in other guides:

Task List	Guide
Define Batch Data Loads Define Extracts	Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud Note: This guide also covers Oracle Taleo Recruiting Cloud Service
Define Security for Workforce Development	Oracle Human Capital Management Cloud Securing Oracle HCM Cloud
Define Transactional Business Intelligence Configuration	Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports

Introduction

Chapter	Title	Contents
1	Overview	An introduction to Talent Management Base.

Application Implementation

Chapter	Title	Contents
2	Synchronization of Users and Roles from LDAP	Initializing Oracle Fusion Applications tables with role information from Oracle Identity Management.

Geographies and Currencies

Chapter	Title	Contents
3	Geographies for HCM	Managing geography structures, hierarchies, and validation, setting up geocoding, and importing geographies.
4	Currencies and Currency Rates	Managing currencies, conversion rate types, and daily rates.

Enterprise and Workforce Structures

Chapter	Title	Contents
5	Enterprise Structures Initial Configuration	An overview of the enterprise structures, modeling an enterprise structure, and using the Enterprise Structures Configurator.
6	Enterprise Structures: Maintenance	Managing reference data sets, legal jurisdictions and authorities, and legal entities for HCM.
7	Workforce Structures: Organizations	Setting up disability organizations, cost centers, departments, and locations. Selecting the employment model, using worker numbers, and person number generation methods.
8	Workforce Structures: Others	Defining grades, jobs, positions, and trees, and managing the worker directory.
9	Workforce Profiles	Using Profile Management to define rating models, content types and content items, talent profiles, content sections, and questionnaires.

Common Applications Configuration

Chapter	Title	Contents
10	Approvals and Notifications	Defining approvals for HCM, managing approval rules, and understanding approver types and approval-rule attributes

Chapter	Title	Contents
11	Application Toolkit Configuration	Mapping reports to work areas and setting up watchlist options.
12	Help configuration	Understanding help features choices and help options, and creating help security groups.
13	Common Reference Objects	Defining application taxonomy and reference data sharing. Managing menu customizations, security and audit policies, oracle social network objects, and messages
14	WebLogic Communication	Using Computer Telephony Integration (CTI) functionality and configuring PSTN gateway address
15	Applications Core Configuration	Defining lookups, messages, document sequences, profile options, and attachments
16	Trees Setup	Managing tree structures, tree labels, trees, and tree versions.
17	Flexfields Setup	Configuring flexfields, managing and deploying flexfields, and managing value sets.
18	Flexfields Maintenance	Managing descriptive flexfields, extensible flexfields, and key flexfields.

Common HCM Configuration

Chapter	Title	Contents
19	Workforce Records	Defining availability, person and employment records, and documents, and scheduling process for portrait gallery.
20	Eligibility Profiles	Defining derived factors, user-defined criteria, and eligibility profiles.
21	Predictive Models for HCM	Running predictive models for HCM, creating and editing predictive attributes, and removing predictive models.

Others

Chapter	Title	Contents
22	Other Setup and Maintenance Task	An overview of transactional business intelligence configuration, extensions, and contextual addresses
23	Import and Export of Setup Data	Understanding creating configuration packages and moving common reference objects

2 Geographies for HCM

Overview of Geographies

Overview of Geographies, Geographic Entities, and Locations

Geography is a physical space on Earth, such as a location or region, that's defined by a boundary. For example, it maybe existing geopolitical locations such as San Jose or Peru. These geographical locations are used in applications to manage business requirements such as sales territories, transportation deliveries, taxation, logistics, and so on.

Geography Type

A divisional grouping of geographies is named as Geography Types. It could be a geopolitical division such as Country, First Order Administrative Divisions (example: State, Province, District, and so on), City, Town, Village, or Non-Administrative Divisions (example: Southwest China, Northern California, and so on) or physical geographic divisions such as Island, Continent, Mountain, and so on.

Geography Use

Specifying the purpose and use of these geographies is known as Geography Use. Data could be classified for use by processes such as Taxation, Sales, Transportation, Marketing and so on.

Master Reference Geography Use

Master Reference Geography Use is data that's classified as being the source of truth. This data is used as a reference for creating User-defined Geography Uses and as the source when working with geographical data such as validating addresses or importing data. This data can be obtained from a third party or manually entered. It is defined by widely recognized administrative or political boundaries such as States, Provinces, Counties, Cities, and so on.

Master Reference Geographies

Master Reference Geographies are geographical boundary names and physical boundaries that are classified as being part of the Master Reference Geography Use. Examples include the State of California, the Province of Alberta, The Country of India, and so on.

Master Reference Geography Type

Master Reference Geography Type is a layer of Master Reference Geographies. Examples of Master Reference Geography Types would include States, Cities, Provinces, Countries, and so on.

How Geography Structure, Hierarchy, and Validation Fit Together

This topic presents the components of geographies.

The following three components are dependent on each other when defining a country:

1. Geography structure
2. Geography hierarchy
3. Geography validation

Every country must have the geography structure defined first before the hierarchy can be defined, and the geography hierarchy has to be defined before the validation can be defined.

Geography Structures

The first step for defining a country is to create a geography structure in which geography types are part of the country structure, and then define how the geography types are hierarchically related within the country structure. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure. Geography structure can be defined using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

A geography structure is a hierarchical grouping of geography types for a country. The following table describes the geography structure for the United States.

Level	Geography Type
1	State
2	County
3	City
4	Postal Code

You can use the geography structure to relate geography types for a country and define geography types for a country.

Relate Geography Types for a Country

You can determine how a country's geographies are hierarchically related by creating the hierarchy of the geography types in the geography structure. When you define a country's structure, the geography type Country is implicitly at the highest level of the geography structure with level as 1. The subsequent geography types that you add after country are numbered in sequence.

You must add a geography type as a level in the country structure before you can define a geography for that geography type in a country. For example, before defining the state of California, the State geography type must be added to the United States country structure. To quickly create country structure, you can copy a structure from another country and modify the geography types for the country.

Define Geography Types for a Country

You can use any of the master reference geography types to create your geography structure. If required, you can create a geography type, before adding it to the country structure. Each geography type is added at a lower level to the current lowest level.

Note: You can't delete geography types that have associated geography data. You can only delete the lowest level geography type of the country structure.

You can use a geography type that you create within the country structure for other country structures as well.

Geography Hierarchy

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

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

Geography hierarchy is a data model that creates conceptual parent-child relationships between geographies.

The application uses geography hierarchy information to facilitate business processes that rely on geography information, such as, tax calculation, order sourcing rules, and sales territory definition. The geography hierarchy information is centrally located and shared among other application offerings.

The geography hierarchy includes geography, geography type, geography usage, master reference geography hierarchy and user defined zones.

Geography Validation

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

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

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

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

- Map to attribute
- Enable list of values

- Tax validation
- Geography validation
- Geography validation control

Attribute Mapping

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

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

Enable List of Values

Once a geography type is mapped to an attribute, then you can specify whether the geography type will appear in a list of values during address entry in user interfaces. It is very important to review carefully if you want to enable a list of values. You should only enable a list of values if you have sufficient geography data imported or created for that geography. If the setup for master geography data is incomplete, then the geography data is either not imported or created. As a result, the list of values for the address attribute doesn't list any geography data.

Once you have enabled a list of values for an address attribute, you can only select the geography data available for the geography type. This means that if a specific geography value isn't available in the geography hierarchy, you can't create an address with a different geography value.

Note: Enable List of Values applies to the UI only. It doesn't apply to import, web services, nor REST APIs. For these, all of the required geography types must have a value in the request when creating or updating an address.

Tax Validation

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

Geography Validation

You must set up geography validation for those geography elements that you plan to use in your sales territories. Setting up validation also helps users fill in missing address information, and validate addresses during entry. For example, you can have users select states or other address elements from lists to ensure accuracy during entry, and you can have the application fill in missing values. For example, when the user enters a Postal Code, the application can retrieve the city and state.

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

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

You need to verify that the default mapping between **Geography Type** and **Map to Attribute** is valid in the Geography Mapping and Validation region and update it if required when you define geography validation. Oracle recommends that you use the following valid mapping for the countries that Loqate supports:

Country Name	Country Code	Geography Type	Map to Attribute
Andorra	AD	- Country - Parroquia - Settlement - Postal Code	- Country - State - City - Postal code
Angola	AO	- Country - Provincia - Município - Comuna - Localidad	- Country - Province - County - City - Additional address attribute 2
Argentina	AR	- Country - Province - Department - Municipality - Postal Code	- Country - Province - County - City - Postal code
Australia	AU	- Country - State - City - Postal Code	- Country - State - City - Postal code
Austria	AT	- Country - Bundensland - Bezirk - Gemeinde - Postal Code	- Country - State - County - City - Postal code
Belgium	BE	- Country - Gewest - Provincie - Gemeente - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Bolivia	BO	- Country - Departamento - Provincia	- Country - Additional address attribute 1

Country Name	Country Code	Geography Type	Map to Attribute
		Canton	- Province - City
Bosnia and Herzegovina	BA	- Country - District - Kanton - Opcine - Nasalje - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
Brazil	BR	- Country - State - City - Postal Code	- Country - State - City - Postal code
Bulgaria	BG	- Country - Oblast - Obshhina - Settlement - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Canada	CA	- Country - Province - City - Postal Code	- Country - Province - City - Postal code
Cayman Islands	KY	- Country - Island - District - Postal Code	- Country - State - City - Postal code
Chile	CL	- Country - Region - Provincia - Kommune - Postal Code	- Country - State - County - City - Postal code
China	CN	- Country - Province - City - Postal Code	- Country - Province - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Croatia	HR	- Country - Zupanije - Grad - Postal Code	- Country - Province - City - Postal code
Cuba	CU	- Country - Provincia - Municipio - City - Postal Code	- Country - Province - County - City - Postal code
Cyprus	CY	- Country - Periochi - Dimos - Postal Code	- Country - Province - City - Postal code
Czech Republic	CZ	- Country - Kraj - Okres - Obec - Postal Code	- Country - State - County - City - Postal code
Denmark	DK	- Country - Amt - Settlement - Postal Code	- Country - Province - City - Postal code
Dominican Republic	DO	- Country - Provincia - Municipio - Town - Postal Code	- Country - Province - County - City - Postal code
Ecuador	EC	- Country - Province - Canton - City - Postal Code	- Country - Province - County - City - Postal code
Estonia	EE	- Country - Maakond - Vald	- Country - State - City

Country Name	Country Code	Geography Type	Map to Attribute
		Postal Code	Postal code
Finland	FI	- Country - Laani - Kunta - Postal Code	- Country - State - City - Postal code
France	FR	- Country - Region - Department - Commune - Postal Code	- Country - Additional address attribute 1 - State - City - Postal code
Germany	DE	- Country - Bundesland - Kreis - Gemeinde - Postal Code	- Country - State - County - City - Postal code
Great Britain	GB	- Country - County - Township - Postal Code	- Country - State - City - Postal code
Greece	GR	- Country - Periferia - Nomi - Dimotika - Postal Code	- Country - State - County - City - Postal code
Guadalupe	GP	- Country - Commune - Postal Code	- Country - City - Postal code
Guam	GU	- Country - State - County - Municipality - Village - Postal Code	- Country - State - County - City - Additional address attribute 2 - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Guernsey	GG	- Country - City - Parishes - Villages - Postal Code	- Country - City - Additional address attribute 2 - Additional address attribute 3 - Postal Code
Hungary	HU	- Country - Megye - Jaras - Telepules - Settlement - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
Iceland	IS	- Country - Jaras - Telepules - Settlement - Postal Code	- Country - Province - County - City - Postal code
India	IN	- Country - State - City - Postal Code	- Country - State - City - Postal code
Indonesia	ID	- Country - Province - Regency - City - Postal Code	- Country - Province - County - City - Postal code
Ireland	IE	- Country - Province - Post County - Post Town - Locality	- Country - Additional address attribute 1 - State - City - Additional address attribute 2
Isles of Man	IM	- Country - Locality	- Country - City

Country Name	Country Code	Geography Type	Map to Attribute
		- Settlement - Postal Code	- Additional address attribute 2 - Postal code
Israel	IL	- Country - District - Subdistrict - City - Postal Code	- Country - State - County - City - Postal code
Italy	IT	- Country - Regione - Provincia - Comune - Postal code	- Country - Additional address attribute 1 - Province - City - Postal code
Jamaica	JM	- Country - Parish - Settlement	- Country - State - City
Japan	JP	- Country - Prefecture - City - Postal Code	- Country - State - City - Postal code
Jordan	JO	- Country - Muhafazat - Liwa - Tajma - Postal Code	- Country - State - County - City - Postal code
Kenya	KE	- Country - County - Division - Settlement	- Country - State - City - Additional address attribute 2
Latvia	LV	- Country - Rajons - Pilseta - Postal Code	- Country - State - City - Postal code
Liechtenstein	LI	Country	Country

Country Name	Country Code	Geography Type	Map to Attribute
		- Wahlkreis - Gemeinde - District - Postal Code	- Additional address attribute 1 - State - City - Postal code
Lithuania	LT	- Country - County - Municipality - Ward - Postal Code	- Country - State - County - City - Postal code
Luxembourg	LU	- Country - District - Canton - Commune - Settlement - Postal Code	- Country - Additional address attribute 1 - State - County - City - Postal code
Malaysia	MY	- Country - State - District - Subdistrict - Postal Code	- Country - State - County - City - Postal code
Malta	MT	- Country - Region - Local Council - Postal Code	- Country - State - City - Postal code
Martinique	MQ	- Country - Region - Department - Commune - Postal Code	- Country - State - County - City - Postal code
Mexico	MX	- Country - State - Municipality - Locality - Postal Code	- Country - State - County - Additional address attribute 2 - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Netherlands	NL	- Country - Province - Municipality - Town - Postal Code	- Country - Province - County - City - Postal code
New Zealand	NZ	- Country - Region - Town - Postal Code	- Country - State - City - Postal code
Norway	NO	- Country - Fylke - Kommune - Postal Code	- Country - Province - City - Postal code
Oman	OM	- Country - Muhafazah - District - City	- Country - State - County - City
Peru	PE	- Country - Region - Provincia - Distrito - Postal Code	- Country - Province - County - City - Postal code
Poland	PL	- Country - Wojewodztwo - Powiat - Gmina - Postal Code	- Country - Province - County - City - Postal code
Portugal	PT	- Country - Distrito - Concelho - Settlement - Postal Code	- Country - Province - County - City - Postal code
Puerto Rico	PR	- Country - Commonwealth - Municipio	- Country - State - County

Country Name	Country Code	Geography Type	Map to Attribute
		- Barrio - Postal Code	- City - Postal code
Qatar	QA	- Country - Municipality - Zone	- Country - State - City
Reunion Island	RE	- Country - Region - Department - Commune - Postal Code	- Country - State - County - City - Postal code
Romania	RO	- Country - Regiune - Judet - Settlement - Comuna - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
Russia	RU	- Country - Federal_District - Respublik - Kray - Oblast - Postal Code	- Country - Additional address attribute 1 - State - County - City - Postal code
San Marino	SM	- Country - Comune - Postal Code	- Country - State - Postal code
Singapore	SG	- Country - Region - District - Postal Code	- Country - State - City - Postal code
Slovakia	SK	- Country - Kraj - Okres - Obec - Postal Code	- Country - Province - County - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Slovenia	SI	- Country - Regija - Upravna Enota - Obcina - Settlement - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
South Africa	ZA	- Country - Province - District Municipality - Local Municipality - Postal Code	- Country - Province - County - City - Postal code
South Korea	KR	- Country - Jibang - Siti - Postal Code	- Country - State - City - Postal code
Spain	ES	- Country - Autonomous Community - Province - City - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Sri Lanka	LK	- Country - Province - District - Divisional Secretariat - Postal Code	- Country - Province - County - City - Postal code
Swaziland	SZ	- Country - District - Inkhundla - Town - Postal Code	- Country - Province - County - City - Postal code
Sweden	SE	- Country - Lan - Settlement - Postal Code	- Country - Province - City - Postal code

Note:
This country maybe labeled
Eswatini in Manage Territories.

Country Name	Country Code	Geography Type	Map to Attribute
Switzerland	CH	- Country - Kanton - Bezirk - Gemeinde - Postal Code	- Country - State - County - City - Postal code
Taiwan	TW	- Country - County - Town - Postal Code	- Country - State - City - Postal code
Thailand	TH	- Country - Region - Changwat - Amphoe - Postal Code	- Country - Additional address attribute 1 - State - City - Postal code
Tunisia	TN	- Country - Governorate - Delegation - Postal Code	- Country - State - City - Postal Code
Turkey	TR	- Country - Sehir - Ilce - Kasaba - Postal Code	- Country - Province - County - City - Postal code
United Arab Emirates	AE	- Country - Emirate - City - Area	- Country - State - City - Additional address attribute 2
United States	US	- Country - State - County - City - Postal Code	- Country - State - County - City - Postal code
Uruguay	UY	- Country - Departamento	- Country - State

Country Name	Country Code	Geography Type	Map to Attribute
		- City - Postal Code	- City - Postal code
Vatican City	VA	- Country - Municipal - Settlement - Postal Code	- Country - Province - City - Postal code
Vietnam	VN	- Country - Region - Tihn - Quan - Thank Pho - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code

Note: For either the tax or geography validation, don't skip more than one consecutive level unless you're certain that the selected geography types can uniquely identify geographies. For example, the United States country structure is: State, County, City, and Postal Code, and you want to select just State and Postal Code for geography or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for geography or tax validation.

Geography Validation Control

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

These are the geography validation levels you can choose:

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

Regardless of the result of validation, the validation process will try to map any address attribute to a geography of the country, and store any mapping it could establish based on the available data. This is called **Geography Name Referencing** and it's executed as part of validation. The result of this referencing is used in several business processes in the application to map an address to a specific geography or zone. Therefore, Geography Name Referencing is the process of validating and mapping address elements of existing location table records against master reference geographies. For example, CA value in the STATE column of the HZ_LOCATIONS table is mapped to the master reference geography of CA (California).

The Geography Dimension value in territories is derived from sell-to addresses of sales accounts. To use geography dimensions in territories, you must validate the geography elements in the addresses, such as state, city, and postal

code. You can validate the address by enabling geography validation for each country using the Manage Geographies task. Perform the following in the Manage Geographies task:

- Enable at least one level in the geography hierarchy for geography validation.
- Enable geography validation for all geography levels that you intend to use for territory definition for each country.
- If needed, enable a list of values containing specific geography elements. This will help users search and select appropriate geography values during addresses entry and eliminate all possibilities of wrong address entry.

You can set geography validation control to Error in the Manage Geography Validation page. This ensures that users can only use valid geography elements in addresses.

Note: If you have already created addresses before setting up geography validation for a country, you must enable geography validation and then execute the Run Maintain Geography Name Referencing task for that country. This validates all your geography elements.

Manage Geography Structures, Hierarchies, and Validation

You can add geography structure by first defining the geography types using the Manage Geographies task. You can then create geography hierarchy and geography validations also using the Manage Geographies task. This example shows how you can configure the geography structure, hierarchy, and validation for a country geography, using the United Kingdom country geography as an illustration.

The following table summarizes the key decisions for this scenario.

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

Define the Geography Structure

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

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

Note: You can't modify or delete a geography type.

Define the Geography Hierarchy

You can add the geographies for the County and Post Town geography types using the geography hierarchy user interfaces to create the geography hierarchy for United Kingdom. You can also use Import Management to import geography hierarchies using a CSV or XML file.

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

Note: If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the ORA_HZ_GEO_HIERARCHY_LIMIT profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the ORA_HZ_GEO_HIERARCHY_LIMIT profile option and change the value.

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

Define the Geography Validations

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

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

8. Click **Save and Close**.

Manage Geography Lookups

To manage geography lookups, perform these steps:

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area and go to the following:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Geography Lookups
2. On the Manage Geography Lookups page, click any of the following lookups:

Lookup Type	Meaning	Description
HZ_GEOGRAPHY_USAGE	Geography Validation Purpose	Purpose of geography validation, for example, tax. This lookup type can't be edited.
HZ_GEO_DISPLAY_ONLY	Zone Definition	Interface elements used to define zones. This lookup type can't be edited.
HZ_GEO_GNR_RUN_TYPE	Geography Name Referencing Program Run Type	Run type for the geography name referencing program. This lookup type can't be edited.
HZ_GEO_IDENTIFIER_TYPE	Geography Identifier Type	Identifier type for geography, for example, name or code. This lookup type can't be edited.
HZ_GEO_POSTAL_CODE_RANGE_FLAG	Postal Code Range Provided	Values indicate whether a postal code range was used to define a set of postal codes. This lookup type can't be edited.
HZ_GEO_DATA_PROVIDER	Geography Information Provider	Names of the source of geography information. You can add new geography providers.
HZ_GEO_IDENTIFIER_SUBTYPE	Geography Identifier Subtype	Identifier sub type for geography, for example, primary. You can specify the primary and secondary names and codes for geographies.

3. View or edit the values as applicable.
4. Click Save and Close to return to the list of lookups.
5. Click Done to exit the page.

Setting Up Geography Validation

You must set up geography validation to enable geography setup, help users fill in missing address information, and validate address information. For example, if you enter the postal code you can retrieve the rest of the address, such as, city and state.

For example, an organization named Vision Corp., wants its salespeople to use a list of values to enter the states in their addresses. Also, it plans to set up territories at the state level. So validation must be set up at the state level.

To define geography validation for Vision Corp.:

1. In the Setup and Maintenance work area, search for the Manage Geographies task.
2. Click **Go to Task**. The Manage Geographies page appears.
3. Search for a country. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking Search. Search for a country. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.
4. Select the country, such as United States, in the Search Results area.
5. Click the **Go to Task** button in the Validation Defined column.

The Manage Geography Validation page appears. The geography types available for the country are shown in the Geography Mapping and Validation region.

6. Ensure that the **No Styles Format** address style is selected. You define validation for the No Styles Format address style so that the validations are performed for all addresses in the country.
7. Select **Enable List of Values** in the Geography Mapping and Validation region to display the geography type as list of values during address entry in user interfaces. For example, for Vision Corp, select **Enable List of Values** for State.

This ensures correct values are entered for states, so that territory assignments work.

Note: You should only enable a list of values if you have sufficient geography data for that geography type.

8. Select **Geography Validation** for a geography type to include it in geography validation. For example, for Vision Corp, select **Geography Validation** for State.

Manage Geography Validation: United States

Address Style

Actions ▾ View ▾ Format ▾ + Freeze Wrap

Address Style Format

No Styles Format

Address Style Format Mapping: No Styles Format

Geography Mapping and Validation

Geography Type	Map to Attribute	Enable List of Values	Tax Validation	Geography Validation
State	State ▾	☒	☐	☒
County	County ▾	☐	☐	☐
City	City ▾	☐	☐	☐
Postal Code	Postal code ▾	☐	☐	☐

Geography Validation Control

Geography Validation Level for Country

You must enable geography validation for all geography levels that you intend to use for territory definition. The territory assignments may fail if the geography data used isn't validated. If Vision Corp. decided to set up territories at the postal code level, it would have to set up validation for state, city, county, and postal code.

Note: If an address element isn't selected for geography validation usage, then during address entry suggested values will be provided for the address element, but the address element isn't validated.

9. Select the appropriate geography validation control level to determine whether you can save an address that fails validation during address entry. For example, Vision Corp. wants to save all addresses including incomplete and invalid addresses, so select **No validation** in the Geography Validation Level for Country list.

Note: If Vision Corp. decided to save only valid addresses, it would have to set the geography validation control level to **Error** in the Geography Validation Level for Country list.

10. Click **Save and Close**.

Manage Territory Geography Splits

You must group territory geographies into group zones to manage territory geography level splits. Grouping the territory geographies involves two steps, selecting the geography level based on which you need grouping and initiating the grouping.

Select the Geography Level for Grouping

You can perform these steps to select the geography level based on which you want to create the group zones:

1. Sign in as a set up user such as Application Implementation Consultant.

2. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Enterprise Profile
 - Task: Manage Geographies
3. Search for the country for which you want to enable territory geography level grouping.
4. Click **Structure Defined**. Manage Geography Structure page appears.
5. Select the **Subject to Grouping** check box corresponding to the geography type level for which you want to enable grouping.

You must select the geography level that suits your business requirements. For example, if your product delivery is based on postal code, and your territory geographies don't have higher levels of master geographies such as counties and cities, then you may have postal code splits. In this case you must select postal code as the geography type level for grouping.

Note: You can enable grouping for only one level at a time.

6. Click **Save and Close**.

Initiate Grouping

Here are the steps to initiate grouping:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Territories
 - Task: Manage Territory Geographies

The Manage Territory Geographies page opens.

2. Click **Initiate Grouping**.
3. Click **OK** in response to the warning message and confirm the process.

Note: You can't automatically un-group the grouped territory geographies. You can manually undo the grouping process by recreating territory geography hierarchy either through the UI or import process.

The geography level that you selected for grouping appears as an expandable Group Zone when the grouping is complete is shown in the following figure.



4. Click **Save and Close**.

How Territory Geographies are Grouped

This topic describes how we can overcome the problem of territory geography splits by grouping them into group zones.

You do a territory geography grouping when any of your territory geography levels has multiple splits. A territory geography splits occur when the lower level master geographies are added to territory geography hierarchy, while skipping the higher level master geographies. This may cause multiple occurrences of the lower geography level members in a territory geography hierarchy.

For example, postal code split happens when a postal code overlaps across many master geography levels such as cities and counties. Suppose that the business firm Vision Corp. delivers its product according to the postal codes. If counties and cities aren't included in the territory geography hierarchy of Vision Corp., then the end user can see the multiple occurrences of the postal code 97229.

When there is a territory geography level split, and if you want to group the split geographies, first you must specify the master geography level for which you want the grouping to be performed, then initiate grouping. When grouping is performed, all the splits of the selected master geography level get grouped under a new group zone. In the previous example, if you select postal code in the master geographies as the level for grouping and initiate the grouping process, then the 12 postal code splits for the postal code 97229 gets grouped together under one group zone named 97229. So, the Territory Manager user can define territories on a clean list of postal codes or their ranges, although some of those postal codes would in fact be the groupings of the postal code splits. The grouped splits are hidden for the Territory Manager user.

Best Practices for Managing Geography Mismatches

This topic employs a couple of use cases to illustrate the best practices for setting up Master Reference Geographies for sales customers using the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for Sales for data enrichment and the Oracle Address, Email, and Phone Verification for address, email, and phone number verification.

When you perform the real-time enrichment of accounts or contacts using the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), if there's a geography data mismatch between the predefined master geography data and the Dun and Bradstreet (D&B) data, then the Service enriches the accounts and contacts data but you can't edit or save the enriched data unless the master geography data mismatches are resolved. In addition, you can verify the enriched address using the Oracle Address, Email, and Phone Verification, however, in case of mismatches between Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) (Loqate) and predefined master geography data you can't save the verified address.

The second use case describes the setup required to enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data.

Use Case 1

You're a sales customer using master reference geographies for territory assignments or tax calculation and have purchased Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for data enrichment and Oracle Address, Email, and Phone Verification. In this case, while the Loqate geography reference data is configured as master geography, Tax calculation is being done using Vertex master geography data. Also, address validation is enabled based on the customer's requirement.

Best Practice: Review geography mapping for the countries where you do business. If the geography mapping for a specific country isn't mapped according to the country-specific address attributes, update the mapping. Oracle recommends performing enrichment before verifying address.

Suppose that you're doing real time enrichment of account or contact. If there's a geography data mismatch between the predefined master geography and the D&B data, the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) still enriches the accounts and contacts data but can't edit or save the enriched account or contact unless the

master geography data mismatches are resolved. However, you can verify the enriched address using the Oracle Address, Email, and Phone Verification.

To save a verified address that has master geography data mismatch, you must add alternative names for the mismatched hierarchy elements in master geography. The following are the steps to add alternative name for the mismatched hierarchy element:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Enterprise Profile
 - o Task: Manage Geographies
2. On the Manage Geographies page, search for the country by the name or country code, for example US.
3. Click the Go to Task button in the Hierarchy Defined column. The Manage Geographies Hierarchy page for the particular country appears.

Note: If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the ORA_HZ_GEO_HIERARCHY_LIMIT profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the ORA_HZ_GEO_HIERARCHY_LIMIT profile option and change the value.

4. Highlight the mismatched hierarchy element, for example California State, and click the Edit icon.
5. Click the Add icon on the Edit page.
6. Add an alternative name CA for the California state geography element.
7. Click Save and Close

Once the alternative name is added for the mismatched hierarchy element in master geography, you can save the enriched address.

Use Case 2

You're a sales customer who doesn't use geographies for territory assignment or tax calculation and has purchased Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for data enrichment and the Oracle Address, Email, and Phone Verification for address verification. To enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data you must do the following setups:

- Deselect the Enable List of Values option in the Geography Mapping and Validation region to avoid Oracle Address, Email, and Phone Verification data conflicts with master reference geography data. By deselecting this option you can avoid any UI level validation against master geographies while adding address.
- Select Geography Validation Level for Country as No validation to verify address data by Oracle Address, Email, and Phone Verification.

Perform the following steps on the Manage Geography Validation page to enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Enterprise Profile

- Task: Manage Geographies
- 2. On the Manage Geographies page, search for the country by the name or country code, for example US.
- 3. Click the Go to Task button in the Validation Defined column. The Manage Geography Validation page appears.
- 4. Deselect the Enable List of Values check boxes for all the geography attributes to avoid any UI level validation against master geographies while entering the addresses. If the Enable List of Values check boxes are selected then, in case of data conflicts, Geography Naming References records aren't created.

Note: If any of the Geography Types listed isn't applicable to the selected country's territory structure, then you must deselect the geography validation for that type.

If you're planning to create territories based on a particular Geography Type, such as County, then you must deselect all the Geography Validation levels under that Geography Type (in this case City and Postal Code) based on which you want to create the territory.

Tip: Review the Address Style Formats that are selected on the Manage Geography Validation page. The review is required because on the Account or Contact Simplified UI page, address attributes are displayed based on the address formats and verified or enriched addresses are saved in Oracle Applications Cloud based on the selected address formats.

Overview of Zone Types and Zones

Geography hierarchies can be classified as follows:

- Master Reference Geography Hierarchy: This refers to the predefined geography hierarchy and is considered as the source of truth. It is defined by widely recognized administrative or political boundaries such as States, Provinces, Counties, Cities, and so on. This hierarchy can be obtained from a supplier or manually entered. This geography hierarchy is the source when validating addresses or importing data. Examples are the State of California, the Province of Alberta, The Country of India, and so on.
- User Defined Geography Hierarchy: This refers to geography hierarchy defined by the user. This geography hierarchy may be created using the Master Reference Geography, obtained from a supplier, or entered manually. A user-defined geography hierarchy can have:
 - Zone Types
 - Zones

Zone Types

Zone types categorize and group zones together, for example, the zone types of Income Tax and Shipping Regions.

Zone types need to be created before you define a zone for the geographical boundary. You can create a zone type which will contain geographical boundaries from anywhere in the world, or you can create a zone type that will only contain geographies from within a specified country. When you create a zone type that's bounded by a country you can define which geography types or geographies you will be able to choose when you create a zone.

Zones

Zones are geographical boundaries for a zone type, for example, the San Jose Tax zone. Zones are based on the master reference geography hierarchy data.

Zones are created within a zone type, and you can associate geographies to define the zone. For example, for the Shipping Regions zone type you can create a West Coast zone which has the state of California as one of its geographies. Within a geography you can specify a postal range. So, for the state of California, for example, you can specify that the zone spans from postal code 90001 to 90011.

Zones Created in Master Geographies

Here is the list of zones created using master geographies in each product offering and the tasks to load them:

Product Offering	Task Name
Territory Geographies	Manage Territory Geographies
Tax	Manage Tax Zone Types
Shipping	Manage Shipping Zones
Compensation	Compensation Zones

Note: There are no bulk loaders for loading these zones.

For more information about creating zone types and zones, see the Related Topics section.

Related Topics

- [Manage Zone Types and Zones for Shipping and Tax](#)
- [Configure Compensation Zone Types and Zones](#)

Import Geographies and Zones

How You Import Geographies

A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth.

You can use the following options when importing geographies:

- Oracle-licensed geography reference data
- Import Management

Note: The processing time for importing geography data can vary based on several variables, such as, the volume of data to be loaded and it could take several hours to complete.

Oracle-Licensed Geography Reference Data

You can import Oracle-licensed data from Loqate, for those countries where the data is available. For more information about the supported countries, see the [List of Available Countries with Loqate Geography Reference Data](#) topic. You can import geography data using the **Manage Geographies** task. Search for the country, and select **Import Geography Data** from the **Actions** menu. If the licensed data isn't available or already set up for a particular country, then the **Import Geography Data** action is disabled.

Note: Customers who are licensed to use HCM Cloud Payroll for the United States or Canada must import their geography data from Vertex. For more information, see the [United States and Canada Payroll implementation and administering guides](#).

Import Management

The Import Management process reads the data included in your XML or text file and imports the data into the application.

To access Import Management functionality, go to **Navigator > Tools > Import Management**

For more information, see the [Import Your Geography Data](#) topic.

Related Topics

- [Overview of Implementing Customer Data Management](#)

List of Available Countries with Loqate Geography Reference Data

Oracle Applications Cloud provides third-party Loqate geography data for import. Here's the list of countries for which the Loqate geography data is available for import.

Country Name	Country Code
Andorra	AD
Angola	AO
Argentina	AR
Australia	AU
Austria	AT
Belgium	BE

Country Name	Country Code
Bolivia	BO
Bosnia and Herzegovina	BA
Brazil	BR
Bulgaria	BG
Canada	CA
Cayman Islands	KY
Chile	CL
China	CN
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Dominican Republic	DO
Ecuador	EC
Estonia	EE
Finland	FI
France	FR
Germany	DE
Great Britain	GB
Greece	GR

Country Name	Country Code
Guadalupe	GP
Guam	GU
Guernsey	GG
Hungary	HU
Iceland	IS
India	IN
Indonesia	ID
Ireland	IE
Isles of Man	IM
Israel	IL
Italy	IT
Jamaica	JM
Japan	JP
Jordan	JO
Kenya	KE
Latvia	LV
Liechtenstein	LI
Lithuania	LT
Luxembourg	LU
Malaysia	MY
Malta	MT

Country Name	Country Code
Martinique	MQ
Mexico	MX
Netherlands	NL
New Zealand	NZ
Norway	NO
Oman	OM
Peru	PE
Poland	PL
Portugal	PT
Puerto Rico	PR
Qatar	QA
Reunion Island	RE
Romania	RO
Russia	RU
San Marino	SM
Singapore	SG
Slovakia	SK
Slovenia	SI
South Africa	ZA
South Korea	KR
Spain	ES

Country Name	Country Code
Sri Lanka	LK
Swaziland	SZ
Sweden	SE
Switzerland	CH
Taiwan	TW
Thailand	TH
Tunisia	TN
Turkey	TR
United Arab Emirates	AE
United States	US
Uruguay	UY
Vatican City	VA
Vietnam	VN

Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data

You must import and set up reference geography data for the countries where you do business. Using the Oracle-licensed geography reference data, you no longer have to source geography data from a third party. You can import Oracle-licensed data from Loqate, including the country structure and hierarchy information, either to create a new geography setup or replace your existing geography data.

All customers with the exception of United States and Canada HCM Payroll customer, can use the information in this section to replace existing geography data with Loqate geography data. You can follow these steps if you're using Nokia or any other geography data and now want to move to Loqate geography data.

Before you begin, perform the following steps:

- Backup existing geography data including customizations, if any.

- Backup territory geographies.
- Perform impact analysis by contacting the support team to identify the use of geography IDs downstream.

Note: Before deleting the geography data, make sure that GEOGRAPHY_ID isn't referenced in any downstream applications such as TAX, FIN, Legal, and so on. Geography data is used across Oracle Cloud applications such as Human Capital Management, TAX, and Legal. Global Single Instance POD users share the same geography data and before deleting geography data, the geography usage POD analysis is required. The Oracle Support team can help you identify the downstream impact.

Create an Export File of All Territories

In case you have implemented Customer Data Management along with the sales functionality, you must export all territories before deleting the master geography data because removing the master geography data invalidates the territory definitions that are based on the Geography dimension. You can either export the definitions of all territories to a file or make manual corrections. If there are a large number of territories, export the territories definition to a file for the territories import process. However, if there are very few affected territories, then you can choose to either export the territories definition to a file or make corrections manually.

This procedure is applicable only if there are territories defined using the Geography dimension.

Perform the following steps to create an export file of all territories.

1. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
2. In the View Active Territories page, select the territory at the highest level.
3. Click the **Actions** list, and select **Export**, and then **Export Selected Territory Hierarchy**.
4. In the Warning dialog box, click **OK**.
5. Click the **Actions** list and select **Export**, and then **View Export Status**.
6. Review the status of the export job and verify if it has completed successfully.
7. In the Exported Data File column, click the .zip file against your export job, and click **Save**. All the territories are exported to a compressed file on your system.
8. Click **OK**.
9. Click **Done** in the View Active Territories page.

Delete the Territory Geography Data

A territory definition has references to the territory geography data and master geography data. Territory geography data is based on the master geography data, in case you have implemented Customer Data Management along with the sales functionality, you must delete the territory geography data prior to deleting the master geography data. When you delete the territory geography data, all territories that are defined using geography dimension become invalid.

This procedure is applicable only if territory geographies are defined.

Perform the following steps to delete the territory geography data.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Territories
 - Task: Manage Territory Geographies
2. On the Manage Territory Geographies page, click **View All Hierarchies**.
3. Select the highest level node for the country for which you want to replace the master geography data and click the **Delete** icon.

4. In the Warning dialog box, click **OK**.
5. In the Confirmation dialog box, click **OK**. The parent node of the territory geography data and its children are deleted.
6. Repeat steps 3 to 5 to delete all the higher nodes in the territory geography data.
7. Click **Save and Close**.

The Territory Management application retains a copy of the dimension members referenced in the territory definitions. This copy is updated when you trigger the **Load and Activate** process from the **Enable Dimensions and Metrics** task. Therefore, although the territory geography data is deleted, the territory definitions may appear to remain valid.

Delete the Master Geography Data

Delete the existing geography data one country at a time. We recommend that you raise a service request for assistance in deleting the geography data.

Delete Geography Structure

If you have created a geography structure, it prevents the geography imports from working or working as desired. For example, if the geography structure exists, the Import Geography option may not be enabled for a country in Manage Geographies even if Loqate predefined geography data is available for that country and the geography hierarchy doesn't exist yet.

Note: If any geography hierarchy was created manually, it must be deleted first.

If the geography structure was created manually, you can follow these steps to delete it. However, we recommend that you raise a service request for assistance in deleting the geography structure.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Enterprise Profile
 - Task: Manage Geographies
2. On the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click Search.
3. Select the country in the search results and click **Actions > Manage Geography Structure**.
4. In the Manage Geography Structure page, delete each level of the structure.
5. Click Save and Close.

You can now proceed to importing geography data.

Note: If other setup or transaction data exists that's based on the geography data, replacement procedures for that setup must also be followed.

Import Oracle-Licensed Geography Reference Data

Use this procedure to import Loqate geography data in Manage Geographies one country at a time. If the country data you want isn't supported by Loqate geography seed data and point the Loqate supported country list here, then the Import Geography Data action is disabled.

The geography data is provided by Loqate and is third-party content. As per Oracle policy, this software and documentation may provide access to or information about content and services from third parties. Oracle and its affiliates aren't responsible for and expressly disclaim all warranties of any kind with respect to third-party content and

services. Oracle and its affiliates aren't responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Perform the following steps to import Oracle-licensed geography reference data.

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Enterprise Profile
 - o Task: Manage Geographies
2. On the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click **Search**.
3. Select the country in the search results.
4. Click the **Actions** list, and select **Import Geography Data**.
5. In the Warning dialog box, click **OK**.
6. In the Confirmation dialog box, click **OK**.

The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting Scheduled Processes from the Navigator.

Note: To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user doesn't have this role assigned, but the other users you created do.

After the import is complete, you can search for the country again in the Manage Geographies page. Check marks now appear in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.

Next, click the **Validation Defined** icon to define the validations, enable List of Values, and choose address style format for a country as set up before. For more information, see the Geography Validation topic.

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features which you must license from Oracle and set up separately.

- Geocoding makes it possible to display customers in the vicinity of a mobile address. You set up **Geocoding Enabled** for those countries where you're using Around Me functionality in CX Sales Cloud Mobile.
- Cleansing makes it possible to validate addresses down to the street level.

Add any geography customizations.

Run the Geography Name Referencing Process

The Geography Name Referencing (GNR) process validates address elements in location tables, such as HZ_LOCATIONS, against the master geography data.

Note: Note: You can't update existing data, such as effective start date, in the GNR process tables for the locations.

Perform the following steps to run the GNR process.

1. Navigate to **Tools > Scheduled Processes** work area.
2. On the Overview page, click **Actions > Schedule New Process**.
3. Click the **Name** list and search for **Validate Geographies of Addresses Against Master Geographies**, and then click **OK**.

4. Click **OK** in the Schedule New Process dialog box.
5. In the Process Details dialog box, enter the following details:
 - **Location Table Name:** HZ_LOCATIONS
 - **Run Type:** ALL
 - **Usage Code:** GEOGRAPHY
6. Enter the country code in the Country Code field.
7. Click **Submit**.
8. In the Confirmation dialog box, click **OK**.
9. Click **Close**.
10. In the Scheduled Processes page, click the **Refresh** icon.
11. Verify if the status of the process has completed successfully.

Find the locations failing in Geography Name References using: <https://cloudcustomerconnect.oracle.com/posts/b1e16b06ae>. Fix Geography Name References failures by updating addresses with the latest geography data.

Recreate and Load the Territory Geography Data

In case you have implemented Customer Data Management along with the sales functionality, you can recreate the territory geography data, after the master geography data is imported, using either of the following methods:

- Import process: If you created the original territory geography data using the import process, then use the same import file to recreate the territory geography structure. For more information about importing the territory geography data using Import Management, see Import Your Sales Territory Data in the Oracle CX Understanding Import and Export Management for CX Sales and B2B Service guide.
- Manual creation process: You can manually recreate the territory geography data structures, as they existed before their deletion, using the Manage Territory Geographies task. For more information about creating zones and adding geographies to a zone, see Managing Territory Geographies in the Related Topics section.

After you have recreated the territory geography data, perform the following steps to load the data.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Territories
 - Task: Enable Dimensions and Metrics
2. On the Enable Dimensions and Metrics page, click the **Actions** list, and select **Load and Activate**. The process loads the territory geography data to make dimension members available for selection when defining territories.
3. In the Confirmation dialog box, click **OK**.
4. Click **Done**.

Restore the Invalid Territory Definitions

After recreating the territory geography hierarchies and running the Load and Activate option from the **Enable Dimensions and Metrics** task, the geography dimensions are populated with the new geography members. The geography members in the territory appear as invalid because your territories still reference the old copies of the dimension members that were deleted. The new members aren't referenced automatically by the territories. You must re-reference the territory definitions from the old geography dimension members to the new ones.

You can restore the invalid territory definitions by either importing the previously created export file or making manual corrections to the territories.

To restore valid territory definitions using territories import:

1. Open the export file you saved in the Creating an Export File of All Territories step. The compressed file contains four CSV files.
2. Open **TERR_HEADER.CSV** file.
3. Enter **REPLACE** in the Action column for all territories that are based on geography dimension.
4. Save the file in CSV format and compress it together with three other CSV files.
5. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
6. Click the **Actions** list, and select **Import to Proposal**, and then **Import Territories**.
7. Select the newly created compressed file and click **OK**.
8. Click the **Actions** list and select **Import to Proposal**, and then **View Import Status**.
9. Review the status of the export job and verify if it has completed successfully.
10. Click **OK**.
11. From the Tasks pane, click **Manage Territory Proposals**.
12. In the Manage Territory Proposals page, on the Current Territory Proposals table, search for the proposal with your import file name.
13. Click the import file name to open the territory proposal.
14. Click **Edit Coverage** to verify that the territory definitions are valid.
15. Verify that there are no values listed as invalid in the Selected Dimension Members section.
16. Click **Save and Close**.
17. Click **Activate**. The territory proposal of your import file is activated.

To restore valid territory definitions through manual corrections:

1. From the Territories and Quotas work area, click **Manage Territory Proposals** in the Tasks pane.
2. In the Manage Territory Proposals page, click the **Create** icon.
3. In the Create Territory Proposals dialog box, enter a name and click **Save and View**.
4. In the Territory Proposals page, add all the territories with the Geography dimension value other than the value Any to the proposal.
5. Select a territory and click **Edit Coverage**.
6. In the Edit Coverage page, select **Geography** from the Dimensions list. The invalid dimension members are displayed in the Selected Dimension Members pane.
7. Expand the values in the Available Dimension Members section or search for the member that has the same name as the one marked invalid in the Selected Dimension Members pane.
8. Select one or more new geography dimension members from Available Dimension Members pane and click **Add** icon to the Selected Dimension Members pane.
9. Click the **Remove** icon to remove the invalid members from the Selected Dimension Members pane.
10. Click **Save and Close**.
11. Repeat steps 4 to 10 for all territories that were based on Geography dimension.
12. Click **Activate**. After the activation process is complete, your territory definitions are valid again and are referencing to the new geography data.

Although this method is always applicable, it's most appropriate when you have to restore territory definitions for a smaller number of territories.

To run the batch assignment process for opportunities:

1. From Navigator, click **Scheduled Processes**.
2. In the Schedule Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, search for the **Request Revenue Territory Assignment** process and select it.

4. Click **OK**.
5. In the Process Details dialog box, enter **OpenOpportunitiesByCreationDate** in the View Criteria Name field. This selects all revenue lines belonging to open opportunities that were created in the last 'X' days.
6. Enter **BindOpptyCreationDateFrom=** followed by the date.
For example, if BindOpptyCreationDateFrom=2014-01-01, then all open opportunities which were created between 1st January 2014 till the current date, are processed.
7. Click **Submit** to schedule the process.
8. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
9. Click **Close**.
10. In the Schedule Processes page, click the **Refresh** icon.
11. Review the status of the process job and verify if it has completed successfully.

Note: Review a small subset of the open opportunities to confirm that the territory assignment is as expected.

To run the batch assignment process for sales accounts:

1. Ensure that the **ZCA_SA_AUTO_ASSIGN_ON_CREATE** and **ZCA_SA_AUTO_ASSIGN_ON_UPDATE** profile options are set to Yes in the **Manage Customer Center Profile Options** task.
2. From Navigator, click **Customers**.
3. In the Customers page, click **Create Account**.
4. In the Create Account page, enter a name and address of the sales account, and select the **Address is sell to** check box.
5. Click **Save and Close**.
6. From Navigator, click **Customers**.
7. In the Search pane, search for the name of the sales account you created and select it.
8. In the section Customer Information, select **Sales Account Team**. The details of the sales account and territories associated with the sales account are displayed.

This indicates that the sales account was created successfully and the batch assignment was run automatically to assign the matching territories to the sales account.

To run the batch assignment process manually from the Scheduled Processes page, perform the following steps.

1. From Navigator, click **Scheduled Processes**.
2. In the Schedule Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, search for the **Request Account Assignment** process and select it.
4. Click **OK**.
5. Enter **SalesAccount_Work_Object** in the Work Object Code field and **SalesAccountTerritory_Candidate_Object** in the Candidate Object Code field.
6. Select **Territory** in the Assignment Mode list.
7. Enter **AllSalesAccountsVC** in the View Criteria Name field. This selects all sales accounts.
8. Click **Submit** to schedule the process.
9. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
10. Click **Close**.
11. In the Schedule Processes page, click the **Refresh** icon.
12. Review the status of the process job and verify if it has completed successfully.

Note: Review a small subset of the accounts to confirm that the territory assignment is as expected.

Verify that the downstream applications using geography data is working fine.

Related Topics

- [Manage Territory Geographies](#)
- [Validate Geographies of Addresses Against Master Geographies](#)
- [Request Revenue Territory Assignment](#)
- [Request Account Assignment](#)

Create Countries

This procedure lists the steps to create countries in the application.

The countries are seeded in the application. If you're unable to find a specific country in the Manage Geographies page, then you can add it to the application.

Note: The application provides support for Loqate geography data for countries. For countries where Loqate geography data isn't available, you can purchase the geography data from a third-party data provider and load it into the application using Import Management. For more information, see the Import Your Data chapter in the Oracle CX Understanding Import and Export Management for CX Sales and Service guide. If countries aren't available in the application, then use the procedure outlined in this topic to create them.

Perform the following steps to create a new country.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Application Extensions
 - Task: Manage Territories
2. On the Manage Territories page, click the **New** icon.
3. Enter the following details:
 - Territory Code: Enter a unique code for the territory.
 - Territory Name: Enter a unique name for the territory.
 - Description: Enter a description for the territory.

4. Click **Save and Close**.

Note: After you have added a new country in the application, if you want to import the geography data for that country, then you must perform Step 5 to 10.

5. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Enterprise Profile
 - Task: Manage Geographies
6. On the Manage Geographies page, click **Actions > Create Country**.
7. In the Create Country dialog box, select the name of the country and click **Save**.

8. Click **Done**.

Note: You can now import the geography data for the newly created country using Loqate geography data available in the application. In case geography data for your country isn't available from Loqate, you can purchase the geography data from a third-party data provider and import it using Import Management.

Related Topics

- [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#)

Import Your Geography Data

You can use Import Management to create Geography records. You can also add alternate name or code to existing geographies with import. For more information see [Example of Importing Geography Data](#) in the Related Topics section.

To import Geography records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Object Attributes

To import your Geography data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Create Country Structure before importing Geography data. For information on how to create Country Structure, see [Import Your Country Structure](#) and [Example of Importing Country Structure](#) in Related Topics Section.
- Identify the target object attributes that are required in the CSV file for a successful import as mentioned in the table [Required Attributes and Validations for the Geography Object](#) below.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data such as creating a country structure.

Required Attributes and Validations for the Geography Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide values for the attributes. The following table lists the required attributes for importing new Geography records, prerequisite setup tasks for the attributes, and specific validations, if any, for Geography import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
CountryCode	The code of the country to which the geography belongs.	This is validated against the country structure to check if the structure is defined for this country.	Required
PrimaryGeographyName	The primary name of the geography.	This is validated against the name of country if geography type is 'Country' or LevelNumber is 1.	Required
RecordTypeCode	The record type code that represents the intent of the import data. The values are: • 0 - indicates the geography that already exists in the base table. • 1 - indicates the intent to create a new geography. • 2 - indicates the intent to add an alternate identifying name or code to an existing geography.	No Validation	Required
LevelNumber	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.	The level should exist in the country structure.	Required
SourceID	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.	None	Required
ParentSourceID	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.	None	Required

You can view the Geography object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this Manage Import Objects page.

Note: Keep a note of the following:

- You can't update geographies via import.
- Before adding a new alternate name, make sure that the alternate name does not exist with the same value for any other geography name.
- You can enable high-volume import for the Geography import object in the Manage Import Objects page.
- PrimaryGeographyCodeType and PrimaryGeographyCode can't be added after PrimaryGeographyName is created via import. You must create them together. Alternatively, you can add primaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.

Create the Source CSV File

You include the data that you want to import into CX Sales and B2B Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator > Tools > Import Management > Import Objects**.
2. Select the **Geography** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Geography from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Note: Geography names aren't translatable and are always displayed in the same language in which they were loaded irrespective of the language of the signed in user. If you need different options of display, you can use the alternative names option.

Related Topics

- [Import Your Country Structure Data](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Example of Importing Country Structure Data](#)
- [Import Data](#)
- [Example of Importing Geography Data](#)

Example of Importing Geography Data

This example demonstrates how to import data using Import Management. In this example, you have a source file containing geography data that you want to import into the application to make the geography data available for real time address validation and tax purposes. A geography is any region with a boundary around it, regardless of its size. It might be a state, a country, a city, a county, or a ward.

Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

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

Before You Start

1. You use the country structure of a country to define which geography types are part of the country. For more information about an example of importing a country structure, see the topic "Example of Importing Country Structure Data".
2. Ensure that Source ID values are unique for each row of data within a single import.
3. Ensure that all the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file must include US, CA, and San Jose.
4. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, then your geography import creates two state records (CA and California) in the application data, with the US as the country parent.

Determine the Information in the Source File

The source geography data files must include a unique Source ID value for each row of data and Parent Source ID value for the parent of that row of data. You include the data that you want to import into CX Sales and B2B Service in a source CSV file. A sample input CSV file for country as US is shown in this table.

RecordTypeCode	PrimaryGeography	CountryCode	LevelNumber	Sourceld	ParentSourceld	LanguageCode
0	United States	US	1	1	<blank>	US
1	California	US	2	11	1	US
1	San Mateo	US	3	111	11	US
1	Redwood City	US	4	1111	111	US
1	94065	US	5	11111	1111	US

Here is a sample CSV file to import geographies with alternate name and code for country India:

RecordType	PrimaryGeogr	CountryCode	LevelNumber	Sourceld	ParentSourcel	IdentifierType	IdentifierSubT	IdentifierValue
0	India	IN	1	1				
1	Karnataka	IN	2	2	1			
1	Bengaluru	IN	3	3	2			
2	Bengaluru	IN	3	3	2	NAME	Standard_ Name	Bangalore
1	Whitefield	IN	4	4	3			
1	560066	IN	5	5	4			
2	560066	IN	5	5	4	CODE	ISO_ COUNTRY_ CODE	91

Note: Note the following:

- The hierarchy is modeled in the CSV file using the `Sourcelid` and `ParentSourcelid`. The `ParentSourcelid` for the Country Record (level Number 1) is always null.
- If defining an alternate name (`RecordTypeCode` = 2) for any level below the country (`LevelNumber` >1), ensure that the `Sourcelid` and `ParentSourcelid` columns match the values for the original record respectively.
- You can't update geographies via import.
- Before adding a new alternate name, make sure that the alternate name doesn't exist with the same value for any other geography name. You can check the existing values for alternate names in the Manage Geographies task page under Hierarchy Defined.
- You can find the list of `IdentifierSubTypes` in Manage Geography Lookups page in the UI.
- `PrimaryGeographyCodeType` and `PrimaryGeographyCode` can't be added after `PrimaryGeographyName` is created via import. You must create them together. Alternatively, you can add `PrimaryGeographyCodeType` and `PrimaryGeographyCode` from the UI after the import is complete.

You must create a source file (CSV) file with the attributes and import it using import management as shown in this table.

Attribute Name	Value	Description
RecordTypeCode	1	The record type code that represents the intent of the import data. The values are: • 0 - indicates the geography that already exists in the base table. • 1 - indicates the intent to create a new geography. • 2 - indicates the intent to add an alternate identifying name or code to an existing geography.
PrimaryGeographyName	India	This is the primary geography name. This will be marked as the primary name for the Geography and also displayed in the Manage Geographies Page.
CountryCode	IN	This indicates the Country Code for the country for which you're importing data.

Attribute Name	Value	Description
LevelNumber	2	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.
SourceId	2	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.
ParentSourceId	1	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.
IdentifierType	Name	The type of the identifier. It can be either Name or Code.
IdentifierSubtype	Standard_Name or Standard_Code	The IdentifierSubtype can be Standard_Name or Secondary_Name. The default value is Standard_Name. The valid Sub Types for Type "CODE" are FIPS_CODE, GEO_CODE, ISO_COUNTRY_CODE, PRIMARY_CITY, or UNKNOWN
IdentifierValue	Bangalore	The value of the identifier.

You can create an import activity, enter the import details, and schedule the import.

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Geography** from the Object drop-down list.

Note: In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

Import Your Country Structure Data

You can use Import Management to create Country Structure records. It is recommended you use Import Management only if you're importing high-volume third-party data. If you're importing licensed data from one of our vendors, then you can create the country structure by navigating to **Setup and Maintenance > Manage Geographies Task** page.

To import Country Structure records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

To import your Country Structure data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Identify the target object attributes that are required in the CSV file for a successful import.

Required Attributes and Validations for Country Structure Object

To import data successfully into Oracle Applications Cloud, your CSV file must include values for the required attributes. This table lists the required attributes for importing new Country Structure records, prerequisite setup tasks for the attributes, and specific validations, if any, for Country Structure import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Country Structure Record
CountryCode	The code for the country for which the country structure is applicable.	The GeographyType has to be "Country" and the LevelNumber has to be "1" for a country. You can't pass different country codes when importing a record.	Yes
GeographyType	Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State, District, City, and Postal Code. For Mexico, it would be State, Municipality, Locality, and Postal Code.	The country has to be present.	Yes
LevelNumber	You need these to create parent-child relationships between geography types for your country. The values can be 1, 2, 3, and so on.	To define a country, you must specify the LevelNumber as 1.	Yes

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Country Structure Record

You can view the Country Structure object and its attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on the Manage Import Objects page. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. For more information on Geographies, see Overview of Geographies, Geographic Entities, and Locations in the Related Topics section.

Note: Note the following:

- The import job will fail if you try to load any already existing country structure. Delete the existing country structure in the UI in Manage Geographies Tasks and import again.
- You can't load additional lower geography structure levels for an existing country structure while importing geography country structure. You can add additional geography levels in the UI for an existing country structure in the Manage Geographies task page.

Create the Source CSV File

You include the data that you want to import into Oracle Applications Cloud in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator > Tools > Import Management > Import Objects**.
2. Select the **Country Structure** object in the table and click **Download**.

You can now edit the downloaded file and provide values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Country Structure from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Click **Validate Data** to check the file for unmapped columns or data format issues. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity. Here, you can download and review the successfully imported user data records, the mapping details used for import activity, and the data file that you provided in CSV format.

Related Topics

- [Overview of Geographies, Geographic Entities, and Locations](#)
- [Geography Validation](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Import Data](#)

Example of Importing Country Structure Data

You use the country structure of a country to define which geography types are part of the country and how the geography types are hierarchically related within the country. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure.

To add a country structure using import management, your source file must contain information about the country to which the country structure belongs. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. You also need to specify the level at which the geography types need to be placed. By default, all countries are at Level 1. You create the country structure by increasing the level number as you go down the country structure. You place the geography types such as states, provinces, and so on at Level 2, districts or counties at Level 3, and so on. To add a country structure, your source file must include the values that let the import process identify the existing records.

Sample Input CSV File

You include the data that you want to import into CX Sales and B2B Service in a source CSV file. Here is a sample input CSV file for country as US.

CountryCode	LevelNumber	GeographyType
US	1	COUNTRY
US	2	STATE
US	3	COUNTY
US	4	CITY
US	5	POSTAL CODE

Here is another input CSV file for importing the country structure for India.

CountryCode	LevelNumber	GeographyType
IN	1	COUNTRY
IN	2	STATE
IN	3	DISTRICT
IN	4	CITY
IN	5	POSTAL CODE

In case you want to import the country structure for Mexico, your input CSV file would look like this:

CountryCode	LevelNumber	GeographyType
MX	1	COUNTRY
MX	2	STATE
MX	3	MUNICIPALITY
MX	4	LOCALITY
MX	5	POSTAL CODE

In this example, we are importing the Country Structure for US. You must create a source file (CSV) file with the attributes as shown in this table and import it using Import Management.

Attribute Name	Value	Description
CountryCode	US	The code for the country for which the country structure is applicable.
LevelNumber	1	The level number of the geography in the hierarchy. For example, Country is at Level 1 (Top level) and State (California) is at Level 2. You need these to create parent-child relationships between geography types for your country.
GeographyType	COUNTRY	Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State,

Attribute Name	Value	Description
		District, City, and Postal Code. For Mexico, it would be State, Municipality, Locality, and Postal Code.

Create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Country Structure** from the Object drop-down list.

Note: In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

How You Import and Export Territory Geography Zones

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

To define your territory geography zones and then import your territory zones into another application instance, you must complete the following steps:

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

Import the Master Reference Geography Data

Firstly, you must import the master reference geography data. Master reference geography data includes geography elements, such as country, state, and city, and is required for any geographical information that you store in the application, such as address information used in customer and sales records. For more information, see the topic Geography Hierarchy. Master reference geography data can be imported into the application using the Import Management.

Define Your Territory Geography Zones

After the master reference geography data has been imported, you can then create your territory geography zones in the application using the Manage Territory Geographies task in Setup and Maintenance. For more information, see the Manage Territory Geographies topic in the Related Topics section.

Export the Territory Geography Zones

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

Import the Territory Geography Zones

After you have downloaded your configuration package for your territory geography zone setup, you can import the territory zones into another application instance.

Note: Ensure that you import your master reference geography data into the new application instance before you import the configuration package.

Related Topics

- [Geography Hierarchy](#)
- [Manage Territory Geographies](#)

Set Up Geocoding

Geocoding

This topic explains geocoding and how to enable this option in the application.

Geocoding is the process of finding latitude and longitude coordinates from geographic data such as street addresses or postal codes. Once these coordinates are available, you can use the spatial services feature to identify points of interest, such as customer and contact addresses, in the vicinity. The application integrates the Geocoding feature with eLocation (http://elocation.oracle.com/maps_oracle_dot_com_main.html), which is a Geocoding service provided by Oracle.

By default, the Geocoding option is turned off in the application. You can enable the Geocoding option by going to the Setup and Maintenance work area and performing the following:

- Offering: Customer Data Management
- Functional Area: Enterprise Profile
- Task: Manage Geographies

If the Geocoding feature is enabled, the feature can be scheduled to run at regular time intervals. This ensures that newly created or updated locations are picked up and geocoded whenever you create or update an address using the user interface, web services, bulk import, or using import management.

Related Topics

- [What are Spatial Services](#)
- [Set Up Geocoding](#)

Set Up Geocoding

This procedure lists the steps to set up geocoding in Oracle Cloud applications.

Geocoding is a process that determines the latitude and longitude coordinates for a location. By default, geocoding is turned off in the application. You can use geocoding to display customers in the vicinity of a mobile address.

Enable Geocoding for a Country

To enable geocoding for a country, complete these steps:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Enterprise Profile
 - Task: Manage Geographies
2. On the Manage Geographies page, search for the country for which you want to enable geocoding. You can either search by the country name or country code.
3. Click **Search**. The search results for the matching country names are displayed.
4. Select the country for which you want to enable the geocoding option.
5. Select **Geocoding Defined** for the country.

Populate Location Latitude and Longitude Information

Once geocoding is enabled, you can schedule this feature to run at regular time intervals so that newly created or updated locations are picked up and geocoded. To schedule the geocoding feature to run at regular intervals, complete these steps:

1. Navigate to **Tools > Scheduled Processes** work area.
2. On the Overview page, click **Actions > Schedule New Process**.
3. Click the Name list and search for Populate Location Latitude and Longitude Information, and then click **OK**.
4. Enter the parameters such as Start Date and End Date, and click **Submit**.

Related Topics

- [Geocoding](#)

Use Web Services to Populate Location Attributes for the Around Me Feature

Use this procedure to populate location attributes using Web services for the Around Me feature in countries that aren't supported by the eLocation service. The Around Me feature enables you to quickly locate information about your surroundings. This feature uses your current location to run a proximity search on objects with location information, such as contacts, opportunities, and customers.

Create an Address with the Location Attributes Using the LocationService Web Service

Perform the following steps to create an address with location attributes, such as latitude and longitude, using the createLocation operation.

1. Extract the Web Services URL
 - a. Sign in to the **Oracle Enterprise Manager Applications Control** using the WebLogic Server credentials.
 - b. Select **Oracle Fusion Customer Relationship Management** from the navigation tree, and then select **Fusion Applications**.
 - c. From the tree, select **CrmCommonApp**, and then select `crmCommonApp (CRMCommonServer_1)`.
 - d. In the Web Services pane, click **Test** for the LocationServiceSoapHttpPort port.
 - e. In the Test Web Service pane, copy the URL of a WSDL that appears in the WSDL field until "?wsdl", and then paste to a notepad.
2. Derive the Payload
 - a. Launch the WSDL URL in a Web browser to open the LocationService endpoint page.
 - b. In the LocationServiceSoapHttpPort pane, select **createLocation** from the Operation list.
 - c. In the Location pane, complete the fields, as shown in the following table.

Field	Value
Country	CN
Address1	Chaoyang District
City	Shanghai
Postal Code	200233
State	China
CreatedByModule	AMS
Latitude	20.36789
Longitude	-39.34444

Note: Deselect all the other parameters in this Location pane. Also, deselect LocationProfile, OriginalSystemReference, and LocationInformation options.

- d. Click the **XML Source** option.

Note: This option appears next to the Operation list.

- e. Copy the XML source and paste to a notepad.

3. Call the Web Service

- a. Open the **Oracle Fusion Service Tester** page.
- b. In the WebService URL field, paste the WSDL URL that you derived from Step 5 of the Extracting the Web Services URL section.
- c. Enter the user name and password credentials.
- d. In the **Payload** pane, paste the XML source that you derived from Step 5 of the Deriving the Payload section.
- e. Click **Invoke**. The Output Payload pane displays the output payload.

4. Test the Web Service

- a. Sign in to the **Oracle Fusion Applications Home** Page.
- b. Navigate to the Customer Center work area.
- c. Search the address that you added.
- d. Click the **Addresses** section.
- e. From the **Actions** list, select the **View Geography Information** option.
- f. Verify the latitude and longitude details.

Update the Location Attributes of an Address Using the LocationService Web Service

Perform the following steps to update the location attributes of an address, such as latitude and longitude, using the updateLocation operation.

1. Extract the Web Services URL

- a. Sign in to the **Oracle Enterprise Manager Applications Control** using the WebLogic Server credentials.
- b. Select **Oracle Fusion Customer Relationship Management** from the navigation tree, and then select **Oracle Fusion Applications**.
- c. From the tree, select **CrmCommonApp**, and then select **CrmCommonApp (CRMCommonServer_1)**.
- d. In the Web Services pane, click **Test** for the LocationServiceSoapHttpPort port.
- e. In the Test Web Service pane, copy the URL of a WSDL that appears in the WSDL field until "?wsdl", and then paste to a notepad.

2. Derive the Payload

- a. Launch the WSDL URL in a Web browser to open the LocationService endpoint page.
- b. In the LocationServiceSoapHttpPort pane, select **updateLocation** from the Operation list.
- c. In the Location pane, complete the fields, as shown in the following table.

Field	Value
LocationId	300100078489616

Field	Value
	Note: Enter the location ID that was generated in Step 1 of the Testing the Results section.
Latitude	30.36789
Longitude	-40.34444

Note: Deselect all the other parameters in this Location pane. Also, deselect LocationProfile, OriginalSystemReference, and LocationInformation options.

- d. Click the **XML Source** option.

Note: This option appears next to the Operation list.

- e. Copy the XML source and paste to a notepad.

3. Call the Web Service

- a. Open the **Oracle Fusion Service Tester** page.
- b. In the WebService URL field, paste the WSDL URL that you derived from Step 5 of the Extracting the Web Services URL section.
- c. Enter the user name and password credentials.
- d. In the **Payload** pane, paste the XML source that you derived from Step 5 of the Deriving the Payload section.
- e. Click **Invoke**. The Output Payload pane displays the output payload.

4. Test the Web Service

- a. Sign in to the **Oracle Fusion Applications Home** Page.
- b. Navigate to the Customer Center work area.
- c. Search the address that you updated.
- d. Click the **Addresses** section.
- e. From the **Actions** list, select the **View Geography Information** option.
- f. Verify the latitude and longitude details.

How You Set up Address Cleansing

Address cleansing validates, corrects, and standardizes address information that you enter in the application. Address cleansing, unlike geography validation, validates both the geography attributes and the address line attributes.

To use the address cleansing functionality, you need to have license for the customer data quality application, because the feature is delivered using data quality integration.

You can specify the real-time address cleansing level for each country by choosing either of these options:

- **None:** Specifies no real time address cleansing.
- **Optional:** Provides option to cleanse addresses.

Once you have enabled address cleansing for a country, a **Verify Address** icon appears at address entry points in the application. Click the icon to perform address cleansing and receive a corrected, standardized address. If the application doesn't find a matching address, then an alert message is displayed.

FAQs for Loqate Support

How to Import Nokia Geography Data

We recommend that you use Loqate geography data. However, if you need to use Nokia data for one or more countries for business reasons you can do so.

By default, Import Geography Data task invokes Loqate geography data.

Note: Oracle doesn't support any Nokia geography data fixes.

Perform these steps to import Nokia geography data:

1. Set the profile value of the ORA_HZ_ENABLE_DAAS_LOQATE profile option to No in the Setup and Maintenance work area by going to the following:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values
2. Import the Nokia geography data for a country as follows:
 - a. Navigate to the Manage Geographies task in the Setup and Maintenance work area by going to the following:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Geographies
 - b. On the Actions menu, Click Import Geography Data for a country.

Note: The Import Geography Data action is disabled for a country if the geography data for that country isn't available from Loqate or if the country data is already imported using either Loqate, Nokia, or any third party geography data.

After the geography data is loaded, the data provider name (Loqate or Nokia) is displayed in the Hierarchy Defined section in Manage Geographies.

How many countries does Loqate support?

Loqate supports 82 countries. Any additional country support beyond the 82 must be logged as an enhancement request. To log the enhancement request, go to Idea Lab.

Will I be charged for Loqate data?

There's no charge or licensing requirement for Loqate geography data.

I am an existing customer, how will I be impacted? Can I import both Loqate and Nokia geography data?

No. You can import either Loqate or Nokia geography data, but you can't import from both providers for a single country. We recommend that you use Loqate geography data because Loqate supports 82 countries including existing 62 Nokia supported countries.

If you're already using Nokia geography data, you can select one of these two options:

- Option 1: You need not do anything and continue to use Nokia geography data. Oracle doesn't support any Nokia geography data fixes.
- Option 2: You can replace Nokia geography data with Loqate geography data. This is a manual process today. You must follow manual steps and work closely with the support team to import new Loqate geography data. For more information about this process, see [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#) section in this chapter.

How often are updates to Oracle licensed geography reference data available? How will I be informed about new countries that are supported by Oracle-licensed geography reference data?

The geography data is updated on a quarterly basis but the update of the latest geography data refresh isn't automated. You will be informed about the geography data refresh using release readiness documents.

How is the Geography Data updated? Are updates available for all countries at the same time or only some countries are updated at a time?

When you import the geography data for a country after Release 18C for the first time you would get the latest Loqate geography data. But if your Loqate geography data is more than three months old, you have to uptake the latest Loqate

geography data by following Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data section in this chapter.

Can I import Vertex or other third-party geography data in Manage Geographies?

Yes, you can continue to import geography data of your choice. Oracle provides support for Loqate geography data out of the box.

Can I import geography data for multiple countries in one import job?

No. You can submit only one import job for a country. After submitting the import job, you can search for a different country and submit another import job for that country. Currently, you can only search and import Loqate data for one country at a time using the Manage Geographies task in Setup and Maintenance menu.

FAQs for Define Geographies

How You Search Geographies in the Language You Prefer

You can search geographical data using the language that you prefer. For example, when you load geography data for Canada in English and French. When you search this data using say Postal Code H4A 0A1, the following is the search result:

- H4A 0A1, Montreal, QC
- H4A 0A1, Montreal, Quebec
- H4A 0A1, Montréal, QC
- H4A 0A1, Montréal, Quebec

You may want the search results to be displayed in the language you prefer. So, if you set the language as English, the following must be displayed:

- H4A 0A1, Montreal, QC
- H4A 0A1, Montreal, Quebec

And if you set the language as French, the following must be displayed:

- H4A 0A1, Montréal, QC
- H4A 0A1, Montréal, Quebec

This can be done after setting up the profile option Filter Geographies Using User Language (HZ_GEO_FILTER_BY_USER_LANG). You must first define the profile option HZ_GEO_FILTER_BY_USER_LANG and specify the language you want to use.

1. Create the profile option as follows:

- a. Click **Navigator > My Enterprise > Setup and Maintenance > Search** and search for Manage Profile Options.
 - b. Click Create new profile option icon and enter the following:
 - Profile Option Code: HZ_GEO_FILTER_BY_USER_LANG
 - Profile Display Name: Filter Geographies Using User Language
 - Application: Trading Community Model
 - Module: Trading Community Model
 - Description: provide the description
 - Start Date: specify a date
 - c. Click Save and close.
 - d. In Profile Option Levels table, select **Enabled** and **Updateable** for the site level.
 - e. Click Save and Close.
2. Set the default value for the profile option as follows:

- a. Click **Navigator > My Enterprise > Setup and Maintenance > Search** and search for Manage Administrator Profile Values.
- b. Search HZ_GEO_FILTER_BY_USER_LANG as the profile option code.
- c. Add new Site level profile value.
- d. Specify the new profile in the following format:

```
<COUNTRY_CODE1>:<GEOGRPHY_LEVEL1>,  
<GEOGRAPHY_LEVEL2>;<COUNTRY_CODE2>:<GEOGRAPHY_LEVEL1>
```

Where Geography Level values start with value 1 for country and increment for each level that's defined in the country's geography structure setup.

For example, the following are the geography levels for Canada:

Country - 1, State - 2, Province - 3, City - 4, Postal Code - 5

Similarly, the following are the geography levels for United States:

Country - 1, State - 2, County - 3, City - 4, Postal Code - 5

Example 1: If you want to filter data for Canadian Cities, then the profile value is CA:3 where CA is the country code for Canada and 3 is geography level value for City.

Example 2: If you want to filter data for both State and Cities for United States, then value should be US:2,4

Example 3: If you want to filter data for multiple countries as given in both example 1 and example 2, then use semi colon as delimiter, like CA:3;US:2,4

- e. Click Save and Close.

When do I define address cleansing?

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

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

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

How many levels in a geography structure can I define?

We recommend that you add up to six levels, starting with country at level 1, while defining geography structures. If you add more than six levels containing list of values or validations, then the sixth level and above may not work as expected in the Address UI of accounts, contacts, suppliers, persons, and so on.

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

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

Can I add any geography to the geography hierarchy?

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

Can I edit a specific geography in the geography hierarchy?

Yes. In the Manage Geography Hierarchy page you can edit details such as the geography's date range, primary and alternate names and codes, and creating geographies within the hierarchy such as adding a postal code for a city. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**. Click the Tasks menu and click Search. Search for **Manage Geographies** and open it. Search for a country by Country Name or Country Code. Click **Hierarchy Defined**. Search and select the required geography. Click **Action Create** or **Edit**.

Can I add alternative names and codes for an existing country?

Yes. You can add alternative names and codes. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**. Click the Tasks menu and click Search. Search for Manage Geographies and open it. Search for a country by Country Name or Country Code. Click **Actions** > **Edit**. Click **Actions** > **Add** on the Edit Country page to add the Primary and Alternative Names or the Primary and Alternative Codes.

How can I add a geography that's at a lower level to any geography in a geography hierarchy?

Select the geography that you want to create a geography at lower level, and then click the **Create** icon. This lets you create a geography for a geography type that's one level lower to the geography type you selected. The structure of the country's geography types are defined in the Manage Geography Structure page.

How can I verify whether the third-party geography structure and hierarchy I imported are available in the application?

You can track the progress of the geography structure and hierarchy import process by navigating to the **Scheduled Processes** page and viewing the status of the third-party geography data import process. Once the process completes, the status changes to Succeeded. You can then verify the newly imported geography structure and hierarchy in the Setup and Maintenance work area by navigating to the following: offering: Customer Data Management; functional area: Enterprise Profile; task: Manage Geographies, where you first loaded the third-party geography data.

Note: Before you load geography data for a country from a third party provider, ensure that no geography structure or hierarchy is saved for that country. If geography structure or hierarchy data is already available, the load process fails.

How can I enable geocoding?

You can enable geocoding for a country by turning the Geocoding option for that country in the **Setup and Maintenance** work area by going to the following: offering: Customer Data Management; functional area: Enterprise Profile; task: Manage Geographies. Search for the country for which you want to enable geocoding and click the **Geocoding Defined** icon. If geocoding is enabled for a country, the Geocoding Defined icon displays a check mark.

Once you have enabled geocoding for a country, you must run the Run Geocode Generation ESS job on the Run Geocode Generation task. Before you run the job, however, ensure that you have specified the country code of the country for which you want to generate the geocodes.

Where can I view the geocode values of a location?

You can search for and view the geocode values of a party's location in the Party Center and the Customer Center pages. Navigate to the Addresses section of the party's profile and click either **View, Columns, Latitude** and **View, Columns, Longitude**, or **View, Columns, Manage Columns, Latitude** and **Longitude**. This displays the latitude and longitude, or geocode values, associated with the location of the party.

Note: Geocode information display is available only when geocoding is enabled for the country to which the address belongs.

Related Topics

- [Geocoding](#)

What are Spatial Services?

Spatial services allow users to find points of interest such as customers, contacts, and so on using the latitude and longitude coordinates of an address.

The Oracle Fusion Mobile Sales application provides these services for sales representatives to discover accounts and contacts around their location.

Where can I update and view the geography name reference information for parties?

To view the geography name reference information associated with parties, you need to ensure that you have created an address for the party. You can create or update party addresses in the Organizations, Persons, and Groups work areas.

Once you have updated an address, you must either wait for the Run Geocode Generation ESS job to run automatically as scheduled or start geocode generation manually from the Setup and Maintenance work area by navigating as follows: offering: Customer Data Management; functional area: Enterprise Profile; task: Run Geocode Generation.

Once the Run Geocode Generation job has updated the geography information for the country associated with the party you updated, you can search for and view the geography name reference information associated with the party in the Organizations, Persons, and Groups work areas. Navigate to the person, organization, or group whose address you want to verify and click **Actions, View Geography Information**. This displays a dialog box that displays the updated geography information, complete with address values enhanced using geography name reference.

Note: Geography name reference enriched geography information display is available only when geography validation is enabled for the country to which the address belongs.

How can I save an address that didn't pass geography validation?

Search and select for the country name in the Manage Geographies page, and then click the **Validation Defined** option. In the Manage Geography Validation page, select **No Validation** in the Geography Validation Level for Country drop-down list. This option saves addresses that don't pass the geography validation, including incomplete and invalid addresses.

Why is Import Geography Data Disabled in Manage Geographies?

Import Geography Data is disabled for a country if the geography data for that country isn't available from Loqate or if the geography structure or hierarchy is already defined for that country. If the hierarchy is defined, delete the geography hierarchy data first and then the geography structure. For example, Pakistan isn't supported currently in the supported list of 82 countries. If you try to import geography data for Pakistan after defining geography structure or geography hierarchy for it, Pakistan would be greyed out in the import list.

3 Currencies and Currency Rates

Manage Currencies

Considerations for Defining Currencies

Consider these points about entering the currency code, date range, or symbol for the currency, when you create or edit currencies.

Currency Codes

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

Date Ranges

You can enter transactions denominated in the currency only for the dates within the specified range. If you don't enter a start date, then the currency is valid immediately. If you don't enter an end date, then the currency is valid indefinitely.

Symbols

Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

Related Topics

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency](#)
- [What's a statistical unit currency type](#)
- [Euro Currency Derivation](#)

Euro Currency Derivation

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. If you have to use a different currency for Euro, you can disable the predefined 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 don't 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 must 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 or enable any currency for displaying monetary amounts, assigning currency to ledgers, entering transactions, recording balances, or for any reporting purpose. All currencies listed in the International Organization for Standardization (ISO) 4217 standard are supported.

The default currency is set to United States Dollar (USD).

Related Topics

- [Considerations for Defining Currencies](#)

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

Precision refers to the number of digits placed after the decimal point used in regular currency transactions. For example, USD would have 2 as the precision value for transactional amounts, such as \$1.00.

Extended precision is the number of digits placed after the decimal point and must be greater than or equal to the precision value. For calculations requiring greater precision, you can enter an extended precision value such as 3 or 4. That would result in the currency appearing as \$1.279 or \$1.2793.

Minimum accountable unit is the smallest denomination for the currency. For example, for USD that would be .01 for a cent.

You can set these values for a currency using the **Manage Currencies** task in the Application Extensions functional area in the Setup and Maintenance work area.

What's a statistical unit currency type?

The statistical unit currency type denotes the Statistical (STAT) currency used to record financial statistics in the financial reports, allocation formulas, and other calculations.

Manage Conversion Rate Types

Guidelines for Creating Conversion Rate Types

Maintain different conversion rates between currencies for the same period using conversion rate types. The following conversion rate types are predefined:

- Spot
- Corporate
- User
- Fixed

You can use different rate types for different business needs. During journal entry, the conversion rate is provided automatically based on the selected conversion rate type and currency, unless the rate type is **User**. For **User** rate types, you must enter a conversion rate. You can define additional rate types as needed. Set your most frequently used rate type as the default. Conversion rate types can't 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 conversion rate type of **Spot** to populate period average rates, and the conversion rate type of **Corporate** to populate 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.

When creating conversion rates, decide whether to:

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

Enforce Inverse Relationships

The **Enforce Inverse Relationship** option indicates whether to enforce the automatic calculation of inverse conversion rates when defining daily rates. The following table describes the impact of selecting or not selecting the option.

Action	Results
Selected	When you enter a daily rate to convert currency A to currency B, the inverse rate of currency B to currency A is automatically calculated and entered in the adjacent column. If either rate is changed, the application automatically recalculates the other rate.

Action	Results
	You can update the application calculated inverse rate, but once you do, the related rate is updated. The option enforces the inverse relationship is maintained but doesn't prevent you from updating the rates.
Not Selected	The inverse rate is calculated, 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's 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** option is deselected 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 automatically creates the rates between EUR to CAD and CAD to EUR. You don't have to manually define the EUR to CAD and CAD to EUR rates.

Select the **Allow Cross Rates Override** check box to permit your users to override application generated cross rates. If you accept the default of not selected, the application generated cross rates can't be overridden.

Maintain Cross Rate Rules

Define or update your cross rate rules at any time by adding or removing contra currency assignments. Add a contra currency to a cross rate rule and run the Daily Rates Import and Calculation process to generate the new rates. If you remove a cross rate rule or a contra currency from a rule, any cross rates generated previously for that contra currency remain unless you manually delete them. Changes to the rule aren't retroactive and don't 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.

Related Topics

- [Examples of Using Conversion Rate Types in a Journal](#)
- [What's the difference between calendar and fiscal period naming](#)

Examples of Using Conversion Rate Types in a Journal

The four predefined conversion rate types are:

- Spot
- Corporate
- User
- Fixed

Scenario

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

- Canadian Dollar CAD: A stable currency
- Mexican Peso MXP: A fluctuating currency
- Hong Kong Dollar HKD: An infrequently used currency

You enter two journal lines with accounts and amounts for each foreign currency transaction. Based on your company procedures, you select the 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.

The following table lists the currency, the rate type that you select, and the reasons for the rate type selection.

Selected Currency	Selected Rate Type	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 Canadian dollars, a stable currency that fluctuates only slightly over the month.
MXP	Spot	Entered a periodic type of transaction. Your company enters daily rates each day for the Mexican peso because the currency is unstable and fluctuates.

Selected Currency	Selected Rate Type	Reason
HKD	User	Entered a one time transaction. Your company doesn't maintain daily rates for Hong Kong dollars.

Your company doesn't currently use the **Fixed** rate type. From January 1, 1999, the conversion rate of the French franc FRF against the Euro EUR was 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 Euro.

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 fluctuations of the entered foreign currency and your company procedures for maintaining daily rates.

- Spot: For currencies with fluctuating conversion rates, or when exact currency conversion is needed.
- Corporate: For setting a standard rate across your organization for a stable currency.
- User: For infrequent entries where daily rates for the entered foreign currency aren't 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 currency maintenance. The User rate type can also provide an accurate conversion rate on the date of the transaction.

Manage Daily Rates

Enter Daily Rates Using the Daily Rates Spreadsheet

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days.

To load rates using the Create Daily Rates Spreadsheet, you must first install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. You can download the installation files from the Tools work area by selecting Download Desktop Integration Installer.

Entering Daily Rates

1. From the General Accounting work area, select the **Period Close** link.
2. From the Tasks panel, 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 a valid value: 10/2/2017.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/6/2017.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click **Submit** and click **OK** twice.
12. Review the **Record Status** column to verify that all rows were inserted successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

Related Topics

- [Examples of Using Conversion Rate Types in a Journal](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Update Currency Rates](#)

Update Currency Rates

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

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.

Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

4 Enterprise Structures

Overview

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

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

Every enterprise has three fundamental structures that describe its operations and provide a basis for reporting.

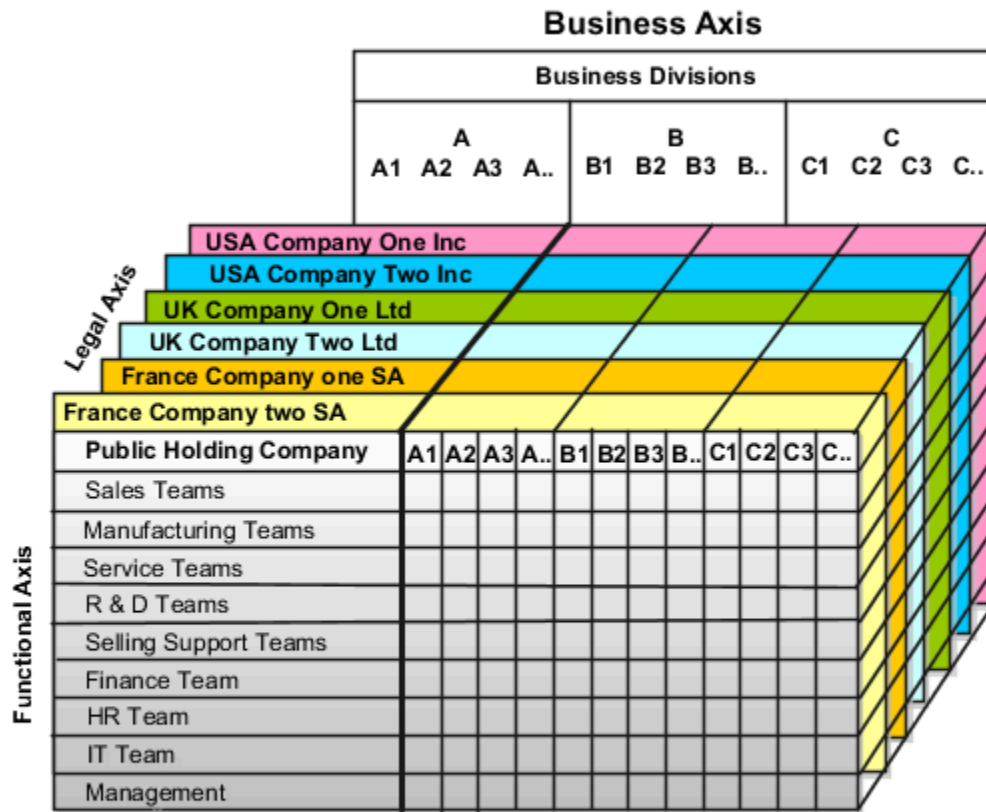
- Legal
- Managerial
- Functional

In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments

Align these structures with your strategic objectives.

This figure illustrates a grid with Business Axis, representing the enterprise division, Legal Axis representing the companies, and the Functional Axis representing the business functions.



Legal Structure

The figure illustrates a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.

Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies.

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

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

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

The figure illustrates:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.
- Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

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

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development and selling, general, and administrative expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Model Your Enterprise Management Structure

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

Scenario

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

InFusion Corporation

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

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

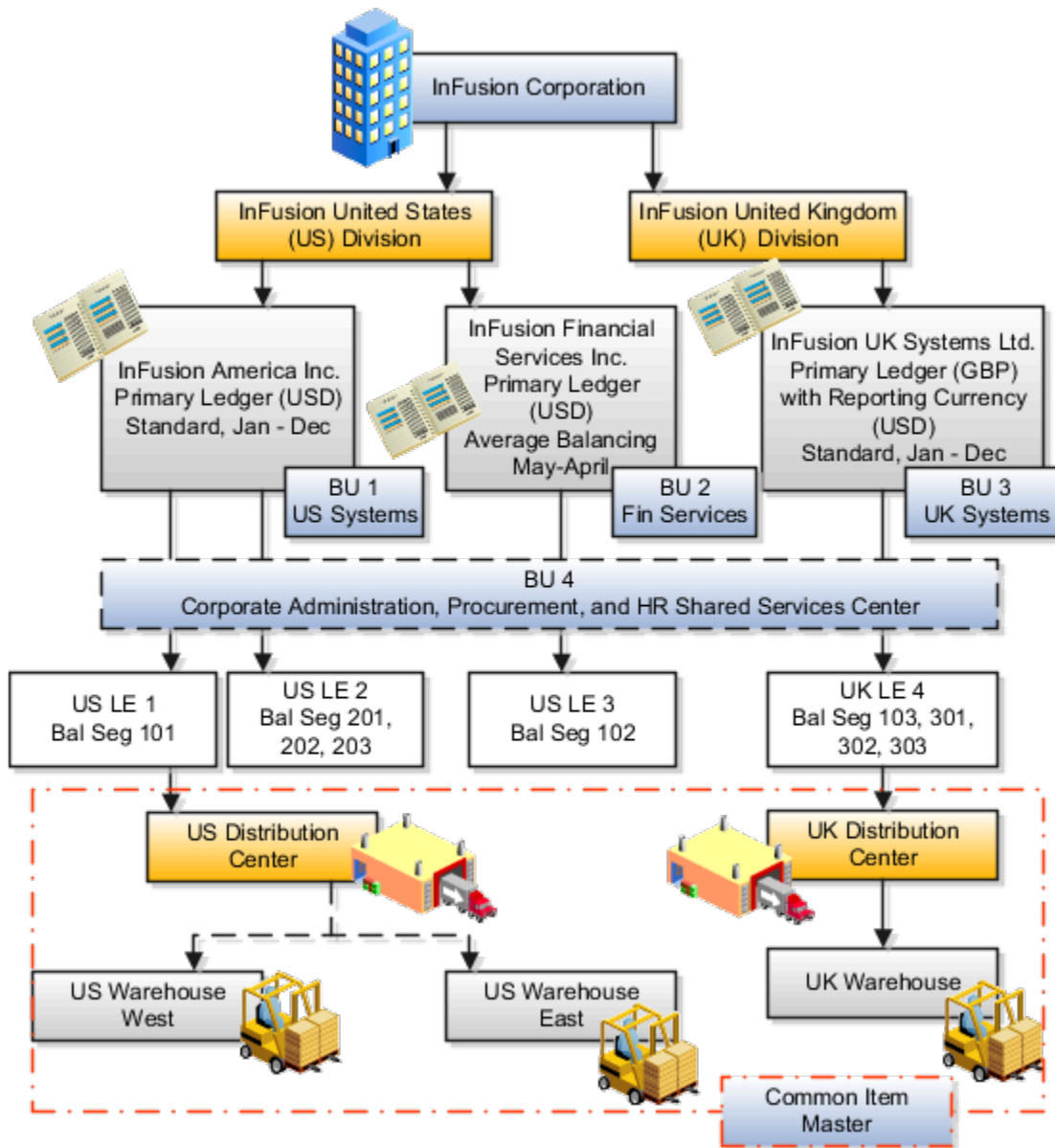
- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you want to achieve proper statutory reporting?
- Your managers need reports that show profit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

Global Enterprise Structure Model

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

- Creation of three separate ledgers representing your separate legal entities:
 - InFusion America Inc.
 - InFusion Financial Services Inc.
 - InFusion UK Services Ltd.

- Consolidation of results for application components, installations, and maintenance product lines across the enterprise
- All UK general and administrative costs processed at the UK headquarters
- US Systems' general and administrative costs processed at US Corporate headquarters
- US Financial Services maintains its own payables and receivables departments



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

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

- The enterprise is required because it serves as an umbrella for the entire implementation. All organizations are created within an enterprise.
- Legal entities are also required. They can be optionally mapped to balancing segment values or represented by ledgers. Mapping balancing segment values to legal entities is required if you plan to use the intercompany functionality. The InFusion Corporation is a legal entity but isn't discussed in this example.
- At least one ledger is required in an implementation in which you record your accounting transactions.
- Business units are also required because financial transactions are processed in business units.
- A shared service center is optional, but if used, must be a business unit.
- Divisions are optional and can be represented with a hierarchy of cost centers or by a second balancing segment value.
- Departments are required because they track your employees.
- Optionally, add an item master organization and inventory organizations if you're tracking your inventory transactions in Oracle Fusion Applications.

Note: Some Oracle Fusion Human Capital Management implementations don't require recording accounting transactions and therefore, don't require a ledger.

Guidelines for Configuring Global Enterprises

Start your global enterprise structure configuration by discussing what your organization's reporting needs are and how to represent those needs in the Oracle Fusion Applications. The following are some questions and points to consider as you design your global enterprise structure in Oracle Fusion.

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

Enterprise Configuration

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

Business Unit Management

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

Security Structure

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

Compliance Requirements

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

Design an Enterprise Configuration

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

Scenario

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

Enterprise Details

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

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

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

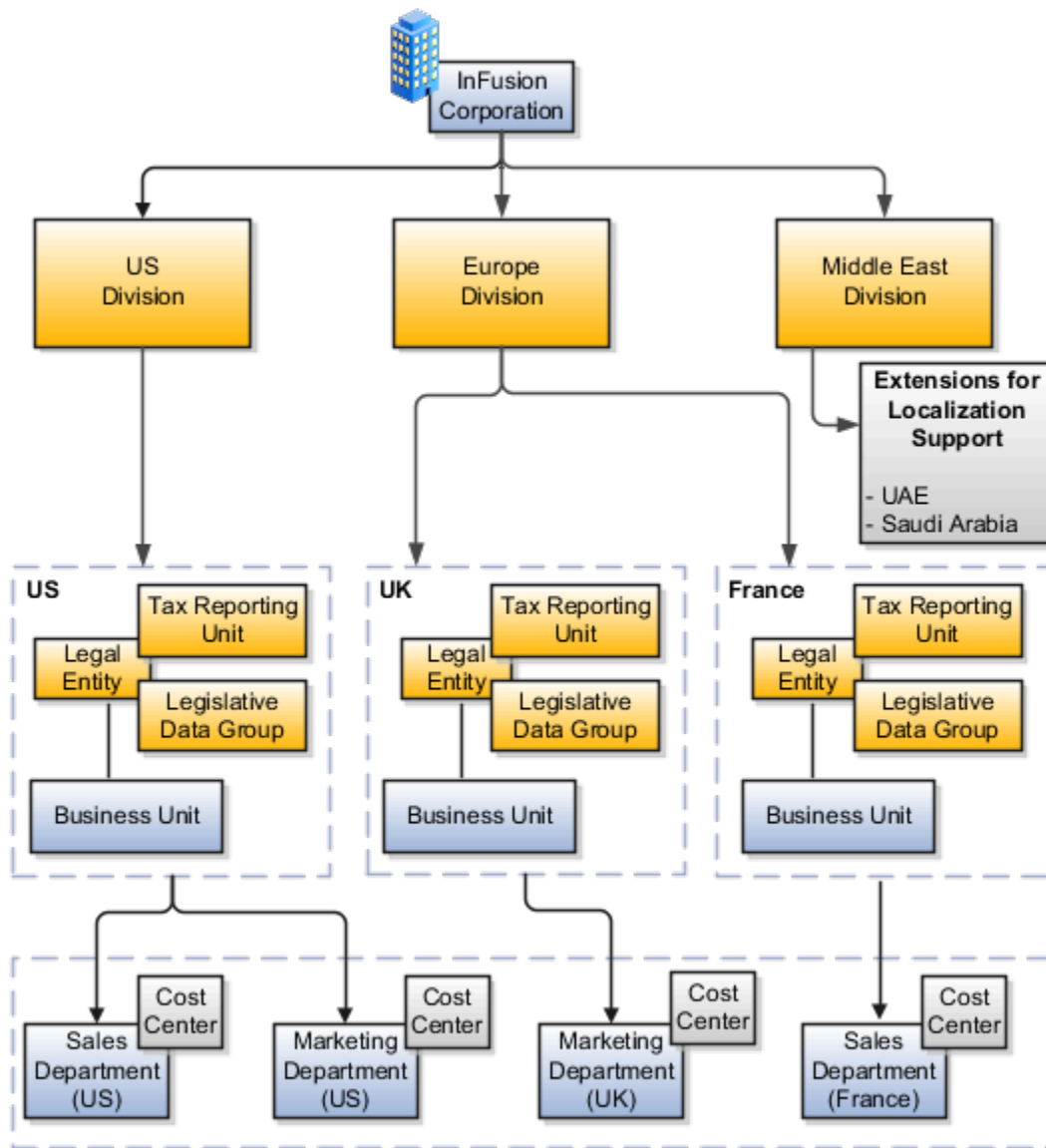
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

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

Resulting Enterprise Configuration

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

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



Enterprise Information for Non-HCM Users

The Manage Enterprise HCM Information task includes default settings for your enterprise such as the employment model, worker number generation, and so on. If you're not implementing Oracle Fusion Human Capital Management (HCM), then the only action you may need to perform using this task is to change the enterprise name, if necessary. The other settings are HCM-specific and aren't relevant outside of Oracle Fusion HCM.

5 Legal Entities, Business Units, and Reference Data Sets

Overview of Legal Entities, Business Units, and Divisions

The setup tasks for legal entities, divisions, business units and other organizations are in different functional areas in the Setup and Maintenance work area. The Legal Structures functional area covers tasks related to legal entity setup, the Organization Structures functional area includes tasks related to business unit setup, and the Workforce Structures functional area includes tasks related to department, division, trees, jobs, positions, and other organizations setup.

Overview

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

Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
- 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
- Minimizing the enterprise's tax liability
- 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, 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
- 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), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies don't 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.

Model Legal Entities

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers. These registers are part of the Oracle Fusion Trading Community Architecture.

When your legal entities are trading with each other, represent them as legal entities and as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

Several decisions you should consider when you create legal entities.

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

The Importance of Using Legal Entities on Transactions

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

For example, a sales order creates an obligation on the legal entity that books the order and promises to deliver the goods on the acknowledged date. The creation also creates an obligation on the purchaser to receive and pay for those goods. Contract law in most countries contains statutes that state damages can be sought for both:

- Actual losses, putting the injured party in the same state as if they had not entered into the contract.
- What is called loss of bargain, or the profit that would have made on a transaction.

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

Legal Entity and Its Relationship to Business Units

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

In some cases, your legal entity is inferred from your business unit that's processing the transaction. For example, Business Unit ACM UK has a default legal entity of InFusion UK Ltd. When a purchase order is placed in ACM UK, the legal entity InFusion UK Ltd is legally obligated to the supplier. Oracle Fusion Procurement, Oracle Fusion Project Portfolio Management, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.

Legal Entity and Its Relationship to Divisions

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

Legal Entity and Its Relationship to Ledgers

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

Legal Entity and Its Relationship to Balancing Segments

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

1. Identify the legal entities within the ledger.
2. Balance transactions that cross legal entity boundaries through intercompany transactions.
3. Decide which balancing segments correspond to each legal entity and assign them in Oracle Fusion General Ledger Accounting Configuration Manager. Once you assign one balancing segment value in a ledger, then

all your balancing segment values must be assigned. This recommended best practice facilitates reporting on assets, liabilities, and income by legal entity.

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

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

Implementing multiple balancing segments requires every journal entry that isn't balanced by division or business unit, to generate balancing lines. You can't change to multiple balancing segments after you begin using the ledger because your historical data isn't balanced by the new balancing segments. Restating historical data must be done at that point.

If your enterprise regularly spins off businesses or holds managers accountable for utilization of assets, identify the business with a balancing segment value. If you account for each legal entity in a separate ledger, no requirement exists to identify the legal entity with a balancing segment value.

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

Legal Entity and Its Relationship to Consolidation Rules

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

Legal Entity and Its Relationship to Intercompany Transactions

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

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

Tip: In the Oracle Fusion Supply Chain applications, you can model intercompany relationships using business units, from which legal entities are derived.

Legal Entity and Its Relationship to Worker Assignments and Legal Employer

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

Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance for your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Overview of Legal Jurisdiction and Authorities

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

Define jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll. When you create a legal entity, the Oracle Fusion Legal Entity Configurator automatically creates one legal reporting unit for that legal entity with a registration.

Jurisdictions

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

Types of jurisdictions are:

- Identifying Jurisdiction
- Income Tax Jurisdiction
- Transaction Tax Jurisdiction

Identifying Jurisdiction

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

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

Income Tax Jurisdiction

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

Transaction Tax Jurisdiction

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

Legal Authorities

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

For example, the Internal Revenue Service is the authority for enforcing income tax laws in United States. In some countries, such as India and Brazil, you're required to print legal authority information on your tax reports. Legal authorities are defined in the Oracle Fusion Legal Entity Configurator. Tax authorities are a subset of legal authorities and are defined using the same setup flow.

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

Create Legal Jurisdictions, Addresses and Authorities

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

Legal Jurisdictions

Create a legal jurisdiction by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Jurisdictions** task.
2. Select **Create**.
3. Enter a unique **Name**, United States Income Tax.
4. Select a **Territory**, United States.
5. Select a **Legislative Category**, Income tax.
6. Select **Identifying**, Yes. Identifying indicates the first jurisdiction a legal entity must register with to do business in a country.
7. Enter a **Start Date** if desired. You can also add an **End Date** to indicate a date that the jurisdiction may no longer be used.

8. Select a **Legal Entity Registration Code**, EIN or TIN.
9. Select a **Legal Reporting Unit Registration Code**, Legal Reporting Unit Registration Number.
10. Optionally enter one or more **Legal Functions**.
11. **Save and Close**.

Legal Addresses for Legal Entities and Reporting Units

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

1. In the Setup and Maintenance work area, go to the **Manage Legal Address** task.
2. Select **Create**.
3. Select **Country**.
4. Enter **Address Line 1**, Oracle Parkway.
5. Optionally enter **Address Line 2**, and **Address Line 3**.
6. Enter or Select the postal code, 94065.
7. Select **Geography** 94065 and **Parent Geography** Redwood Shores, San Mateo, CA.
8. Optionally enter a **Time Zone**, US Pacific Time.
9. **OK**.
10. **Save and Close**.

Legal Authorities

Create a legal authority by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Authorities** task.
2. Enter the **Name**, California Franchise Tax Board.
3. Enter the **Tax Authority Type**, Reporting.

Note: Create an address for the legal authority.

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

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

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

22. Save and Close.

Related Topics

- [Legal Authorities](#)
- [Overview](#)
- [Update Existing Setup Data](#)

Create Legal Entities, Registrations, and Reporting Units

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

Legal Entity

Create a legal entity by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Entity** task.
2. Accept the default **Country**, United States.
3. Enter **Name**, InFusion USA West.
4. Enter **Legal Entity Identifier**, US0033.
5. Optionally enter **Start Date**. When the start date is blank the legal entity is effective from the creation date.
6. Optionally enter an **End Date**.
7. Optionally, if your legal entity should be registered to report payroll tax and social insurance, select the **Payroll statutory unit** check box.
8. Optionally, if your legal entity has employees, select the **Legal employer** check box.
9. Optionally, if this legal entity isn't a payroll statutory unit, select an existing payroll statutory unit to report payroll tax and social instance on behalf of this legal entity.
10. Enter the **Registration Information**
11. Accept the default **Identifying Jurisdiction**, United States Income Tax.
12. Search for and select a **Legal Address**, 500 Oracle Parkway, Redwood Shores, CA 94065.

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

13. **OK**.
14. Optionally enter a **Place of Registration**.
15. Enter the **EIN or TIN**.
16. Enter the **Legal Reporting Unit Registration Number**.
17. **Save and Close**.
18. In the Setup and Maintenance work area, go to the **Manage Legal Entity** page and **Select** to set scope.
19. Select the **Manage Legal Entity**.
20. In the ***Legal Entity** list, select **Select and Add**.
21. Click **Apply and Go to Task**.
22. Select your legal entity.
23. **Save and Close**.

This sets the scope for your task list to the selected legal entity.

24. **Save and Close**.

Legal Entity Registrations

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

1. In the Setup and Maintenance work area, go to the **Manage Legal Entity Registrations** task. Verify that the **Legal Entity** scope value is set correctly.
2. **Go to Task**.
3. Select **Create**.
4. Enter **Jurisdiction**.
5. Enter **Registered Address**.
6. Enter **Registered Name**.
7. Optionally enter **Alternate Name**, **Registration Number**, **Place of Registration**, **Issuing Legal Authority**, and **Issuing Legal Authority Address**, **Start Date**, and **End Date**.
8. **Save and Close**.

Legal Reporting Unit

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

1. In the Setup and Maintenance work area, go to the **Manage Legal Reporting Unit** task. Verify that the **Legal Entity** scope value is set correctly.
2. **Go to Task**
3. Select **Create**.
4. Enter **Territory**, United States.
5. Enter **Name**.
6. Optionally enter a **Start Date**.
7. Enter **Registration Information**.
8. Search for and select **Jurisdiction**.
9. Enter **Main Legal Reporting Unit** information.
10. Select the value Yes or No for the **Main Legal Reporting Unit**. Set value to yes only if you're creating a new main (primary) legal reporting unit.
11. Enter the **Main Effective Start Date**, 1/1/11.
12. **Save and Close**.

Related Topics

- [Overview](#)
- [Model Legal Entities](#)
- [Plan Legal Reporting Units](#)
- [Update Existing Setup Data](#)

Legislative Data Groups

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. Each payroll statutory unit can belong to only one legislative data group.

Payroll-related information, such as elements, is organized by legislative data group. Each legislative data group:

- Marks a legislation in which payroll is processed.
- Is associated with a legislative code, currency, and its own cost allocation key flexfield structure.
- Is a boundary that can share the same set up and still comply with the local laws.
- Can span many jurisdictions as long as they're within one country.
- Can contain many legal entities that act as payroll statutory units.

How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units

You can designate legal entities as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). You can have only one legal entity that's also a payroll statutory unit and legal employer, or multiple legal entities, payroll statutory units and legal employers.

Payroll statutory units and tax reporting units share a parent child relationship with the payroll statutory unit being a parent of a tax reporting unit.

Legal Employers and Payroll Statutory Units

You can designate payroll statutory units to group legal employers to do statutory calculations at a higher level. For example, you can use payroll statutory units for court orders, or to calculate the United Kingdom (UK) statutory sick pay. A legal employer can exist independently of an enterprise or be a part of a payroll statutory unit. There can be many legal employers belonging to a payroll statutory unit, but a legal employer can belong only to one payroll statutory unit.

Legal Employers and Tax Reporting Units

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, if a single tax reporting unit is linked to a payroll statutory unit and two legal employers are associated with this payroll statutory unit, then both legal employers are associated with the tax reporting unit. Use the Manage Legal Reporting Unit HCM Information task to designate an existing legal reporting unit as a tax reporting unit. You need to select a parent payroll statutory unit when you create a legal reporting unit belonging to a legal employer (that isn't a payroll statutory unit as well). Next, you need to designate the legal reporting unit as a tax reporting unit and select the legal employer.

Related Topics

- [Examples of HCM Organization Models](#)
- [Overview](#)
- [What's a legal employer](#)
- [What's a payroll statutory unit](#)
- [What's a tax reporting unit](#)

Examples of HCM Organization Models

You can use any of these HCM organization models.

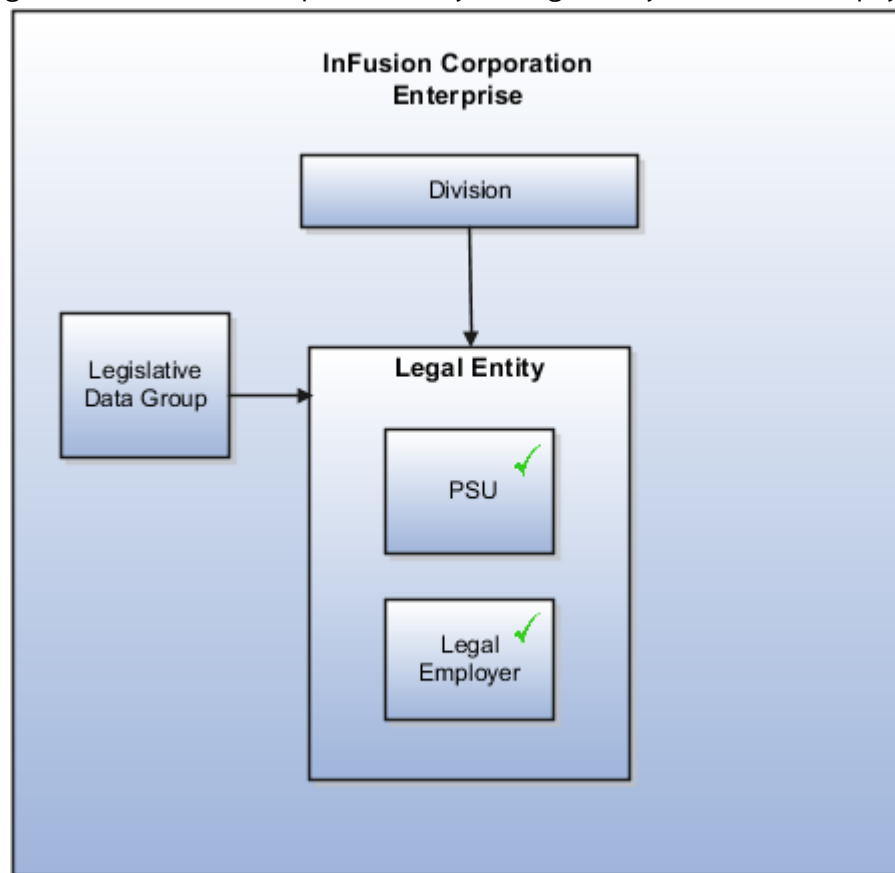
- Simple Configuration
- Multiple Legal Employers and Tax Reporting Units
- One Payroll Statutory Unit and Two Tax Reporting Units
- One Payroll Statutory Unit with Several Tax Reporting Units
- Multiple Payroll Statutory Units with Several Tax Reporting Units

These models include a legislative data group (LDG) that isn't an organization classification and show how you can partition payroll data by associating them with a payroll statutory unit

Simple Configuration

This is an example of a simple configuration without any tax reporting units. The enterprise has only one legal entity, which is both a payroll statutory unit and a legal employer, and shares the same boundaries. In this type reporting can be done only at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as these countries report at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity, which is both a payroll



statutory unit and a legal employer.

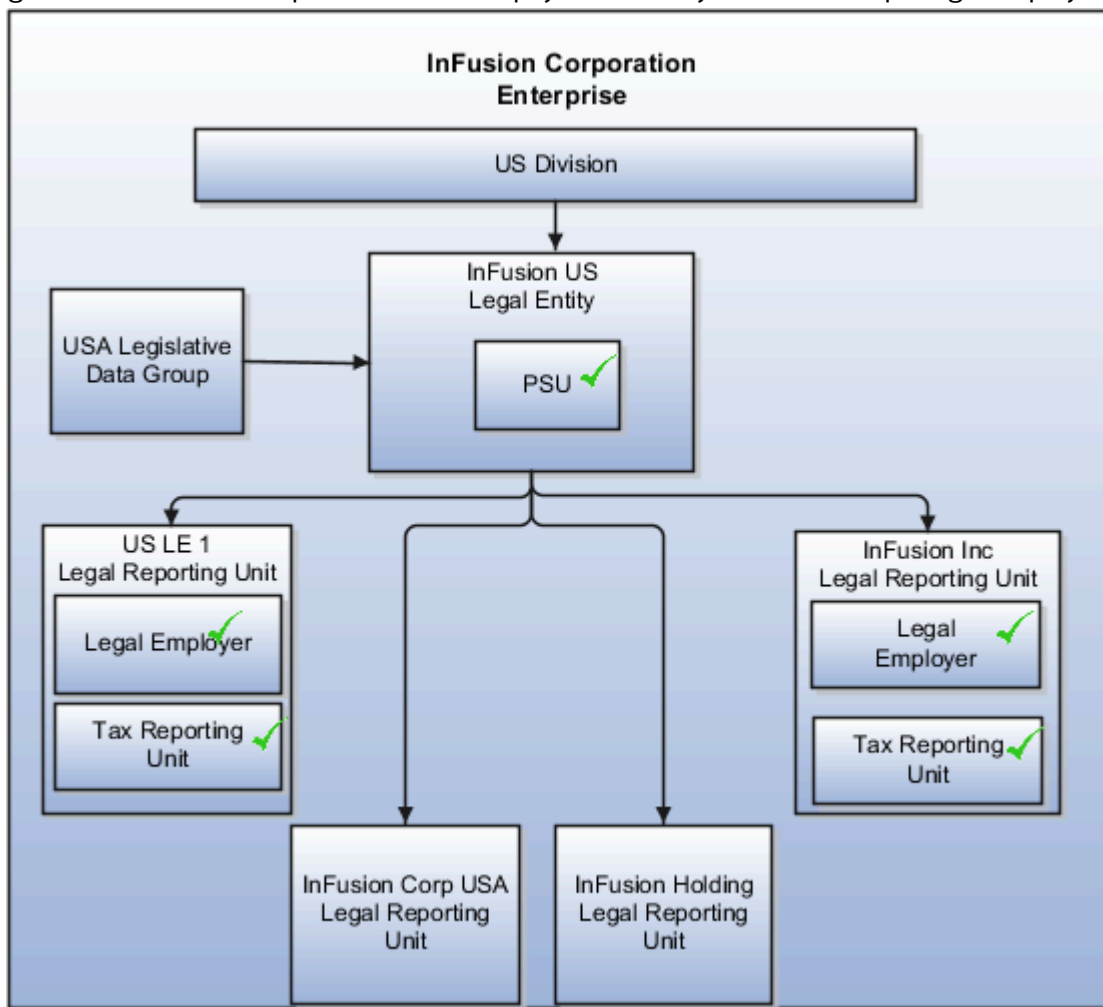
Multiple Legal Employers and Tax Reporting Units

In this configuration, you define one legal entity, InFusion US as a payroll statutory unit with two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit. Tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit.

The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately as either a payroll statutory unit, legal employer, or a tax reporting unit.

This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US

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



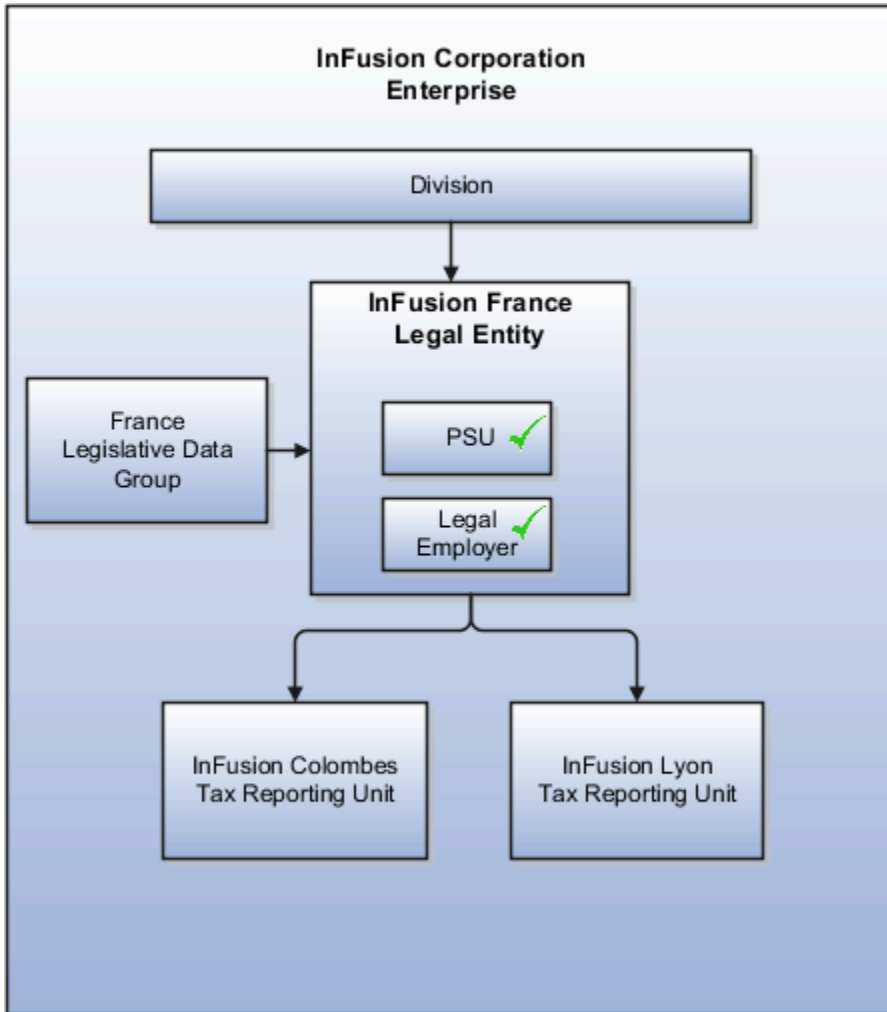
units.

One Payroll Statutory Unit and Two Tax Reporting Units

This model makes no distinction between a legal employer and a payroll statutory unit. You define tax reporting units as subsidiaries to the legal entity.

In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting. Statutory reporting boundaries are the same for both payroll and HR management. An example of a country that might use this model is France.

This figure illustrates an example of an organization with one legal entity. The legal entity is both a legal employer and a payroll statutory unit and that has two tax reporting units.

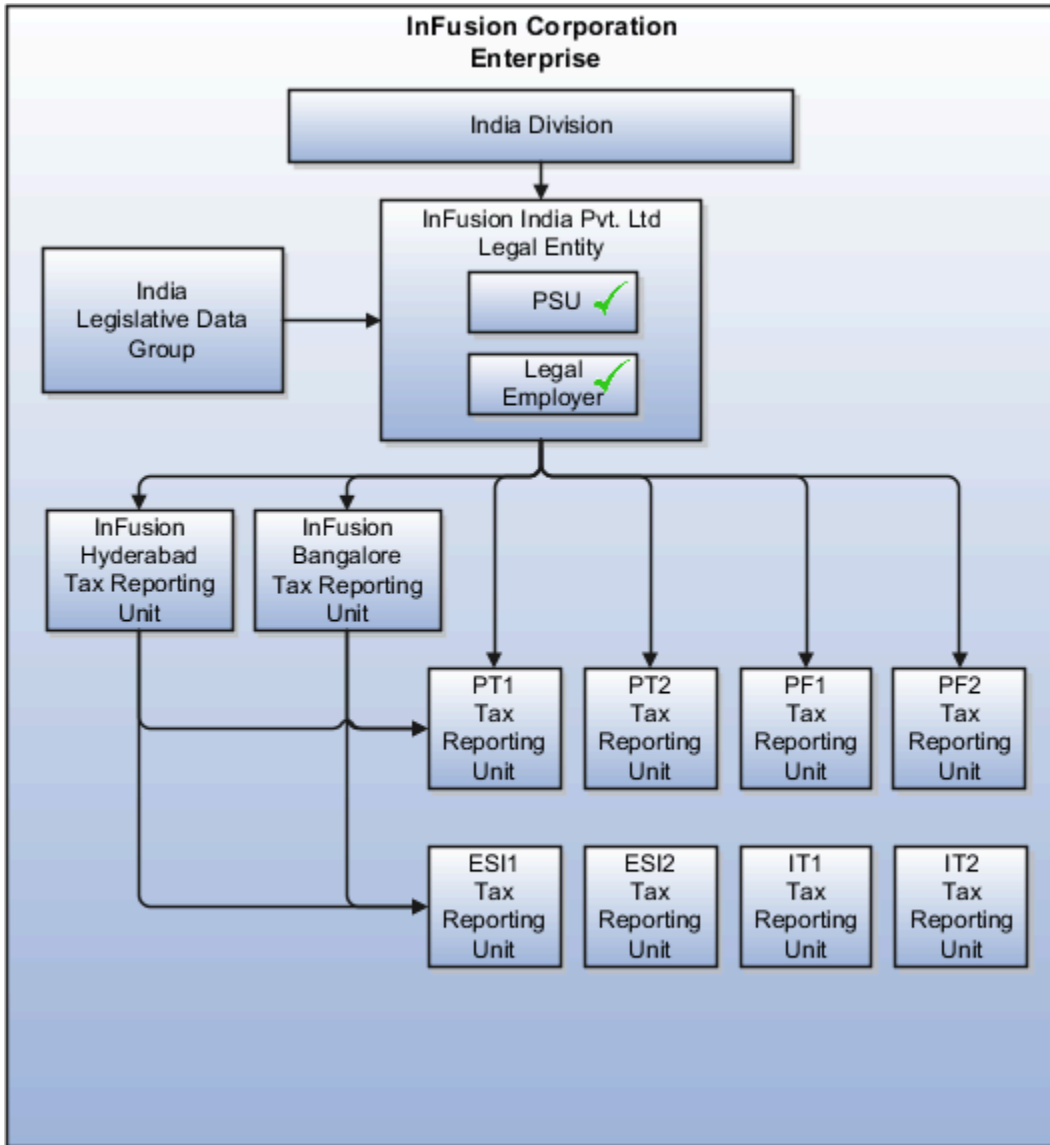


One Payroll Statutory Unit with Several Tax Reporting Units

In this model, the enterprise has one legal entity. Legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can report separately on both entities

Using this model, you can't report on tax reporting unit balances within a legal employer, and categorize balances by either or both organizations, as required. An example of a country that might use this model is India.

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

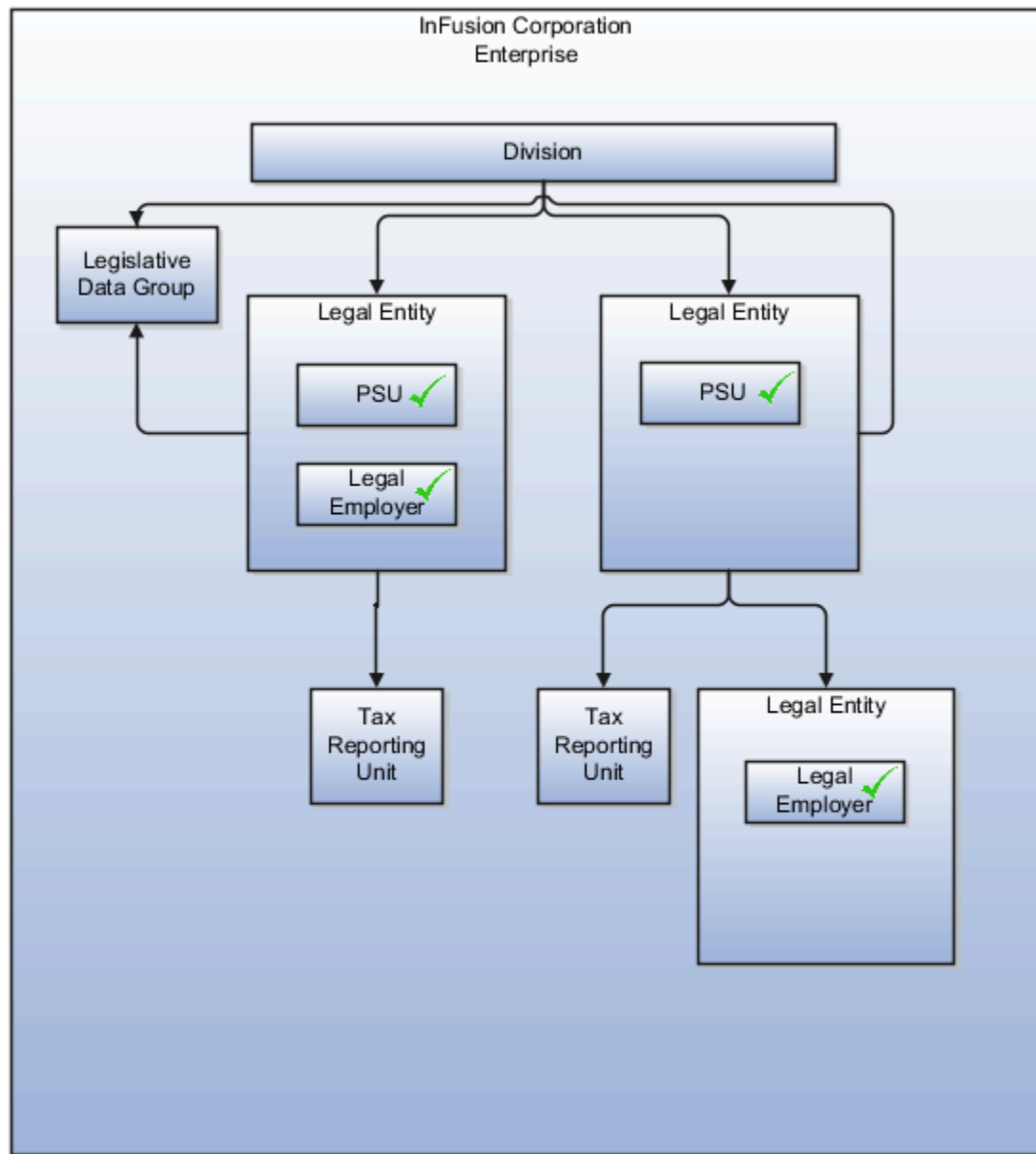


Multiple Payroll Statutory Units with Several Tax Reporting Units

In this model, the enterprise has two legal entities. The legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can report separately on both entities.

Using this model, you can't report on tax reporting unit balances within a legal employer, and categorize balances by either or both organizations, as required. An example of a country that might use this model is the United Kingdom (UK).

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



from each other.

Related Topics

- [How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units](#)
- [Legislative Data Groups](#)
- [Overview](#)

Examples of Creating Calculation Cards for Deductions at Different Levels

You can create and manage calculation cards at several different levels, from an individual person to a payroll statutory unit. Use the cards to capture information specific to a person or organization, such as an employee's tax filing status or an employer's tax identification number. Calculation card entries override default values defined at other levels. The priority of information, from highest to lowest, is as follows:

1. Personal calculation card (payroll relationship level)
2. Tax reporting unit calculation card
3. Payroll statutory unit calculation card
4. Calculation value definitions (legislative data group level)

Note: Not all countries or territories support creating calculation cards for payroll statutory units and tax reporting units. The enterable values at each level also vary by country or territory. The basic steps to create and manage calculation cards are the same at all levels.

Use these examples to understand when you might define calculation cards at each level.

Personal Calculation Card

Scenario: An employee qualifies for a special reduced tax rate.

Task: Calculation Cards task in the Payroll section under My Client Groups.

Tax Reporting Unit Card

Scenario: The income tax exemption amount is 2000 at the legislative data group level, but a tax reporting unit in a particular state or province uses an exemption amount of 2500. Enter this default value for the tax reporting unit, which can be overridden on personal calculation cards.

Task: Manage Legal Reporting Unit Calculation Cards task in the Setup and Maintenance section.

Payroll Statutory Unit Card

Scenario: During application setup, the implementation team defines default contribution rates for the payroll statutory unit.

Task: Manage Legal Entity Calculation Cards task in the Setup and Maintenance section.

Calculation Value Definition

Scenario: You can view the predefined income tax rates for your country, but you can't edit them.

Task: Calculation Value Definitions task in the Payroll section.

If an employer qualifies for a special tax rate, enter these values on a calculation card at the appropriate level.

Business Units

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 has 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 do the following:

- Assign your business units to one primary ledger. For example, if a business unit is processing payables invoices, then it must post to a particular ledger. This assignment is required for your business units with business functions that produce financial transactions.
- Use a business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, then 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 provides the following advantages:

- Enables flexible implementation
- Provides consistent entity that controls and reports on transactions
- Shares 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 share reference data, such as payment terms and transaction types, across business units, or you can have each business unit manage its own set depending on the level at which you want to enforce common policies.

In summary, use business units for:

- Management reporting
- Transaction processing
- Transactional data security
- Reference data sharing and definition

Brief Overview of Business Unit Security

A number of Oracle Fusion Applications use business units to implement data security. You assign roles like Accounts Payable Manager to users to permit them to perform specific functions, and you assign business units for each role to users to give them access to data in those business units. For example, users who have been assigned a Payables role for a particular business unit, can perform the function of payables invoicing on the data in that business unit. Roles can be assigned to users manually using the Security Console, or automatically using provisioning rules. Business Units can be assigned to users using the Manage Data Access for Users task found in Setup and Maintenance.

Related Topics

- [Reference Data Sets and Sharing Methods](#)

How Business Units Work with Reference Data Sets

Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization. Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. 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 assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can 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.

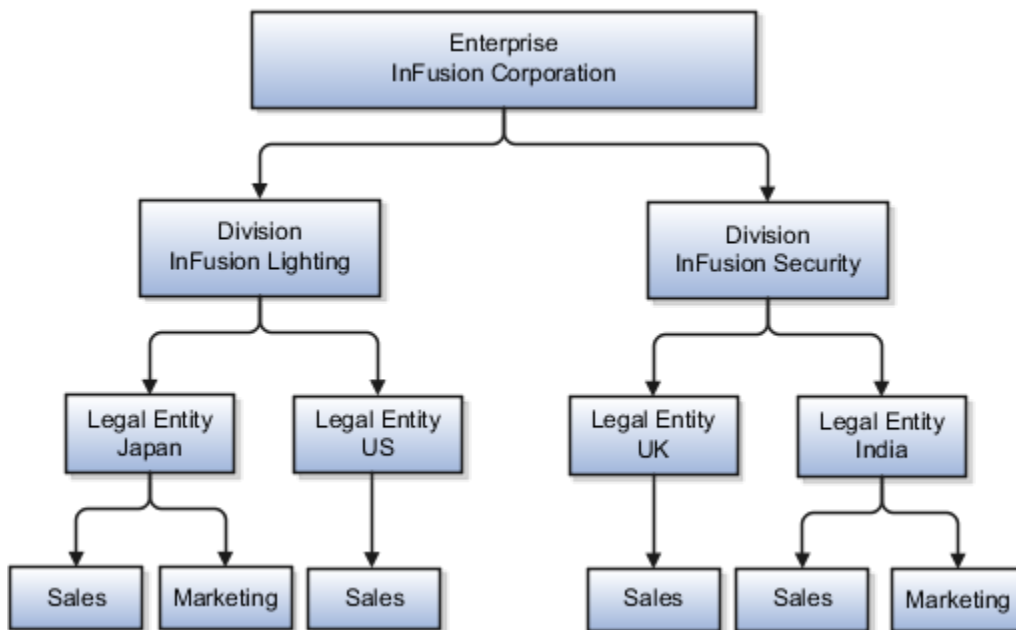
Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set to use 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 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. They 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

The following table describes the default set assignment and the set assignment overrides for each business unit in InFusion:

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

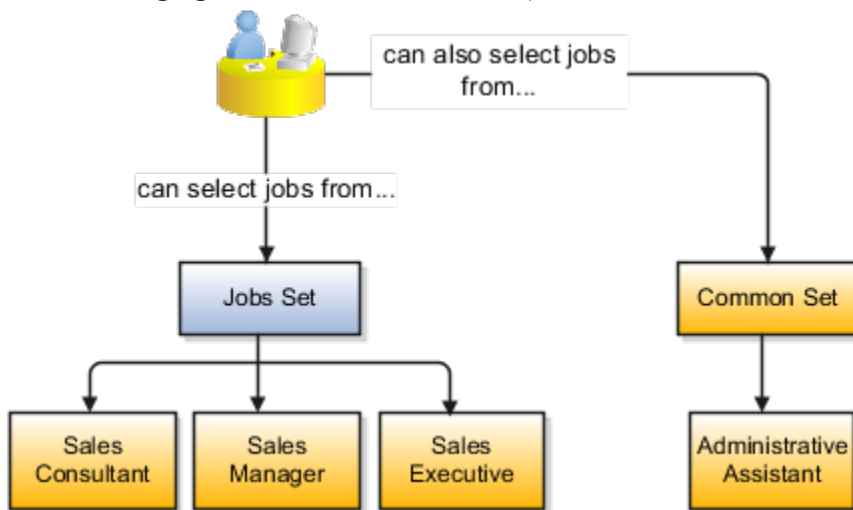
Business Unit	Default Set Assignment	Set Assignment Overrides

When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and 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 can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades, locations, and departments from the Mktg_Japan_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

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



Associate Business Unit with Legal Employer

You can associate multiple business units with a legal employer. This enables filtering business units by legal employer, on responsive pages that have implemented this feature. You use the **Associated Business Units** extensible flexfield (EFF) context for the business unit - legal entity association.

These are some key points to note:

- By default, the **Associated Business Units** context isn't associated with any page. You need to configure the mapping on the Manage Extensible Flexfields page. Thereafter, you can associate multiple business units with the legal employer. Once the context is associated, it appears for all legal employers.
- A legal employer must have at least one associated business unit to filter the business unit by legal employer.
- You can associate multiple business units with a legal employer, but can't associate the same business unit twice with a legal employer.
- You can associate the same business unit with multiple legal employers.

- You can delete the legal employer - business unit association.
- You can associate business units when updating or correcting a legal employer.
- The business unit list of values displays all active and inactive business units configured. There isn't any filtering for only active business units.
- Business units are listed in the ascending order of business unit name.

In this example, Vision Enterprise has 3 legal employers in India - Vision India, Vision Corp India, and Vision India Financial Services. Each legal employer has 5 business units defined. You want to filter the business units according to the Vision India legal employer. So, you associate the business units with the legal employer using the **Associated Business Units** extensible flexfield context.

Let's look at the steps to update the key values for this association. For other fields, you can use the default values.

Add Context to Manage Legal Entity HCM Information Page

1. Go to **My Enterprise > Setup and Maintenance**.
2. Search and select the **Manage Extensible Flexfields** task.
3. Search for **Organization Information EFF** on the **Manage Extensible Flexfields** page.
4. Click **Edit**.
5. Expand the **Organization** category and select **Legal Employer**.
6. In the Legal Employer: Details section, select the **Associated Business Units** delivered context and click the **Pages** tab.
7. In the Legal Employer: Associated Contexts Details section, click the **Select and Add** icon.
8. In the Select and Add: Contexts window, enter **Associated Business Units** in the **Name** field and click **Search**.
9. Select the context.
10. Click **Apply**.
11. Click **Save and Close**.
12. Select the **Organization Information EFF** context on the **Manage Extensible Flexfields** page and click the **Deploy Flexfield** button.

Associate Business Units to Vision India

1. Go to **My Client Groups > Quick Actions > Workforce Structures**.
2. Search and click the **Manage Legal Entity HCM Information** task.
3. Search and click the **Vision India** legal entity to associate the business units.
4. Click **Edit > Update or Correct**.
5. Click the **Add Row** icon in the Associated Business Units section.
6. Search and select these business units.

Number	Business Unit
1	Legal
2	Human Resources
3	Facilities

Number	Business Unit
4	Administration
5	Operations

Note: As a prerequisite, these business units should already exist.

Repeat step 5 to add more business units.

7. Click **Submit**.

Related Topics

- [Filter Business Units Based on Legal Employers](#)

FAQs for Legal Entities, Business Units, and Reference Data Sets

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 assignments within that relationship are automatically with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

What's a legal address?

A legal address is the mailing address of a legal entity or legal authority. A legal address is also the address a legal entity uses to register with a legal authority.

You can use legal addresses to send correspondence, such as invoices, bills, reports, and so on, to a legal entity or authority.

Note:

- You must create legal addresses before creating legal entities
- You can create legal addresses for legal authorities when creating legal authorities

What's a payroll statutory unit?

Payroll statutory units are legal entities that are responsible for paying workers, including the payment of payroll tax and social insurance. A payroll statutory unit can pay and report on payroll tax and social insurance on behalf of one or many legal entities, depending on the structure of your enterprise. For example, if you're a multinational, multiple company 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, 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.

What's an ultimate holding company?

The legal entity that represents the top level in your organization hierarchy, as defined by the legal name entered for the enterprise. This designation is used only to create an organization tree, with these levels:

- Ultimate holding company as the top level
- Divisions and country holding companies as the second level
- Legal employers as the third level

What reference data objects can be shared across business units?

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

Application Name	Reference Data Object	Method of Sharing
Trading Community Model	Customer Account Relationship	Assignment to one set only, no common values allowed

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

Application Name	Reference Data Object	Method of Sharing
Receivables	Remit To Address	Assignment to one set only, with common values
Receivables	Revenue Contingencies	Assignment to one set only, with common values
Receivables	Transaction Source	Assignment to one set only, with common values
Receivables	Transaction Type	Assignment to one set only, with common values
Advanced Collections	Collections Setups	Assignment to one set only, with common values
Advanced Collections	Dunning Plans	Assignment to one set only, with common values
Tax	Tax Classification Codes	Assignment to multiple sets, no common values allowed
Human Resources	Departments	Assignment to one set only, with common values
Human Resources	Jobs	Assignment to one set only, with common values
Human Resources	Locations	Assignment to one set only, with common values
Human Resources	Grades	Assignment to one set only, with common values
Project Billing	Project and Contract Billing	Assignment to multiple sets, no common values allowed
Project Foundation	Project Accounting Definition	Assignment to one set only, no common values allowed
Project Foundation	Project Rates	Assignment to one set only, with common values
Order Management	Hold Codes	Assignment to one set only, with common values
Order Management	Orchestration Process	Assignment to one set only, with common values

Application Name	Reference Data Object	Method of Sharing

What happens if I override the set assignment?

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

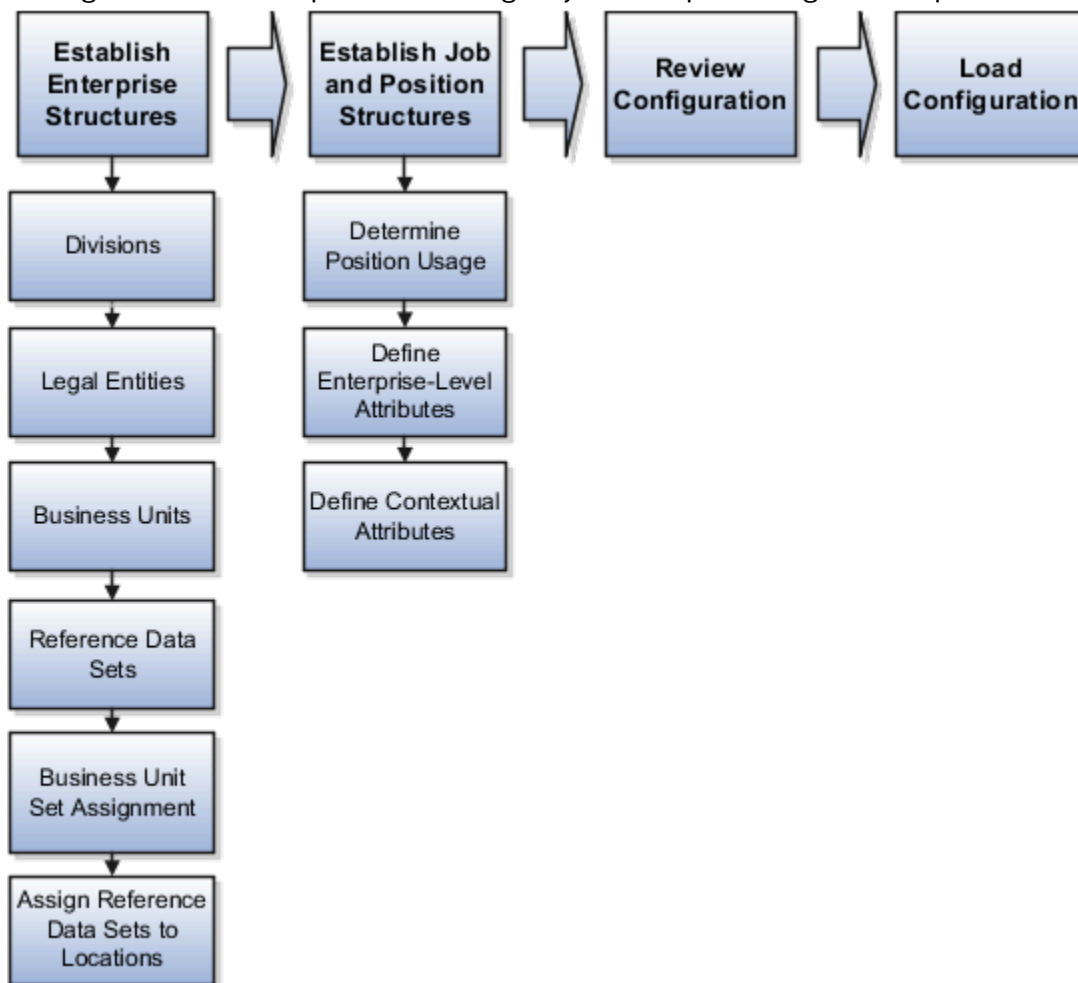
- Grades are assigned to Vision 2 SET.
- Departments are assigned to Vision 3 SET.
- Jobs are assigned to the default set, Vision 3 SET.

6 Enterprise Structures Configurator (ESC)

How You Establish Enterprise Structures Using the Enterprise Structures Configurator

The Enterprise Structures Configurator is an interview-based tool that guides you through the process of setting up a basic enterprise structure. By answering questions about your enterprise, the tool creates a structure of divisions, legal entities, business units, and reference data sets that reflects your enterprise structure. After you create your enterprise structure, you also follow a guided process to determine whether to use positions, and whether to set up additional attributes for jobs and positions. After you define your enterprise structure and your job and position structures, you can review them, make any necessary changes, and then load the final configuration.

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



To be able to use the Enterprise Structures Configurator, you must select the Enterprise Structures Guided Flow feature for your offerings on the Configure Offerings page in the Setup and Maintenance work area. If you don't select this

feature, then you must set up your enterprise structure using individual tasks provided elsewhere in the offerings, and you can't create multiple configurations to compare different scenarios.

Establish Enterprise Structures

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

Establish Job and Position Structures

You also use a guided process to determine whether you want to use jobs only, or jobs and positions. The primary industry that you select in the Establish Enterprise Structures task provides the application with enough information to make an initial recommendation. You can either accept the recommendation, or you can answer additional questions about how you manage people in your enterprise, and then make a selection. After you select whether to use jobs or positions, you're prompted to set up a descriptive flexfield structure for jobs, and for positions if applicable. Descriptive flexfields enable you to get more information when you create jobs and positions.

Review Configuration

You can view a result of the interview process prior to loading the configuration. The review results, show the divisions, legal entities, business units, reference data sets, and the management reporting structure that the application will create when you load the configuration.

Load Configuration

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

Configuration Workbench

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

How You Create Legal Entities in the Enterprise Structures Configurator

Use the Enterprise Structures Configurator, to create legal entities for your enterprise automatically, based on the countries in which divisions of your business operate, or you can upload a list of legal entities from a spreadsheet.

Automatically Creating Legal Entities

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

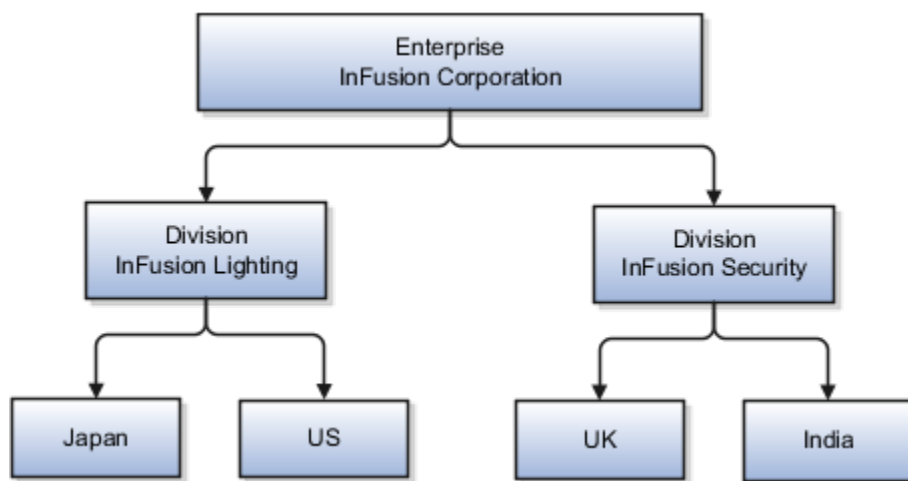
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically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

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

Example: Creating Legal Entities Automatically

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

This figure illustrates InFusion Corporation's enterprise structure.



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

Country	Enterprise	InFusion Lighting	InFusion Security
Japan	No	Yes	No
US	No	Yes	No
UK	No	No	Yes
India	No	No	Yes

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

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

Creating Legal Entities Using a Spreadsheet

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

Related Topics

- [Examples of HCM Organization Models](#)
- [What's an ultimate holding company](#)
- [How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

Considerations for Creating Business Units in the Enterprise Structures Configurator

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

Automatically Creating Business Units

To create business units automatically, you must specify the level at which to create business units. Business units within your enterprise may be represented at one of two levels:

- Business function level, such as Sales, Consulting, Product Development, and so on.

- A more detailed level, where a business unit exists for each combination of countries in which you operate and the functions in those countries.

You can automatically create business units at the following levels:

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

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

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

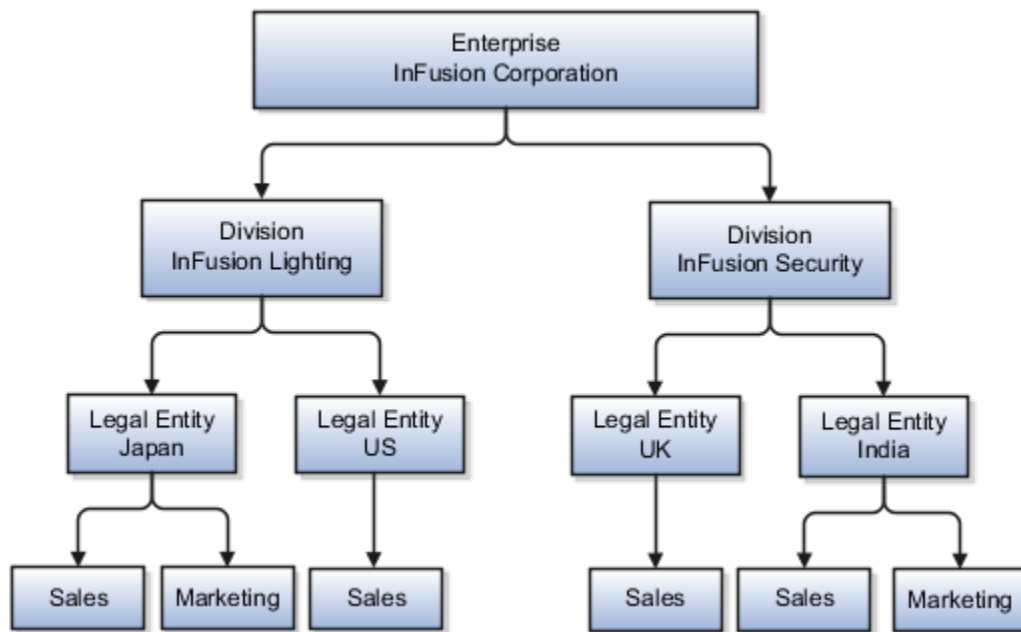
After you select a business unit level, the application generates a list of business units, and you select the ones you want the application to create. If you select a level that has two components, such as country and division, then the application displays a table listing both components. You select the check boxes at the intersections of the two components.

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

Example: Selecting Business Unit Levels

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

This figure illustrates InFusion Corporation's enterprise structure.



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

Business Unit Level	Suggested Business Units
Country	- US - UK - Japan - India
Country and Division	- InFusion Lighting: Japan - InFusion Lighting: US - InFusion Security: UK - InFusion Security: India
Country and business function	- Sales: Japan - Marketing: Japan - Sales: US - Sales: UK - Marketing: India - Sales: India
Division	- InFusion Lighting - InFusion Security
Division and Legal Entity	InFusion Lighting: Japan

Business Unit Level	Suggested Business Units
	• InFusion Lighting: US • Infusion Security: UK • Infusion Security: India
Division and Business Function	• InFusion Lighting, Sales • InFusion Lighting, Marketing • InFusion Security, Sales • InFusion Security, Marketing
Business Function	• Sales • Marketing
Legal Entity	• Legal Entity: Japan • Legal Entity: US • Legal Entity: UK • Legal Entity India
Legal Entity and Business Function	• Legal Entity: Japan, Sales • Legal Entity: Japan, Marketing • Legal Entity: US, Sales • Legal Entity: UK, Sales • Legal Entity India, Marketing • Legal Entity India, Sales

Manually Creating Business Units

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

Related Topics

- [Business Units](#)
- [Reference Data Sets and Sharing Methods](#)
- [What reference data objects can be shared across asset books](#)

How You Create Reference Data Sets in the Enterprise Structures Configurator

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

A standard set called the Enterprise set is predefined.

Common Set

The Common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment

How You Roll Back an Enterprise Structure Configuration

The Enterprise Structures Configurator provides the ability to roll back an enterprise configuration.

Roll Back a Configuration Manually

You can manually roll back an enterprise configuration after loading it, for example, because you decide you don't want to use it. Clicking the Roll Back Configuration button on the Manage Enterprise Configuration page rolls back any enterprise structures that were created as a part of loading the configuration.

Roll Back a Configuration Automatically

If an error occurs during the process of loading the configuration, then the application automatically rolls back any enterprise structures that were created before the error was encountered.

FAQs for Enterprise Structures Configurator

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

The Enterprise Structures Configurator is an interview-based tool that guides you through setting up divisions, legal entities, business units, and reference data sets. If you don't use the Enterprise Structures Configurator, then you must set up your enterprise structure using the individual tasks that correspond to each enterprise component. In addition, you can't set up multiple configurations and compare different scenarios. Using the Enterprise Structures Configurator is the recommended process for setting up your enterprise structures.

7 Divisions, Departments, Worker Unions, Locations, and Trees

Guidelines for Using Single or Multiple Classifications for an Organization

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

Defining an Organization with One Classification

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

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, use an organization within the sales applications as a department that employs salespeople and classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, create a legal entity for each country using the Manage Legal Entity task. Then use the Manage Departments task to classify the legal entity as a department.

Related Topics

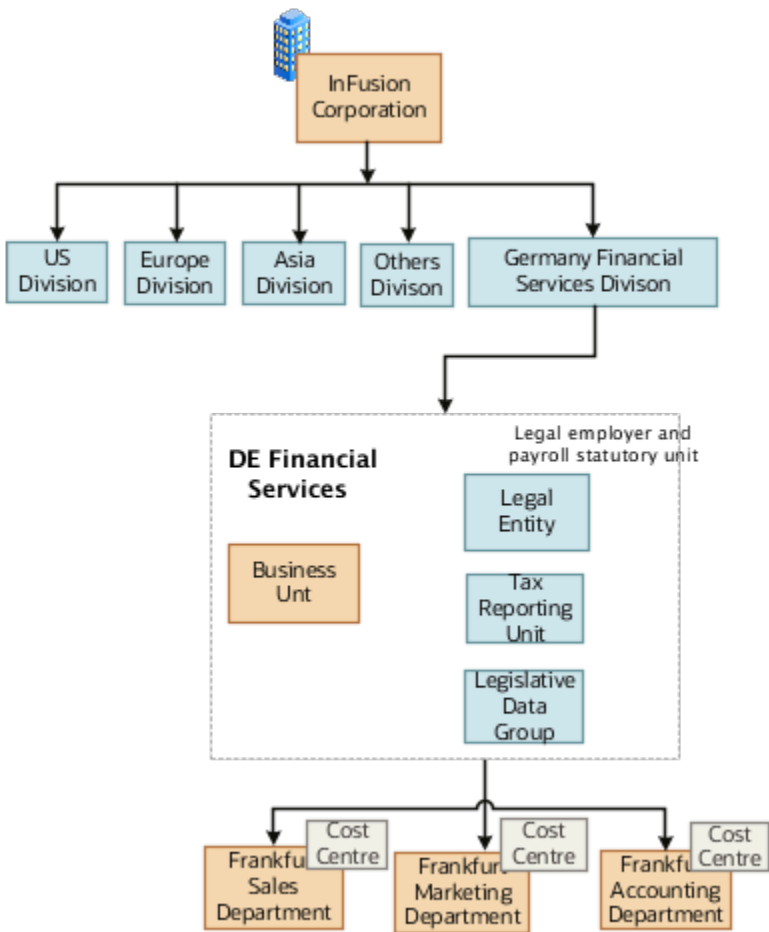
- [Model Your Financial Reporting Structure](#)

Add Organizations to Restructure your Business

The InFusion Corporation is a global company with organizations in the United States (US), the United Kingdom (UK), France, China, Saudi Arabia, and the United Arab Emirates (UAE). Its main area of business is in the high tech industry, but it recently acquired a financial services business, based in Germany. InFusion wants to retain the financial services company as a separate business with all the costs and reporting managed by the Financial Services division.

You need to set up organizations to reflect the newly acquired company and its organizations.

The following figure illustrates how to set up the new division for Germany, and how the new division fits into the



enterprise.
The following table summarizes the key decisions for setting up the new division:

Decisions to Consider	In This Example
Create a separate division?	Yes, as you want to keep the Financial Services company as a separate line of business. By creating a separate division, you can manage the costs and reporting separately from the InFusion Corporation. Additionally, you don't have to modify any existing organizations in your enterprise setup.
How many departments?	The Financial Services company currently has three departments for sales, accounting, and marketing. As InFusion has no plans to downsize or change the company, you can create the three departments to retain the structure.
How many cost centers?	Three, to track the costs of each department.
How many legal entities?	You need one legal entity defined as a legal employer and payroll statutory unit. As the new division operates only from Germany, you can configure the legal entity to suit Germany's legal and statutory requirements.

Decisions to Consider	In This Example
Create legislative data group?	Yes, you need a legislative data group as you currently don't employ or pay people in Germany. Create one legislative data group to run payroll for your workers in Germany.
Create location?	Create a new location address for each organization located differently. The financial services company is based in Frankfurt, and the headquarters and departments are all in the same location.

You can use the following tasks to set up the enterprise structures that you need to include in the new Financial Services company:

- Creating a Location
- Creating a Division
- Creating Departments
- Creating a Legislative Data Group
- Creating Legal Entities
- Defining Legal Employer and Payroll Statutory Unit Information

Creating a Location

1. In the **Workforce Structures** work area, click the **Manage Locations** tab to open the **Manage Locations** page.
2. On the **Manage Locations** page, click **Create**, and complete the fields shown in the following table. Use the default values except where indicated.

Field	Value
Name	Germany
Code	DE
Country	Germany
Address Line 1	Hauptstrasse 85
Postal Code	6000
City	Frankfurt

3. Click **Submit**.

Creating a Division

1. In the **Workforce Structures** work area, click **Manage Divisions** to open the **Manage Divisions** page.

- On the **Manage Divisions** page, click **Create**.
- On the **Create Division: Division Description** page, select the **Create New** option to create a division with a single classification.
- In the **Division Description** region, complete the fields shown in the following table. Use the default values except where indicated.

Field	Value
Name	Germany Financial Services
Location	Germany

- Click **Next**.
- On the **Create Division: Division Details** page, complete the fields shown in the following table. Use the default values except where indicated.
- Click **Next**.
- On the **Create Division: Review** page, review the division details, and click **Submit**.
- Click **Yes**.
- Click **OK**.

Creating Departments

- In the **Workforce Structures** work area, click the **Manage Departments** tab to open the **Manage Department** page.
- On the **Manage Departments** page, click **Create**.
- On the **Create Department: Description** page, select the **Create New** option to create a department with a single classification.
- Enter the details of the accounting department by completing the fields shown in the following table. Use the default values except where indicated.

Field	Value
Department Name	Accounting
Location	Germany

- Click **Next**.
- Associate a cost center in the **Create Department: Department Details** page.
- Click **Next**.
- On the **Create Department: Review** page, review the details of the department, and click **Submit**.
- Repeat steps 2 through 8 to create the sales and marketing departments.

Creating a Legislative Data Group

- In the **Setup and Maintenance** work area, locate the **Manage Legislative Data Groups** task. Click **Go to Task** to open the **Manage Legislative Data Group** page.
- On the **Manage Legislative Data Groups** page, click **Create**.

- On the **Create Legislative Data Groups** page, complete the fields shown in the following table. Use default values except where indicated.

Field	Value
Name	Germany Financial Services
Country	Germany
Currency	Eur

- Click **Submit**.

Creating Legal Entities

- In the **Setup and Maintenance** work area, locate the **Manage Legal Entity** task. Click **Go to Task** to open the **Manage Legal Entity** page.
- On the **Manage Legal Entity** page, click **Create**.
- On the page, complete the fields shown in the following table. Use default values except where indicated.

Field	Value
Name	Legal Entity
Legal Entity Identifier	123456
Payroll Statutory Unit	Selected
Legal Employer	Selected
Legal Address	123
EIN or TIN	123
Registration Number	123

- Click **Save and Close**.

Defining Legal Employer and Payroll Statutory Unit Information

- In the **Setup and Maintenance** work area, locate the **Manage Legal Entity HCM Information** task. Click **Go to Task** to open the **Manage Legal Entity** page.

2. Search for the new legal entity that you created in the "Creating Legal Entities" task.
3. Enter the payroll statutory unit and legal employer details.
4. Associate the legislative data group with the payroll statutory unit.
5. Click **Save**.

Disability Organizations

You can set up disability organizations to identify the external organizations with which disabled employees are registered, and assess the degree of disability in the employee. You set up disability organizations using the Manage Disability Organizations task in the Workforce Structures work area under My Client Groups.

Purpose of Disability Organizations

Disability organizations provide information and support to people with disabilities, for example, the Royal National Institute of Blind People. You can create a disability organization as a Trading Community Architecture party using the Manage Integration of Additional Applications task in the Setup and Maintenance work area. You can then select a disability organization party usage code.

For employees with disability, you can select the disability organization in their person records, identify the registration and expiration dates, and enter any other descriptive or legislative information about the disability.

Related Topics

- [Person Records](#)
- [Third Parties Overview](#)

Divisions

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results.

Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies don't reflect directly the legal structure of the enterprise. The management entities and structure can include:

- Divisions and subdivisions
- Lines of business
- Other strategic business units
- Their own revenue and cost centers

These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

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

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

By definition a division can be represented in the chart of accounts. Companies can use product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise.

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

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

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

Example of Adding a New Division After Acquiring a Company

This example describes how you can restructure your enterprise after acquiring a new division.

Scenario

You are part of a senior management team at InFusion Corporation. InFusion is a global company with organizations in the following countries:

- United States (US)
- United Kingdom (UK)
- France
- China
- Saudi Arabia
- United Arab Emirates (UAE)

The company's main area of business is in the high tech industry, and it recently acquired a new company. You must analyze the company's current enterprise structure and determine the new organizations to create in the new company.

Details of the Acquired Company

The acquired company is a Financial Services business based in Germany. The Financial Services business differs significantly from the high tech business. Therefore, you want to keep the Financial Services company as a separate business with all the costs and reporting managed by the Financial Services division.

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

Decision to Consider	In This Example
Create location?	The Financial Services company and its departments are based in Frankfurt. Therefore, you only have to create one location.
Create separate division?	Yes. Although the new division will exist in the current enterprise structure, you want to keep the Financial Services company as a separate line of business. By creating a separate division, you can manage the costs and reporting separately from the InFusion Corporation. Additionally, you don't have to modify any organizations in the enterprise setup.
Create business unit?	Yes. The Financial Services business requires you to create several jobs that don't exist in your high tech business. You can segregate the jobs that are specific to financial services in a new business unit.
How many departments?	The Financial Services company currently has departments for sales, accounting, and marketing. As you have no plans to downsize or change the company, you can create three departments to retain the structure.
How many cost centers?	Although you can have multiple cost centers to track the department costs, you decide to create one cost center for each department.
How many legal entities?	Define a legal entity for each registered company or some other entity recognized by law. Using the legal entity, you can: - Record assets - Record liabilities - Record income - Pay transaction taxes - Perform intercompany trading In this case, you only need one legal entity. You must define the legal entity as a legal employer and payroll statutory unit. As the new division operates only from Germany, you can configure the legal entity to suit Germany's legal and statutory requirements. Note: You can identify the legal entity as a payroll statutory unit. When you do so, the application transfers the legal reporting unit associated with the legal entity to Oracle Fusion HCM as a tax reporting unit.
Create legislative data group?	Yes. Because you currently don't employ or pay people in Germany, you must create one legislative data group to run payroll for the workers in Germany.

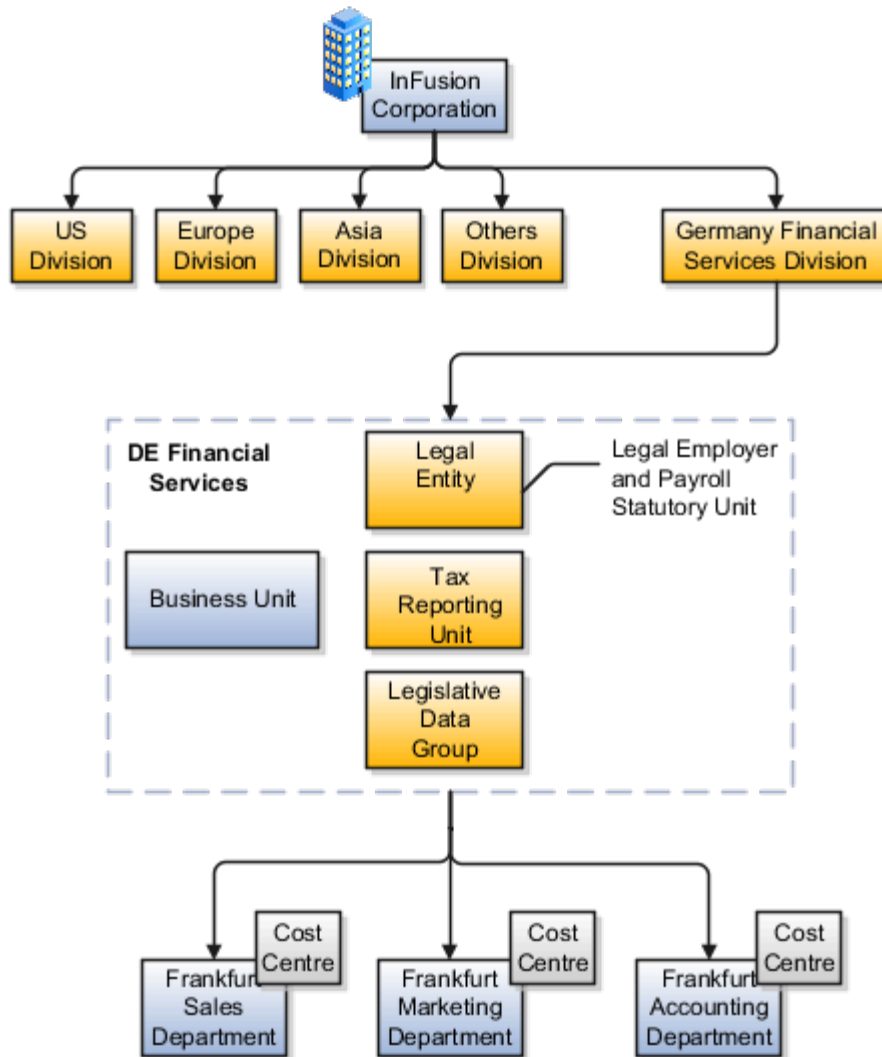
Resulting InFusion Enterprise Structure

Based on the analysis, you must create the following:

- One new division
- One new location
- Three new departments

- Three new cost centers
- One new legal entity
- One new legislative data group

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



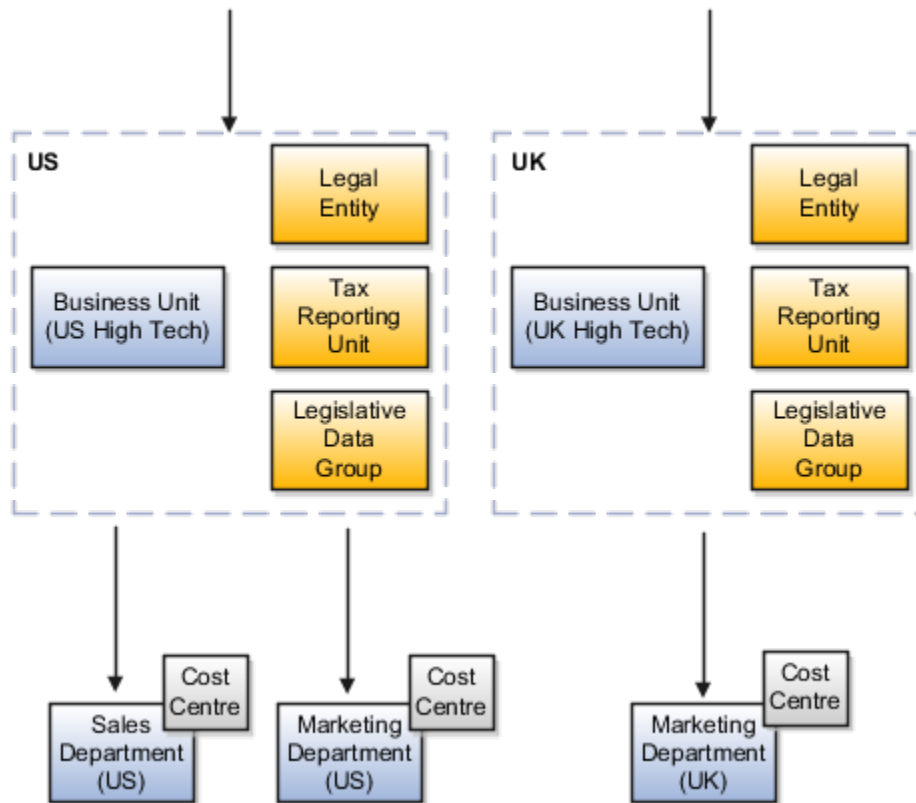
organizations.

Departments

A department is an organization to which you assign workers. It is an organization with one or more operational objectives or responsibilities that exist independently of its manager. You track the department's financial performance through one or more cost centers. For example, sales, research and development, and human resources. You can report and keep track of headcount by creating a department hierarchy using Oracle Fusion Trees.

Departments and cost centers example:

This figure illustrates how departments belong to legal entities within the enterprise structure.



Departments and Cost Centers

A cost center represents the smallest segment of an organization for which you allocate and report on costs. The manager of a department is typically responsible for cost control by meeting a budget and may be responsible for the assets used by the department. You can track the financial performance of a department through one or more cost centers.

Uploading Departments Using a Spreadsheet

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

Related Topics

- [Upload Workforce Structures Using a Spreadsheet](#)

Cost Centers and Departments

The two important components to be considered in designing your enterprise structure are cost centers and departments.

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

Cost Centers

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

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

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach requires defining more cost center values.
- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values. The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

Departments

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

A manager of a department is typically responsible for:

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

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

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Applications, departments are defined and classified as Department organizations. Oracle Fusion Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

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

Department Classifications

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

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

Project Organization

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

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

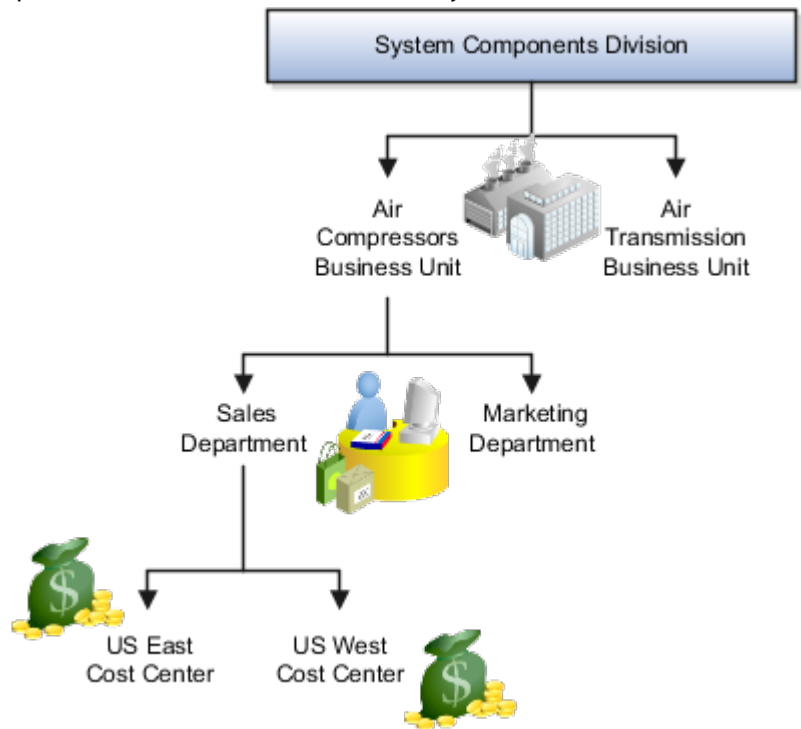
Sales and Marketing Organization

In sales applications, you can define sales and marketing organizations. Sales organization hierarchies are used to report and forecast sales results. Salespeople are defined as resources assigned to these organizations.

In some enterprises, the HCM departments and hierarchies correspond to sales organizations and hierarchies. Examining the decision on how to model sales hierarchies in relationship to department hierarchies when implementing Customer Relationship Management to eliminate any possible redundancy in the definition of the organizations is important.

The following figure illustrates a management hierarchy, in which the System Components Division tracks its expenses in two cost centers, Air Compressors and Air Transmission. At the department level, two organizations with a classification of Department are defined, the Marketing Department and Sales Department. These two departments can be also identified as a Resource Organizations, which enable assigning resources, such as salespeople, and other sales

specific information to them. Each department is represented in the chart of accounts by more than one cost center,



enabling granular as well as hierarchical reporting.

Cost Organization

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

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

How You Create a Chart of Account to Create a Department

In this example you can see how to create a chart of account for HCM implementations. You must set up a minimal chart of account to associate a company and cost center with departments. This topic describes a simple scenario primarily intended for use within HCM. For more detailed information on setting up a chart of account, refer to the Financials product documentation.

Vision Corporation US is a US-based legal entity with cost centers in Arizona and California. In this example, we will create a Arizona cost center and associate it with the Sales Department.

The following table summarizes key decisions that you must consider when creating a chart of .

Decisions to Consider	In this Example
What should be the validation type for the value set?	Independent. Only this type is supported for creating General Ledger (GL) cost center information for departments in HCM.
What should be the segment labels for the chart of account?	The first segment is Primary Balancing Segment and the second segment is Cost Center Segment. Selecting these labels in this order is crucial in specifying the General Ledger cost center information for a department.

Summary of Tasks

In the Setup and Maintenance work area, create a chart of account and cost center value sets to create a chart of account structure and instance, and then associate it with the department.

1. Create the chart of account value set for the Vision Corporation US enterprise.
2. Specify Arizona and California as the values for the chart of account value set
3. Create the cost center value set for the Vision Corporation US enterprise.
4. Specify Arizona and California as the values for the cost center value set.
5. Create the chart of account structure by associating it with the chart of account and cost center value sets you created earlier.
6. Create the chart of account structure instance by associating it with the structure.
7. Specify the General Ledger cost center information by associating it with the chart of account and the cost center you created earlier, for creating the sales department.

Create a Chart of Account Value Set

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Chart of Accounts Value Sets
2. Click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Value Set 1
Description	Vision Corporation US Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character

Field	Value
Value Subtype	Text
Maximum Length	5

4. Click **Save and Close**.

Specify Values for the Chart of Account Value Set

1. On the Manage Chart of Accounts Value Sets page, search and select Vision Corporation US Value Set 1 from the search results.
2. Click **Manage Values**.
3. Click Create.
4. Complete the fields as shown in this table.

Field	Value
Value	AZ
Description	Arizona
Enabled	Select the check box

5. Click **Save and Close**.
6. Create additional values for the Vision Corporation US Value Set 1 as shown in this table.

Field	Value
Value	CA
Description	California
Enabled	Select the check box

7. On the Manage Values page, click **Save and Close**.

Create a Cost Center Value Set

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment

- Functional Area: Financial Reporting Structures
- Task: Manage Chart of Accounts Value Sets

2. Click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Cost Center Value Set 1
Description	Vision Corporation US Cost Center Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character
Value Subtype	Text
Maximum Length	5

4. Click **Save and Close**.

Create a Chart of Account Structure

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Workforce Deployment
 - Functional Area: Financial Reporting Structures
 - Task: Manage Chart of Accounts Structures
2. Search and select the **GL#** key flexfield code.
3. Click **Manage Structures**.
4. Click **Create**.
5. Complete the fields as shown in this table.

Field	Value
Structure Code	Vision Corp CoA Cost Center
Name	Vision Corp CoA Cost Center

Field	Value
Description	Vision Corporation Chart of Account Cost Center
Delimiter	Select any value

6. Click **Save**.
7. In the Segments section, click **Create**.
8. Complete the fields as shown in this table.

Field	Value
Segment Code	Vision_Corp_COA
API Name	visionCorpCoa
Name	Vision Corporation COA
Sequence Number	1
Prompt	Vision Corporation COA
Short Prompt	Vision
Enabled	Select the check box
Display Width	1
Range Type	Low
Column Name	SEGMENT1
Default Value Set Code	Vision Corporation US Value Set 1
Selected Labels	Primary Balancing Segment

9. Click **Save and Close**.

10. Create another segment with the following values

Field	Value
Segment Code	Vision_Corp_CostCenter_COA
API Name	visionCorpCostcenterCoa
Name	Vision Corporation Cost Center COA
Sequence Number	2
Prompt	Vision Corporation Cost Center COA
Short Prompt	Vision1
Enabled	Select the check box
Display Width	1
Range Type	Low
Column Name	SEGMENT2
Default Value Set Code	Vision Corporation US Cost Center Value Set 1
Selected Labels	Cost Center Segment

11. Click **Save and Close**.

12. On the Create Key Flexfield Structure page, click **Save and Close**.

Create a Chart of Accounts Structure Instance

- In the Setup and Maintenance work area, go to the following:
 - Offering: Workforce Deployment
 - Functional Area: Financial Reporting Structures
 - Task: Manage Chart of Accounts Structure Instances
- Search and select the **GL#** key flexfield code.
- Click **Manage Structure Instances**.
- Click **Create**.

5. Complete the fields as shown in this table.

Field	Value
Structure Instance Code	Vision COA Structure Instance
API name	VisionCoaStructureInstance
Name	Vision Corporation COA Structure Instance
Structure Name	Vision Corp CoA Cost Center

6. Click **Save and Close**.

Specify the General Ledger Cost Center Information for Creating a Department

1. In the Workforce Structures work area, click the **Manage Departments** tab.
2. Click **Create**.
3. Select the **Create new** option.
4. Enter **Sales Department** in the Name field.
5. Click **Next**.
6. In the GL Cost Center Information section, complete the fields as shown in this table.

Field	Value
Record Identifier	10
Company Value Set	Vision Corporation US Value Set 1
Company	AZ
Cost Center Value Set	Vision Corporation US Cost Center Value Set 1
Cost Center	AZ

7. Click **Next** to review the specified information.
8. Click **Submit**.

How You Configure the Department Title

The **Title** field for a department is hidden and optional, by default. You need to do these 2 steps to enable the field and make it mandatory:

Enable Title Field

You need to set the value of the profile option `ORA_PER_ENABLE_DEPARTMENT_TITLE` to Y. These are the steps to do so:

1. Navigate to the **Setup and Maintenance** work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for the `ORA_PER_ENABLE_DEPARTMENT_TITLE` profile option code and select the profile option in the search results.
4. In the Profile Values section, enter **Y** in the **Profile Value** field.
5. Click **Save and Close**.

Once you set the profile option value to Y, you can see the **Title** field in all the department pages, including Create, Update, Correct, and Review pages. Currently, the **Title** field appears in the Department LOV only on the responsive position pages.

Make Title Field Mandatory

Prerequisite Tasks:

1. Create a sandbox and add the **Page Composer** tool.
2. Create a department from the Workforce Structures work area on the **My Client Groups** tab.

Do these steps to make the title field mandatory:

1. Click **Edit Pages** from the **Settings and Actions** menu.
2. Click **Structure** and place your cursor in the **Title** field.
3. Click **Edit** in the Confirm Shared Component Edit window.
4. Search for **InputText:Title** in the component list and click the **Edit** icon.
5. Scroll down to the **Required** field in the Edit Properties window and click the **down arrow**.
6. Select **Expression Builder**.
7. Add the `#{pageFlowScope.makeTitleMandatory eq 'Y'}` condition in the expression editor.
8. Click **OK**.
9. Scroll down to the **Show Required** field in the Edit Properties window and click the **down arrow**.
10. Select **Expression Builder**.
11. Add the `#{pageFlowScope.makeTitleMandatory eq 'Y'}` condition in the expression editor.
12. Click **OK**.

Worker Union Management

These three components manage worker union information in Human Capital Management (HCM) Cloud:

- Worker Unions

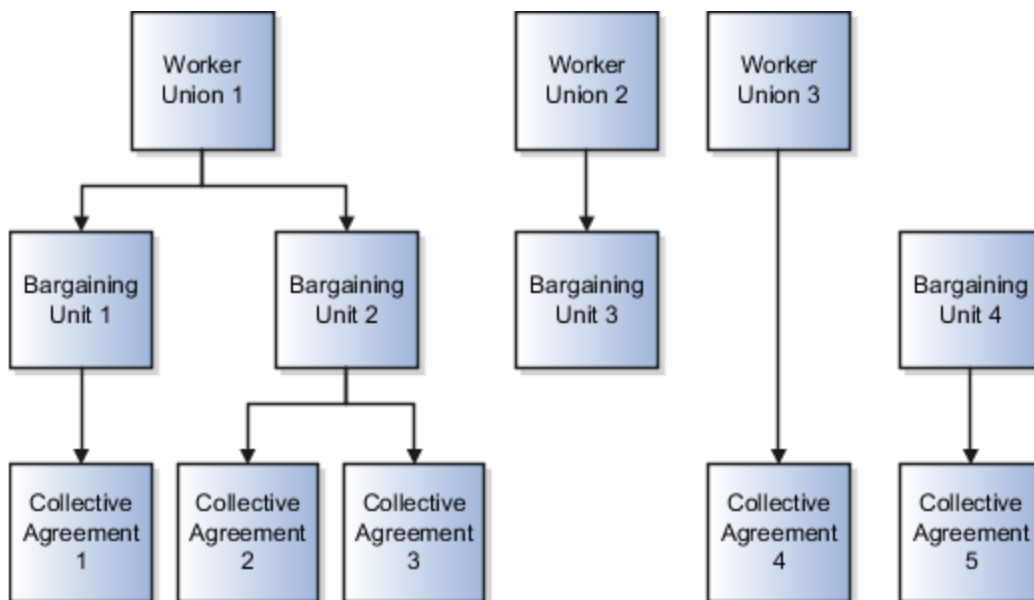
- Bargaining Units
- Collective Agreements

Worker Unions

The worker union is a HCM organization. You can create a new worker union or select an existing organization to define a worker union. The details of a worker union are country-specific and the country value is mandatory for a worker union. You can optionally attach any supporting documents for the worker union. A worker union holds date-effective attributes. Therefore, you can track the changes to the worker union over a period of time. You can also inactivate the worker union. You can configure additional attributes specific to any legislation or customer using the available descriptive flexfields and extensible flexfields.

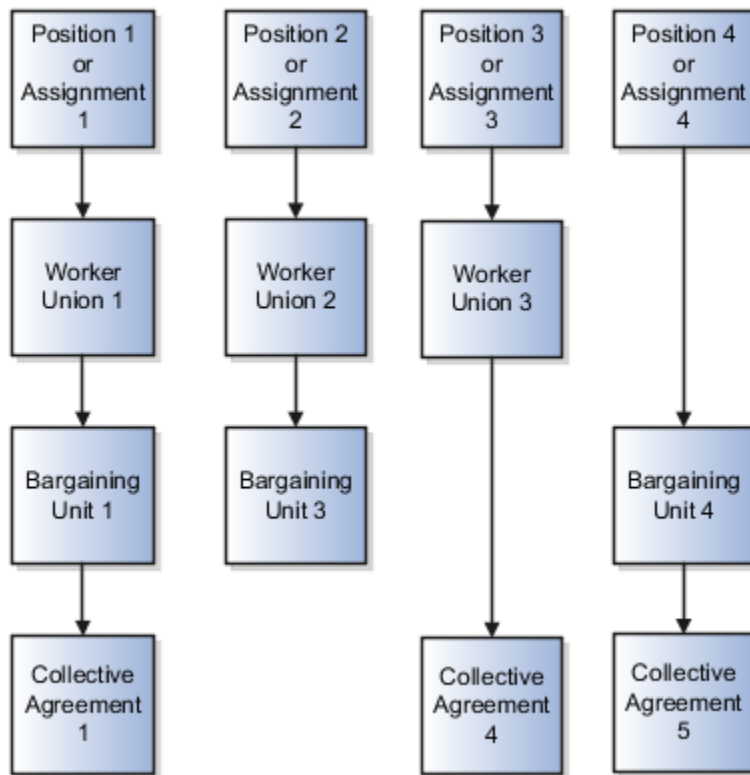
You can optionally associate worker unions with their affiliated bargaining units. The values in the Bargaining Unit and Location fields are filtered to match the country you selected. You can add more than one work union contact and enter the contact details, such as contact name, union title, work phone, and work Email.

This figure illustrates the association between worker union, bargaining unit, and collective agreement:



A worker union can be associated with multiple bargaining units. However, a bargaining unit can be associated with only one worker union. A collective agreement can be associated with only one worker union and bargaining unit. A worker union or bargaining unit can be associated with multiple collective agreements.

This figure illustrates the association between position or assignment and worker union, bargaining unit, and collective agreement:



A position or worker assignment can be associated with only one collective agreement, bargaining unit, and worker union. However, a bargaining unit, worker union, or collective agreement can be associated with multiple positions or worker assignments.

Bargaining Units

A bargaining unit is a specific group of employees who are represented by one authorized union or association for purposes of collective bargaining. A bargaining unit is defined as a lookup type.

Collective Agreements

A collective agreement is a special type of commercial agreement that's negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

Let's take a look at the collective agreement details:

A collective agreement is country-specific. You may enter the bargaining unit, legal employer, and union values depending on the country. For example, you can create a collective agreement without the bargaining unit and legal employer, or only with the legal employer. When you select the value in the Country field, the values in the Bargaining Unit, Legal Employer, and Union fields are filtered to match the country selected. You can optionally associate collective agreements with worker unions and attach documents to the collective agreement.

You can provide details of the parties negotiating the collective agreement, such as the employee and employer organizations. The employee organization can be the trade union or bargaining unit representing the employee while the employer organization is represented by the company management.

A collective agreement is date-effective, therefore, you can track changes to a collective agreement over time. You can also inactivate the collective agreement. You can configure additional attributes specific to a legislation or customer using the available descriptive flexfields and extensible flexfields. If you specify a Valid To date for a collective agreement, it lapses after that date and you can't link it to an employee.

Note: If the collective agreement is linked to an assignment, you can't edit the Identification Code, Country, Bargaining Unit, Union, and Legal Employer fields. Additionally, you can't delete the collective agreement.

Here's how you can link collective agreements:

You can link a collective agreement to an assignment provided the bargaining unit, country, and legal employer of the collective agreement are consistent with the assignment. If you created a collective agreement without associating it with a legal employer or bargaining unit, you can link the collective agreement to any assignment within the same country.

You can link a union, bargaining unit, or collective agreement with a worker assignment provided that its country and legal employer is consistent with the assignment.

The union, bargaining unit, and collective agreement list of values (LOV) that you can select for linking with an assignment or position are filtered as described in this table:

Attribute	Linking Object	Filter Conditions
Union	Assignment	The LOV is filtered to show unions that are active as of the start date and whose country matches the country of the legal employer on the worker assignment.
Union	Position	The LOV is filtered to show unions that are active as of the position start date. As there is no legislation context available for a position, the LOV isn't filtered based on the union country. All unions configured in the application are listed in the LOV.
Bargaining Unit	Assignment	- If you don't select a union, the LOV is filtered to show bargaining units that are active as of the start date, and whose country matches the legal employer country or have no country tag itself. - If you select a union, the LOV is filtered to show bargaining units that are active as of the start date and are associated with the selected union.
Bargaining Unit	Position	As there is no legislation context available for a position, the LOV isn't filtered based on country tags configured for the bargaining unit lookup codes.

Attribute	Linking Object	Filter Conditions
		- If you don't select a union, the LOV is filtered to show bargaining units that are active as of the position start date. - If you select a union, the LOV is filtered to show bargaining units that are active as of the position start date and are associated with the selected union.
Collective Agreement	Assignment	Note: The LOV is filtered to show only those values that match the country of the legal employer on the worker assignment. If you don't select a union or bargaining unit, the LOV is filtered to show all active collective agreements as of the start date. If you select a union without selecting a bargaining unit, the LOV is filtered this way: - Shows collective agreements that are active and match the selected union, but don't have an associated bargaining unit (union-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). If you select a bargaining unit without selecting a union, the LOV is filtered this way: - Shows collective agreements that are active and match the selected bargaining unit, but don't have an associated union (bargaining unit-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). If you select a union and a bargaining unit, the LOV is filtered this way: - Shows collective agreements that are active and match the selected union and bargaining unit (union and bargaining unit-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values).
Collective Agreement	Position	As there is no legislation context available for a position, the LOV isn't filtered based on the collective agreement country. If you don't select a union or bargaining unit, the collective agreement LOV is filtered to

Attribute	Linking Object	Filter Conditions
		show all active collective agreements as of the position start date. If you select a union without selecting a bargaining unit, the LOV is filtered this way: - Shows collective agreements that are active and match the selected union, but don't have an associated bargaining unit (union-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). If you select a bargaining unit without selecting a union, the LOV is filtered this way: - Shows collective agreements that are active and match the selected bargaining unit, but don't have an associated union (bargaining unit-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). If you select a union and a bargaining unit, the LOV is filtered this way: - Shows collective agreements that are active and match the selected union and bargaining unit (union and bargaining unit-specific values). - Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values).

Attribute	Linking Object	Filter Conditions
		Note: - The global collective agreement values can be used on a position by configuring the following profile option: - Code: ORA_PER_ALLOW_GLOBAL_CAGR_ON_POSITIONS - Display Name: Allow Global Collective Agreements on Position - By default, the profile value is set to N. In this case, the global collective agreement values can't be used on a position even though the values are available for selection in the LOV. If you select a global collective agreement value, the application will display an error message when you submit the position change or creation. - If you set the profile value to Y, the global collective agreement values can be used on a position.

Collective Agreement Flexfields

Use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks in the Setup and Maintenance work area to manage flexfields. You can configure these collective agreement-related flexfields as required, to meet your enterprise requirements:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_COL_AGREEMENTS_F	PER_COL_AGREEMENTS_DDF	Collective Agreements Legislative Information	For storing additional legislative information regarding collective agreements.	Available only for Oracle localization use.
PER_COL_AGREEMENTS_F	PER_COL_AGREEMENTS_DFF	Collective Agreements Attributes	For storing additional information regarding collective agreements.	Available for use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_COL_AGRS_EXTRA_INFO_F	PER_COL_AGREEMENTS_EFF	Collective Agreements EIT Information EFF	For storing additional collective agreement information as single and multiple row extensible flexfield contexts.	Available for use.

Locations

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Location Details quick action in the Workforce Structures area on the My Client Groups tab.

You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

When specifying the location address, you can default the country in the location responsive pages. You configure the default location country on the **Manage Enterprise HCM Information** page. If you don't configure any default country, then the country is automatically defaulted to United States in the location address.

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

A point to note is that the Ship-to Site, Receiving Site, Bill-to Site, Office Site, and Designated Receiver fields in the Shipping Details section of a location setup are for information purpose only and can be used to report upon. They aren't currently used by any feature or process within HCM.

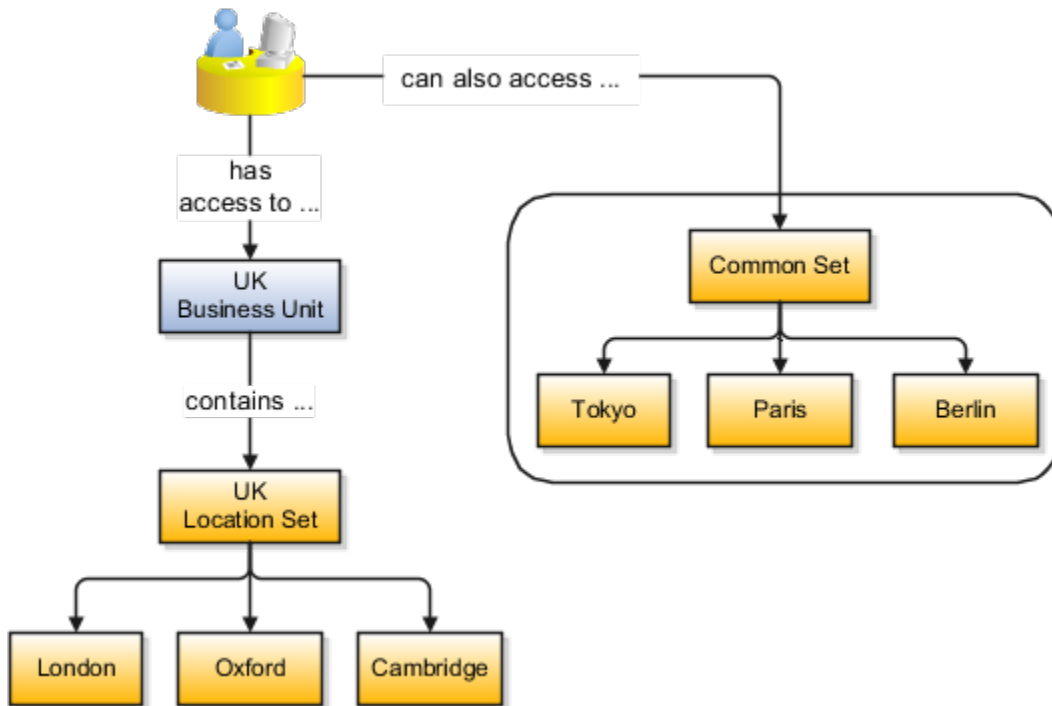
Location Sets

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

Note the following:

- You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit.
- You can also configure a location as an employee location on the **Location Details** page.
- When users search for locations, they can see the locations that they have access to along with the locations in the common set.

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



Uploading Locations Using a Spreadsheet

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

- Download a spreadsheet template
- Add your location information to the spreadsheet
- Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- [Why can't I see my location in the search results](#)
- [Upload Workforce Structures Using a Spreadsheet](#)
- [What happens if I inactivate a location](#)

Associate Legal Employers with Locations

You can associate multiple legal employers with a location. This enables filtering locations by legal employer on pages that have implemented this feature. You use the **Legal Employers Operating At This Location** extensible flexfield (EFF) context for the legal employer - location association.

These are some key points to note:

- A location must have at least one associated legal employer to filter the location by legal employer.
- You can associate multiple legal employers operating at a location, but can't associate the same legal employer twice with a location.
- You can associate the same legal employer with different locations.
- You can delete the legal employer - location association.
- The legal employer - location mapping is copied when you duplicate a location.
- You can associate legal employers when creating, updating, or correcting a location.
- The legal employer list of values displays all active and inactive legal employers configured. There isn't any filtering for only active legal employers. Similarly, there is no filtering of legal employers by matching the legal employer country with the location address country.
- Legal employers are listed in the ascending order of legal employer name.
- Locations are first filtered based on the set. And thereafter, if an association exists, they're filtered based on the legal employers.

In this example, Vision Enterprise has 3 legal employers Vision Corporation, Vision US, and Vision Consulting operating at multiple locations in the US. You want to filter locations from where Vision Corporation is operating.

Let's look at the steps to update this association.

Associate Vision Corporation with the Pleasanton Location

1. Go to **My Client Groups > Quick Actions > Workforce Structures**.
2. Click the **Location Details** task.
3. Click **Add**.
4. Select the **Additional Info** option on the questionnaire page and click **Continue**.
5. Enter these required details to create a location.

Section	Field	Value
When and Why	When does this location start?	8/25/21
Location Details	Name	Pleasanton
	Code	PLS
Main Address	Address Line 1	603
	ZIP Code	94588
	City	Pleasanton
	State	CA

Section	Field	Value
	County	Alameda

6. In the Additional Info section, click **Add** in the Legal Employers Operating At this Location section to associate the **Vision Corporation** legal employer to this location.
7. Select **Vision Corporation** from the **Legal Employer** list.

Note: As a prerequisite, the legal employer should already exist.

8. Click **OK**.
9. Click **Submit**.

Related Topics

- [Filter Locations Based on Legal Employers](#)

HCM Trees

Oracle Fusion trees graphically represent the hierarchical structures of your organization. You manage trees in the Workforce Structures work area under My Client Groups.

There are predefined tree structures for department, organization, position, and geography. You can't change the predefined HCM tree structures. With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree. However, only one version of a tree can be active at any time.

Department Trees

You can create multiple department trees using the predefined department tree structure. The first node of the tree is a department and you can have only one first node for a department tree. You can't add a department as a node more than once in the same tree version. You can secure data by using department trees in an organization security profile.

Organization Trees

You can automatically create a default organization tree if you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise. You can create the tree with the ultimate holding company as the first node, divisions and country holding companies in the second level and legal employers in the third level. If you aren't using the Enterprise Structures Configurator, you can create organization trees using the predefined tree structure. You can select any type of organization as the first node and for the child nodes, but there can be only one first node.

You can secure HCM data using an organization tree, to identify organizations in an organization security profile

Position Trees

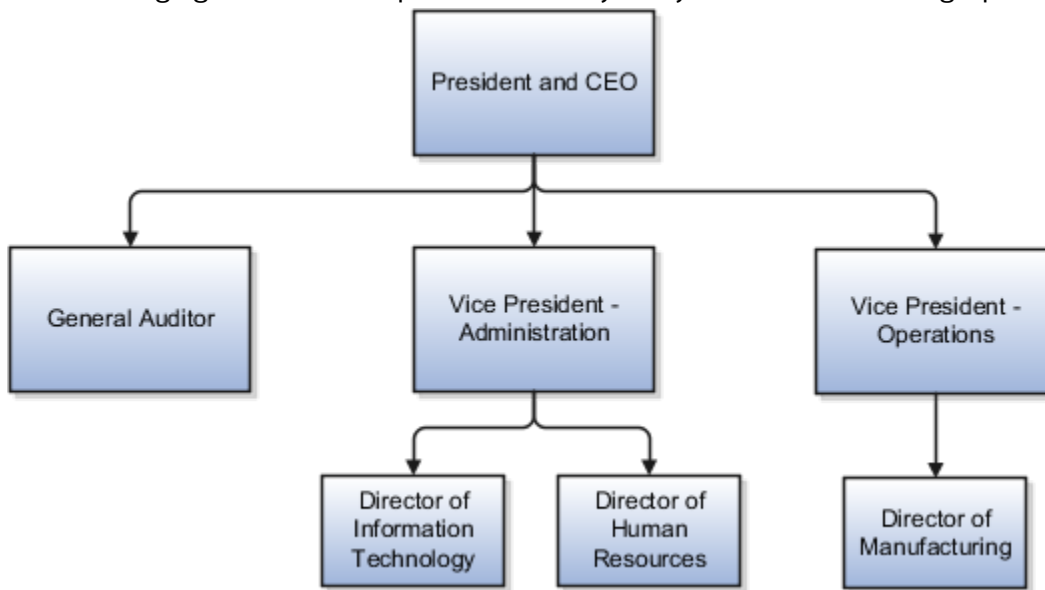
You can create multiple position trees using the predefined position tree structure in the Workforce Structures work area. You can then create multiple versions to establish reporting relationships among positions. Position trees can have only one first node.

Position Tree Uses

- You can use position hierarchies for budgeting and organizational planning.
- You can secure access to positions by identifying a position hierarchy in a position security profile. For example, you can create a position security profile that includes all positions in a position hierarchy under a specified first position. You can also include the position security profile in a person security profile to secure access to person records. In this case, the person security profile includes the person records of the people who occupy the positions in the position security profile.

Example of a Position Tree

The following figure illustrates a position hierarchy that you can establish using a position tree.



Geography Trees

You can create versions of the predefined geography tree structure to represent countries in which your enterprise operates. For each country, you can define lower-level nodes such as states and cities. For example, United Kingdom - England - London. You manage trees in the Workforce Structures work area.

Although you can create multiple versions, you can create only one tree in the hierarchy. Geography trees also have only one first node.

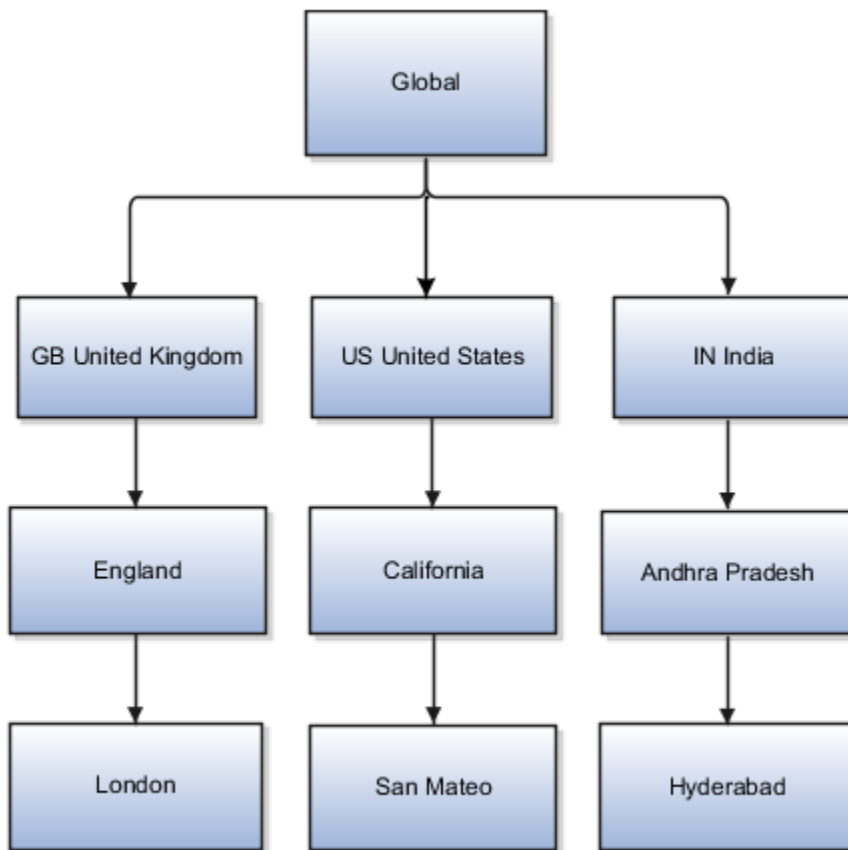
Calendar Events

You use the geography tree to specify the locations to which calendar events apply. You can create the tree using these conditions.

- If an event applies to your entire enterprise, you can attach it to the first node in the tree, for example, Global.
- If an event applies only to specific countries in your enterprise, you can attach it to the nodes for those specific countries, for example, United Kingdom.
- If an event applies only to specific states or cities in a country, you can attach it to the state or city level nodes. For example, England, London.

Example of a Geography Tree

This figure illustrates the geographical hierarchy that you can establish using a geography tree.



Related Topics

- [Guidelines for Managing Trees and Tree Versions](#)

FAQs for Divisions, Departments, Worker Unions, Locations, and Trees

What's a reporting establishment?

A reporting establishment is an organization that's used for statutory reporting other than tax and social insurance reporting. In some countries, such as France, a reporting establishment can also be a tax reporting unit. A reporting establishment and a legal employer share a parent-child relationship with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments. You create reporting establishments using the Manage Legal Reporting Unit HCM Information task in the Setup and Maintenance work area.

Can I delete an organization?

No you can't. However, you can disable an organization if it's no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.

How do I create a disability organization?

Use the Manage Integration of Additional Applications task in the Setup and Maintenance work area. Disability organizations are one of the choices when creating third-party organizations.

How can I identify my organization in a report?

Use the organization manager information in the Create and Edit Department pages to enter a reporting name to identify the organization in a report. You use organization hierarchies for statutory, legal and management reporting

You can see all employees in the Manager list.

What's the purpose of the legislative action attributes?

When you create transfer or termination related actions using the Configure Actions task in the Workforce Structures work area, you can also enter legislative attributes for the actions. You can use the attributes to:

- Indicate whether an action is transfer-related.
- Specify the termination type for termination-related actions.

For example, the termination-related action Resignation can have the termination type as voluntary and the action Reduction in Force can have the termination type as involuntary. Typically you enter this information to meet specific legislative requirements or for reporting purposes.

What's the difference between department name and title?

A department name is unique but the department title is non-unique and can be the same across departments. You can't have 2 or more departments with the same name, but you can have multiple departments with the same title. For example, you can have a Human Resources department (title) that can be common across the enterprise but there can only be one unique US Human Resources department (name) in the enterprise. A department name is mandatory but the title is hidden and optional, by default. You can enable the Title field and make it mandatory.

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

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

How can I associate a location with an inventory organization?

From the Oracle Fusion Global Human Resources, go to the Manage Locations page. Use the Manage Locations task in the Workforce Structures work area.

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

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

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

What happens if I select a geographic hierarchy node when I create or edit a location?

The calendar events that you created for the geographic node start to apply for the location and may impact the availability of worker assignments at that location. You manage locations using the Manage Locations task in the Workforce Structures work area.

The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

Related Topics

- [How an Individual's Schedule Is Determined](#)

8 Jobs and Positions

Jobs

Jobs are typically used without positions by service industries where flexibility and organizational change are key features. As part of your initial implementation, you specify whether to use jobs and positions, or only jobs.

Basic Details

Basic details for a job include an effective start date, a job set, a name, and a code.

A job code must be unique within a set. Therefore, you can create a job with the code DEV01 in the US set and another job with the same code in the UK set. However, if you create a job with the code DEV01 in the Common set, then you can't create a job with the same code in any other set.

Benchmark Information

You can identify a job as being a benchmark job. A benchmark job represents other jobs in reports and salary surveys. You can also select the benchmark for jobs. Benchmark details are for informational purposes only.

Progression Information

A progression job is the next job in a career ladder. Progression jobs enable you to create a hierarchy of jobs and are used to provide the list of values for the Job field in the Promote Worker and Transfer Worker tasks.

The list of values includes the next three jobs in the progression job hierarchy. For example, assume that you create a job called Junior Developer and select Developer as the progression job. In the Developer job, you select Senior Developer as the progression job. When you promote a junior developer, the list of values for the new job will include Developer and Senior Developer. You can select one of these values, or select another one.

Jobs and Grades

You can assign grades that are valid for each job. If you're using positions, then the grades that you specify for the job become the default grades for the position.

Evaluation Criteria

You can define evaluation criteria for a job, including the evaluation system, a date, and the unit of measure for the evaluation system.. The Hay system is the predefined evaluation system that's available. An additional value of Custom is included in the list of values for the Evaluation System field, but you must add your own criteria and values for this system.

Uploading Jobs Using a Spreadsheet

If you have a list of jobs already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

1. Download a spreadsheet template.

2. Add your job information to the spreadsheet.
3. Upload directly to your enterprise configuration.

You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Considerations for Enforcing Grades at Assignment Level](#)

Examples of Jobs

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

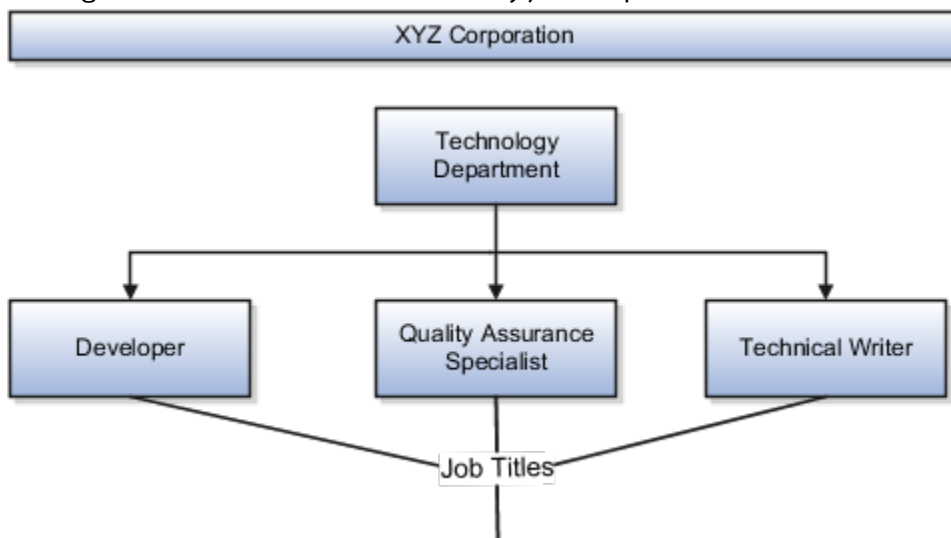
Software Industry

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

- Recently, three developers have resigned from the company.
- The director decides to redirect the headcount to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

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

This figure illustrates the software industry job setup.



Examples of Positions

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

Retail Industry

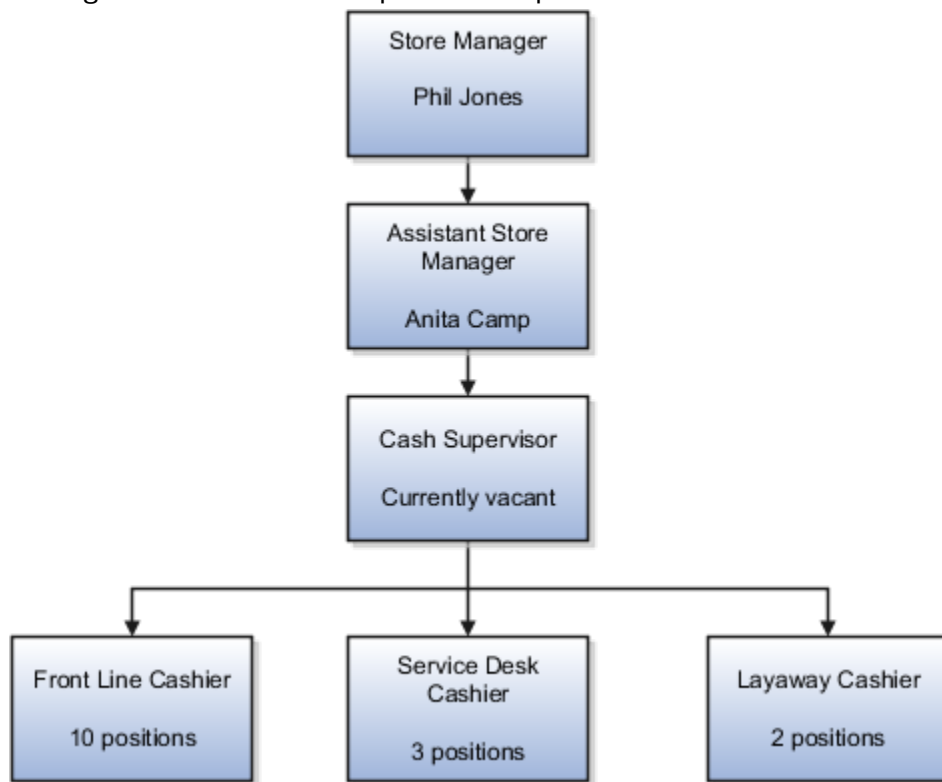
ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it's better for this industry to use positions.

Note the following:

- You have to create a vacancy manually when position synchronization is used and an employee terminates employment (when an incumbent moves out of the position).
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.

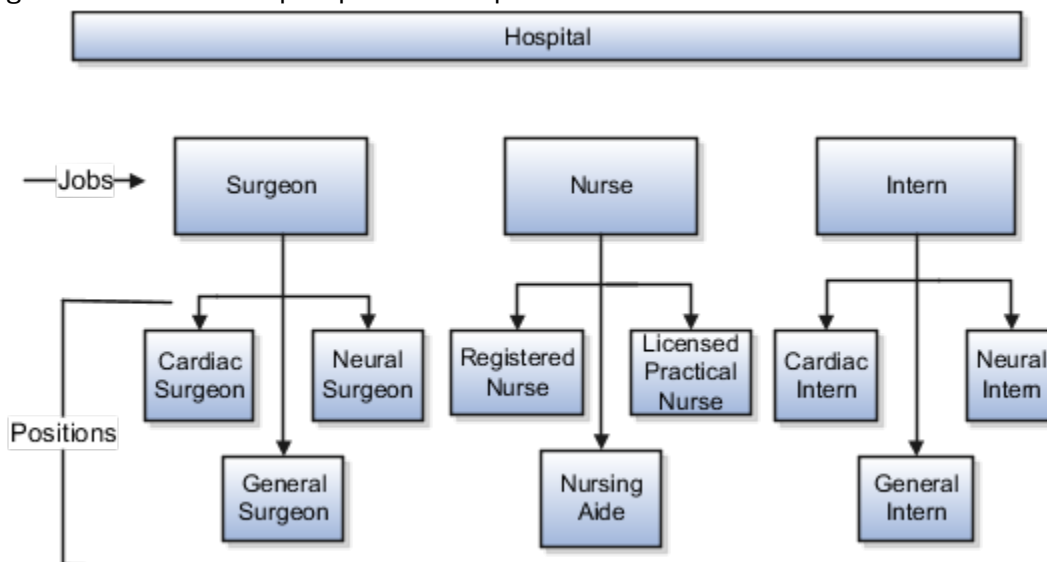


Health Care Industry

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

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

This figure illustrates the hospital position setup.



Considerations for Using Jobs and Positions

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks.

Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.
- You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

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

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

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

Primary Industry	Workforce Setup
Mining	Positions
Utilities	Positions

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

Management of People

Consider the following scenarios how industries manage their employee turnover:

- Scenario 1: Replace employees by rehiring to the same role.
- Scenario 2: Replace headcount but the manager uses the headcount in a different job.

- **Scenario 3:** Rehire employees to the same position, but the manager requests reallocation of budget to a different post.

The following table displays suggestions of what the industry should use, either jobs or positions, in these three scenarios:

Industry	Scenario 1	Scenario 2	Scenario 3
Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)	Positions	Jobs	Jobs
Controlled (An industry that's highly structured in which all aspects of work and remuneration are well organized and regulated.)	Positions	Positions	Positions
Manufacturing	Positions	Jobs	Positions
Retail	Positions	Jobs	Positions
Education	Positions	Jobs	Positions
Other	Positions	Jobs	Jobs

Related Topics

- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)

Job and Position Structures

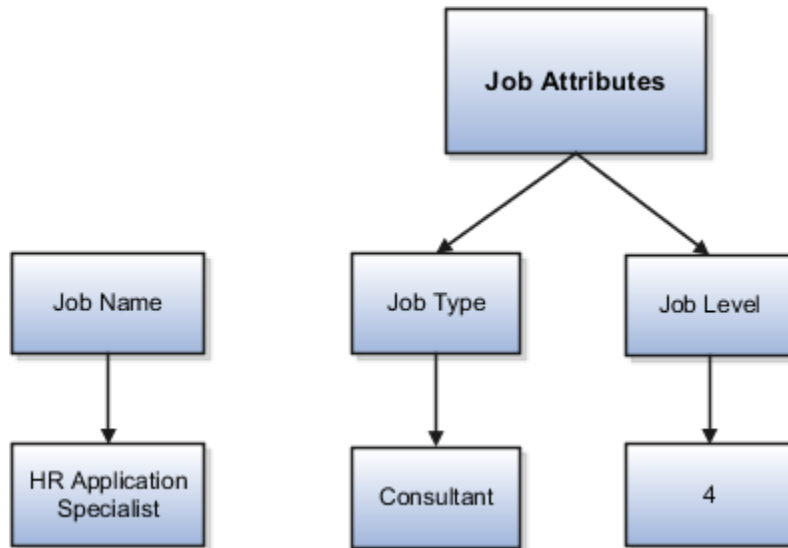
Job and position structures identify the descriptive flexfield structure that enables you to specify additional attributes that you want to capture when you define jobs and positions. Job and position attributes provide further detail to make jobs and positions more specific. You also use attributes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

Enterprise-Level Job Attributes

When you define a job, you enter a value for the name of the job. To make job names more specific, set up attributes to identify additional details about the job, such as the nature of the work that is performed or the relative skill level required. If these attributes apply to all jobs within your enterprise, set up enterprise-level job attributes. Standard capabilities mean that you can use the different segments of the name to identify common jobs or job holders for analysis or compensation, or for grouping records in reports, for example, to find all jobs of a specific job type. You

should not use attributes with values that change regularly, for example, salary ranges or expense approval levels that change every year.

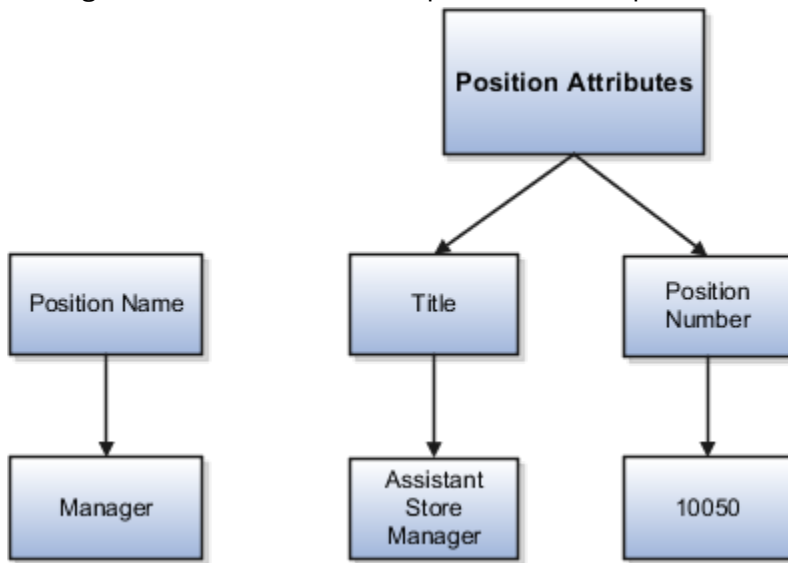
This figure illustrates how job type and job level provide further details for the HR Application Specialist job.



Enterprise-Level Position Attributes

Position attributes at the enterprise level are similar to those for jobs. Each position that you define identifies a specific role in the enterprise, which you can manage independently of the person in the position. A position belongs to one specific department or organization. The name of each position must be unique. To simplify the process of managing unique names for positions, set up enterprise-level attributes to identify separate components of the position name. For example, you can set up an attribute for position title and one for position number. When defining the attributes that make up the structure of a position name, consider whether any of your attributes are part of the definition of a common job type. Using job types for a position can help you manage common information that applies to many different positions. For example you can define a job type of Manager.Level 1 and use this for comparison of positions across departments or lines or business, or for setting common job requirements. You can then define multiple manager type positions in your HR department, each of which has responsibility for a different management function or group.

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



Business Unit-Level Attributes for Positions

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

Reference Data Set-Level Attributes for Jobs

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

Position Synchronization

If position synchronization is enabled, assignments inherit specified values from the associated position.

Synchronized Attributes

You can select any of the following attributes for synchronization when position synchronization is enabled:

- Department
- Job
- Location
- Grade
- Grade Ladder

- Manager
- Full Time or Part Time
- Regular or Temporary
- Assignment Category
- FTE and Working Hours
- Start Time and End Time
- Probation Period
- Union, Bargaining Unit and Collective Agreement
- Synchronize Mapped Flexfields

Position Changes

All active assignments that are synchronized from position automatically inherit changes from the position. Assignment attributes synchronized from position automatically inherit changes from the position. For those attributes not synchronized from position, you can either retain the existing values or update values from the position.

The Review page in the Edit Position page displays the list of impacted assignments with a status for each assignment. The status indicates if there are any issues due to the position change. You must correct all errors before submitting the position changes.

Assignment Changes

When you change the position in existing assignments you have a choice whether to inherit the values for those attributes which aren't synchronized from the position. If you choose not to inherit, then the previous values remain unchanged.

Position Synchronization Configuration Changes

If the position synchronization configuration is changed after person and assignments are created, then the Synchronize Person Assignment from Position process must be run to apply the changes in assignments.

Position Hierarchy Configuration Changes

When the manager is synchronized from the HCM position hierarchy and you change the parent position, all assignments inherit the new manager from the current parent position. When you remove a position from the hierarchy, all child positions move one level up in the hierarchy. Hence, the grandparent position is the new parent position.

The incremental flattening process is triggered when you add or change a parent position. The flattening process will update the changes in the position hierarchy.

When you change the position in an existing assignment, the manager value is updated based on the parent position of the changed position. If the parent position doesn't have an incumbent, the incumbent in the position in the next level up in the hierarchy is the new manager.

Uploading Changes Using HCM Data Loader

When you create or update assignments using HCM Data Loader, you can synchronize them from positions. In this case, you must:

- Enable position synchronization before you load the assignments. If you enable it after the assignments are loaded, then you can synchronize from positions for current and future dates only.
- Set the **Synchronize from Position** (Position Override) attribute on the employment terms or assignment object to Y.

After loading the assignments, you must run the Synchronize Person Assignments from Position process to synchronize the assignments. When you run the process, set the **Past Period to Be Considered in Days** parameter to an appropriate value. For example, if you set this parameter to 60 days, then any assignment records with start dates during the previous 60 days are synchronized from positions. By default, **Past Period to Be Considered in Days** is set to 30 days.

Related Topics

- [How Assignment Values Are Inherited from Position](#)
- [Synchronize Person Assignment from Position Process](#)

Set Up Position Synchronization

Position synchronization is inheritance of values in an assignment from the values specified in the associated position. You can enable position synchronization at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks (in the Setup and Maintenance work area) respectively.

Enterprise Level Setup

You can enable position synchronization either at the enterprise or the legal employer levels. Select the Enable Position Synchronization attribute in the Edit Enterprise page to enable position synchronization for the enterprise. By default, this attribute is deselected. You can also specify whether the inherited values can be overridden at the assignment level.

If you enable position synchronization at the legal entity and the enterprise levels, then the settings specified at the legal employer level takes precedence over the settings specified at the enterprise level.

Legal Employer Level Setup

Set the Enable Position Synchronization attribute to Yes in the Position Synchronization page to specify the attributes to be configured with the position for the legal employer.

Select No for the Enable Position Synchronization attribute, to exclude a specific legal employer.

You can also use the same settings as defined for the enterprise. In this case, you must select the **Use Enterprise** option, which is the default value. If position synchronization is configured at the enterprise level, then the assignment inherits the attribute values from the position selected. You can also override these values at the assignment level.

Enabling Position Synchronization Post Setup

Here are the steps to enable position synchronization for the enterprise or legal entity post setup..

1. On the Home page, under **My Client Groups** tab, click the **Show More** link to access more quick actions.
2. Navigate to **Workforce Structures > Manage Enterprise HCM Information** page or **Manage Legal Entity HCM Information** page.
3. Under Position Synchronization Configuration section, select the attributes that you want to synchronize.
4. Select the **Allow Override at the Assignment** option if you want to exclude an assignment from synchronization.
5. Using HCM Data Loader, you need to update all assignments that you want to must be synchronized from the position (as of the date you want to enable position synchronization).
6. Set the **Synchronize from Position** (position override check in HCM Data Loader) attribute on these assignments to **Y**. This enables position synchronization even if you don't want to allow override at the assignment.
7. Run the Synchronize Person Assignments from Position process to synchronize the assignments.

Related Topics

- [Synchronize Person Assignment from Position Process](#)

How Assignment Values Are Inherited from Position

If you enable position synchronization, assignments inherit specified values from the associated position. You can also specify whether the inherited values can be overridden in the assignment. You can specify this at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks respectively.

Overriding of Assignment Values

When you enable position synchronization, you specify which attributes the assignment inherits from the position due to synchronization. Assignment attributes synchronized from position inherit their values from the position and aren't editable. The restriction on editing values in the assignment applies only to the information that's entered in the position. For example, if the Bargaining Unit isn't entered in the position, you can edit this value in the assignment even though it's one of the attributes inherited from the position. If override is allowed at the assignment level, then you can specify at the assignment level whether you want to synchronize from position or not. By default, the Synchronize from Position attribute on the Edit Assignments page is set to Yes. If you prevent override at the assignment level, users can't update the specified attributes that the assignment has inherited from the position. You can use personalization to enable managers to specify a value for the Synchronize from Position field.

You can choose to either retain the existing values in the assignment or update the values from the position for any attributes that aren't synchronized. So, if you don't select the grade attribute for synchronization and update the grade value in the position, you can either retain the existing grade value in the assignment or update it from the position.

If a synchronized attribute is empty at the position, then this attribute won't be synchronized in the assignment. You can enter any value for this attribute in the assignment. If a value already exists for this attribute, it will be retained and you can change it to any other value.

Note: If you choose to specify your own values for an assignment, then that assignment won't be synchronized with any future position changes.

HCM Position Hierarchy

Position hierarchy defines positions' relationships. The HCM position hierarchy is built based on these relationships. You enable the HCM position hierarchy on the Manage Enterprise HCM Information page in the Setup and Maintenance work area.

When you enable HCM position hierarchy:

- You can specify the parent position for a position on the Create and Edit Position pages in the Workforce Structures work area. When you search for positions based on a parent position, it will show all child positions for the specific parent position.
- You can also use the hierarchy to synchronize the line manager in the assignment from the line manager value in the parent position.
- You can view the positions that are part of the HCM position hierarchy on the My Team page and view the incumbents for a position.
- You can inactivate a position only if an incumbent with an inactive assignment exists.

Updating the Position Hierarchy

You can only correct the HCM position hierarchy. You can enable or disable the position hierarchy configuration by flattening the existing hierarchy. You must run the Synchronize Person Assignments from Position process to flatten the position hierarchy.

When the position hierarchy is flattened, then schedule to run the Synchronize Person Assignments from Position process. This will apply the manager changes in assignments if the position hierarchy is changed after person and assignments are created. The assignment changes can exist on the current date, date in the future, or in the past.

You can't change the position hierarchy configuration if the line manager is synchronized based on the HCM position hierarchy. However, if line manager synchronization was configured as of a date in the past, then you can correct the position hierarchy configuration.

Graphical Position Hierarchy

The HCM position hierarchy shows the relationship between positions and their parent positions. You can view and edit the hierarchy on the HCM Position Hierarchy page, if your data security profile allows you.

You can identify a position's parent on the Manage Positions page if the Use HCM Position Hierarchy option is enabled for the enterprise.

The nodes of the position hierarchy represent positions and parent positions. You can:

- Add child positions under a position either by creating a new position or by selecting an existing position as the child.
- Create a copy of an existing position by specifying a new name and code. The rest of the information is copied from the original position to the copy. You can change any information that you want.
- Edit the position.

- View the incumbent details including name, person type, person number, position entry and exit dates, and their status as of the current date.
- Delete any position that doesn't have any incumbents or child positions.

In each position node, you can view:

- Position name and code.
- Business unit, job, department, and location.
- Number of incumbents for the position.
- Open Full Time Equivalent (FTE)
- Current incumbents in the position.

Considerations for Using Position or Position Hierarchy for Synchronizing Assignment Manager

To select a line manager synchronization option for the enterprise or for individual legal entities, use the Manage HCM Enterprise Information and Manage HCM Legal Entity Information in the Setup and Maintenance work area respectively. This topic discusses the line manager synchronization options available.

HCM Position Hierarchy

Use the HCM Position Hierarchy to synchronize the line manager on the assignment with the incumbent of the parent position in the position hierarchy.

When there is a change in the position hierarchy, the affected assignments are automatically updated. Alternately, when you update a position using the HCM Data Loader run the Synchronize Person Assignments from Position process for the assignments to inherit the position changes. For example, if a position is moved under a different parent position, if there are any direct reports they're automatically reassigned to the incumbent in the new parent position. If there is no manager in the parent position, the application checks for the incumbent in the grandparent position, or until it finds an incumbent. If there are multiple incumbents in a parent position, the incumbent with the longest tenure in the position is assigned as the new manager. You can change the manager to the other incumbent on the Employment page.

If you move a position or remove it from the hierarchy, the grandparent position becomes the new parent position for all the child positions. For example, if you have a hierarchy as follows: Manager (grandparent), Team lead (parent), and Developer (child), and you move the Team Lead position to a different branch. The Manager position is the new parent position for the Developer position.

Note: If you're using HCM position hierarchy, remove the function privilege for the Manage Position Trees task in the Setup and Maintenance work area for your users. You can also hide the Manager field on the Create Position and Edit Position pages using personalization if you synchronize the line manager using position hierarchy.

Position Manager

Use the position manager to synchronize the line manager on the assignment with the line manager defined for the position. You can use this option if you're not using the HCM Position Hierarchy and want to manually maintain the manager at the position. .

Related Topics

- [Guidelines for Loading Positions](#)

Synchronize Assignment Flexfields From Position Flexfields

You map position flexfields with assignment flexfields using the Manage Assignment Flexfields Mapping task in the Functional Setup Manager.

Use the task to map assignment descriptive flexfield segments to position descriptive flexfield segments. Synchronizing mapped flexfields includes the following steps:

1. Define flexfield mapping
2. Enabling flexfield synchronization
3. Synchronizing assignment flexfields from position flexfields

Define Flexfield Mapping

To map flexfields, follow these steps.

1. In the Functional Setup Manager, click the **Manage Assignment Flexfields Mapping** task.
2. Specify the following information.

Field	Description
Source Context	The context for the position descriptive flexfield. If you want to map a global position flexfield segment, leave the source context blank
Source Segment	The position descriptive flexfield segment of the selected context or the global segment if the context was left blank
Destination Context	The context for the assignment descriptive flexfield you want to map the position flexfield to. If you want to map it to a global assignment flexfield segment, leave the destination context blank.
Destination Segment	The assignment descriptive flexfield segment of the selected assignment context or the global segment if the context was left blank.
Enterprise Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the enterprise. Leave this field blank if the flexfield mapping applies to a specific legal employer.
Legal Employer Configuration: Legal Employer	Use this option if the flexfield mapping doesn't apply to the enterprise. You can select multiple legal employers. Select the legal employer.

Field	Description
Legal Employer Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the selected legal employer.

3. Add more mappings as required and specify information described in step 2 for each row.
4. Save the mapping.

Enabling Flexfield Synchronization

To enable flexfield synchronization, follow these steps.

1. In the Setup and Maintenance work area, click the **Manage Enterprise HCM Information** task to enable the setting for the enterprise, or click the **Manage Legal Entity HCM Information** task to enable the setting for a specific legal entity.
2. Click **Edit** and select **Update**.
3. Select the **Enable Position Synchronization** and **Synchronize Mapped Flexfields** check boxes in the Position Synchronization Configuration section.
4. Click **Submit**.

Synchronizing Assignment Flexfields from Position Flexfields

To synchronize assignment flexfields from position flexfields, follow these steps.

1. In the Navigator, click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. Run the Synchronize Person Assignments from Positions process.

Related Topics

- [Position Synchronization](#)
- [Considerations for Flexfield Mapping in Position Synchronization](#)
- [Synchronize Person Assignment from Position Process](#)

Considerations for Flexfield Mapping in Position Synchronization

You map position descriptive flexfields to assignment descriptive flexfields using the Manage Assignment Flexfield Mapping task in Oracle Fusion Functional Setup Manager.

Use this mapping to automatically populate values for those assignment flexfields mapped to the position flexfields, when position synchronization is enabled. This topic describes what to consider when you're mapping flexfields.

Enterprise or Legal Entity Levels

Before you map flexfields, you must decide whether you want the mapping to be available for the enterprise or for specific legal entities only. You can reuse a mapping across different legal entities. Settings at the legal employer level takes precedence over enterprise settings, if both are specified.

Context Specific or Global

You must decide whether to map context specific or global flexfield segments because you can't map a context specific flexfield segment to a global flexfield segment. You can't map two or more segments of different contexts or multiple position segments to the same assignment segment.

When you change the position value in an assignment, all synchronized global segments inherit the value from the new position. You can manually update those segments that have a blank value in the position.

When you change the position value in an assignment, all context specific segments inherit the value from the new position. If the new position has similar values to the old position and additional contexts defined, the assignments retain the same values and inherit the additional values from the new position.

Selecting and removing a position in an assignment makes the context and segments editable but the current values aren't removed if they're synchronized from the position.

Numeric or Character

You can map flexfields of the same type (for example, numeric-to-numeric or character-to-character only), same precision, and the same value set (same value set ID).

Related Topics

- [Position Synchronization](#)
- [Considerations for Managing Descriptive Flexfields](#)

Synchronize Person Assignment from Position Process

To synchronize the position changes with the affected assignments, run the Synchronize Person Assignments from Position process. The Initialize Position Synchronization process to load position synchronization changes is incorporated into the Synchronize Person Assignments from Position process. Run the Synchronize Person Assignment from Position to:

- Update affected assignments in the enterprise or legal entity if position synchronization is enabled (either initially or later, as a change).
- Prevent data corruption
- Synchronize the line manager based on the HCM position hierarchy.
- Update assignments affected by the position changes, uploaded using HCM Data Loader.

Note: You must schedule this process to run on a regular basis. If you're synchronizing the manager, then it's recommended to run this process daily.

Use the Schedule New Process page in the Scheduled Processes work area to run the Synchronize Person Assignment from Position process.

Before you run the process, you must enable position synchronization on the Manage Enterprise HCM Information or Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area

Process Parameters

Past Period to Be Considered in Days

Number of days in the past to be considered for updating the attribute in the assignments. The default value is 30 days. Note that even if position synchronization was enabled in the past and you loaded position data with an effective date of 6 months back, you don't need to specify 180 days as the number of days. This is because the process detects the effective date and the last updated date of the position data. You can enter 2 days as the parameter value though changes are effective 6 months back.

Run at Enterprise Level

Select **Yes** to run the process for the enterprise, or **No** to run it for a specific legal entity.

Legal Entity

Legal entity for which you want to run the process.

Process Results

This process updates all affected assignments with the changes from the position. This includes:

- Changes due to position synchronization.
- Past or future-dated changes to the position hierarchy.
- Rollback of line manager changes in assignments for reverse termination.
- Line manager hierarchy changes
- Flexfield-mapping changes.
- Changes in position loaded using HCM Data Loader

Workforce Structures Code Generation Methods

A code uniquely identifies either a position or a job. Currently, you can generate a code for position and job workforce structures. Use the **Manage Enterprise HCM Information** task in the **Workforce Structures** work area to configure the code generation method for positions and jobs for your enterprise.

You can generate the position code or the job code in one of these 3 ways:

- Manually
- Automatically prior to submission
- Automatically upon final save

Manual: Use this method to manually enter the code when creating a position or a job. You can update the code in the Details page. This is the default method for generating the position and job code.

Automatic prior to submission: Use this method to automatically create and display the code when you create a position or job. This method may create gaps in the code sequence if the transaction is canceled after the position or job code is generated.

Automatic upon final save: Use this method to create position or job codes only after the create transaction is approved. You can't see the position or job code when you're creating the respective workforce structure, but can see it on the Details page after the transaction is approved. This method has less possibility of creating gaps in the generated codes.

The **Automatic prior to submission** and **Automatic upon final save** methods use an enterprise number sequence. All workforce structures' codes that are generated using the automatic methods are numeric only. By default, the sequence starts from 1; however, you can change the starting number. The code increments by one for each new position or job created.

You can change the position or job code generation method from **Automatic prior to submission** method to the **Automatic upon final save** method and the other way around. You can also change from the automatic method to the manual method and the other way around but you must be careful which method you choose if you have existing data. You can't edit an automatically generated position or job code.

Initial Position and Job Code

You can specify the initial position or job code for your enterprise when you generate the code automatically. The application uses this number for the first record that you create using the automatic position and job code setting and increments the number by one for subsequent records. By default, the initial code is 1. The validation on the initial position and job code helps you identify the starting code in automatic code generation when the method is changed from manual to automatic.

Using the initial position and job code, you can retain the legacy codes for existing positions and jobs respectively. Additionally, you can automate the number generation for new positions and jobs, starting from the last legacy person number plus one. You can change the initial code.

Note: To avoid duplicate codes being generated, follow these recommendations.

- If you have been using the manual method of position or job code generation for sometime and now moving to the automatic method, we recommend setting an initial code to a value higher than the old position or job codes that were specified manually.
- When using HDL to load positions or jobs, the position and job code can be automatically generated, hence we recommend you leave the code blank in the dat file.

Upload Workforce Structures Using a Spreadsheet

Using a spreadsheet, you can upload multiple objects at a time, for the following workforce structures:

- Jobs
- Locations
- Departments

For example, to upload multiple jobs at a time:

- Select Manage Jobs in the Workforce Structures work area

- Display the Create menu
- Select Create in Spreadsheet

Uploading Using a Spreadsheet

For each workforce structure, you can do the following:

- Download a predefined spreadsheet template from the application
- Work on the spreadsheet offline, and upload the spreadsheet to the application when your changes are complete
- Upload the spreadsheet multiple times to accommodate revisions

Effective Start Date

Ensure that the effective start date of the workforce structure is same as or earlier than the hire date of persons associated with the workforce structure; for example, enter a job start date earlier than the hire date of persons associated with the job. You may want to consider creating all objects as of a common early date, for example, create all locations with the start date 1-1-1950.

Entering Descriptive Flexfield Values

Use the Attribute columns in the main sheet to enter values for the descriptive flexfields that are already defined for the object. Use the DFF Reference sheet to understand which attribute columns map to which descriptive flexfields, since this information isn't displayed in the main sheet.

Note: You can't enter values in the DFF Reference sheet, you can only view details of the descriptive flexfields.

Uploading Jobs Using a Spreadsheet

When uploading jobs using a spreadsheet, you:

- Can't create a new job profile
- Can only associate an existing job profile
- Must enter the name of an existing job profile in the spreadsheet

Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

FAQs for Jobs and Positions

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

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

A job set is an organizational partition of jobs. For example, a job set can include global jobs for use in all business units, or jobs for a specific country or line of business. When you select a job for a position or an assignment, you can view the available jobs in your business unit set and the common set.

Related Topics

- [What's a job set](#)

What happens if I select Synchronize Mapped Flexfields?

When you select this option, assignment flexfields are synchronized with the mapped position flexfields.

You must first map position flexfields to assignment flexfields using the Manage Assignment Flexfield Mapping task in the Functional Setup Manager, and then select this option in the Manage Enterprise HCM Information task. When position synchronization is enabled, the position flexfields are inherited in the assignments.

What happens if I specify a parent position?

You can specify a parent position when you enable HCM position hierarchy using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. A parent position is one, which is the next position up in the position hierarchy.

On the Manage Positions page, click the parent position link to view the position details and click the icon next to the parent position to refresh the search with the parent position.

As a prerequisite, you specify a parent position to synchronize the line manager from the parent position. When you select to synchronize the line manager using the position hierarchy the incumbent in the parent position is populated as the new manager.

Related Topics

- [Position Synchronization](#)

What happens if I specify the standard working hours in a position?

In an assignment, the standard working hours are inherited from the position. The working hours and the standard working hours provided in the position are used to calculate the FTE (Full Time Equivalent) in the assignment. If there is a FTE value already existing in the position, you can choose to update it based on the ratio of the working hours to standard working hours.

When position synchronization is enabled, even if FTE value exists for the position, it is not copied to the assignment during synchronization. Instead, the assignment FTE value is calculated as a ratio of working hours to standard working hours, if specified.

Related Topics

- [Work Day Information](#)

Why can't I see the position code for the new position?

Based on your enterprise settings, the position code is generated after the Create Position transaction is approved. For example, once the transaction is approved, you can see the position code on the Position Details page.

9 Grades, Grade Rates, and Grade Ladders

Grades

From the Manage Grades page, create grades to record the level of compensation for workers. You can:

- Create grades for multiple pay components, such as salary, bonus, and overtime rates
- Define one or more grades that are applicable for jobs and positions

This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments for a worker.

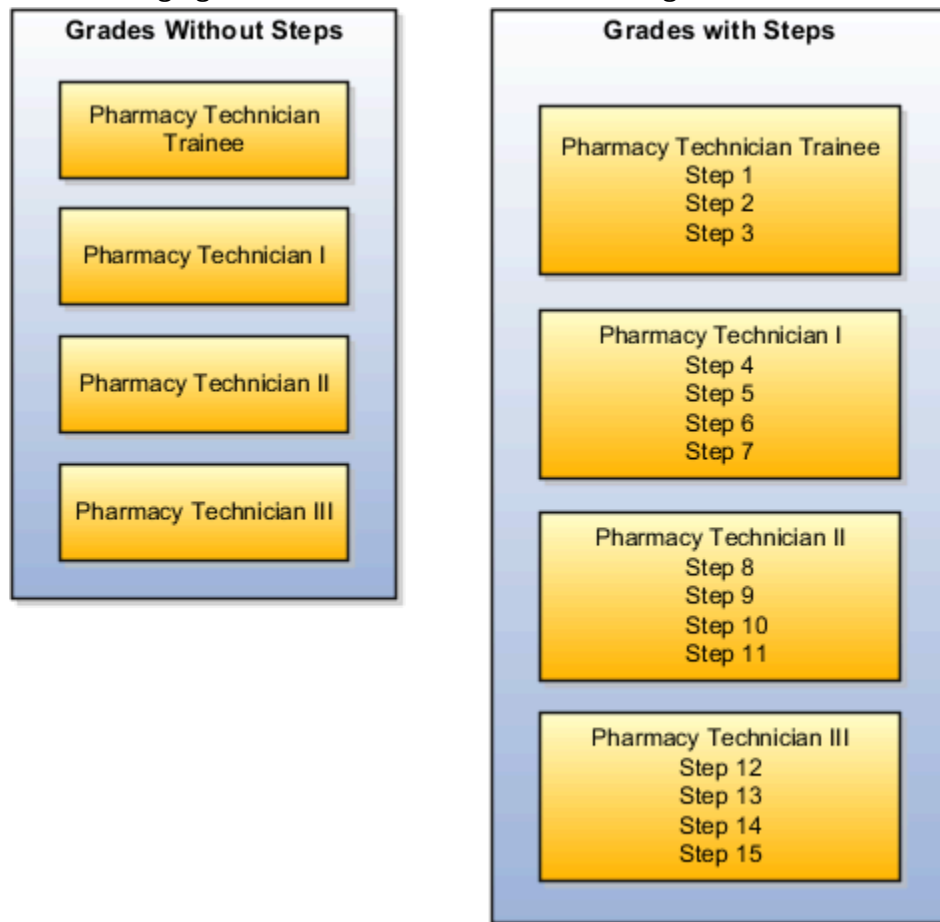
Grades and Sets

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

Grade Steps

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

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



Grade Rates

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades.

For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

Grade Ladders

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

Related Topics

- [Grade Rates](#)
- [Grade Ladders](#)
- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Grade Rates

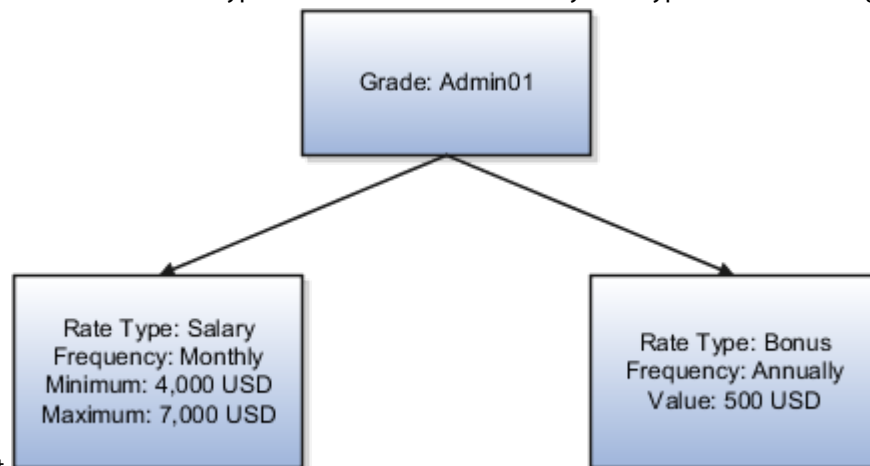
Grade rates contain the pay values that are related to each grade.

Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay such as salary, overtime, and bonuses.

Note the following:

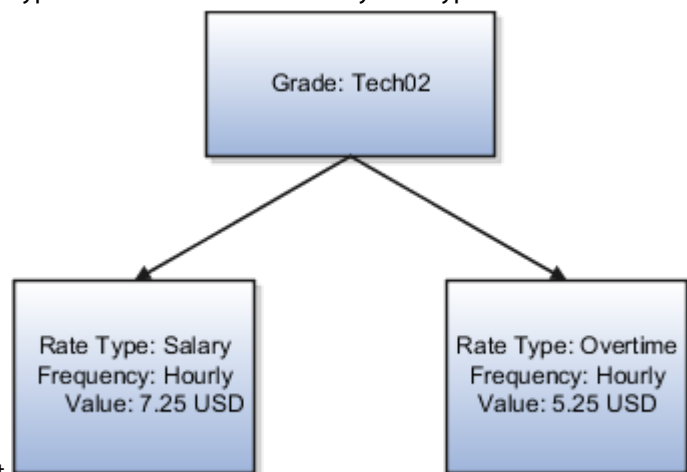
- Grade rates for some jobs or positions might include an hourly salary rate and an overtime rate.
- Grade rates for other jobs or positions might contain a salary rate type with a range of amounts and a bonus rate type with a fixed amount.
- Grade rates typically serve only as a guideline to validate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

This figure illustrates a grade that has two rate types associated with it: Salary rate type that has a range of values Bonus



rate type with a fixed amount

This figure illustrates a different grade that has two rate types associated with it: Salary rate type that has a fixed



amount Overtime rate type that also has a fixed amount

Rate Types

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

Grade Rates and Legislative Data Groups

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

Grade Rates and Grades

You can do the following:

- Set up grade rates when you set up grades
- Set up grade rates independently from grades

For grades with steps, you enter rates when you attach the grades to a grade ladder.

Related Topics

- [How Grades, Grade Rates, and Sets Work with Legislative Data Groups](#)
- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Grade Ladders

Grade ladders group grades and grades with steps in the sequence in which your workers typically progress. You create grade ladders either from the Manage Progression Grade Ladders page (in the Compensation work area) or from the Manage Grade Ladders page (in the Workforce Structures work area).

Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You may create different grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades

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

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

Ladders with Grade Steps

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

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

Related Topics

- [Grade Rates](#)
- [Grades](#)
- [How You Set Up Grade Ladders for Pay Scale Requirements](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

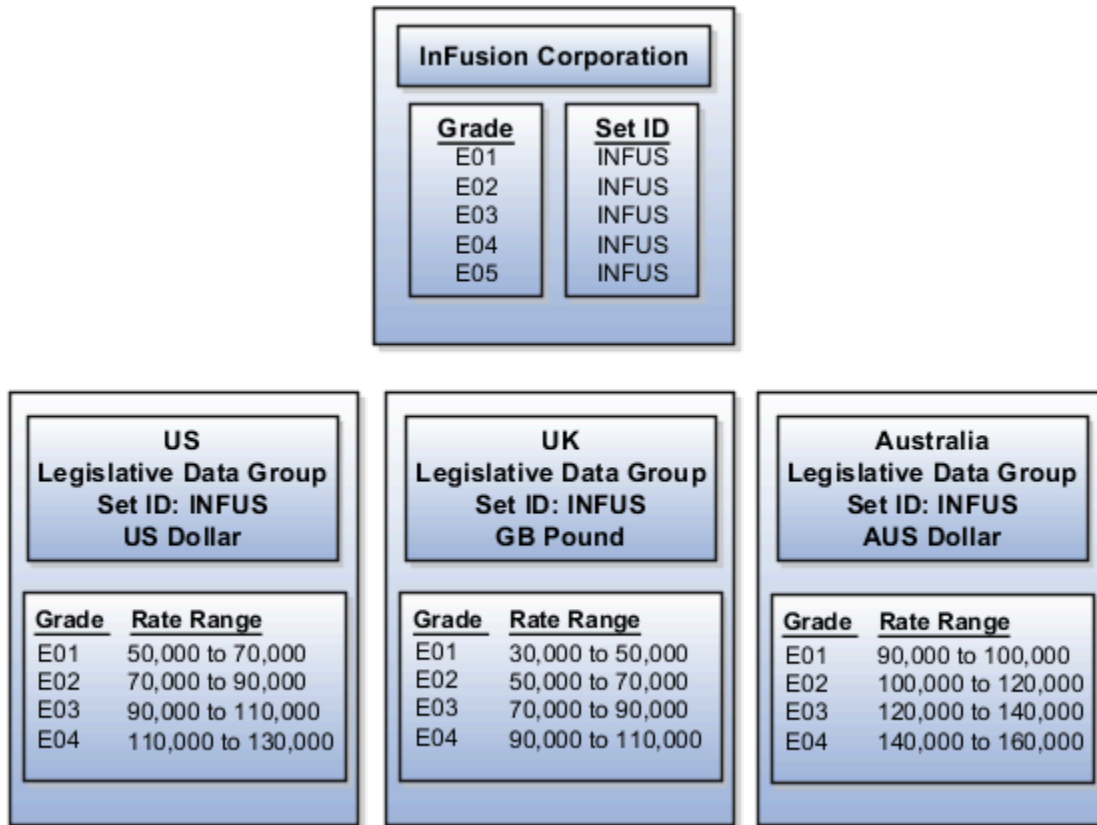
How Grades, Grade Rates, and Sets Work with Legislative Data Groups

You assign grades to sets, and grade rates to legislative data groups from the Workforce Structures > Manage Grade Rates page.

If you have grades that are common across multiple business units, you can:

- Assign them to the set that's associated with business units.
- Set up grade rates that are specific to each legislative data group.

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



Grades and Sets

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

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people.

For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that's shared between the countries, but set up different grade rates for each country in the applicable currency.

Related Topics

How You Set Up Grade Ladders for Pay Scale Requirements

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

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

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

Summary of the Tasks

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Create Grades

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

Field	Value
Grade Set	Common
Name	Technicians 03

Field	Value
Code	Tech03

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

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

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

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

Field	Value
Step Name	Year 1
Step Name	Year 2

Field	Value
Step Name	Year 3
Step Name	Year 4

Create a Grade Ladder

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

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

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

Field	Value
Name	Technician Ladder Rates

Field	Value
Rate Type	Salary
Frequency	Monthly
Annualization Factor	12
Currency	EUR

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

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

Grade Name	Step Name	Value
Technicians 06	Step 1	3,586.36
Technicians 06	Step 2	3,851.38
Technicians 06	Step 3	4,122.34
Technicians 06	Step 4	2,143.92

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

Related Topics

- [Example of Setting Up Grade Ladders for Spine Point Requirements](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Example of Setting Up Grade Ladders for Spine Point Requirements

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points. You manage grade ladders using the Manage Grade Ladders task in the Workforce Structures work area.

Spine Points

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

Grade Structure

You can use grade ladders to meet the requirements of a grade structure with spine points. The following table illustrates a grade structure with spine points that's similar to the one used for university workers in the UK.

Spine Point	Salary	Grade	
1	25,674		1
2	26,361		
3	27,068		
4	27,796		
5	30,394		
6	31,778	2	
7	32,648		
8	33,542		
9	34,466		
10	35,425		
11	38,441		
12	39,510		3
13	40,634		
14	41,746		
15	42,914		
16	44,118		
17	45,358		

To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number.
- Create a grade ladder with all three grades.
- Create step rates with annual salary amounts.

Resulting Grades, Rates, and Grade Ladder

The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

Grade Name	Steps	Ceiling Step
Grade 1	• Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5	Spine Point 5

Grade Name	Steps	Ceiling Step
	Spine Point 6	
Grade 2	- Spine Point 6 - Spine Point 7 - Spine Point 8 - Spine Point 9 - Spine Point 10 - Spine Point 11 - Spine Point 12	Spine Point 11
Grade 3	- Spine Point 12 - Spine Point 13 - Spine Point 14 - Spine Point 15 - Spine Point 16 - Spine Point 17	Spine Point 17

The following table lists the grades, steps, and rates to add to the ladder.

Grade Name	Steps	Rates
Grade 1	- Spine Point 1 - Spine Point 2 - Spine Point 3 - Spine Point 4 - Spine Point 5 - Spine Point 6	25, 674 26, 631 27, 068 27, 796 30, 394 31, 778
Grade 2	- Spine Point 6 - Spine Point 7 - Spine Point 8 - Spine Point 9 - Spine Point 10 - Spine Point 11 - Spine Point 12	31, 778 32, 648 33, 542 34, 466 35, 425 38, 441 39, 510
Grade 3	- Spine Point 12 - Spine Point 13 - Spine Point 14 - Spine Point 15 - Spine Point 16	39, 510 40, 634 41, 746 42, 914 44, 118

Grade Name	Steps	Rates
	Spine Point 17	45, 358

- Related Topics
- How You Set Up Grade Ladders for Pay Scale Requirements
 - Examples of Grades, Grade Rates, and Grade Ladders

FAQs for Grades, Grade Rates, and Grade Ladders

Can I edit the legislative data group for a grade rate?

No. If you need to change the legislative data group for a grade rate, you must change the grade rate to inactive and create a new grade rate with the correct legislative data group.

How can I add rates to grade steps?

Rates can be added to a grade with steps, when you add the grade to a grade ladder.

What's the difference between grade ladders and progression grade ladders?

Grade ladders group grades and grades with steps in the sequence in which your workers typically progress. Progression grade ladders are hierarchies used to group grades and steps and define their sequence. They include the associated progression rules and rates for each grade and step within the ladders. Oracle Fusion Human Capital Management has both a Grade Ladder and a Progression Grade Ladder For a specific grade ladder definition; you should use one of these, but not both.

The differences between them are:

Progression Grade Ladders	Grade Ladder
- Viewed in Manage Progression Grade Ladders page in Compensation work area - Required if you're using grade step progression or rate synchronization processes - Enables population of worker salary record from grade or step rates during employment transactions	Viewed in Manage Grade Ladders page in Workforce Structures work area

Progression Grade Ladders	Grade Ladder
- Only one rate (grade rate or step rate) allowed per progression grade ladder - Associated with a single legislative data group	

What's a ceiling step?

A ceiling step is typically the highest step within a grade to which a worker may progress. When a worker reaches the ceiling step within a grade, typically any further progress must be made by moving the worker to another grade. You can override the ceiling for individual assignments.

In most cases, the ceiling step is the last step in the sequence. For example, if the grade has steps 1 through 5, step 5 is the ceiling step. However, you may have situations where you want another step to be the ceiling. For example, in a grade with steps 1 through 5, you might indicate that step 4 is the ceiling step, and workers can progress from step 1 to step 4, and then on to the next grade. You can use step 5 when a worker isn't entitled to move to the next grade, perhaps because he doesn't yet have the required qualifications or certificates, but you still want to increase his pay to reward him for many years of experience and good performance. You can provide the pay increase by moving him to step 5.

10 Workforce Structures - Configuration Options

Workforce Structures Enterprise-Level Configuration

Let's look at the different configuration options for workforce structures and the minimum search characters configuration for each workforce structure at the enterprise-level.

Workforce Structure Configuration Options

You can configure workforce structure-related options at the enterprise level using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. This table provides the description and default value for each option.

Option	Description	Default Value
Default Location Country	You can default a country for the location at the enterprise level. This defaults the selected country under the country field (Main Address) from Location Details (Add) Quick Actions. If the country value is not defaulted at Enterprise setup then the default country is United States	None
Default Evaluation System	You can set a default evaluation system at the enterprise level which would default the specified evaluation system for both job and position	None
Guided Flows: Future-Dated Records Validation	You can use this option to control whether users can update work structures with future-dated records using the self-service work structure related pages. You can select from these values: • None: No validation is displayed. • Error: An error message is displayed indicating that the work structure has a future-dated record, and the user is prevented from updating the work structure. • Warning: A warning message is displayed indicating that the work structure has a future-dated record. The user can choose to ignore the message and continue with the transaction.	None
Initial Position Code	You can specify the initial position for your enterprise when you generate the code automatically.	1

Option	Description	Default Value
	The application uses this number for the first record that you create using the automatic position code setting and increments the number by one for subsequent records. By default, the initial code is 1.	
Initial Job Code	You can specify the initial job for your enterprise when you generate the code automatically. The application uses this number for the first record that you create using the automatic job code setting and increments the number by one for subsequent records. By default, the initial code is 1.	1
Job Code Generation Method	You can generate a code for job workforce structure. Use the Manage Enterprise HCM Information task in the Workforce Structures work area to configure the code generation method for jobs for your enterprise. You can generate the job code in one of these 3 ways: - Manually - Automatically prior to submission - Automatically upon final save	None
Position Code Generation Method	You can generate a code for position workforce structure. Use the Manage Enterprise HCM Information task in the Workforce Structures work area to configure the code generation method for positions for your enterprise. You can generate the position code in one of these 3 ways: - Manually - Automatically prior to submission - Automatically upon final save	None

Minimum Search Characters

You can define the minimum number of characters to search for workforce structure objects using the Manage Enterprise HCM Information task in the Setup and Maintenance work area.

The minimum search characters are used to search for the name and code for each search page depending on the number of objects. For performance reasons, the minimum value is 1.

Note: If your organization has a detailed department structure with a large number of departments, it's recommended that you use 3 characters to search for departments. But, if you have a few departments, then you can set the value to 1 character to make the search easier.

Workforce Structure	Minimum Search Suggested Characters	Default Value
Grade	1	None
Grade Ladder	1	None
Grade Rate	1	None
Job	2	None
Job Family	1	None
Location	1	None
Organization	3	None
Position	2	None

Workforce Structures Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these workforce structure-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Value	Description
ORA_PER_ALLOW_GLOBAL_CAGR_ON_POSITIONS	Allow global Collective Agreements on Position	No	Allow global Collective Agreements to be associated to a Position.
ORA_PER_DEPARTMENT_LOV_STARTSWITH_NUMROWS	Search LOV Departments Starts With Row Count Threshold	10000	Enable department search to start with characters entered when row count is high. Row count is across organization units, organization unit classifications, location details and sets
ORA_PER_DEPTTREE_LOV_STARTSWITH_NUMROWS	Search LOV Department Tree Nodes Starts With Row Count Threshold	10000	Enable department tree node search to start with characters entered when row count is high. Row count is across department tree nodes, organization units/ classifications
ORA_PER_ENABLE_DEPARTMENT_TITLE	Title Attribute in Departments Enabled	N	Enable the Title attribute in Departments.
ORA_PER_GRADESTEP_LOV_STARTSWITH_NUMROWS	Search LOV Grade Steps Starts With Row Count Threshold	10000	Enable grade step search to start with characters entered when row

Profile Option Code	Profile Display Name	Default Value	Description
			count is high. Row count includes rows across tables for grade steps
ORA_PER_GRADE_LOV_STARTSWITH_NUMROWS	Search LOV Grades Starts With Row Count Threshold	10000	Enable grade search to start with characters entered when row count is high. Row count includes rows across tables for grades and sets
ORA_PER_JOB_LOV_STARTSWITH_NUMROWS	Search LOV Jobs Starts With Row Count Threshold	10000	Enable job search to start with characters entered when row count is high. Row count includes rows across tables for jobs, job families and sets
ORA_PER_LOCATION_LOV_STARTSWITH_NUMROWS	Search LOV Locations Starts With Row Count Threshold	10000	Enable location search to start with characters entered when row count is high. Row count includes rows across tables for locations, territories and sets
ORA_PER_LOV_COMPACT_DEPARTMENT_SEARCH	Department LOV Compact Search Enabled	No	Enable compact search to use only department name when searching for departments
ORA_PER_LOV_COMPACT_JOB_SEARCH	Job LOV Compact Search Enabled	No	Enable compact search to use only job name and code when searching for jobs
ORA_PER_LOV_COMPACT_LOCATION_SEARCH	Location LOV Compact Search Enabled	No	Enable compact search to use only location name and code when searching for locations
ORA_PER_LOV_COMPACT_POSITION_SEARCH	Position LOV Compact Search Enabled	No	Enable compact search to use only position name and code when searching for positions
ORA_PER_ORGTREE_LOV_STARTSWITH_NUMROWS	Search LOV Departments Starts With Row Count Threshold	10000	Enable organization tree node search to start with characters entered when row count is high. Row count is across organization tree nodes, organization units/ classifications
ORA_PER_POSITIONTREE_LOV_STARTSWITH_NUMROWS	Search LOV Position Tree Nodes Starts With Row Count Threshold	10000	Enable position tree node search to start with characters entered when row count is high. Row count is across position tree nodes, positions, organization units/ classifications
ORA_PER_POSITION_LOV_STARTSWITH_NUMROWS	Search LOV Positions Starts With Row Count Threshold	10000	Enable position search to start with characters entered when row count is high. Row count includes rows across tables for positions, jobs and departments
ORA_POS_HIRING_STATUS_FILTER	ORA_POS_HIRING_STATUS_FILTER	Null	Enable Position List of Values filtering based on Hiring Status. In pending worker pages, the position LOV isn't filtered, but instead an error message is shown

Profile Option Code	Profile Display Name	Default Value	Description
			if the user selects a position that isn't approved for hiring. The same validation also applies when using HCM Data Loader (HDL). The position filtering doesn't apply for nonworkers.

Note: Compact Search/NUMROWS Profile Options – For all the above listed Compact Search Profiles a scheduled process, "Optimize Workforce Structures LOV to Use Starts With" runs automatically on a daily basis. The process switches the search from 'contains' to 'starts with' for all large workforce structures LOVs when the row threshold is exceeded. The default for the threshold for the number of rows is 10,000. You can change the default value as per your requirements. You can set it to 0 if you don't want the application to change the LOV search. This is because the scheduled process won't consider the profile option if the value is ≤ 0 , or if it contains a non-numeric character.

Workforce Structures Lookups

This topic identifies common lookups that are work structure-related and have user or extensible configuration levels. Review these lookups and update them as appropriate to suit enterprise requirements. You review lookups using the Manage Common Lookups task in the Setup and Maintenance work area.

Lookup Type	Description	Configuration Level
BARGAINING_UNIT_CODE	Identifies a legally organized group of people which has the right to negotiate on all aspects of terms and conditions with employers or employer federations. This is applicable for positions.	User
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.	Extensible
EVAL_SYSTEM_MEAS	Measurement unit for evaluation criteria on job or position	Extensible
GRADE_PAY_RATE_TYPE	Shows rate types like salary, bonus, and over time.	Extensible
JOB_FUNCTION_CODE	Description of the primary function of a job. Used for grouping and reporting jobs of like function.	User
MANAGER_LEVEL	Description of the seniority of a manager on the job	User
PROBATION_PERIOD	Specifies the unit of measurement for the Probation Period of a Position. For example, 365 "Day", 52 "Week", 12 "Month", 1 "Year", and so on.	Extensible
SECURITY_CLEARANCE	Classifies if security clearance is needed.	Extensible

Workforce Structures Flexfields

Use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks in the Setup and Maintenance work area to manage flexfields. You can configure these workforce structure-related flexfields as required, to meet your enterprise requirements:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
Organizations				
HR_ALL_ORGANIZATION_UNITS_F	PER_ORGANIZATION_UNIT_DFF	Organization Attributes	For storing additional information on organizations	Available for use.
HR_ORGANIZATION_INFORMATION_F	PER_ORGANIZATION_INFORMATION_EFF	Organization Information EFF	For storing additional organization information as single and multiple row extensible flexfield contexts.	Available for use.
Grade and Grade Rates				
PER_GRADES_F	PER_GRADES_DF	Grade Additional Details	For storing additional grade information.	Available for use.
PER_GRADE_LEG_F	PER_GRADES_LEG_EFF	Grade Legislative Information	For storing additional legislative information for grades as single and multiple row extensible flexfield contexts	Available only for Oracle localization use.
PER_GRADE_LADDERS_F	PER_GRADE_LADDERS_DF	Grade Ladder Additional Details	For storing additional information related to grade ladder.	Available for use.
PER_RATES_F	PER_RATES_DF	Rate Additional Details	For storing additional grade rate details.	Available for use.
Jobs				
PER_JOB_EVALUATIONS	PER_EVALUATION_CRITERIA_DFF	Evaluation Criteria Attributes	For storing additional job evaluation information.	Available for use.
PER_JOBS_F	PER_JOBS_DFF	Job Attributes	For storing additional job information.	Available for use.
PER_JOB_EXTRA_INFO_F	PER_JOBS_EIT_EFF	Job EIT Information	For storing additional job information as single and multiple row extensible flexfield contexts.	Available for use.
PER_JOB_LEG_F	PER_JOBS_LEG_EFF	Job Legislative Information	For storing additional legislative information related to job as single and multiple row extensible flexfield contexts	Available only for Oracle localization use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_JOB_FAMILY_F	PER_JOB_FAMILY_DFF	Job Family Attributes	For storing additional job family information.	Available for use.
Locations				
PER_LOCATION_DETAILS_F	PER_LOCATIONS_DF	Location Attributes	For storing additional location information.	Available for use.
PER_LOCATION_EXTRA_INFO_F	PER_LOCATION_INFORMATION_EFF	Location Information EFF	For storing additional location information as single and multiple row extensible flexfield contexts.	Available for use.
PER_LOCATION_LEG_F	PER_LOCATION_LEG_EFF	Location Legislative EFF	For storing additional location legislative information as single and multiple row extensible flexfield contexts.	Available only for Oracle localization use.
Positions				
PER_POSITION_EXTRA_INFO_F	PER_POSITIONS_EIT_EFF	Position EIT Information	For storing additional position legislative information as single and multiple row extensible flexfield contexts.	Available for use.
PER_POSITION_LEG_F	PER_POSITIONS_LEG_EFF	Position Legislative Information	For storing additional position legislative information as single and multiple row extensible flexfield contexts.	Available only for Oracle localization use.
HR_ALL_POSITIONS_F	PER_POSITIONS_DFF	Position Attributes	For storing additional position information.	Available for use.

Parameters for Work Structure Extensible and Descriptive Flexfields

Flexfield segments have list of values that are dependent on standard attributes. Workforce structure attributes can be used as these objects:

- Flexfield parameters for workforce structure descriptive flexfields.
- Input parameters when creating a value set for a flexfield segment.

You can use workforce structure attributes and descriptive flexfields as parameters when you configure workforce structure extensible flexfields (EFF) and workforce structure descriptive flexfields (DFF).

Note: If you have configured the value set or default conditions using parameters for the EFF, these values will be reinitialized only when you navigate to the EFF field.

Grades

This table shows the parameters that you can use for these grade workforce structures EFF.

- PER_GRADES_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_GRADES_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

Jobs

This table shows the parameters that you can use for these job workforce structures DFF and EFF.

- PER_JOBS_DFF
- PER_JOBS_EIT_EFF
- PER_JOBS_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_JOBS_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_JOBS_DFF	SET_ID	NUMBER	Set ID
PER_JOBS_EIT_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_JOBS_EIT_EFF	SET_ID	NUMBER	Set ID
PER_JOBS_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

Locations

This table shows the parameters that you can use for these location workforce structures DFF and EFF.

- PER_LOCATIONS_DF
- PER_LOCATION_INFORMATION_EFF
- PER_LOCATION_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATIONS_DF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATIONS_DF	SET_ID	NUMBER	Set ID
PER_LOCATION_INFORMATION_EFF	ACTION_REASON_CODE	VARCHAR2	Action Reason Code
PER_LOCATION_INFORMATION_EFF	ACTIVE_STATUS_CODE	VARCHAR2	Active Status Code

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_1	VARCHAR2	ADDRESS_LINE_1
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_2	VARCHAR2	ADDRESS_LINE_2
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_3	VARCHAR2	ADDRESS_LINE_3
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_4	VARCHAR2	ADDRESS_LINE_4
PER_LOCATION_INFORMATION_EFF	BILL_TO_SITE	VARCHAR2	Bill-to Site Flag
PER_LOCATION_INFORMATION_EFF	BUILDING	VARCHAR2	BUILDING
PER_LOCATION_INFORMATION_EFF	COUNTRY	VARCHAR2	COUNTRY
PER_LOCATION_INFORMATION_EFF	DESIGNATED_RECEIVER_ID	NUMBER	Designated Receiver ID
PER_LOCATION_INFORMATION_EFF	DESIGNATED_RECEIVER_LIST_NAME	VARCHAR2	Designated Receiver List Name
PER_LOCATION_INFORMATION_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_LOCATION_INFORMATION_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATION_INFORMATION_EFF	FLOOR_NUMBER	VARCHAR2	FLOOR_NUMBER
PER_LOCATION_INFORMATION_EFF	GEOGRAPHIC_HIEARCHY_CODE	VARCHAR2	Geographic Hierarchy Code
PER_LOCATION_INFORMATION_EFF	INTERNAL_LOCATION_CODE	VARCHAR2	Location Code
PER_LOCATION_INFORMATION_EFF	INVENTORY_ORGANIZATION_CODE	VARCHAR2	Inventory Organization Code
PER_LOCATION_INFORMATION_EFF	LEGISLATION_CODE	VARCHAR2	Legislation Code
PER_LOCATION_INFORMATION_EFF	LOCATION_ID	NUMBER	Location ID
PER_LOCATION_INFORMATION_EFF	OFFICE_SITE	VARCHAR2	Office Site Flag
PER_LOCATION_INFORMATION_EFF	POSTAL_CODE	VARCHAR2	POSTAL_CODE
PER_LOCATION_INFORMATION_EFF	RECEIVING_SITE	VARCHAR2	Receiving Site Flag
PER_LOCATION_INFORMATION_EFF	REGION_1	VARCHAR2	REGION_1

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_INFORMATION_EFF	REGION_2	VARCHAR2	REGION_2
PER_LOCATION_INFORMATION_EFF	REGION_3	VARCHAR2	REGION_3
PER_LOCATION_INFORMATION_EFF	SET_CODE	VARCHAR2	Set Code
PER_LOCATION_INFORMATION_EFF	SET_ID	NUMBER	Set ID
PER_LOCATION_INFORMATION_EFF	SHIP_TO_LOCATION_CODE	VARCHAR2	Ship-to Location Code
PER_LOCATION_INFORMATION_EFF	SHIP_TO_LOCATION_SET_ID	NUMBER	Ship-to Location Set ID
PER_LOCATION_INFORMATION_EFF	SHIP_TO_SITE_FLAG	VARCHAR2	Ship-to Site Flag
PER_LOCATION_INFORMATION_EFF	TOWN_OR_CITY	VARCHAR2	TOWN_OR_CITY
PER_LOCATION_LEG_EFF	ACTION_REASON_CODE	VARCHAR2	Action Reason Code
PER_LOCATION_LEG_EFF	ACTIVE_STATUS_CODE	VARCHAR2	Active Status Code
PER_LOCATION_LEG_EFF	ADDRESS_LINE_1	VARCHAR2	ADDRESS_LINE_1
PER_LOCATION_LEG_EFF	ADDRESS_LINE_2	VARCHAR2	ADDRESS_LINE_2
PER_LOCATION_LEG_EFF	ADDRESS_LINE_3	VARCHAR2	ADDRESS_LINE_3
PER_LOCATION_LEG_EFF	ADDRESS_LINE_4	VARCHAR2	ADDRESS_LINE_4
PER_LOCATION_LEG_EFF	BILL_TO_SITE	VARCHAR2	Bill-to Site Flag
PER_LOCATION_LEG_EFF	BUILDING	VARCHAR2	BUILDING
PER_LOCATION_LEG_EFF	COUNTRY	VARCHAR2	COUNTRY
PER_LOCATION_LEG_EFF	DESIGNATED_RECEIVER_ID	NUMBER	Designated Receiver ID
PER_LOCATION_LEG_EFF	DESIGNATED_RECEIVER_LIST_NAME	VARCHAR2	Designated Receiver List Name
PER_LOCATION_LEG_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_LOCATION_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATION_LEG_EFF	FLOOR_NUMBER	VARCHAR2	FLOOR_NUMBER
PER_LOCATION_LEG_EFF	GEOGRAPHIC_HIEARCHY_CODE	VARCHAR2	Geographic Hierarchy Code
PER_LOCATION_LEG_EFF	INTERNAL_LOCATION_CODE	VARCHAR2	Location Code
PER_LOCATION_LEG_EFF	INVENTORY_ORGANIZATION_CODE	VARCHAR2	Inventory Organization Code
PER_LOCATION_LEG_EFF	LEGISLATION_CODE	VARCHAR2	Legislation Code

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_LEG_EFF	LOCATION_ID	NUMBER	Location ID
PER_LOCATION_LEG_EFF	OFFICE_SITE	VARCHAR2	Office Site Flag
PER_LOCATION_LEG_EFF	POSTAL_CODE	VARCHAR2	POSTAL_CODE
PER_LOCATION_LEG_EFF	RECEIVING_SITE	VARCHAR2	Receiving Site Flag
PER_LOCATION_LEG_EFF	REGION_1	VARCHAR2	REGION_1
PER_LOCATION_LEG_EFF	REGION_2	VARCHAR2	REGION_2
PER_LOCATION_LEG_EFF	REGION_3	VARCHAR2	REGION_3
PER_LOCATION_LEG_EFF	SET_CODE	VARCHAR2	Set Code
PER_LOCATION_LEG_EFF	SHIP_TO_LOCATION_CODE	VARCHAR2	Ship-to Location Code
PER_LOCATION_LEG_EFF	SHIP_TO_LOCATION_SET_ID	NUMBER	Ship-to Location Set ID
PER_LOCATION_LEG_EFF	SHIP_TO_SITE_FLAG	VARCHAR2	Ship-to Site Flag
PER_LOCATION_LEG_EFF	TOWN_OR_CITY	VARCHAR2	TOWN_OR_CITY

Organizations

This table shows the parameters that you can use for these organization workforce structures DFF and EFF.

- PER_ORGANIZATION_UNIT_DFF
- PER_ORGANIZATION_INFORMATION_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_ORGANIZATION_UNIT_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_ORGANIZATION_UNIT_DFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_ORGANIZATION_UNIT_DFF	SET_ID	NUMBER	Set ID
PER_ORGANIZATION_INFORMATION_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_ORGANIZATION_INFORMATION_EFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_ORGANIZATION_INFORMATION_EFF	SET_ID	NUMBER	Set Id

Positions

This table shows the parameters that you can use for these position workforce structures DFF and EFF.

- PER_POSITIONS_DFF
- PER_POSITIONS_EIT_EFF

- PER_POSITIONS_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_POSITIONS_DFF	ASSIGNMENT_CATEGORY	VARCHAR2	Assignment Category
PER_POSITIONS_DFF	BARGAINING_UNIT_CD	VARCHAR2	Bargaining Unit Code
PER_POSITIONS_DFF	BUSINESS_UNIT_ID	NUMBER	Business Unit Id
PER_POSITIONS_DFF	COLLECTIVE_AGREEMENT_ID	NUMBER	Collective Agreement Id
PER_POSITIONS_DFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_POSITIONS_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_POSITIONS_DFF	ENTRY_GRADE_ID	NUMBER	Entry Grade Id
PER_POSITIONS_DFF	ENTRY_STEP_ID	NUMBER	Entry Step Id
PER_POSITIONS_DFF	GRADE_LADDER_ID	NUMBER	Grade Ladder Id
PER_POSITIONS_DFF	JOB_ID	NUMBER	Job Id
PER_POSITIONS_DFF	LOCATION_ID	NUMBER	Location Id
PER_POSITIONS_DFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_POSITIONS_DFF	UNION_ID	NUMBER	Union Id
PER_POSITIONS_EIT_EFF	ASSIGNMENT_CATEGORY	VARCHAR2	Assignment Category
PER_POSITIONS_EIT_EFF	BARGAINING_UNIT_CD	VARCHAR2	Bargaining Unit Code
PER_POSITIONS_EIT_EFF	BUSINESS_UNIT_ID	NUMBER	Business Unit
PER_POSITIONS_EIT_EFF	COLLECTIVE_AGREEMENT_ID	NUMBER	Collective Agreement
PER_POSITIONS_EIT_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_POSITIONS_EIT_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_POSITIONS_EIT_EFF	ENTRY_GRADE_ID	NUMBER	Entry Grade Id
PER_POSITIONS_EIT_EFF	ENTRY_STEP_ID	NUMBER	Entry Step Id
PER_POSITIONS_EIT_EFF	JOB_ID	NUMBER	Job Id
PER_POSITIONS_EIT_EFF	LOCATION_ID	NUMBER	Location Id
PER_POSITIONS_EIT_EFF	POSITION_TYPE	VARCHAR2	Position Type
PER_POSITIONS_EIT_EFF	UNION_ID	NUMBER	Union Id
PER_POSITIONS_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

11 Person

Person Number Generation Methods

You can select one of the following person number generation methods for your enterprise on the Edit Enterprise page of the Manage Enterprise HCM Information task in the Setup and Maintenance work area:

- Manual
- Automatic prior to submission
- Automatic upon final save

Manual: You can use the Manual method to manually enter a person number when creating person records. You can update person numbers in the Manage Person page.

Automatic prior to submission: The Automatic prior to submission method automatically creates and displays person numbers when creating person records. This method is the default method for person number generation.

Note: The Automatic prior to submission method may create gaps in the person number sequence if the transaction is canceled after the person number is generated.

Automatic upon final save: The Automatic upon final save method creates person numbers only after the Add Person transaction is approved. You can't view the person number when creating the person record. However, you can view the person number on the Manage Person page after the transaction is approved. This method generates person numbers without gaps in the sequence.

Note: Person numbers are also assigned to contacts if they are created as a part of the Add Person transaction. For example, if a person is assigned person number 5 and two contacts are created during the Add Person transaction, then the contacts will be assigned person number 6 and 7. This means the next new person will be assigned person number 8.

The Automatic prior to submission and Automatic upon final save methods use an enterprise number sequence. By default, the sequence starts from 1; however, you can change the starting number. The person number increments by one for each new person record created.

You can change the person number generation method but you must be careful of the method that you select if you have existing data. You can change from Automatic prior to submission method to the Automatic upon final save method and change it back again. You can also change from the automatic method to the manual method and change this to the former.

Initial Person Number

You can specify the initial person number for your enterprise when you generate person numbers automatically. The application uses this number for the first person record that you create using the automatic person number setting, and increments the number by one for subsequent person records. By default, the initial person number is 1.

Using the initial person number option, you can retain the legacy person numbers for existing persons. Additionally, you can automate the number generation for new persons, starting from the last legacy person number plus one. You can change the initial person number.

Person Numbers for Contact Records

Workers and contacts have the same number sequence when the generation method is Automatic. You can correct automatically generated person numbers for contacts on the Manage Person page if the person number generation method is Manual. If contacts are later hired as workers, they retain their original person numbers.

Related Topics

- [Worker Numbers](#)

Person Types

You use person types to identify different groups of people in your enterprise.

For example, for purposes of reporting, you may want to identify the following:

- Contractual workers in your enterprise with the Contingent Worker person type.
- Regular employees with the Employee person type.

On the basis of the person type, you can:

- Maintain information for a group of people
- Secure access to information

System Person Types

These are predefined person types that the application uses to identify a group of people. You can't 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.
- 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.

Related Topics

- [What happens if I change the status of a user person type](#)
- [What's the purpose of the default user person type](#)

Person Names and Languages

You can define how to display people's names in the application and in which language. You can define whether to display a person's name in the global or the local language.

Person name has two parts, style and format.

Name Styles

The name style determines these things:

- Which components of a person's name to display. For example, one country may display first name and last name while another may display the middle name too
- What's the order of display of the components
- Which components are required and which are optional. For example, title may be optional in some countries.

The legal employer sets the legislative context for the person record. So, if the legal employer is a Canadian legal entity, the Canadian name style is used. When a country-specific name style doesn't exist, a universal name style (last name, first name, title, and middle names) is used

Note: A person's contacts have the same name style as the person for whom they're contacts.

Name Formats

A name format is an arrangement of the name components.

- The format is an arrangement of these name components: first name, last name, and title. You can choose from these predefined name formats: Display name, List name, Full name, and Order name.
- The format can differ based on the display context. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global or Local

The profile option HR: Local or Global Name Format controls whether users see local names or global names. The profile option HR: Local or Global Name Format controls whether users see local names or global names by default. Global names use one name format. Users who manage people across countries may want to see the names displayed consistently so may use global names for example. Users who view or manage persons in a single country may prefer to see local names

Person-Name Languages

Each enterprise has a global-name language. Person names appear in this language by default. When you create a person record, you can define what language to use for the local name. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the language.

Let's look at an example:

- The global-name language for the enterprise is American English.
- You set the local-name language in a person record to Japanese. Users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese.
- All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English. Users can set preferences to select the language in which they want to see person names displayed in.

Person Name Styles

Person name styles define the person name components for a country. Only one style can exist for a country, while you can predefine name styles for some countries.

Note the following:

- You can create name styles for countries that have none.
- You can copy an existing style to use as the basis.
- You can create a new name style in case of specific requirements for a country

For countries that don't have a predefined person name style, the universal name style applies by default.

You can edit predefined name styles by doing the following:

- creating additional components
- selecting mandatory components
- changing order of components
- selecting list of values for the components

You can't delete predefined components and make mandatory components optional. You can delete only those components that were added to a predefined name style. You can't delete a predefined name style.

Note: You can create, edit, and delete user-defined name style and its components any time. If a user-defined name style is deleted after person names have been created using that style, the universal name style applies by default.

Person Name Components

Last Name is a mandatory name component for all person name styles. You can set other person name components as mandatory, based on specific requirements for a country.

Note the following:

- The name components Name Information 1 through Name Information 14 are reserved for localization requirements.
- You can use the components Name Information 15 through Name Information 30 to define specific person name components for a country.

For example, if you want to capture Mother's Maiden Name for a country, you can use the name component Name Information 15, and denote the display name for this component as Mother's Maiden Name.

Related Topics

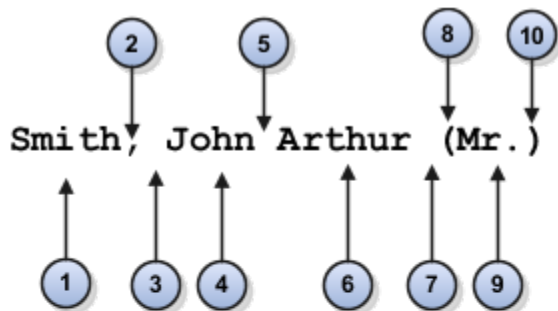
- [What's the difference between person name formats and person name styles](#)
- [Person Names and Languages](#)
- [Person Name Formats](#)

Person Name Formats

A person name format type determines how a person's name appears across Applications.

- Each person name format type contains a sequence of name components that represents different parts of a person's name, for example, first name, last name, and punctuation marks.
- You can change the sequence of, remove, or include additional name components according to your requirements.

The following figure displays a sample name format, including the components and punctuation marks.



1 Last name	6 Middle name
2 Comma	7 Space
3 Space	8 Opening bracket
4 First name	9 Title
5 Space	10 Closing bracket

Predefined Name Format Types

Oracle Fusion HCM provides the following predefined format types.

Format Type	Usage	Default Structure
Full Name	Names that appear in reports.	[Last Name], [First Name] [Middle Name] [Title]
Display Name	Names that appear singly, for example, on the Personal Details page header.	[First Name] [Prefix] [Last Name]
List Name	Names that appear in lists	[Prefix] [Last Name], [First Name]
Order Name	Names that appear in name-ordered lists where the full name alone isn't sufficient to sort the list.	[Last Name] [First Name]

Note: When you create or edit format types, to avoid creating blank person names, ensure that you include at least one name component that's never blank.

Local and Global Name Formats

Oracle Fusion HCM includes local and global formats for each format type.

When you create a new format on the basis of an existing format type, you identify it as either local or global. For local format types, you must also select the legislation that the format type applies to

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

Conditional Name Format

Use the conditional name component to add conditions to person name formats. If there's a value in the first name attribute that's displayed else the value in the second name attribute is displayed. For example, let's say you create a display name format with a conditional name component including Known As and First Name as the first and second attributes respectively. If the person name attribute has a value in both Known As and First Name fields, then the Known As value is displayed. If the person name attribute doesn't have a value in the Known As field but has a value in the First Name field then the First Name value is displayed.

These are some of the key points to note about the conditional name component.

- You can use only 2 core name attributes for the conditional name component.
- You can have multiple conditional name components in the same person name format but you can't nest one conditional name component within another.
- You can't use punctuation such as space, open bracket, and closed bracket, or use sub-components or separators within the conditional name component.
- After updating the person name formats, you need to run the **Apply Name Formats to Person Names, Keywords and LDAP** job set from the **Scheduled Processes** page in the **Tools** work area with these parameters
 - Country Name for which you want to change the name format, and the

- Format Type to apply the name format set.
- A person's first name and last name initials are displayed even when a person hasn't uploaded an image.

Related Topics

- [When does the application update stored names with a person name format](#)
- [How can I switch between local and global formats to display person names](#)

How You Specify Work Phones

A person can have only one primary phone. Typically, employees see others' phone details only if it's work related and primary. If you specify a nonwork phone as primary then workers can't see the phone details.

Who can see which phone number is controlled by Oracle's virtual private database policy, which can't be changed

Access Security and Privileges

You can see a coworker's work and nonwork phone numbers if your role has these privileges

- Manage person phones data
- View person phones data
- Report person phones data

It's important to understand these phone lookup codes since the virtual private database policy relies on the lookup codes:

Lookup Code	Meaning
W1	Work Phone
W2	Second Work Phone
W3	Third Work Phone
WF	Work Fax
WM	Work Mobile Phone

If you want to change the phone type, keep in mind the lookup code and how the VPD policy works with that lookup code. Lookup codes starting with W indicate the phone number is public and can be viewed by all. Lookup codes not starting with W indicate the phone number is private and can be seen only by people with the required privileges.

Apply Name Formats to Person Names, Keywords, and LDAP

When you change a person name format, the change isn't reflected in person records until you run the Apply Name Formats to Person Names, Keywords, and LDAP job set. The job set includes these required child processes so you just need to run the parent process and not run these processes individually:

- Apply Name Formats to Person Names
- Send Personal Data for Multiple Users to LDAP
- Update Search Person Keywords

How the Process Works

When you run the process, this is what happens:

1. The Apply Name Formats to Person Names process is first executed.
2. The Update Search Person Keywords and Send Personal Data for Multiple Users to LDAP processes are then executed in parallel.

Let's say the Apply Name Formats to Person Names job set is executed successfully in the first step but either the Update Search Person Keywords or the Send Personal Data for Multiple Users to LDAP processes fails in the second step. The parent process and the child processes that failed are marked as an failed. The successful processes are implemented, failed jobs aren't.

When the Apply Name Formats to Person Names, Keywords and LDAP job set is running, you can't schedule or run the Apply Name Formats to Person Names, Send Personal Data for Multiple Users to LDAP, and Update Search Person Keywords processes independently.

How You Run the Process

You run the job set from the Scheduled Processes task using these steps.

1. Navigate to **Tools > Scheduled Processes**.
2. Click **Schedule a Process**.
3. Select **Job set** and search for **Apply Name Formats to Person Names, Keywords and LDAP**.
4. Click **OK**
5. Select each job and enter the parameters.
6. Click **OK**

Related Topics

- [Overview of Scheduled Processes](#)

How You Update Person Search Keywords

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're indexed to improve search performance.

Process to Update Person Keywords

An event is raised when the value of a keyword attribute changes, for example, if a person acquires a language skill or a different phone number. 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 Process

Although most changes to the PER_KEYWORDS table are automatic, you need to run the Update Person Search Keywords process regularly because of these reasons:

- The automatic process doesn't apply future-dated changes to the PER_KEYWORDS table.
- The process ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

How to Schedule the 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 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.

Running the Update Person Search Keywords process refreshes the whole PER_KEYWORDS table. Therefore, you must run the process at times of low activity to avoid performance problems.

Related Topics

- [Person-Record Keyword Searches](#)

Person-Record Keyword Searches

The application searches for keywords in these person attributes: department, person number, job name and code, position name and code, person name, primary email, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, memberships, areas of interest, and areas of expertise.

Access to Restricted Information

Line managers can access their workers' restricted information such as competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations. Restricted information is included in search results when the searcher is a line manager. For example, if a line manager searches for a language skill and a match is found in any direct or indirect reports, that information appears in the search results. 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're copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied to ensure that the source and indexed values don't differ. 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.

Name and Keyword Search

The person search uses a person's full name instead of the first name or last name. The full name definition may vary for each country. For example, the full name definition for India may be First Name Middle Name Last Name, while the full name definition for Canada may be First Name Known As Last Name Suffix. You control the definition of the full name using the Manage Person Name Formats task in the Setup and Maintenance work area.

There's an implied OR condition between the search criteria when you use keyword search. When you use the name search, there's an implied AND condition between the search criteria. For example, when you enter **Chris Harper** in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results. Here are some examples:

You enter...	Search Results
Harper Chris	- Jenner, Chris - Harper, Smith - Chris, Ray - Harper, Liam - Harper, Chris - Harper, Christopher
Chris Harper	- Jenner, Chris - Harper, Smith - Chris, Ray - Harper, Liam - Harper, Chris - Harper, Christopher
Chris%	- Jenner, Chris - Black, Chris - Blake, Christopher - Simpson, Christy

You enter...	Search Results
	• Harper, Chris • Harper, Christopher • Christ Johnson
Chris	• Jenner, Chris • Black, Chris • Harper, Chris
"Chris Harper"	• Harper, Chris
Chris and Harper	• Harper, Chris
"Chris" "Harper"	• Harper, Chris

Date-Effective Search

In the person search UI, you can enter an effective as-of date. When date-effective values such as work location are copied to the keywords table, their history isn't 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. Here's an 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 doesn't appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

How You Optimize Person Search Keywords

The Oracle Text index in the PER_KEYWORDS table is utilized for person searches in My Client Groups, and the Directory. This index may become fragmented over a period of time and may cause a delay in displaying search results.

Why You Run a Process

You run the Optimize Person Search Keywords Index process to identify the fragmented indexes and help improve the overall search performance. To launch this process, use the Navigator > Tools > Scheduled Processes > Schedule New Process button in the search results table.

Note: You must run the Update Person Search Keywords process first and then the Optimize Person Search Keywords process. You can't schedule both processes simultaneously. If you schedule them at the same time, the second process will wait for the first process to complete before it starts.

When to Run the Process

You must run the Optimize Person Search Keywords Index process daily at times of low activity with the options, Full mode and the appropriate maximum time. The default time is 180 minutes. Although, if the process is run consistently over time it may take about 10-30 minutes only. You can decide the frequency of running the process based on the size of your customer base, system usage, database usage, data loaders used, index fragmentation, and schedule of the Update Person Search Keywords process.

How You Communicate Person and Assignment Changes to Consumer Applications

You may need to alert other Oracle Fusion applications when you make changes to person and assignment details to synchronize their information with Oracle Fusion Global Human Resources.

To share the changes made to person and assignment details with consumer applications, you must run the Synchronize Person Records process. The process generates an HCM event, ChangedPersonDetails, that consumer applications listen to. When you start the process, you can specify the start and end dates. The process generates events for the changes made between the start and end dates that you specified. If you specify no date, the process runs on the system date, and generates events for changes made on that date.

If you make changes to person records daily, it's recommended that you schedule Synchronize Person Records to run once daily at the end of the day (without specifying start and end dates). It isn't necessary to run the process multiple times in a day..

Note: In the Coexistence for HCM environment, you can run Synchronize Person Records after you upload person records to Oracle Fusion for the first time. When you run the process, specify the start date (start date of the oldest person record) and end date (system date). When you load person records subsequently, run Synchronize Person Records on the system date (without specifying start and end dates). Don't schedule the process to run daily.

Changes Notified to Consumer Applications

When you run Synchronize Person Records, the process generates the ChangedPersonDetails event when you make changes to the following person and assignment details:

- Person details:
 - Name
 - Work email
 - Phones
 - Image
 - Service dates
- Assignment details:
 - Job
 - Position

- Department
- Work location
- Work location address
- Manager
- Work type

Note:

- The ChangedPersonDetails event isn't generated if you make changes to the following existing person details:
 - Job
 - Position
 - Department
 - Work location
 - Work location address
- The event is generated in case of changes made to employee or contingent worker data only. It isn't generated for data changes in these cases.
 - Changes to ex-employees and ex-contingent worker records as of the application date (current date).
 - Changes to employee records with a future hire or start date.

Person Lookups

This topic identifies common lookups that are person-related and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements using the Manage Common Lookups task.

Person Information Lookups

Person information lookups are described in the following table:

Lookup Type	Description	Configuration Level
ORA_PER_EXT_IDENTIFIER_TYPES	Type of a person's identifier in an external application, such as time device badge identifier, third-party payroll identifier, or third-party payroll alternate identifier	User
PER_NATIONAL_IDENTIFIER_TYPE	Type of a person's national identifier, such as social security number, civil registration number, or national insurance number	User
PERSON_TYPE_STATUS	Status of a user person type, such as active or inactive	User

Lookup Type	Description	Configuration Level
EMAIL_TYPE	Type of a person's email address, such as home email or work email Note: A person can have only one work email by default. If you want to add a secondary work email, you must define another lookup type.	Extensible
ADDRESS_TYPE	Type of a person's address, such as home address or mailing address	Extensible
PHONE_TYPE	Type of a person's phone, such as home phone or mobile phone	Extensible
PER_CM_MTHD	Communication methods for a person, such as email or instant messenger	Extensible
PER_CONTACT_TIMES	Times of day when a specified phone number can be used, such as evenings or weekends	Extensible
PER_ETHNICITY	Person's ethnicity, such as Hispanic, Asian, or American Indian	User
PER_RELIGION	Person's religion, such as Christianity, Hinduism, or Islam	Extensible
PROFESSION	Person's profession reported on a visa or work permit, such as engineer, nurse, or teacher	Extensible
TITLE	Person's title, such as Miss, Doctor, or Professor, forming part of the person's name	Extensible
HONORS	Higher qualifications, such as CPA, PhD, or DDS, forming part of the person's name	Extensible
PER_HIGHEST_EDUCATION_LEVEL	Person's highest level of academic qualification, such as BSc, Diploma, or MA.	User
MILITARY_RANK	Person's military rank, such as private, sergeant, or corporal, forming part of the person's name	Extensible
BLOOD_TYPE	Person's blood group, such as A rhesus negative or B rhesus positive	User
CONTACT	Relationship between a person and the person's contact, such as partner, child, or brother	User

Lookup Type	Description	Configuration Level
MAR_STATUS	Person's marital status, such as single, married, or legally separated	User
SEX	Person's gender, such as male or female.	User
PER_VISA_PERMIT_TYPE	Person's visa permit type, such as study visa, visit visa, or work visa.	User

For some of the person lookups that have a configuration level of User, Oracle has mapped and delivered corresponding system lookup types. This is because Oracle delivers reports and processes that only permit specific values. If you add or modify existing lookup codes, you need to map new or modified lookup codes to the Oracle-delivered lookup codes. If this isn't done, the report will be incorrect. Use the Manage Extended Lookup Codes task in the Setup and Maintenance work area to map the user or extensible lookup codes to system lookup codes.

User-Configurable Lookup Type	System Lookup Type
CONTACT	ORA_PER_CONTACT
MAR_STATUS	ORA_PER_MAR_STATUS
PER_HIGHEST_EDUCATION_LEVEL	ORA_PER_HIGHEST_EDUCATION_LEVE
PER_NATIONAL_IDENTIFIER_TYPE	ORA_PER_NATIONAL_IDENTIFIER_TY
PER_ETHNICITY	ORA_PER_ETHNICITY
PER_VISA_PERMIT_TYPE	ORA_PER_VISA_PERMIT_TYPE
SEX	ORA_PER_SEX

These are some key points.

- If you change any of the details in an Oracle delivered lookup code in the user lookup types, you take ownership of the lookup code. The lookup code won't be updated when Oracle delivers any updates to that lookup code. But, if you delete the lookup code in the user lookup type, it will be replaced when Oracle delivers updates to the lookup type.
- If the lookup code is specific to a country then the country is selected in the Extended Lookup Codes table. If a lookup code has multiple countries, then there will be multiple entries, one for each country in the Extended Lookup Codes table. Alternatively, if no country is selected, the lookup code is considered global.

Document Information Lookups

Document information lookups are described in the following table.

Lookup Type	Description	Configuration Level
PER_DRIVERS_LICENSE_TYPE	Type of a person's driver's license, such as permanent or temporary	Extensible
PER_CITIZENSHIP_STATUS	Status of a person's citizenship, such as active or expired	Extensible
PER_PASSPORT_TYPE	Type of a person's passport, such as emergency or regular	Extensible
PER_VISA_PERMIT_TYPE	Type of a person's visa or work permit, such as temporary worker or residence permit	User
PER_VISA_PERMIT_STATUS	Status of a person's visa or work permit, such as pending or active	Extensible

Disability Information Lookups

Disability information lookups are described in the following table.

Lookup Type	Description	Configuration Level
DISABILITY_CATEGORY	Type of a person's disability, such as hearing loss or visual impairment	User
DISABILITY_REASON	Causes of a person's disability, such as accident or illness	Extensible
DISABILITY_STATUS	Status of a person's disability registration, such as approved or pending	User
ORA_PER_SELF_DISCLOSE_DISABILITY	Type of self-disclosure responses for a disability based on the country selection.	User
ORA_PER_DISABILITY_COUNTRY	List of all countries for which disability information can be defined. This lookup is used to manage the display of countries when workers specify their own disabilities.	Extensible

Use Gender Lookup Type in the EEO Report

In this example, you will learn what you need to do so that the Oracle delivered United States Equal Employment Opportunity (EEO) report operates correctly if you add a new lookup code in the SEX lookup type. Kate Williams is the Director of Human Resources and she wants her employees in the United States to be able to select a value of "Undeclared" while specifying the gender.

As a part of this, you will create a new lookup code in the SEX lookup type with a value of "Undeclared" and a tag of "+US", and map this to the Oracle delivered Gender of a person (System Lookup).

Note: This is an example of the mapping that needs to be done if you add a new lookup code. Oracle doesn't recommend that the "Undeclared" value always be mapped to the "Male" value for EEO reporting purposes.

Create a New Code

1. Click **Setup and Maintenance** under the name menu.
2. Search for and click the **Manage Common Lookups** task.
3. Enter **SEX** as the Lookup Type and click **Search**.
4. Click the **+** icon (New) in the SEX: Lookup Codes section and enter this information.

Field	Value
Lookup Code	UNDECLARED
Enabled	Select the check box
Start Date	01/01/2000
Meaning	Undeclared
Tag	+ US

5. Click **Save and Close**.

Map the New Lookup Code to the System Lookup

1. Click **Setup and Maintenance** link under the name menu.
2. Search for and click the **Manage Extended Lookup Codes** task.
3. Navigate to and select **Gender of a person (System Lookup)** in the Lookup Type region.

4. Click **Add** to enter this information.

Field	Value
Country	United States
Lookup Code	Male
Extended Code	UNDECLARED (this is the value added in the Lookup Code in the above task)
Extended Name	Undeclared (this is the value added in the Meaning in the above task)
All Enterprises	Yes

5. Click **Save and Close**.
The EEO report will now display all employees who have selected a gender of "Undeclared" as "Male".

Related Topics

- [Overview of Lookups](#)

Considerations for Duplicate Checks When Importing Person Records

You can specify at the enterprise level whether to search for duplicates when creating person records using HCM Data Loader or the new hire flows (except the classic pages). Use the Manage Enterprise HCM Information task in the Setup and Maintenance work area to set duplicate checks when importing or creating person records.

You can also request a duplicate person check for individual worker objects that you load using HCM Data Loader. Any setting specified on the worker object takes precedence over the enterprise-level setting.

If one or more criteria is missing when the other criteria produce a match, the application identifies the record as a matching record. All records that are a match aren't imported.

You can select from any of these **Person Creation Duplicate Check** settings

None

The application doesn't check for any matching person records.

National ID Country-Type-ID

The application checks for the national identifier country, type, and country in a person's record. If the national identifier value is null, no duplicates are found.

Last Name, First Initial, DOB Or NID Country-Type-ID

The application checks for the national identifier record with the same country and type, or if either one is null. Alternatively, it checks for the last name, first initial and date of birth.

Last Name, First Initial, DOB, Gender Or NID Country-Type-ID

The application checks for the last name, the first name initial, and the date of birth, or only the national identifier with the same country and type.

Last Name, First Name, DOB, Gender Or NID Country-Type-ID

The application checks for the last name, the first name, the date of birth, and the gender, or only the national identifier with the same country and type.

Other Options

The other options are 1) NID 2) Last Name, First Initial, Date of Birth or National ID 3) Last Name, First Initial, Date of Birth, Gender or National ID, and 4) Last Name, Full First Name, Date of Birth, Gender or National ID.

Related Topics

- [How Person Records Are Matched](#)

Considerations for Loading Person Photos

You can load employees' photos in the employee's public information page, from the Change Photo quick action on the Me tab, or the HCM Data Loader. Employees can also upload their own photos using the person spotlight window. This topic describes what to consider when you're loading person photos.

Employee Personal Health Data

Before loading employee photos, consider whether the photos might create an unintended connection to employee's personal health data. Privacy and security protections in your country may apply.

Include or Exclude Photos

To upload multiple photos at a time use the Worker object in the HCM Data Loader.

When uploading the photo,

- Ensure that the file size is less than 20 megabytes.
- Upload a photo in any format, but the typical format is either a .png or .jpeg file.
- Ensure that the photo dimensions are 90 x 120 pixels to help reduce the distortion of photo. If the photo isn't 90 x 120 pixels, it's recommended to maintain a 3 x 4 aspect ratio.

If you want to disable workers from uploading photos, you must either remove the related security privilege from the Worker role or hide the photo section using page composer.

Note: Contact your administrator to remove the security privilege.

Shape of Photo Section

To set the shape of the photo section, you must specify a value in the PER_PERSON_IMAGE_DISPLAY profile option. You can set the value for this profile as Circle or Square.

Caching Images

To cache person photos to improve performance of pages that display many images, for example, organization chart, you must specify Y in the PER_IMAGE_ENABLE_CACHING profile option. You can also choose not to cache photos especially if people at your site use kiosks to access the application.

Related Topics

- [How You Cache Person Photos](#)

How You Cache Person Photos

You can cache person photos to improve performance, using the profile option PER_IMAGE_ENABLE_CACHING. You create the profile option using the Manage Profile Options task. After you create the profile option, set the value using the Manage Administrator Profile Values task in the Setup and Maintenance work area.

Creating the Profile Option and Setting the Value

You can improve the performance of pages that display many photos (for example, organization chart) by caching the person photo.

You create the profile option by providing PER_IMAGE_ENABLE_CACHING as the profile option code, Per Image Enable Caching as the display name, and Global Human Resources as the application and module. As this is a site-level profile, select the Enabled and Updatable check boxes at the Site level. After creating the profile option, set the profile value to Y using the Manage Administrator Profile Values task.

You can choose not to cache the photos especially if people at your site use kiosks to access the application.

Related Topics

- [Create and Edit Profile Options](#)

How National Identifiers are Validated

A national identifier is unique when it doesn't match any other national identifier in the application. You can set up validation to check for the country-type-number combination by setting the **Person Creation Duplicate Check** enterprise option to one of the options that contains these 3 attributes. For example, when you specify the option **National Identifier Country and National Identifier Type and National Identifier Number** as the enterprise option, then the check for national identifier uniqueness is done on national identifiers having these 3 attributes. A national

identifier - United States, SSN, 887-2234 will be considered unique to the national identifier - United Kingdom, SSN, 887-2234, simply because the countries don't match even if the type and number are the same.

The national identifier is validated when you add a national identifier during any of the add new person processes or while changing a person's information. The ID is also validated when you add it when creating a person record using any of these services:

- Worker v2 service
- Worker REST service
- HCM Data Loader and HCM Spreadsheet Data Loader

A point to note is that Oracle Recruiting candidates aren't included in the check when a person record is created using the methods mentioned earlier. However, the national identifier of these candidates can be checked against the national identifiers of all non-candidates when they become pending workers.

Profile Option to Validate the National Identifier

You need to enable the National Identifier Uniqueness Validation Mode profile option to check if the national identifier in a person record is unique. You can choose any of these values at the site-level.

Profile Option Value	Description
None	The national identifier isn't checked for uniqueness.
Warning	A warning is displayed indicating the national identifier isn't unique. You can continue with the same value however.
Error	An error message is displayed preventing you from entering a national identifier, which isn't unique.

Duplicate Person Check

The duplicate person check identifies whether a person record is unique based on the first and last names, date of birth, and national identifier. The national identifier validation checks for the uniqueness of the national identifier in the person record. The differences between the two are indicated in this table:

Attribute	National Identifier Validation	Duplicate Person Check
How is it configured?	Configured using the National Identifier Uniqueness Validation Mode profile option.	Configured using the Person Creation Duplicate Check enterprise option.
When is it triggered?	When you create or update a person's national identifier record (excluding Oracle Recruiting candidates)	When you hire an employee, a contingent worker, a nonworker, a pending worker, or when a candidate is transformed into a pending worker, depending on the configuration in Oracle Recruiting.
How does it work?	Enabled using a profile option and checks uniqueness of national identifier.	This is independent of national identifier uniqueness validation. When enabled, each new person record will first be checked for any existing duplicate records. If any possible

Attribute	National Identifier Validation	Duplicate Person Check
	When enabled, each new or updated national identifier record is checked for uniqueness against the records of all other people (excluding Oracle Recruiting candidates), to show a warning or error to prevent the action if a national identifier number is found to belong to another person.	duplicates are found, the user can decide how to proceed. The definition of duplicate is configured in the enterprise option, and can include comparing the names, dates of birth, and even genders, or the national identifiers and their countries and types.

Related Topics

- [Candidate Duplicate Check and Merge After Job Offers](#)

User and Role-Provisioning Setup Options

This topic introduces the user and role-provisioning options, which control the default management of some user-account features. To set these options, perform the **Manage Enterprise HCM Information** task in the Workforce Structures functional area for your offering. You can edit these values as necessary and specify an effective start date for changed values.

User Account Creation

The **User Account Creation** option controls:

- Whether user accounts are created automatically when you create a person, user, or party record
- The automatic provisioning of roles to users at account creation

Note: User accounts without roles are suspended automatically. Therefore, roles are provisioned automatically at account creation to avoid this automatic suspension.

The **User Account Creation** option may be of interest if:

- Some workers don't need access to Oracle Applications Cloud.
- Your existing provisioning infrastructure creates user accounts, and you plan to integrate it with Oracle Applications Cloud.

User Account Role Provisioning

After a user account exists, users both acquire and lose roles as specified by current role-provisioning rules. For example, managers may provision roles to users manually, and the termination process may remove roles from users automatically. You can control role provisioning by setting the **User Account Role Provisioning** option.

Note: Roles that you provision to users directly on the Security Console aren't affected by this option.

User Account Maintenance

The **User Account Maintenance** option controls whether user accounts are suspended and reactivated automatically. By default, a user's account is suspended automatically when the user is terminated and reactivated automatically if the user is rehired.

User Account Creation for Terminated Workers

The **User Account Creation for Terminated Workers** option controls whether user-account requests for terminated workers are processed or suppressed. This option takes effect when you run the **Send Pending LDAP Requests** process.

Related Topics

- [User Account Creation Option](#)
- [User Account Role Provisioning Option](#)
- [User Account Maintenance Option](#)
- [User Account Creation for Terminated Workers Option](#)

The Manager Hierarchy: How It's Maintained

In many situations, a person's manager hierarchy must be readily available. For example, a person's line manager may be required during an approval process, and business intelligence reports often retrieve data based on a manager hierarchy. This topic describes how the manager hierarchy is maintained.

How the Manager Hierarchy Is Maintained

A person's manager hierarchy could be derived from active data tables, but the impact of that approach on performance is unpredictable. Therefore, the complete manager hierarchy for each person is extracted from data tables and stored in a separate manager hierarchy table. This table is known as the denormalized manager hierarchy. The denormalized manager hierarchy ensures that a person's manager hierarchy is both easily accessible and up to date.

Running the Refresh Manager Hierarchy Process

Whenever a change is made to a person's manager hierarchy through the application pages, the change is reflected automatically in the denormalized manager hierarchy table. You use the Refresh Manager Hierarchy process to populate the denormalized manager hierarchy table when person records are migrated from other applications.

You run the Refresh Manager Hierarchy process in the Scheduled Processes work area. To run the process, you must have the Human Resource Specialist job role. The process has no default schedule. 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. Refresh Manager Hierarchy processes all types of manager hierarchies.

In addition to performing full refreshes of the manager hierarchy, you can perform incremental refreshes. With this approach, you refresh the hierarchy based on manager changes occurring in the previous N days. Schedule a full refresh every month or quarter and an incremental refresh every day or week, for example.

FAQs for Person

What happens if I change the status of a user person type?

The status of a user person type determines whether it's 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't select that person type to associate with worker assignments.

Note: You cannot inactivate a default user person type. You must first select a different user person type as the default.

What's the purpose of the default user person type?

Each system person type contains a default user person type that the application uses to associate with person records for reporting and display purposes.

When you hire a worker and specify assignment information, the application associates the default user person type with that worker assignment. However, if you select a different person type, then the application considers the selected person type as the default one for that worker.

When does the application update stored names with a person name format?

When you update a name format, you run the Apply Name Formats to Person Names process so that the application updates the stored names according to the updated format type rules. You run the process for a specific name format and legislation combination. You then run the Update Person Search Keywords process followed by the Synchronize Person Records process. For these processes, use the same date as when the Apply Name Formats to Person Names process was run and set After Batch Load to Yes. This is because the `last_update_date` in the `PER_PERSON_NAMES_F` table is updated when the Apply Name Formats to Person Names process is run.

How can I switch between local and global formats to display person names?

You use the HR: Local or Global Name Format profile option. If you select the global name format, then person names appear in the same format across all legislations. If you select a particular legislation, then person names appear in a format specific to that legislation.

For example, if you set the profile option to Japan, then Japanese person names appear in the local name format that was created for Japan. However, person names that were stored using formats other than those of the Japanese legislation appear according to the global name format.

What's the difference between person name formats and person name styles?

Person name formats determine the order of the person name components for a specific format type.

The sequence of components for predefined name format types can be configured for a country. For example: Display Name can be defined as First Name, Last Name, and List Name can be defined as Last Name, First Name.

Person name styles define the person name components that can be captured for a country; for example, first name, last name, title, previous last name, known as, and so on. Person name styles can be configured by selecting the required name components for a country.

Why can't I see the people I just imported?

After you load person data, you need to run these processes in order.

1. Synchronize Person Records process with the required date range and the **After Batch Load** parameter set to **Yes**.
2. Update Person Search Keywords process with **After Batch Load** parameter set to **Yes**.
3. Send Pending LDAP Requests process with the **User Type** parameter set to **All** and **Batch Size** parameter set to **A**.

What are the lookup types associated with person identifiers?

The `ORA_PER_EXT_IDENTIFIER_TYPES` lookup type provides the predefined identifier types. You can add more types such as a person's parking pass identifier by adding values to this lookup type. The predefined identifier types are Time Device Badge identifier, Third-Party Payroll identifier, and Third-Party Payroll Alternate identifier.

How can I enable the Employment Details tab in the Personal Information work area?

The tab isn't available out of the box. To enable the tab, you must create a sandbox and set the Visible property of the tab to **Yes**. To do this, select *Configuration > Structure* from the Navigator menu, expand the *Me* category, and click *Personal Information*. Then, set the property for the tab in the *Tabs* area.

Related Topics

- [Managing Categories and Page Entries for the Navigator and Springboard: Procedure](#)

How can I add additional content on the questionnaire pages?

You can enable and configure an additional content card for each HCM app that uses the questionnaire page such as Pay, Personal Info, and Absences, on the **Me** tab in the main menu. When you click the additional content card, a blank page is displayed that you can configure. On this page, you can provide employees information and content specific to your organization such as policy and procedures, links, and instructional videos.. Here's how you add the additional content card on the questionnaire page.

1. Activate a sandbox.
2. In the main menu, click **Configuration > Structure**.
3. Click **Me** and expand the application for which you want to enable the additional content card (for example, Personal Info).
4. Select **Additional Content for Personal Info**.
5. Change the **Name** and **Image** as per your requirements, and change **Visible** to **Yes**, or enter an **EL expression** to determine who sees the card.
6. Click **Save and Close**.
7. Use Page Composer to add additional content

Related Topics

- [Create and Activate Unified Sandboxes](#)
- [Guidelines for Using Page Composer](#)
- [Add Additional Content to the Guided Flow for Promote Action](#)

What are the parameters that I can use for different flexfield configurations?

You can use these parameters for the flexfield configurations.

- PER_PASSPORT_DFF - LegislationCode and LEGISLATION_CODE
- PER_PERSON_EIT_EFF - EFFECTIVE_START_DATE and PERSON_ID
- PER_VISA_PERMIT_DFF - LEGISLATION_CODE and LegislationCode

Considerations for Configuring the Personal Info Pages in the Transaction Design Studio

Let's look at the key considerations when configuring these responsive pages in the Transaction Design Studio - Personal Details, Contact Info, Family and Emergency Contacts, Identification Info, and Additional Person Info.

- You can't use the Country parameter along with the Page Attributes but you can use the Country parameter in conjunction with the Available Attributes to show or hide, or make the fields required. This is because the Country parameter works based on the country of the record. For example, for the country of the national Identifier, visa, or passport, you can use this parameter to display different attributes per country. For the national Identifier, you can display the Expiration Date for one country but not for other countries.

- Email and Biographical Info objects don't have a country stripe. So, the Country parameter can't be used even with Available Attributes for these objects.
- You can't configure the Name and Address regions in the Transaction Design Studio. The display of these regions is controlled by the settings specified in the Manage Person Name Styles and Manage Address Format configuration tasks. Hence, they are excluded from the Transaction Design Studio to avoid conflicts between the configuration setup and the Transaction Design Studio settings.
- Because of the global person model, a single country setting doesn't apply for a person.

12 Workforce Records

Overview of Workforce Records

In the Setup and Maintenance work area, most of the setup tasks for workforce details are in the Workforce Information functional area. If you create an implementation project, these tasks are in the Define Workforce Records task list. You define a person's name format, name style, availability, employment values, and document types as a part of the Workforce Information functional area.

You define other workforce related tasks such as person number generation methods using the Manage Enterprise HCM Information task.

The Workforce Information functional area and the Define Workforce Records task list cover tasks in the following areas:

Area	Includes
Availability	Calendar events, work schedules and assignment, work shifts and workday patterns
Person Record Values	Person lookups, flexfields, profile options, person name formats and style, and person types
Employment Record Values	Employment lookups, flexfields, profile options, and assignment statuses
Documents	Document lookups, flexfields, and document types
Processes for Person Search	Settings for person search processes

Related Topics

- [Person Number Generation Methods](#)

Document Records

Document Types and Categories

You use document records to create and manage documents such as medical certificates, licenses, and visas. You can create your own document types to supplement the predefined document types, categories, and subcategories. Use the Document Records task from Quick Actions, person spotlight, My Team work area, or person smart navigation to create and maintain document records for a person.

The system document type displays on the setup page after you create the document type. Here are the attributes you can configure for a document type:

Field	What You Use it For
Type	Categorize the document. Specify whether the document type you want to create is at the person or assignment level. The default is Person. If you specify Person, the assignment ID isn't populated for document records. You can translate the document type using the Translation Editor icon.
Description	Include text that displays like a description or tip when creating a document record of that type. If you specify this text, workers see an information icon next to the document type field when they create a document record for this type. You can translate the document description using the Translation Editor icon.
Expiration Notification Period	Specify an expiration period for this document type. This is a read-only field and doesn't determine any automatic notification.
Minimum Attachments	Specify the number of attachments users should include for the document record.
Report Path	Specify the path of the BI publisher template that enables a report or letter to be generated when creating a document record for the document type. For example, <code>/Custom/Human Capital Management/Document Records/Visa Application.xdo</code>
Country	Indicate the country the document type applies to. Default is All Countries. When workers create a document record this displays as a read-only field. It isn't available for selection and can't be updated once the document type is created. It also doesn't restrict selection of a document type by matching any assignment information of the worker.
Category	Group documents into meaningful categories at a higher level. For example, absence. You can use the DOCUMENT_CATEGORY lookup type to define new document categories and subcategories When workers create a document record this displays as a read-only field. It isn't available for selection when creating the document record and can't be updated after the document type is created.
Subcategory	Further group documents into subcategories. For example, general or medical. Define document categories as values for the DOCUMENT_CATEGORY lookup type and document subcategories as extended lookup values for the selected category. This is read-only. It isn't available for selection when creating a document record and can't be updated after the document type is created.
Status	Indicate whether new document records can be created for this document type.
Approval Required	Indicate whether document records created for this document type need approval. If you set this attribute to No, document records won't go through document approval.
Allow Multiple Occurrences	Indicate whether multiple records of this document type can be created for the person.
Publish Required	Indicate whether documents are available from a specified date or immediately. If this is set to Yes, it displays as a required field in the Add Document Record flow. You can edit the publish date using REST, HDL, or HSDL.

Field	What You Use it For
	Note: If the publish date is in the future, the document record won't display on the Document Records list page until that date. However, users having the View Unpublished Document Records privilege can select Show in the Future Published field to see such document records. See the topic, Make Document Records Available from a Specific Date
Enable Document Delivery Preferences	Indicate delivery preferences for the document.

Use these tabs to configure other information for the document type:

- Document Record Preferences - includes document record attributes.
- Additional Information - includes flexfield information, if configured.
- Document Delivery Preferences - includes delivery preferences, if enabled.
- Attachments - includes reference files for a document type that workers can use when creating a document record of that type.

For more information, see these documents on My Oracle Support (<https://support.oracle.com>):

- FAQs for Document Records (2602600.1)
- How to Store BI Report Output as a Document Record Using HCM Extracts (2603747.1)
- Controlling Security of Document Records (2594767.1)
- Generate Letters from Document Records for a Specific Document Type (2650165.1)

Related Topics

- [Document Record Preferences](#)
- [Document Type Descriptive Flexfields](#)
- [How You Set Preferences for Document Delivery](#)
- [Examples of Document Type Security Profiles](#)

Document Type Lookups

This topic identifies lookups related to document records. Review these lookups, and update them as appropriate to suit enterprise requirements. You review these lookups in the Setup and Maintenance work area.

Document Types Lookups

Here's a list of the document types lookups that are available:

Lookup type	Description	Configuration Level
DOCUMENT_CATEGORY	Categorizes a document.	Extensible

Lookup type	Description	Configuration Level
DOCUMENT_STATUS	Status of a document record.	User

Note: DOCUMENT_STATUS isn't available for use.

Document Records Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these document record-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_DOR_ASG_LVL_DELETE_ON_CANCEL_WR	Cancel of Non-Global Transfer Work Relationship	No	If this is set to Yes, then this is what happens in this process: • If there are multiple assignments in the work relationship and the assignments have document records, then the document records associated with the assignments are deleted. • When document records are being deleted, the document records pending transactions are discarded from the approval process.
ORA_PER_DOR_ASG_LVL_DELETE_ON_DELETE_ASG	Delete Assignment Level Document Records During Delete Assignment Enabled	No	If this is set to Yes, then this is what happens in this process: • All document records associated with the assignment are deleted. • Document records pending approval are discarded from the approval process.
ORA_PER_DOR_ASG_LVL_MOVE_ON_CHANGE_LE	Move Assignment Level Document Records During Change Legal Employer Enabled	N	If this is set to Yes, then this is what happens in these processes: • Global Transfer ◦ When document records are moved from source to destination assignment, document records pending approval aren't moved. However, users can move the document records manually

Profile Option Code	Profile Display Name	Default Profile Value	Description
			using HDL, HSDL or REST, post approval. - Only document records from the source assignment are moved. - If there are multiple assignments in the source work relationship and the assignments have document records, then the document records associated with a non-source assignment continue to be associated with the original assignment - Cancellation of Global Transfer Work Relationship - When document records are moved from destination to source assignment, document records pending approval aren't moved. The pending transactions are discarded from the approval process. - If there are multiple assignments in the destination work relationship and the assignments have document records, then the document records associated with a non-destination assignment are deleted. - If there are multiple assignments in the destination work relationship and the assignments have document records, then the document records associated with a non-destination assignment are deleted.
ORA_PER_DOR_ATTACHMENT_SCAN	Document Record Attachment Scan Enabled	Yes	If this is set to Yes, the Add (Add from Attachment) action is enabled on the Document Records page. To disable the action, you must set the profile option to No.
ORA_PER_DOR_FILE_DOWNLOAD_MAX_SIZE	Document Records File Download Maximum Size	5 MB	You can increase the profile value to enable larger files to be included in the download of document records.
ORA_PER_DOR_SOA_WAIT_IN_MINS	Document Records Post Approval Commit Wait Time	0	This is what you can specify: Specify the time to wait in minutes to commit document record transaction data after it's approved. Value can be between 1 and 59.

Descriptive Flexfields

Document Type Descriptive Flexfields

You use the Document Type Descriptive Flexfields task in the Setup and Maintenance work area to create and manage the flexfields. Review these flexfields and use them as appropriate to suit enterprise requirements.

Here's the list of document type descriptive flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
HR_DOCUMENT_TYPES	PER_DOCUMENT_TYPE_DFF	Document Type Descriptive Flexfield	For capturing organization specific information for document types.	Available for use.
HR_DOCUMENT_TYPES	PER_DOCUMENT_TYPE_LEG_DDF	Document Type Developer (legislative) Flexfield	For capturing legislation specific information for document types.	Available for Oracle Localization use.

Parameters for Document Type Descriptive and Developer Flexfields

This table shows the parameters that you can use in the document type DFF (PER_DOCUMENT_TYPE_DFF) and document type DDF (PER_DOCUMENT_TYPE_LEG_DDF):

Parameter Name	Parameter Description	Data Type	Supported in DFF	Supported in DDF
CATEGORY_CODE	Document type category code	Varchar2	Yes	Yes
LEGISLATION_CODE	Document type legislation code	Varchar2	Yes	Yes
SYSTEM_DOCUMENT_TYPE	System document type	Varchar2	Yes	Yes

Related Topics

- [Overview of Descriptive Flexfields](#)

Document Record Descriptive Flexfields

You use the Document Records Descriptive Flexfields task in the Setup and Maintenance work area to create and manage the flexfields. Review these flexfields and use them as appropriate to suit enterprise requirements.

Document Records Descriptive Flexfields

Here's the list of document records descriptive flexfields in the application:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
HR_DOCUMENTS_OF_RECORD	PER_DOC_OF_RECORD_LEG_DDF	Documents of Record Legislative Information	For capturing legislation specific information for document records.	Available only for Oracle Localization use.
HR_DOCUMENTS_OF_RECORD	PER_DOCUMENTS_OF_RECORD_DFF	Documents of Record Attributes	For capturing organization specific information for document records.	Available for use.

Parameters for Document Records Descriptive and Developer Flexfields

This table shows the parameters that you can use for the document record DFF (PER_DOCUMENTS_OF_RECORD_DFF) and document record DDF (PER_DOC_OF_RECORD_LEG_DDF):

Parameter Name	Parameter Description	Data Type	Supported in DFF	Supported in DDF
PERSONID	Person identifier for whom the document record is created.	Number	Yes	Yes
ASSIGNMENTID	Assignment identifier of the worker.	Number	Yes	Yes
SYSDOCTYPEDFF	Document type context	Varchar2	Yes	No
SYSDOCTYPE	Document type context	Varchar2	No	Yes

Related Topics

- [Overview of Descriptive Flexfields](#)

Configure Flexfield Parameters in Value Sets for Document Records

You want to use the person ID as an input parameter when creating a value set for a document record flexfield segment.

Business Requirement: Meg is an employee at Vision Corporation. She needs to create some document records for her contacts, for example, her spouse and mother. She should be able to easily select the name of the contact for whom she is creating the document record.

Summary of Tasks

1. Define a segment for the PER_DOCUMENTS_OF_RECORD_DFF Document Records Descriptive Flexfield (DFF).
2. Define a value set that will display the contact values based on the person ID of the employee (Meg).

Defining a Segment for the DFF

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Document Records Descriptive Flexfields
2. On the Document Records Descriptive Flexfields page, select the Documents of Record Attributes row and click **Edit** on the **Actions** menu.
3. Click the **Create (+)** icon in the Global Segments area and create a segment by entering these values:
 - o Name: Contact
 - o Description: Displays the list of contacts for an employee.
 - o Data Type: Number

Note: You need to create the segment under the GLB_BIRTH context code.

Defining a Value Set for the DFF

1. Click **Create Value Set**.
2. In the Create Value Set page, enter these values:
 - o **Value Set Code:** EMP_CONTACT
 - o **Description:** Value set containing the contacts of the employee.
 - o **Module:** Search and select Global Human Resources
 - o **Validation Type:** Table
 - o **Value Data Type:** Character
3. In the **FROM Clause** field, enter the following syntax:

```
PER_CONTACT_RELSHIPS_F CR, per_person_names_f_v ppnf
```

4. In the **Value Column Name** field, enter **ppnf.display_name**.
5. In the **ID Column Name** field, enter **ppnf.person_id**.
6. In the **Start Date Column Name** field, enter **to_date(null)**.
7. In the **End Date Column Name** field, enter **to_date(null)**.
8. In the **WHERE Clause** field, enter the following syntax:

```
CR.PERSON_ID = :{PARAMETER.PERSONID}  
and CR.CONTACT_PERSON_ID = ppnf.person_id  
and trunc(sysdate) between CR.effective_start_date and CR.effective_end_date  
and trunc(sysdate) between ppnf.effective_start_date and  
ppnf.effective_end_date
```

9. Click **Save and Close** three times to return to the Document Records Descriptive Flexfields page.
10. Click **Deploy Flexfield**.
11. Click **OK**, and then click **Done**.

Log in as Meg and create a document record of type Birth. The contacts for Meg appear in the flexfield segment LOV. She can then select the contact for whom she wants to create the document record.

Defaulting a Value in a Flexfield Segment

When you use a value set, the display will always be a LOV, even if there is only one value in the value set. For scenarios where you want to default a single value in the specific flexfield segment, you need to select SQL as the default type value for the initial default.

This is a sample SQL to default a person number:

1. To default the selected worker's person number:

```
select person_number
from per_all_people_f
where sysdate between effective_start_date and effective_end_date
and person_id = :{PARAMETER.PERSONID}
```

2. To default the logged in user's person number:

```
select person_number
from per_all_people_f
where sysdate between effective_start_date and effective_end_date
and person_id = HRC_SESSION_UTIL.GET_USER_PERSONID
```

Create and Default Context for Descriptive Flexfield Based on Document Type

When you create a document record, the flexfield segments are displayed based on the context selected for the document type. You can configure the flexfield context for a document type such that it's automatically selected when you create a document record. This example shows how you can do so.

To automatically populate the context, you must enter a context code for the document flexfield that exactly matches the internal document type.

The internal document type is generated as follows:

- Document type is valid for a specific country: The internal document type is derived as country_code_document type name, all in uppercase. The spaces and hyphens in the document type name are replaced with underscores. For example, if the document type name is Loan Request and the document type is valid for India only, the internal document type takes the value IN_LOAN_REQUEST.
- Document type is global: The internal document type is derived as GLB_document type name. For example, if the document type name is Loan Request and the document type is valid for all countries, the internal document type takes the value GLB_LOAN_REQUEST.

Consider the following example where you want to default a flexfield context based on the document type.

Business Requirement

You want to configure a custom loan request form using the Document Records functionality. You want to configure the following attributes as part of this custom loan request form:

1. Loan Start Date
2. Loan Type
3. Loan Reason
4. Loan Value
5. Employee Guarantee 1
6. Employee Guarantee 2

Summary of Tasks

1. Configure a document type.
2. Define the descriptive flexfield (DFF) for document records.

3. Define six segments for the PER_DOCUMENTS_OF_RECORD_DFF Document Records DFF.
4. Verify that the context value is automatically defaulted and all segments configured for the context are automatically displayed.

Configure a Document Type

Configure a document type with Type = Loan Request. To do this, follow these steps:

1. In the Setup and Maintenance work area, go to the following:
 - Functional Area: Workforce Information
 - Task: Document Types
2. In the Search Results area, click the **Create** icon.
3. In the Document Type Information page, enter these values:
 - **Type:** Loan Request
 - **Description:** Loan request for employees.
 - **Country:** Search and select India
 - **Category:** Benefits
4. Click **Submit**, and then click **Yes**.
5. Click **OK**, and then click **Done**.

Define the DFF for Document Records

Define the PER_DOCUMENTS_OF_RECORD_DFF descriptive flexfield. To do this follow, these steps:

1. In the Setup and Maintenance work area, go to the following:
 - **Functional Area:** Workforce Information
 - **Task:** Document Records Descriptive Flexfields
2. On the Document Records Descriptive Flexfields page, click **Edit** on the **Actions** menu.
3. Verify that the **Derivation Value** field in the Context Segment area is configured with the **SYSDOCTYPEDFF** value.
4. Click **Manage Contexts**.
5. In the Search Results area, click the **Create** icon.
6. In the Create Context page, enter these values:
 - **Display Name:** Loan Request
 - **Context Code:** IN_LOAN_REQUEST

7. Click **Save and Close**.

Important: Ensure that the context code is the same as the System Document Type.

Note: System Document Type is an internal code. Its value is derived by the application using the following logic:

- If document type is for a specific country then the document type will be CountryCode + '_' + Document Type Name converted to upper case, where spaces () and hyphens (-) in the Document Type Name are replaced with underscores (_)
- If document type is for all countries (global) then the document type will be 'GLB' + '_' + Document Type Name converted to upper case, where spaces () and hyphens (-) in the Document Type Name are replaced with underscores (_)

For example, in this case since document type (Loan Request) is specific for the country India, the document type will be IN_LOAN_REQUEST

If this document type was defined for all countries (global), then the document type would be GLB_LOAN_REQUEST.

8. Search the IN_LOAN_REQUEST context code in the Manage Contexts page.

9. In the Search Results area, select the Loan Request row, and click **Edit** on the **Actions** menu.

Define Segments for the Document Records DFF

Create the following segments as per the business requirement for the context you created:

1. Loan Start Date
2. Loan Type
3. Loan Reason
4. Loan Value
5. Employee Guarantee 1
6. Employee Guarantee 2

To do this, follow these steps:

1. In the Context Sensitive Segments area, click the **Create (+)** icon.
2. In the Create Segment page, enter these values:
 - **Name:** Loan Start Date
 - **Data Type:** Date
 - **Display Type:** Date/Time
3. Click **Create Value Set**.
4. In the Create Value Set page, enter these values:
 - **Value Set Code:** CZ_DATE
 - **Module:** Search and select Global Human Resources
 - **Value Data Type:** Date
5. Click **Save and Close**.

6. Repeat steps 1 through 5 by using values from this table for the remaining segments:

Name	Data Type	Display Type	Value Set Code	Value Data Type
Loan Type	Character	List of Values	Loan_Type	Character
Loan Reason	Character	List of Values	Loan_Reason	Character
Loan Value	Number	Text Box	15 Number	Number
Employee Guarantee 1	Character	Text Box	10 Characters	Character
Employee Guarantee 2	Character	Text Box	10 Characters	Character

7. Click **Save and Close** three times to return to the Document Records Descriptive Flexfields page.
 8. Click **Deploy Flexfield**. During the deployment process, validate the messages for any errors or warnings.
 9. Click **OK**, and then click **Done**.

Verifying Automatic Default of Flexfield Context Based on Document Type

- Log in as an employee and create a document record of type Loan Request. Notice that the context value will be automatically defaulted and all segments configured for the context will be automatically displayed.
- If you change the document type, the appropriate context value will again be defaulted and all segments for the corresponding context code will be displayed automatically.

Document Record Preferences

You can restrict the creation, update, and deletion of document records post approval for a document type. By default, the preferences for document records aren't restricted. To access the document record preferences, use the Document Types task in the Setup and Maintenance work area.

The following table describes the different combinations that you can select for the document record preferences.

Restrict Create	Restrict Update	Restrict Delete
No	No	No
No	No	Yes
No	Yes	Yes (option disabled)
Yes	Yes (option disabled)	Yes (option disabled)

When you click Yes for the Restrict Create option, the application automatically selects Yes for the Restrict Update and Restrict Delete options. Additionally, the Restrict Update and Restrict Delete options are disabled. When you click Yes for the Restrict Update option, the application automatically selects Yes for the Restrict Delete option. Additionally, the Restrict Delete option is disabled.

Generate Letter from Document Record for a Specific Document Type

You're creating a document type that employees can use to create a document record for generating a letter to submit for their visa processing. You create the document type and additionally specify a BI publisher report path to generate the letter. Create a document descriptive flexfield context that includes the fields required in the letter. You then associate this context with the document type you created.

Before You Start

1. Use the seeded `DocumentReport.xdm` data model to create your own BI template for the letter that needs to be generated. Only one template can be used per document type. The draft and approved letters are based on this template.
2. Create an RTF template and associate this template to the data model. Note down the report path and specify the path when you create the document type.
3. Ensure users have access to the report, if necessary add or modify permissions.

Creating the Document Descriptive Flexfield for Visa Application Document Type

1. In the Setup and Maintenance work area, go to the Document Records Descriptive Flexfields task.
2. On the Document Records Descriptive Flexfields page, select `PER_DOCUMENTS_OF_RECORD_DFF` and click Edit.
3. Click Manage Contexts.
4. In the Create Context section, enter values as shown in the table. For others use the default values:

Field	Value
Display Name	Letter for Visa Application
Description	Letter for visa application
Context Code	Auto-populated but can be modified
API Name	Auto-populated but can be modified
Enabled	Checked

5. Click Save.
6. In the Context Sensitive Segment section, create the required segments and fields that you want to include in the visa application letter.

7. Click on Save and Close till you return to the Document Records Descriptive Flexfields page.
8. Click OK and then Done.

Control Access to Document Records

You can control a worker's access to document records by giving the appropriate access. You can grant either the view or manage access to document records based on the document type.

You can restrict access to selected document types by granting view access only for those document types. On the Document Records page, workers can view all document records for which they have view and manage access. They can edit and delete those document records for which they have manage access.

Example

Let's say you want a worker to view all document records but manage documents of type adoption and birth. Here's how you do it:

1. Create a document security profile by including the document types (adoption and birth) that require manage access.
2. Create a custom role for the worker with the View Person Documentation aggregate privilege.
3. Assign the document security profile created in step 1 to the delivered employee role (that contains Manage Person Documentation by Worker aggregate privilege).
4. Assign the delivered and custom employee roles to the user.

For more information about controlling access to document records, see the Oracle Human Capital Management Cloud Securing HCM guide on the Oracle Help Center (<https://docs.oracle.com/en/cloud/saas/index.html>).

For more information on controlling security of document records, see the document Controlling Security of Document Records (2594767.1) on My Oracle Support at <https://support.oracle.com>

Set Document Record Availability

You can view document records using the Document Records task from Quick Actions, person spotlight, My Team work area, or person smart navigation. Additionally, you can specify a date from when the document records for a document type can be viewed. To do this, follow these steps:

Creating the Document Type

1. In the Setup and Maintenance work area, go to the Document Types task.
2. In the Search Results area, click the **Create** icon. The Create Document Type page is displayed.
3. In the Document Type Information area, click **Yes** for the **Publish Required** option when you enter the details. This displays Publish Date as a required field for workers on the Add Document Record page.
4. Select the restrict options for the document record and attachment preferences, and click **Submit**.
5. Click **Yes**, and then click **OK**.

Note:

- You can change the Publish Required option to Yes. To make the change, you need to ensure that all document records of the document type have the publish date populated.

Creating Document Records using HDL

Enter the attribute values as shown in the following table when you create the document records using HCM Data Loader.

Attribute	Value
Publish	Y
Publish Date	Date you want to publish the document records. For example, 2017/12/01.

Note:

- You can update the attribute values through HSDL and REST.
- You need to populate the publish date using HCM Data Loader before you change the publish date to Yes.

For more information about loading document records using HCM Data Loader, see the HCM Business Objects guide.

Related Topics

- [Document Record Preferences](#)
- [Guidelines for Loading Document Records](#)

Document Records Available in Other HCM Flows

You have two options to upload attachments to responsive employment flows:

- **Comments and Attachments section:** In this section, the attachments are associated with the approval workflow. The attachments have a lifecycle of archive and purge after which the attachments are no longer accessible.
- **Document Records section:** In this section, the attachments are stored in the worker's document records. The attachments are not automatically archived or purged.

You can enable both the sections to be used together or independently. If you don't want to permanently store the attachments, you must use the Comments and Attachments section. However, if you want to store the attachments in the employee's document records, you must enable and use the Document Records section. You can add document records specific to a responsive employment business process by enabling the Document Records plug-in section. However, if you don't want the employee to upload any attachment during a transaction, you must disable both the sections using HCM Experience Design Studio.

Here are a few scenarios where you may enable the Document Records plug-in section:

- When hiring a new person, the HR specialist may want to add document records such as offer or contract letter, birth certificate, educational certificates, and previous work experience letters.
- When a person is being terminated, the HR specialist may want to add the resignation letter and clearance emails by different teams such as finance, security, and IT assets.
- When promoting an employee, the line manager or HR specialist may want to add a justification letter or a recommendation letter.

HCM Employment Flows

You can enable the Document Records plug-in section in these HCM employment flows:

- Add Assignment
- Add Contingent Worker
- Add Pending Worker
- Add a Nonworker
- Change Assignment
- Change Location
- Change Manager
- Change Working Hours
- Create Work Relationship
- Direct Reports
- Edit Pending Worker
- Hire an Employee
- Local and Global Transfer
- Promote
- Resignation
- Termination
- Transfer
- Work Relationship

The Document Records plug-in section is hidden out-of-the-box. To enable this section in the responsive employment flow, you must use HCM Experience Design Studio.

For setup information about HCM Responsive User Experience, see the following white paper on My Oracle Support (<https://support.oracle.com>): HCM Responsive User Experience Setup Information (Doc ID 2399671.1)

HCM Flow - Document Type Mapping

By default, all document types that are part of the user's document type security profile appear in the Document Type list of values when creating a document record in an employment flow.

Note: For flows, such as Add Contingent Worker, Add a Nonworker, Add Pending Worker, and Hire an Employee, if the signed-in user has manage access to a document type, then the list of values displays those document types.

If you want to permit only specific document types for an employment flow, you need to configure the mapping of the employment flow with the document type using the HCM Flow and Document Type Mapping section on the HCM Enterprise Information page. To do this, follow these steps:

1. In the Setup and Maintenance work area, search and select the Manage Enterprise HCM Information task.
2. Click Edit, and then click Update.
3. In the Update Enterprise dialog box, select the effective start date and the action reason, and then click OK.
4. Navigate to HCM Flow and Document Type Mapping section.
5. Click the Add Row (+) icon.
6. Select the HCM flow and the document type.

7. Repeat steps 5 and 6 to configure additional mappings.
8. Click on Submit, and then click Yes in the warning dialog box.
9. Click OK in the confirmation dialog box, and then click Done.

Note: There's no date-effective mapping of the Document Type and HCM Flow. The mapping as of the date of the transaction is used.

Points to Consider

- You can attach new document records when adding a pending worker. However, these document records won't be displayed when you edit or convert the pending worker. Nonetheless, you can add more document records as part of the Edit Pending Worker and Convert Pending Worker flows.
- You can attach new document records when using Resignation and Termination flows. However, these document records won't be displayed when you view or correct the termination.
- You can't have different document types mapped for different variations of the Local and Global Transfer flow. For example, Transfer, Global Transfer, and Global Temporary Assignment support the same document types.
- When the employment transaction is deleted (for example, Transfer is deleted), the document records created as part of the transaction are retained. They won't be deleted automatically.
- Existing document records for the person won't be displayed in the Document Records section on the Employment flow pages.
- The Document Records section won't be available in the read-only Employment Info page. You must use the Document Records quick action to view all existing document records for the worker.
- The approval process of the employment flow apply when document records are added as part of the employment flow. When the employment flow is approved, the document records are moved to the worker's document records.
- The document records approval flow won't be applicable for the Document Records plug-in section.
- The document records attributes can't be added to the approval payload of the employment flow when configuring the approval rule for the employment flow.
- The BIP data models for the employment flow approval notifications include the document records data set. However, the BIP templates for employment flow approval notifications don't include the Document Records section out-of-the-box. You need to modify the RTF templates to include the document records information by using the newly defined data set in the corresponding data model.
- Attachments in notifications only display the name and can't be downloaded. An approver can click Edit to view and download the attachments.
- The effective date of the employment transaction works as the publish date for the document records created as part of the employment transaction.
- If the document type configuration is modified such that it makes the pending document records data invalid, then the employment transaction which is pending approval and contains such document records, fails.

Restrict Document Types During Mass Download of Document Records

By default, all document types that are part of the user's document type security profile will appear in the Document Type list of values when the user submits a request to mass download document records. You can restrict the list

of document types that can be mass downloaded from the employment flow by configuring the HCM Flow and Document Type Mapping on the Manage Enterprise HCM Information setup page. This mapping applies only to the Mass Download of Document Records page.

To configure the document type mapping for the Mass Download of Document Records flow, follow these steps:

1. In the Setup and Maintenance work area, search and select the **Manage Enterprise HCM Information** task.
2. Click **Edit**, and then click **Correct**.
3. Navigate to the **HCM Flow and Document Type Mapping** section.
4. Click the **Add Row (+)** icon.
5. Search and select the **Mass download document records** flow and the document type.
6. Repeat steps 4 and 5 to configure any additional mapping.
7. Click **Submit** and then click **Yes** in the warning dialog box.
8. Click **OK** in the confirmation dialog box, and then click **Done**.

Deep Links for Document Records

You can use deep links to open pages without navigating through the menu structure. When you add deep links to a business intelligence report or a company website, users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation. You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them.

You can use these parameters in the document records deep links:

- Person ID
- Person Number
- Document Type ID
- System Document Type
- Mode - mode of the document records page, this can be either Create, View, or List
- Document Type Read Only - should be passed if you pass pMode as CREATE. It can either be Y or N.

Note:

- You must not click deep links that require parameters directly on the deep links page.
- If you try to access a document type in a deep link for which you don't have access or the document type is inactive, you will receive an exception.

This table lists Document Records deep links that are available in the Deep links work area.

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Document Records (DOCUMENT_RECORDS_ANY,NONE)	Opens the Document Records page of a person without person search	Y	pPersonId: unique identifier of the person.	pPersonId: PERSON_ID column in PER_PERSONS or PER_ALL_PEOPLE_F tables

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
	Note: This is same for both HR specialists and managers.		pPersonNumber: number that uniquely identifies the person. Note: Either pPersonId or pPersonNumber is required. pDocumentTypeId: unique identifier of the document type of a specific document record. pSystemDocType: unique identifier of system document type of a specific document record Note: You can pass the pDocumentTypeId or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page. pMode: mode of document records page It can have three values. CREATE: To open Add Document Records page VIEW: To open the document record of the specified type, if it exists. Else, opens the list view. LIST: To open the Document Records list page. Note: If you don't pass pMode, then LIST is passed as Default mode. pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can	pPersonNumber: PERSON_NUMBER PER_ALL_PEOPLE_F tables pDocumentTypeId: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL pSystemDocType: SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			have two values Y or N and N is the default value. If it's Y then the document type field is read-only on the Add Document Records page, else it's editable.	
Document Records (MANAGER_DOCUMENT_RECORDS,NONE)	This deep link is for managers. It displays the person search page where managers can search for their directs and open the Document Records page.	Y	pDocumentTypeld: unique identifier of the document type of a specific document record. pSystemDocType: unique identifier of system document type of a specific document record Note: You can pass the pDocumentTypeld or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page. pMode: Mode of Document Records page. It can have three values: CREATE: To open Add Document Records page VIEW: To open the document record of the specified type, if it exists. Else, open the list view LIST: To open the Document Records list page Note: If you don't pass pMode, then LIST is passed as Default mode. pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can have two values Y or N and N is the default value. If it's Y then the document type field is read-only on	pDocumentTypeld: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL pSystemDocType :SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			the Add Document Records page, else it's editable.	
Document Records (HR_DOCUMENT_RECORDS, NONE)	This deep link is for HR specialists. It displays the person search page where the HR specialist can search his organization and open the Document Records page.	Y	pDocumentTypeld: unique identifier of the document type of a specific document record. pSystemDocType: unique identifier of system document type of a specific document record Note: You can pass the pDocumentTypeld or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page. pMode: mode of Document Records page. It can have three values: CREATE: To open Add Document Records page VIEW: To open the document record of the specified type, if it exists. Else, open the list view LIST: To open the Document Records list page Note: If you don't pass pMode, then LIST is passed as Default mode. pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can have two values Y or N and N is the default value. If it's Y then the document type field is read-only on the Add Document Records page, else it's editable.	pDocumentTypeld: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL pSystemDocType: SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Document Records (DOCUMENT_RECORDS, NONE)	Opens the Document Records page of the signed-in user.	Y	NA	NA
Create Document Record (EMP_CREATE_DOCUMENT_RECORDS, NONE)	Displays the Create Document Records page of the signed-in user.	N	NA	NA
Document Delivery Preferences (EMP_DOC_DELIVERY_PREF,NONE)	Opens the Document Records page of the signed-in user.	N	NA	NA
Document Delivery Preferences (MGR_DOC_DELIVERY_PREF,NONE)	This deep link is for managers. It displays the person search page where the manager can search for their directs and open the Document Delivery Preferences page.	N	NA	NA
Document Delivery Preferences (HR_DOC_DELIVERY_PREF,NONE)	This is for HR specialists. It displays the person search page where the HR specialist can search for their organization and open the Document Delivery Preferences page.	N	NA	NA

This table lists the target audience and security requirements for different Document Records deep links.

Note:

- Replace instances of pod.oraclecloud.com with your pod name.
- Replace the PersonNumber and PersonID with the actual person number and ID. In the examples these are indicated with sample values.

Deep Link	Audience	Security Requirements	Examples
Document Records (DOCUMENT_RECORDS_ANY,NONE)	Employee, Manager, HR	Functional Security: • Manage Person Documentation by Worker • Manage Person Documentation by Manager • Manage Person Documentation • View Person Documentation Data Security:	List mode with person number <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonNumber</code> 1. List mode with person ID <code>https://pod.oraclecloud.com/</code>

Deep Link	Audience	Security Requirements	Examples
		- Manage Person Documentation - View Person Documentation	<code>fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson:</code> 2. List mode with person number and document type ID <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson:</code> 3. List mode with person number and system document type <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson: BIRTH</code> 4. List mode with person ID and system document type <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson: ADOPTION</code>
Document Records (MANAGER_DOCUMENT_RECORDS,NONE)	Manager	Functional Security: - Manage Person Documentation by Worker - Manage Person Documentation by Manager - Manage Person Documentation - View Person Documentation Data Security: - Manage Person Documentation - View Person Documentation	Without Parameters <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE</code> With Parameters 1. List mode with system document type (pSystemDocType) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pSystemDocType: BIRTH</code>

Deep Link	Audience	Security Requirements	Examples
			2. View mode with system document type (<code>pSystemDocType</code>) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMode=VIEW</pre> 3. View mode with system document type (<code>pSystemDocType</code>) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys PASSPORT;pMode=VIEW</pre> 4. Create mode <code>pMode</code> (equal to CREATE) system document type (<code>pSystemDocType</code>) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pMo</pre> 5. Create mode <code>pMode</code> (equal to CREATE) with system document type <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&bjKey=pSys BIRTH;pMode=CREATE</pre> 6. Create mode <code>pMode</code> (equal to CREATE) with system document type (<code>pSystemDocType</code>) and <code>pDocTypeReadOnly</code> parameter <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMode=CREATE;pDocTypeRea</pre>
Document Records (HR_DOCUMENT_RECORDS,NONE)	HR	Functional Security:	Without Parameters <pre>https:// pod.oraclecloud.com/</pre>

Deep Link	Audience	Security Requirements	Examples
		- Manage Person Documentation by Worker - Manage Person Documentation by Manager - Manage Person Documentation - View Person Documentation Data Security: - Manage Person Documentation - View Person Documentation	<code>fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE</code> With Parameters - List mode with system document type (<code>pSystemDocType</code>) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSystemDocType;BIRTH</code> - View mode with system document type (<code>pSystemDocType</code>) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSystemDocType;BIRTH;pMode=VIEW</code> - View mode with system document type (<code>pSystemDocType</code>) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSystemDocType;PASSPORT;pMode=VIEW</code> - Create mode <code>pMode</code> equal to (CREATE) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE;pMode=CREATE</code> - Create mode <code>pMode</code> equal to (CREATE) with system document type (<code>pSystemDocType</code>) <code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSystemDocType;BIRTH;pMode=CREATE</code> - Create mode <code>pMode</code> equal to (CREATE) with system document type (<code>pSystemDocType</code>) and (Doc Type Read

Deep Link	Audience	Security Requirements	Examples
			Only)pDocTypeReadOnly parameter https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objkey=pSysBIRTH;pMode=CREATE;pDocTypeRead
Document Records (DOCUMENT_RECORDS,NONE)	Employee, Manager, HR	Functional Security: - Manage Person Documentation by Worker - Manage Person Documentation by Manager - Manage Person Documentation - View Person Documentation Data Security: - Manage Person Documentation - View Person Documentation	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS&action=NONE
Create Document Record (EMP_CREATE_DOCUMENT_RECORDS,NONE)	Employee, Manager, HR	Functional Security: - Manage Person Documentation by Worker - Manage Person Documentation by Manager - Manage Person Documentation - View Person Documentation Data Security: - Manage Person Documentation - View Person Documentation	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_CREATE_DOCUMENT_RECORDS&action=NONE
Document Delivery Preferences (EMP_DOC_DELIVERY_PREF,NONE)	Employee, Manager, HR	Functional Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences Data Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_DOC_DELIVERY_PREF&action=NONE

Deep Link	Audience	Security Requirements	Examples
Document Delivery Preferences (MGR_DOC_DELIVERY_PREF, NONE)	Manager, HR	Functional Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences Data Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MGR_DOC_DELIVERY_PREF&action=NONE
Document Delivery Preferences (HR_DOC_DELIVERY_PREF,NONE)	Employee, Manager, HR	Functional Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences Data Security: - Manage Person Document Delivery Preferences - View Person Document Delivery Preferences	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOC_DELIVERY_PREF&action=NONE

Related Topics

- [Deep Links](#)

How You Set Preferences for Document Delivery

You typically define delivery preferences for documents that are delivered periodically from employers to workers, for example, payslips, or year end tax statements. You can select default delivery methods for a document type, including online and paper, and specify other delivery related preferences. You set these preferences using the Document Types task in the Setup and Maintenance work area.

These are the key attributes required for setting document delivery preferences:

Attribute	Description
Delivery Method	Select default delivery methods for a document type, including online and paper, and specify other delivery related preferences.
Online Delivery Consent Required	Specify whether worker consent is required for delivering documents online-only. If you set the Online Delivery Consent Required option to Yes and Initial Consent Granted to No, then the Delivery Method is automatically selected as Paper and the option is disabled for edit; the option is automatically deselected (while still disabled) when you set Initial Consent Granted to No again.

Attribute	Description
Allow Person Level Overrides	Enable workers to override the delivery preferences for their document records. Note: If this isn't enabled, delivery preferences for the document type is displayed in read-only mode in the Document Delivery Preferences page.
Document Delivery Default Overrides	Set default delivery preferences on the document type and override the preferences on associated work structures. Delivery preference is derived based on the preference set at these levels: • Document Type (lowest precedence) • Payroll Statutory Unit or Legal Employer • Department • Location • Person (highest precedence)

FAQs for Document Records

Can I change the Document Type setting from Person to Assignment?

Yes, you can. But, you must populate the assignment ID for all document records for that document type. Otherwise, such document records will be at the person level. You can update the document record and add the assignment ID only using HSDL, HDL, or REST.

Overview of Work Schedules

How You Configure and Assign Work Schedules

To define worker schedules, you configure calendar events and work schedules using these tasks in the Setup and Maintenance work area. They're part of the Workforce Deployment offering, Workforce Information functional area.

	Task	Description
1	Manage Availability Lookups	Use lookup codes to define geographical locations for area 1 through area 4, such as United Kingdom (area1), England (area2), and London (area3). Add the codes to the ORA_PER_GEOGRAPHIC_TREE_NODES lookup to create these location lookups.

	Task	Description
		Use the PER_CAL_EVENT_CATEGORY lookup type to define calendar event categories beyond the delivered Public holiday category.
2	Manage Geography Trees	Create the geographic tree and tree versions. Add the geographic tree nodes to the tree versions. Also, audit, activate, and flatten the tree versions.
3	Manage Calendar Events	Create calendar events, such as May Day , Thanksgiving , and Boxing Day , to include and exclude at various levels of the organizational or geographical hierarchy.
4	Manage Locations	Update locations, as appropriate, to override calendar events for default geographic hierarchies. For example, a team in Bangalore is working with a team in France. For the duration of the project, you want the Bangalore team to also observe the French public holidays. This task is part of the Workforce Structures functional area.
5	Work Shifts	Create work shifts, such as Day Office and Night Home .
6	Work Workday Patterns	Create workday patterns using the work shifts, such as a weekly work pattern with the Day Office shift starting on Monday and ending on Wednesday. The Night Home shift starts on Thursday and ends on Friday.
7	Eligibility Profiles	Create profiles that automatically determine who's eligible for a particular work schedule. For example, you want to identify people in the Support department.
8	Work Schedules	Create work schedules made up of work patterns, calendar events, exceptions, if any, and eligibility profiles.
9	Work Schedule Assignment Administration	Assign the work schedules to the appropriate workforce structures, such as assignment, position, job, department, or location.
10	Work Schedule Assignment	Modify the work schedule assignment for a specific person. This task is in the Person Management work area, on the Tasks panel tab after you find the specific person.

Related Topics

- [How an Individual's Schedule Is Determined](#)

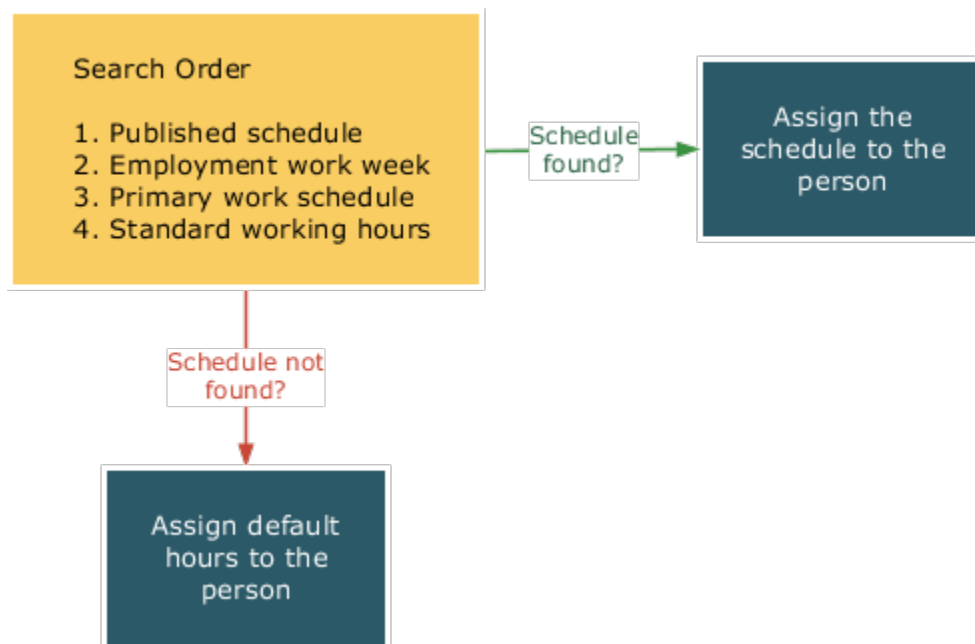
How an Individual's Schedule's Determined

You can set up an individual's work time in different ways. A person's official schedule for a selected time period's automatically determined using this information:

- Current schedule or work hours
- Calendar events and work schedule resource exceptions
- Absence entries

Search Order

This flow chart shows you the order that the application searches for someone's schedule, before applying it to the assignment.



Published Schedule (Workforce Management)

The published schedule's built using the employment work week, primary work schedule, or standard working hours for each person. It can also be built using published schedules from other scheduling applications. The published schedule shows applicable calendar events and absences.

Employment Work Week

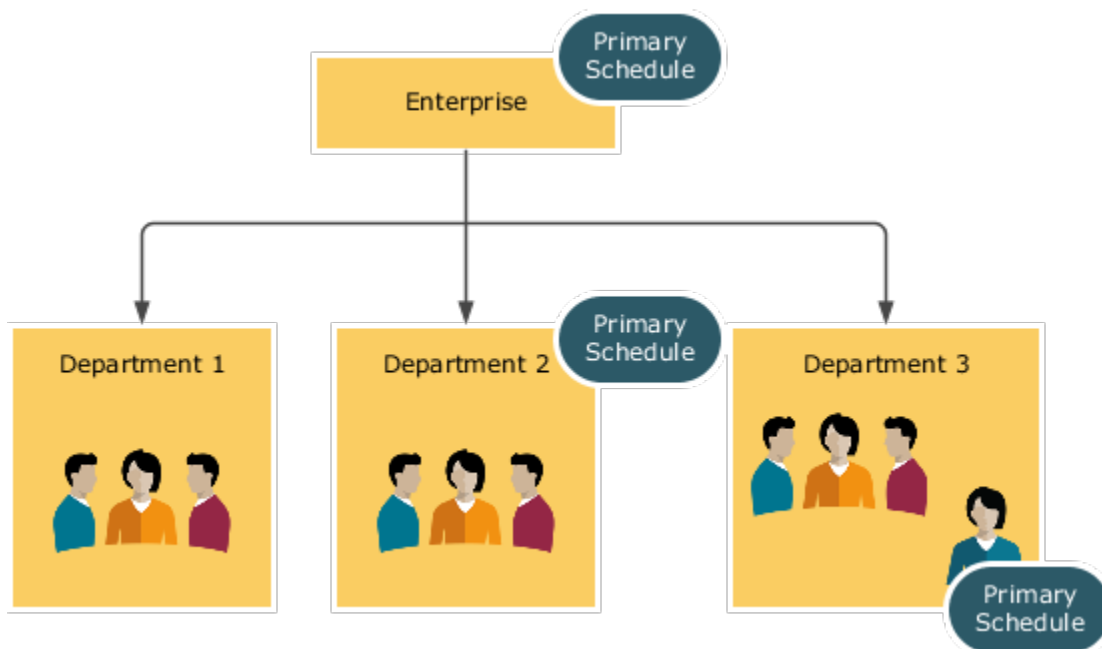
The employment work week's configured on the person's employment record. Schedules built from the work week also show applicable calendar events and absences.

Primary Work Schedule

The primary work schedule's linked to one of these levels. Schedules built from the work schedule also show assigned calendar events and resource exceptions, as well as applicable absences.

1. Primary assignment of the person
2. Position
3. Job
4. Department
5. Location
6. Legal Employer
7. Enterprise

The process moves through the schedule hierarchy in the specified order and stops as soon as it finds a primary schedule. This example hierarchy shows primary work schedules associated with three levels.



Departments 1 and 3 don't have primary schedules. So, the primary schedule at the enterprise level applies to everyone, with one exception. A person in department 3 has a schedule for their primary assignment. That primary assignment schedule applies instead of the enterprise-level schedule. Department 2 has a primary schedule, and it applies to everyone in that department.

Everyone's schedules are affected by the calendar events and resource exceptions that exist in the primary work schedule, regardless of level. They're also affected by any absences they report during the selected time period.

Standard Working Hours

The standard working hours are defined on the person's primary assignment. Schedules built with these hours also show applicable calendar events and absences.

Default Hours

If the application doesn't find a schedule, it uses the default hours 8:30a to 5:00p.

Calendar Events and Geographic Hierarchy

People Covered by a Calendar Event

You determine whether the people covered by a calendar event are identified using an organization or a geographic hierarchy. For example, the calendar event covers everyone in an enterprise or a specific department. Or, the calendar event covers everyone in a specific country, state or province, or city.

By default, a calendar event covers everyone in the hierarchy nodes you include in the coverage. But, the event covers people assigned work schedules only if you add the event or calendar event category as an exception in the work schedule.

Related Topics

- [Geographic Hierarchy Determines Calendar Event Coverage](#)
- [Organization Hierarchy Determines Calendar Event Coverage](#)

Geographic Hierarchy Determines Calendar Event Coverage

A calendar event applies to people's work assignments according to their geographic location when the event uses the geographic hierarchy. For example, in the UK you want to identify January 2 as a holiday in Scotland but not in England, Wales, or Northern Ireland.

You create geographic hierarchies using the **Manage Geography Trees** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area. You link the geography hierarchy to calendar events when you set the calendar event **Hierarchy Type** to **Geographic**.

Related Topics

- [People Covered by a Calendar Event](#)

Organization Hierarchy Determines Calendar Event Coverage

A calendar event applies to people's work assignments according to their position in an organization when the event uses the organizational hierarchy. For example, you want the **Annual Sales Team Outing** calendar event to apply to everyone in and below the Sales department in the organization hierarchy. You don't want it to apply to people in the Research department.

You create the organization hierarchy using the **Manage Organization Trees** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area. You link the organization hierarchy to calendar events when you set the calendar event **Hierarchy Type** to **Organization**.

Related Topics

- [People Covered by a Calendar Event](#)

Basic Process to Create a Calendar Event Using a Geographic Tree

Here's the basis process to create calendar events using a geographic tree:

1. Add the country, state, and city level nodes in the **Geographic Tree Nodes** lookup.
Note: You add this lookup only when you want to create calendar events for states and cities.
2. Create a geography tree based on the delivered tree structure HCM Geography Tree Structure and add a tree version.
3. Add geographic tree state and city nodes.
4. Audit, activate, and row-flatten the tree version.
5. Create calendar events for the country, state, and city level nodes.
6. Optionally, override the default geography hierarchy, as appropriate.
7. Sign in as a covered individual to confirm the calendar events are part of their schedule.

Related Topics

- [People Covered by a Calendar Event](#)
- [Geographic Hierarchy Determines Calendar Event Coverage](#)
- [How do I create a calendar event category](#)

Add India and UK Nodes to the Geographic Tree Nodes Lookup

You're adding the IN and UK country nodes to the **ORA_PER_GEOGRAPHIC_TREE_NODES** lookup so that you can use them to create calendar events. The IN node includes the Telangana and Karnataka state nodes and the Hyderabad and Bangalore city nodes. The UK node includes the England and Scotland state nodes and the London and Edinburgh city nodes. Use the **Manage Availability Lookups** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

1. On the Manage Availability Lookups page, click **ORA_PER_GEOGRAPHIC_TREE_NODES**.
2. In the ORA_PER_GEOGRAPHIC_TREE_NODES: Lookup Codes section, add the India and UK lookup codes, as shown in this table. The lookup code should be a unique short code for the country, state or province, or city.

Lookup Code	Meaning
GL	Global
IN	India
IN_TELA	Telangana, India
TELA_HYD	Hyderabad, Telangana

Lookup Code	Meaning
IN_KARN	Karnataka, India
KARN_BAN	Bangalore, Karnataka
UK	United Kingdom
UK_ENG	England, United Kingdom
ENG_LON	London, England
UK_SCOT	Scotland, United Kingdom
SCOT_EDIN	Edinburgh, Scotland

3. Click **Save and Close**.
4. On the Manage Availability Lookups page, click **Done**.

Related Topics

- [Create a Geographic Tree and Tree Version for India and UK](#)

Create a Geographic Tree and Tree Version for India and UK

You're creating a geographic tree version for India and UK that you can use when you create calendar events. Use the **Manage Geography Trees** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Before You Start

Make sure all of the geographic nodes that you need are in the **ORA_PER_GEOGRAPHIC_TREE_NODES** lookup type.

Create a Geographic Tree

1. On the Manage Trees and Tree Versions page, **Actions** menu, select **Create Tree**.
2. On the Create Tree: Specify Definition page, in the **Name** field, enter **Enterprise Locations**.
3. In the **Code** field, enter **ENT_LOC**.
4. Click **Next**.
5. On the Create Tree: Specify Labels page, click **Next**.
6. On the Create Tree: Specify Access Rules page, click **Submit**.

Create a Geographic Tree Version

1. On the Manage Trees and Tree Version page, select the tree that you just created, **Enterprise Locations**.
2. On the **Create** icon menu, select **Create Tree Version**.
3. On the Create Tree Version: Specify Definition page, in the **Name** field, enter **Enterprise Locations Version 1**.
4. In the **Effective Start Date** field, select **January 1** of this year.
5. Click **Next**.
6. On the Confirmation dialog box, click **OK**.

Add the Root Node

1. On the Create Tree Version: Specify Nodes page, click the **Create** icon.
2. On the Add Tree Node dialog box, in the **Data Source** field, select **Geographic Tree Calendar Top Scopes Data Source**.
3. In the **Available Nodes** field, select **Global** and move it to the **Selected Nodes** field. You select **Global** because the first node in a geographic tree must be the root node.
4. Click **OK**.

Add the Country-Level Nodes

1. On the Create Tree Version: Specify Nodes page, select **Global**.
2. Click the **Create** icon.
3. On the Add Tree Node dialog box, in the **Data Source** field, select **Geographic Tree Territory Code Data Source**.
4. In the **Available Nodes** field, select the **GB United Kingdom** and **IN India** country level nodes and move them to the **Selected Nodes** field.
5. Click **OK**.

Add the State-Level Nodes

1. On the Create Tree Version: Specify Nodes page, expand the **Global** node.
2. Select a country node, such as **GB United Kingdom**.
3. Click the **Create** icon.
4. On the Add Tree Node dialog box, in the **Data Source** field, select **Geographic Tree Calendar Events Data Source**. Now you can define the state-level nodes.
5. In the **Available Nodes** field, select **England, United Kingdom** and **Scotland, United Kingdom**, and move them to the **Selected Nodes** field.
6. Click **OK**.
7. Repeat steps 2 -- 6 to add the Telangana and Karnataka state-level nodes for India.

Add the City-Level Nodes

1. On the Create Tree Version: Specify Nodes page, expand the **GB United Kingdom** node.
2. Select **England, United Kingdom**.
3. Click the **Create** icon.
4. On the **Add Tree Node** dialog box, in the **Data Source** field, select **Geographic Tree Calendar Events Data Source**.
5. In the **Available Nodes** field, select **London, England** and move it to the **Selected Nodes** field.
6. Click **OK**.
7. On the Create Tree Version: Specify Nodes page, click **Submit**.
8. On the Confirmation dialog box, click **OK**.

9. Repeat steps 1 -- 9 to add the Hyderabad city-level node to the **Telangana, India** node. Repeat them again to add the Bangalore city-level node to the **Karnataka, India** node.

Related Topics

- [Add India and UK Nodes to the Geographic Tree Nodes Lookup](#)
- [Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version](#)

Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version

You're auditing, activating, and row-flattening the India and UK geographic tree version you want to use to create calendar events. Use the **Manage Geography Trees** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Before You Start

Make sure that the Enterprise Locations geographic tree exists and has the **Enterprise Locations Version 1** tree version. Use the **Manage Geography Trees** task to confirm it exists or to create it.

Audit the Tree Version

1. On the Manage Trees and Tree Versions page, expand the geographic tree that you created.
2. Select the **Enterprise Locations Version 1** tree version.
3. On the **Actions** menu, select **Audit**.
4. On the Trees Audit Result page, click **Online Audit**.
5. On the Confirmation dialog box, click **OK**.
6. On the Tree Audit Result page, click **Done**.

Activate the Tree Version

1. On the Manage Trees and Tree Versions page, ensure that the tree version that you created, **Enterprise Locations Version 1**, is still selected.
2. On the **Actions** menu, select **Set Status Active**.
3. On the Confirmation dialog box, click **OK**.

Row-Flatten the Tree Version

1. On the Manage Trees and Tree Versions page, ensure that the tree version that you created, **Enterprise Locations Version 1**, is still selected.
2. On the **Actions** menu, select **Flatten > Row Flattening**. Flattening the tree version makes tree retrieval and display faster.
3. On the Row Flattening page, click **Online Flattening**.
4. On the Confirmation dialog box, click **OK**.
5. On the Row Flattening page, click **Done**.
6. On the Manage Trees and Tree Versions page, click **Done**.

Related Topics

- [Create a Geographic Tree and Tree Version for India and UK](#)

Create the May Day Calendar Event for India

You're creating the **May Day** calendar event for India. Use the **Manage Calendar Events** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Before You Start

Make sure that the **Enterprise Locations** geographic tree exists. Use the **Manage Geography Trees** task to confirm it exists or to create it.

Create the Calendar Event

1. On the Manage Calendar Events page, click the **Create** icon.
2. On the Create Calendar Event page, complete the fields, as shown here.

Field	Value
Name	May Day
Short Code	MD_HYD
Category	Public Holiday
Start Date	5/1/18 12:00 AM
End Date	5/2/18 12:00 AM

3. In the Coverage section, **Hierarchy Type** field, select **Geographic**.
4. In the Hierarchy field, select **Enterprise Locations**.
5. In the Coverage Source section, expand the hierarchy and select the **India** nodes.
6. Click **Include**.
7. Click **Submit**.
8. On the Confirmation dialog box, click **OK**. On the Manage Calendar Events page, you can see that the **May Day** calendar event was created.
9. On the Manage Calendar Events page, click **Done**.

Related Topics

- [People Covered by a Calendar Event](#)
- [How an Individual's Schedule Is Determined](#)
- [Create a Geographic Tree and Tree Version for India and UK](#)
- [Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version](#)
- [How You View WFM Team Schedules](#)

Override the Default Edinburgh Geography Hierarchy with Hyderabad

You're overriding the default geographic hierarchy for a team of project managers in Edinburgh, Scotland working with developers in Hyderabad. For the duration of the project, you want the Edinburgh team members to observe the same public holidays as their Hyderabad teammates. Use the **Manage Locations** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area.

Override the Default Hierarchy

1. On the Manage Locations page, search for the person's location, for example, using the name **Edinburgh**.
2. In the Results in Table section, select **Edinburgh**.
3. On the Edit menu, select **Update**.
 - a. On the Update Location dialog box, select the action reason, such as **Seasonal Closure**.
 - b. Click **OK**.
4. Click **OK**.
5. Click **Save**.
6. On the Confirmation dialog box, click **OK**.
7. Click **Submit**.
8. On the Warning dialog box, click **Yes**.
9. On the Manage Locations page, click **Done**.

Related Topics

- [People Covered by a Calendar Event](#)
- [Create the May Day Calendar Event for India](#)

Calendar Events FAQs

What's a half day calendar event?

An event that divides the duration shift on the specified day in half. It shows the person's availability to work for only the first half of the day. You can add half-day events to elapsed work schedules.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)

What's a calendar event message?

A message that appears on the calendars of people covered by a calendar event. For example, a message about a Spanish public holiday could appear on the calendars of people working in Spain. It lets people working in other countries know why people in Spain are unavailable on that date. You create calendar event messages using the **Planned Schedule** task in the Time Management work area.

Why didn't a calendar event message appear on the calendars of everyone in an organization or location?

If you use work schedules and a person is covered by a calendar event, you need to include the calendar event as a schedule exception. Otherwise, even though the person belongs to the organization or location covered by the calendar event, no calendar event message appears on their calendar. You add the calendar event exception to their primary work schedule or schedule assignment.

How do I create a calendar event category?

Add lookup codes to the **PER_CAL_EVENT_CATEGORY** lookup. Use the **Manage Availability Lookups** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

How can I view calendar events I created?

Sign in with credentials for someone who would have the calendar event. Then, open their calendar in the Time and Absences work area and go to the appropriate month, week, or day.

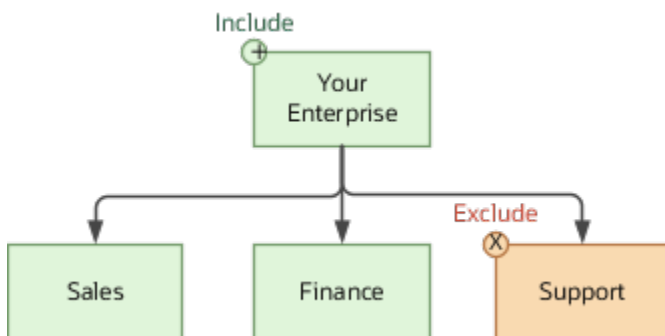
Calendar Event Setup Examples

Example of Including and Excluding Calendar Event Coverage in a Hierarchy

You want to apply the New Phone System Training calendar event to everyone in your enterprise except those people working in the Support department. When an event applies to most of a hierarchy, it's most efficient to include the whole hierarchy in the coverage. Then, you can exclude the exceptions.

Include an Enterprise, Exclude a Department

You include your enterprise, which also includes the departments in that organization hierarchy, such as Sales and Finance. Then, you exclude the departments that the calendar event doesn't apply to, such as the Support department.



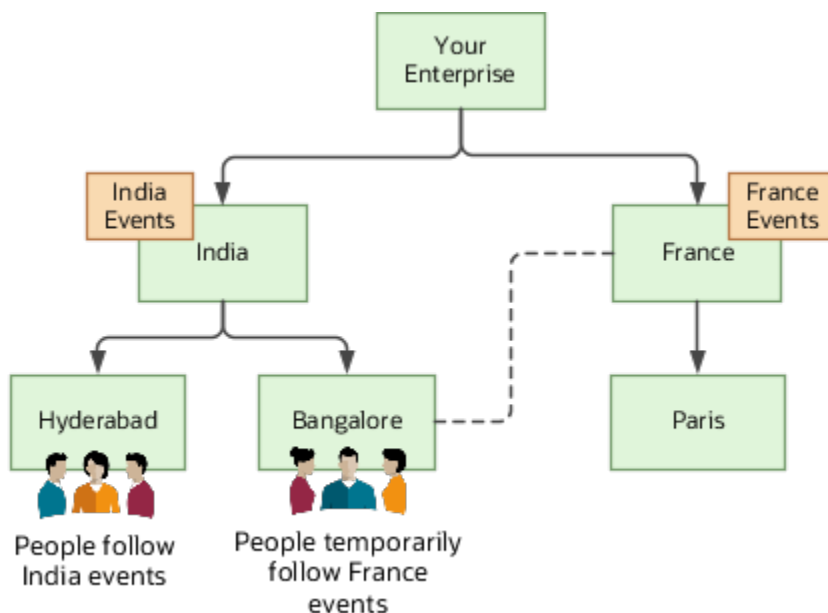
You can also include and exclude geographic hierarchy levels the same way.

Examples of Overriding Calendar Event Coverage for Specific Geographic Locations, Levels, and Individuals

You set up public holidays and other calendar event for people at your India and France locations using a geographic hierarchy. You also set up regional holiday events for Hyderabad and Bangalore. You override geographic coverage for locations and levels using the **Manage Locations** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area. You override geographic coverage for individuals on their Employment page.

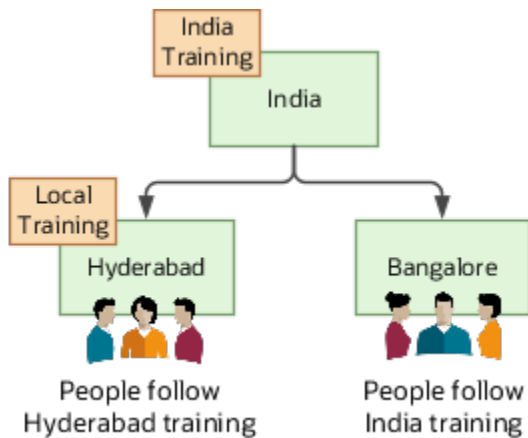
Specific Geographic Locations

For 6 months, your people in Bangalore work closely with their counterparts in Paris on a critical project. During this time, you want the people in Bangalore to follow the calendar events you set up for France. On the Manage Locations page, edit the location information for Bangalore and set the geographic hierarchy to France, as shown here.



Specific Geographic Levels

You're providing training on a new phone system to people in your India offices. People in Hyderabad have a regional holiday at that time, so you schedule their training for the next week. On the Manage Locations page, edit the location information for each person, setting the geographic hierarchy to Hyderabad instead of India. This edit links each person with calendar events defined exclusively for their Hyderabad location, as shown here.



Specific Individuals

Some individuals in Bangalore are working closely on a project with their French counterparts for a year. For the duration of the project, you want these individuals in Bangalore to follow the calendar events for the France location. For each individual, open their Employment page and set the geographic hierarchy to France.

Related Topics

- [Geographic Hierarchy Determines Calendar Event Coverage](#)

Examples of Overriding the Calendar Event Name or Category in a Hierarchy

You can create a calendar event using the name or category that makes sense to the most people in the organization or geography. You can then override the name or category at lower levels of the hierarchy, as appropriate.

Calendar Event Name

You set up the **May Day** calendar event for all locations in your enterprise. But, you want people in France to see the event as **Labor Day**. On the Calendar Event page, select the France location node on your geographical hierarchy. Then, click the **Override** icon to enter a new name for the event.

Calendar Event Category

You linked the **Good Friday** calendar event with the **Public Holiday** event category and applied the coverage to all departments in your enterprise. But for your finance department, you want to change the event category to a voluntary holiday. On your organization hierarchy, select the Finance node. Then, click the **Override** icon to select a different category.

Related Topics

- [People Covered by a Calendar Event](#)
- [Organization Hierarchy Determines Calendar Event Coverage](#)

Work Schedules

Work Schedule Types Supported by Oracle HCM Cloud Applications

You define availability details for a period using work schedules. Oracle HCM Cloud applications support only time and elapsed work schedules. You create these schedules using the **Work Schedules** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Note: For people with multiple assignments, assign work schedules of the same type to their assignments so that absence durations calculate correctly.

Time

A time work schedule has a fixed work day pattern and anyone assigned the schedule is available for specific hours each day. For example, you want an 8-hour schedule for 5 days of the week. You create a time work schedule that starts at 8:00a and ends at 5:00p, Monday through Friday.

Elapsed

An elapsed work schedule doesn't have fixed start or end times for anyone assigned the schedule. Instead, they're available for a specific number of hours each day--a specific duration. For example, everyone works 8 hours a day, Monday through Friday. Some people may start work at 9:00a and others at 11:00a. Some people might work in 2-hour bands with an hour or more of nonwork time in between. And some people might work during the night. It doesn't matter as long as they work their assigned duration.

Related Topics

- [Basic Process to Create a Work Schedule](#)
- [Exception Options in Work Schedules](#)

Exception Options in Work Schedules

When you create a work schedule, you can include exceptions, such as public holidays or training sessions. You then use these exceptions to determine people's availability to work.

Calendar Event

A calendar event is an exception for a single event on 1 or more consecutive days, such as a public holiday or training event.

Calendar Event Category

A calendar event category is an exception for all calendar events that make up the event category. For example, the events **New Year's Day**, **Good Friday**, and **Easter Monday** make up the category **UK Public Holidays**.

Resource Exception

A resource exception is an exception for everyone assigned the work schedule. For example, everyone assigned the **Night Shift** schedule is scheduled to attend a training event, so they aren't available to do their regular work.

People can see the **Work period** exceptions for themselves and their team on the Time and Absences work area calendar. They need to select either or both of the **Employment schedule** and **My schedule** display options. They can't see any off period, or nonwork, exceptions.

Related Topics

- [How do I change exceptions in individuals' work schedules](#)

Basic Process to Create a Work Schedule

Here's the basic process to create a work schedule.

1. Create calendar events.
2. Create shifts.
3. Create a weekly work pattern made up of one or more shifts.
4. Create a work schedule made up of a weekly work pattern and calendar event, or calendar event category exceptions.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [Basic Process to Create a Calendar Event Using a Geographic Tree](#)
- [Assign the Weekly Day Office, Night Home Work Schedule](#)
- [Modify the Weekly Day Office, Night Home Work Schedule of an Individual](#)

Create the Day Office and Night Home Time Shifts

You're creating two shifts for a support department in India. The day shift is Monday through Wednesday from 9:00a -- 5:00p. The night shift is Thursday and Friday from 5:00p -- 1:00a. Use the **Work Shifts** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Create the Time Shifts

1. On the Work Shifts page, **Create** icon menu, select **Create Time Shift**.
2. On the Create Time Shift dialog box, complete the fields for one of the shifts, as shown here:

Field	Day Value	Night Value
Name	Day Office	Night Home
Start Time	9:00a	5:00p

Field	Day Value	Night Value
Category	Work from office	Work from home
Duration	8 Hours	8 Hours
Shift Detail Type	None	None

3. Click **Save and Close**. After you complete the second shift, skip to step 5.
4. Repeat steps 1 -- 3 to create the second shift.
5. On the Work Shifts page, click **Done**.

Related Topics

- [Basic Process to Create a Work Schedule](#)

Create the Weekly Day Office, Night Home Work Pattern

You're creating a weekly work pattern that uses the **Day Office** and **Night Home** shifts for a support department in India. Use the **Work Workday Patterns** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Before You Start

Make sure that the **Day Office** and **Night Home** shifts exist. Use the **Work Shifts** task to confirm they exist or to create them.

Create the Time Workday Pattern

1. On the Work Workday Patterns page, **Create** icon menu, select **Create Time Workday Pattern**.
2. On the Create Time Workday Pattern dialog box, in the **Name** field, enter **Weekly Day Office, Night Home**.
3. In the **Length of Days** field, enter **7**.
4. Add the two workday pattern details by completing these steps twice.
 - a. In the Workday Pattern Details section, click the **Add Row** icon.
 - b. Complete the fields for one of the patterns, as shown here:

Field	Day Office Value	Night Home Value
Start Day	1	4
End Day	3	5
Shift Name	Day Office	Night Home

Field	Day Office Value	Night Home Value

5. Click **Save and Close**.
6. On the Work Workday Patterns page, click **Done**.

Related Topics

- [Basic Process to Create a Work Schedule](#)

Create the Weekly Day Office, Night Home Work Schedule

You're creating the work schedule that uses the **Weekly Day Office, Night Home** workday pattern for a support department in India. The work schedule includes public holiday exceptions. Use the **Work Schedules** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Before You Start

Make sure that these tasks are complete. The tasks are in the Setup and Maintenance work area, Workforce Deployment offering, Workforce Information functional area.

1. Make sure that the **Weekly Day Office, Night Home** workday pattern exists. Use the **Work Workday Pattern** task to confirm it exists or to create it.
2. Make sure that the **India_Support_Team** eligibility profile exists and identifies everyone in the India support department. Use the **Eligibility Profiles** task to confirm it exists or to create it.

Create the Work Schedule

1. On the Work Schedules page, click **Create**.
2. On the Create Work Schedule page, complete the general fields, as shown here.

Field	Value
Name	Weekly Day Office, Night Home
Category	Work
Type	Time
Effective From Date	January 1 of the current year
Effective To Date	December 31 of the current year

3. Add the pattern by completing the fields, as shown here.

Field	Value
Sequence	1
Name	Weekly Work Pattern

4. Add the exception by completing the fields, as shown here.

Field	Value
Type	Calendar event category
Name	Public holiday

5. Add the **India_Support_Team** eligibility profile.
6. Click **Submit**.
7. On the Work Schedules page, click **Done**.

Related Topics

- [Basic Process to Create a Work Schedule](#)

Assign the Weekly Day Office, Night Home Work Schedule

You're assigning the **Weekly Day Office, Night Home** work schedule to everyone who works in a support department in India. Use the **Work Schedule Assignment Administration** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Assign the Work Schedule

1. On the Work Schedule Assignment Administration page, search for and click **Weekly Day Office, Night Home**.
2. On the Edit Work Schedule Assignment Administration: Weekly Day Office, Night Home page, in the Resource Assignments section, click the **Add Row** icon.
3. Complete the fields, as shown here:

Field	Value
Resource Type	Department
Name	Support IN

Field	Value
Start Date	January 1 of the current year
End Date	December 31 of the current year
Primary	Yes

4. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.
6. On the Work Schedule Assignment Administration page, click **Done**.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [Basic Process to Create a Work Schedule](#)
- [How do I change exceptions in individuals' work schedules](#)
- [Modify the Weekly Day Office, Night Home Work Schedule of an Individual](#)

Modify the Weekly Day Office, Night Home Work Schedule of an Individual

You need to modify the work schedule for Vijay Singh because he's scheduled to attend the Advance Communication Skills training on February 8. His schedule has to indicate that he's unavailable on that day.

Modify the Work Schedule

1. Click **Navigator > Person Management**.
2. On the Person Management: Search page, search for and click **Vijay Singh**.
3. On the Tasks panel tab, click **Work Schedule Assignment**.
4. On the Work Schedule Assignment page, click the **Add Row** icon.
5. In the Schedules section, complete the fields, as shown here:

Field	Value
Name	Weekly Day Office, Night Home
Start Date	January 1 of the current year
End Date	December 31 of the current year

Field	Value
Primary	Yes

6. In the Exceptions section, click the **Add Row** icon.
7. Complete the fields, as shown here:

Field	Value
Type	Resource Exception
Name	In the choice list, click Create . Then, create a resource exception called Advanced Communication Skills that starts and ends on February 8.
Availability	Off Period

8. Click **Submit**.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [Basic Process to Create a Work Schedule](#)
- [How do I change exceptions in individuals' work schedules](#)
- [Assign the Weekly Day Office, Night Home Work Schedule](#)

Work Schedules FAQs

What's a primary work schedule?

The schedule used to determine an individual's work availability. For example, you assign two schedules for different time periods to someone's primary work assignment. For those schedules to determine the person's work availability for those time periods, you need to set both schedules to **Primary**. If you assign only a single work schedule, that schedule automatically determines the person's work availability.

You manage work schedules using the **Work Schedule Assignment** task in the Person Management work area.

How do I change exceptions in individuals' work schedules?

You can change how the exceptions affect that person's work availability when you assign a schedule to someone using the Work Schedule Assignment page. For example, you added a calendar event as an exception that affects everyone. But, a designated person has to remain available to handle critical customer queries. So, you change the person's work availability for that exception.

FAQs for Workforce Records

How can I enable the network at work features?

As an Implementor, you can enable and configure network at work using the Configure Offerings page in the Setup and Maintenance work area. You select the Network at Work functional area under the Workforce Deployment offering.

Social network integration is disabled by default. You can enable social network integration and specify whether to enable the Follow action and publish HCM profile updates to Oracle Social Network.

13 Responsive User Experience Setup

Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application. Deep links can also be used for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools > Deep Links**.
3. Copy the URL for a deep link.
4. Paste the URL in the desired location.

When you open Deep Links, you will find a list of all available deep links.

Quick Actions

Quick actions are links on the Home page that enable you to initiate actions quickly on yourself, your team, or your client groups. You can view the quick actions grouped under the following tabs:

- **Me** - This tab lists actions to manage your own information.
- **My Team** - This tab lists actions to manage your team.
- **My Client Groups** - This tab lists actions to manage people within your area of responsibility.

Click the **Show More** link to view all the available actions grouped under a specific head.

The set of actions that you see are displayed based on your security privileges. The people that you can act on differ based on the tab you're on. Consider that you're both a line manager and an HR Specialist. You can access the Promote action from both the tabs: My Team and My Client Groups. Also, you will see a different set of employees on each tab whom you can promote. You can promote only your direct reports using the Promote task in the My Team tab. You can promote only those employees that you have access to as an HR Specialist, using the Promote task in the My Client Groups tab.

Related Topics

- [Configure Quick Actions](#)

Search Logic Profile Options for Client List of Values in Global Human Resources

You can use the logic **CONTAINS** to create the client list of values. This returns results containing the characters you enter. Optionally, for individual list of values, you could change this logic to **STARTS WITH**, to return results that start with the search characters you enter.

For example, when you search for a person with the name John Smith while using the logic **CONTAINS**, you can search by **'jo'** or **'sm'** or **'th'**. When you use the logic **STARTS WITH**, your search must start with **'j'**.

Use the logic **STARTS WITH** when your list contains thousands of values (more than 15,000 records) to improve the search performance. Or, if you don't partition your data by set ID.

Note: If you change the search logic for a client list of values, the logic changes in all pages where the list of values is used.

You can use these profile options to change the search logic for a client LOV in Global Human Resources.

Object	Profile Option Code
Address Attributes	PER_LOV_SEARCH_ADDRESSES_STARTSWITH (Site level value is delivered as Y)
Bargaining Unit	PER_LOV_SEARCH_BARGAININGUNITS_STARTSWITH
Business Unit	PER_LOV_SEARCH_BUSINESSUNITS_STARTSWITH
Collective Agreement	PER_LOV_SEARCH_COLLECTIVEAGREEMENTS_STARTSWITH
Country (including Phone Country Code)	PER_LOV_SEARCH_HCMCOUNTRIES_STARTSWITH
Department	PER_LOV_SEARCH_DEPARTMENTS_STARTSWITH
Department Trees	PER_LOV_SEARCH_DEPARTMENTTREENODES_STARTSWITH
Document Type	PER_LOV_SEARCH_HRDOCUMENTTYPES_STARTSWITH
Cost Center	PER_LOV_SEARCH_HCM_COSTCENTER_STARTSWITH
Grade	PER_LOV_SEARCH_GRADES_STARTSWITH
Grade Ladder	PER_LOV_SEARCH_GRADELADDERS_STARTSWITH
HCM Trees	PER_LOV_SEARCH_HCMTREES_STARTSWITH

Object	Profile Option Code
Job	PER_LOV_SEARCH_JOBS_STARTSWITH
Job Families	PER_LOV_SEARCH_JOBFAMILIES_STARTSWITH
Legal Employer	PER_LOV_SEARCH_LEGALEMPLOYERS_STARTSWITH
Location	PER_LOV_SEARCH_LOCATIONS_STARTSWITH
Organization Trees	PER_LOV_SEARCH_ORGANIZATIONTREENODES_STARTSWITH
Person (Worker, Manager, Employee)	PER_LOV_SEARCH_WORKERS_STARTSWITH
Position	PER_LOV_SEARCH_POSITIONS_STARTSWITH
Position Trees	PER_LOV_SEARCH_POSITIONTREENODES_STARTSWITH
Roles	PER_LOV_SEARCH_ROLES_STARTSWITH
Sets	ORA_PER_LOV_SEARCH_HCM_SETS_STARTSWITH
Union	PER_LOV_SEARCH_UNIONS_STARTSWITH
User Accounts	PER_LOV_SEARCH_USERACCOUNTS_STARTSWITH
User Roles	PER_LOV_SEARCH_USERROLES_STARTSWITH

Related Topics

- [Set Profile Option Values](#)

Displayed, Conditionally Displayed, and Hidden Fields in Global Human Resources

Responsive user experience pages, by default display the frequently used fields and hide the less frequently used fields. This topic helps you to identify which fields are displayed, conditionally displayed, or hidden in Global Human Resources. If there are hidden fields your company wants to display, you can personalize the responsive pages using Page Composer. Visibility of fields displayed either as delivered or enabled using Page Composer can then be controlled using the Transaction Design Studio. Use the Transaction Design Studio to control the availability of fields and sections of a transaction for new redesigned transactions by legal employer and role.

Related Topics

- [Responsive User Experience- Global Human Resources - Displayed, Conditionally Displayed, and Hidden Fields \(Doc ID 2709404.1\)](#)

HCM Experience Design Studio

You can do these actions in the HCM Experience Design Studio:

- Configure HCM actions
- Configure person spotlight
- Add background images for landing pages for redesigned HCM actions.

How to Configure HCM Actions

You can do these actions in the Transaction Design Studio:

- Create rules to configure pages to include sections and fields applicable to your business.
- Change the required status of optional attributes.
- Control the availability of the questionnaire page for actions that use the guided process design.
- Enable flexfields and the segments you want to make visible.

You can specify these common criteria for a rule:

- **Legal Employers:** Select the legal employers covered by the rule.
- **Business Unit:** Select the business unit covered by the rule.
- **Roles:** Select the applicable roles. This is the role of the user performing the action not the person being acted on.

You can hide unused or optional sections and fields on the redesigned actions and pages. For example, for the promote action for the India legal employer, you can show the salary section if salary is adjusted when a worker is promoted, or you can hide the position section and the position fields if you don't use position management.

You can create multiple rules for an action. The criteria help determine which rule applies to which employees. If an employee meets multiple criteria for a page or action, then the rules are applied in the order displayed in the transaction design studio. You can set a rule to be active or inactive. You can have only one active rule for any action at any time. You can also

Note: You can configure the Convert Pending Worker flow using the Create Work Relationship action.

How is it Different from the Page Composer

The Transaction Design Studio doesn't replace the ADF Page Composer completely but reduces the need to create EL expression to vary pages for different roles or legal employers. You can use either of the tools depending on your requirement. Use the ADF Page Composer advanced configuration options to configure changes not supported by the Transaction Design Studio

How to Configure the Person Spotlight

You configure the person spotlight using the person spotlight page in the HCM Experience Design Studio. You can rename the tabs and pages, and change the sequence in which they appear on a person's spotlight. In addition, you can hide a tab completely or use an EL expression to make the tab available to a select group of employees.

Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio. You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the frequently used attributes and hide the less frequently used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages**.
4. Select the site layer and click **OK**.

Related Topics

- [Overview of Page Modification](#)

Create Rule to Configure Promote Action

In this example, you create a rule to configure the Promote action. You must hide the Compensation region in the Promote flow for all UK legal employers. This rule is applicable for line manager performed promotions only.

Prerequisites

1. You must activate a sandbox before defining a rule.
2. Enable page-level configuration at the Site level.

Select the Action

1. On your Home page, select **My Client Groups > Employment > HCM Experience Design Studio**.
2. Select the **Transaction Design Studio** tab.
3. Select **Promote** from the **Action** list.

Add Rule

1. Click **Add** to add a new rule.
2. Enter these rule details:

Field	Value
Name	UK Promotion
Description	Hide Compensation region for UK LE only
Legal Employers	Vision Corporation UK
Action	Promotion
Business Unit	Vision Operations
Worker Type	Employee, Contingent worker
Roles	Line Manager (ORA_PER_LINE_MANAGER_ABSTRACT)
Active	Yes

Configure Rule

1. In the Show or Hide Regions section, scroll down to the Compensation row and select **Not visible**.
2. Scroll down to the Page Attributes region and select **Promotion** from the **Region** list.
3. In the Grade attribute row, select **Not visible** from the list.
4. Click **Save**.

How You Configure List of Values (LOVs)

You can centrally configure list of values (LOV) used in HCM so that the same search and display fields appear on all pages that use this LOV. You can independently configure the search and display fields. The configuration controls what your users will see in results; display or search-and-display fields, and what fields user will be able to search against - search-only or search-and-display fields. For example, if you configure Name, Work Email, and Person Number as searchable fields for the Workers LOV, these fields will appear on all pages that have the Workers LOV and you can use them in searching for values.

You can do these actions, based on the particular LOV capabilities and your requirements.

- Hide fields that aren't relevant for your organization
- Add more fields to enhance the search results and easily identify an individual record
- Reorder fields to reflect their relevance in your organization

You can configure these LOVs on the Search Configuration page in the HCM Experience Design Studio.

- Countries
- Departments
- Jobs
- Locations
- Phone Countries
- Positions
- Workers

These are some key points to note:

- If Oracle Search or database implementations of the same LOVs are available, then only the enabled one will be listed.
- The LOV configuration is a replacement for any personalization implemented through Page Composer. Any personalization done using Page Composer may be overwritten on upgrade. It's recommended to revert any personalization and use the LOV Configuration instead.
- The user must have the Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege to your user to access the LOV configuration UI.

LOV Configuration Options

You can configure these options on the individual LOV configuration pages.

Section	What You Can Do
Search and Display Fields	• Choose the fields to display in the search results. Use the Add and Delete actions to add or remove fields respectively. • Choose the display order of the fields. Use the Up and Down arrow icons to reorder the list of fields as required. • Choose the searchable (Search and display option) or not-searchable fields (Display only option)
Search Only Fields	Choose the fields that you can use for search, but these fields may not appear in the search results. Use Add and Delete actions to add or remove such fields respectively
Preview	Test your configuration

Flows That Display the Configured LOVs

Product	LOV	Flow
Global Human Resources	Countries	• Add a Contingent Worker • Add a Nonworker • Add a Pending Worker • Add Document Record • Contact Info • Create Work Relationship • Edit Document Record • Edit Pending Worker • Family and Emergency Contacts • Hire an Employee • Identification Info • Local and Global Transfer • Location Details • Personal Details
Global Human Resources	Departments	• Add Assignment • Add a Contingent Worker • Add a Nonworker • Add a Pending Worker • Change Assignment • Create Work Relationship • Edit Pending Worker • Employment Details • Hire an Employee • Local and Global Transfer • Manage Job Offers • Mass Legal Employer Change • Pending Workers • Position Details • Promote • Request a New Position • Request a Position Change • Transfer • Vacancy
Global Human Resources	Jobs	• Add Assignment • Add a Contingent Worker • Add a Nonworker • Add a Pending Worker

Product	LOV	Flow
		• Change Assignment • Create Work Relationship • Edit Pending Worker • Employment Details • Hire an Employee • Job Details • Local and Global Transfer • Manage Job Offers • My Team • Pending Workers • Position Details • Promote • Request a New Position • Request a Position Change • Transfer • Vacancy
Global Human Resources	Locations	• Add Assignment • Add a Contingent Worker • Add a Nonworker • Add a Pending Worker • Change Assignment • Change Location • Create Work Relationship • Edit Pending Worker • Employment Details • Hire an Employee • Local and Global Transfer • Location Details • Manage Job Offers • Mass Legal Employer Change • Pending Workers • Position Details • Promote • Request a New Position • Request a Position Change • Transfer • Vacancy
Global Human Resources	Phone Countries	• Add a Contingent Worker

Product	LOV	Flow
		- Add a Nonworker - Add a Pending Worker - Contact Info - Create Work Relationship - Edit Pending Worker - Family and Emergency Contacts - Hire an Employee - Local and Global Transfer - Location Details
Global Human Resources	Positions	- Add Assignment - Add a Contingent Worker - Add a Nonworker - Add a Pending Worker - Change Assignment - Create Work Relationship - Edit Pending Worker - Employment Details - Hire an Employee - Local and Global Transfer - Manage Job Offers - My Team - Position Details - Promote - Request a New Position - Request a Position Change - Transfer - Vacancy
Global Human Resources	Workers	- Add a Contingent Worker - Add a Nonworker - Add a Pending Worker - Add Assignment - Change Assignment - Change Location - Create Work Relationship - Edit Pending Worker - Employment Details - Hire an Employee - Local and Global Transfer

Product	LOV	Flow
		- Location Details - Mass Download of Document Records - Mass Legal Employer Change - Position Details - Promote - Request a New Position - Request a Position Change - Responsive Quick Action Person Search - Share Info (Grantee) - Termination - Transfer
Talent Management		- Career Development - Goal Management - Performance Management - Profile Management - Requested Feedback - Succession Management - Talent Review

Workers LOV

You need to enter a search term to display the search results. No workers are displayed when you don't enter any search terms in the LOV. This is to prevent showing random workers initially, even before you search for a worker as most times randomly listed people may not be the people that you're searching. This helps in improving both, user experience and performance.

You can't search by business title; it's disabled by default. You can enable it on the **Manage Administrator Profile Values** page by setting the **PER_LOV_SEARCH_WORKERS_EXCLUDE_BUSINESS_TITLE** profile option to **N**. You need to then change the property of the **Business Title** field from **Display only** to **Search and display** in the Search and Display Fields section,.

Note: The Workers LOV attributes vary depending on whether Oracle Search is enabled for people.

FAQs for Responsive User Experience Setup

Why can't I see some quick actions on landing pages after an upgrade?

These responsive landing pages are redesigned:

- Absences
- Career Development
- Compensation
- Data Exchange
- Goals
- Mass Updates
- New Person
- Performance
- Profiles
- Workforce Structures

Quick action tasks available on the **My Client Groups** tab are also available from the new landing pages as well. If you don't see a task in the list of quick actions, you won't see it on the landing page and vice-versa. You need to enable the quick actions to see these tasks in the landing pages. Here are the steps to enable the quick actions.

1. Navigate to **Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter a name and description for the sandbox.
4. Add **Structure** and any other tools you require.
5. Click **Create and Enter**.
6. Navigate to **Configuration > Structure**.
7. Click **My Client Groups** and then click the **Quick Actions** tab.
8. Select the quick action you want to configure.
9. Change the **Visible** or other settings as needed.
10. Click **Save and Close**.

Does the Transaction Design Studio replace the Page Composer?

No. The Transaction Design Studio doesn't replace the Page Composer completely but reduces the need to create EL (Expression Language) expression to vary pages for different roles or legal employers. You can use either of the tools depending on your requirement.

Why isn't the Create Primary Work Relationship field visible for a global transfer even though it's set to Visible in the Transaction Design Studio?

When you set the Create Primary Work Relationship field in the Local and Global Transfer flow to Visible, this is what happens:

- The field is visible when you create a global temporary assignment by selecting the transfer type as Temporary in the Local and Global Transfer flow.
- The field isn't visible when you do a global transfer by selecting the transfer type as Permanent in the Local and Global Transfer flow. This is because the work relationship is set to Primary by default in a global transfer. There's no choice of whether to create a primary work relationship or not.

Why can't I see the roles I selected earlier in a rule for the Additional Person Info action in the Transaction Design Studio?

In cases where you can select multiple roles for a rule in the Transaction Design Studio, the roles have to belong to any of these categories to be visible in the Roles menu.

- HCM_Job
- HCM_Abstract
- HCM_Data

If the role belongs to any other category, then the role won't be visible in the Transaction Design Studio.

Related Topics

- [Role Types](#)

Why can't I see the direct reports action and action reason fields in the When and Why section of the Resignation flow even though they're enabled in the Transaction Design Studio?

You can't see the action and action reason fields for the direct reports in the Resignation page because the person resigning can't reassign their own direct reports. The fields are visible to the approver of the resignation when the resignation transaction goes for approval.

14 Workforce Profiles

Overview of Profile Management

Profile management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. Profiles summarize the qualifications and skills of a person or a workforce structure such as a job or position.

Profiles are valuable for tracking workers' skills, competencies, and accomplishments, and for various talent management activities, such as career planning, identifying training needs, performance management, and in the recruitment process for identifying job requirements and suitable applicants.

Note:

If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A.

In the Enhanced Talent Profiles feature, the display of the person profile and talent ratings has a more engaging and responsive interface design. The new user experience enables features to be presented on both mobile and web pages. The interfaces are simple, intuitive and are written in a more conversational language.

The administration enhancements provide increased product performance and extensibility. The enhanced solution introduces content templates that represent the talent content (for example, Competencies, Certificates, Skills, and Awards) required to support the Oracle Talent Management Suite. Each content template includes unique attributes. These content templates can be used and reused to create the content sections necessary to capture talent data. The templates can be used to design both person and model talent profiles.

Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

This topic discusses:

- Profile search
- Profile comparison
- Best-fit analysis

Profile Search

You can search for worker, job, and position profiles based on certain criteria. For example, a Human Resource (HR) Specialist in London requiring to fill an Applications Developer position internally, can search for profiles of all workers who are based in London and have experience with Java and PL/SQL.

Profile Comparison

Use the **Compare** option in the Organization Chart tab on the person gallery to compare profiles. You can compare profiles to determine next career moves or training needs for workers, and identify suitable candidates for jobs. For example, John is looking for his next career move. He can compare his profile to that of a job to determine whether his competency ratings match the targeted competency ratings in a job profile. If his Teamwork rating is 3 and the rating requirement for the job is 4, he has a deficiency of -1. John and his manager can use this gap to drive development plans and other talent management-related functions.

Best-Fit Analysis

Use the best-fit analysis to determine the person profile that most closely matches a job profile and vice versa. For example, if you want to fill a Developer vacancy, and the job profile requires a B.S. degree in Computer Science, level 4 expertise in Java, and a rating of at least 3 in Teamwork, you can review an automatically-generated list of workers who most closely match this set of requirements. You can also use the best-fit analysis to find workers who are similar to a selected worker, or jobs that are similar to a selected job.

For more information about Best Fit, see My Oracle Support: Oracle Profile Management: Best Fit Analyses (Doc ID 2043543.1).

Related Topics

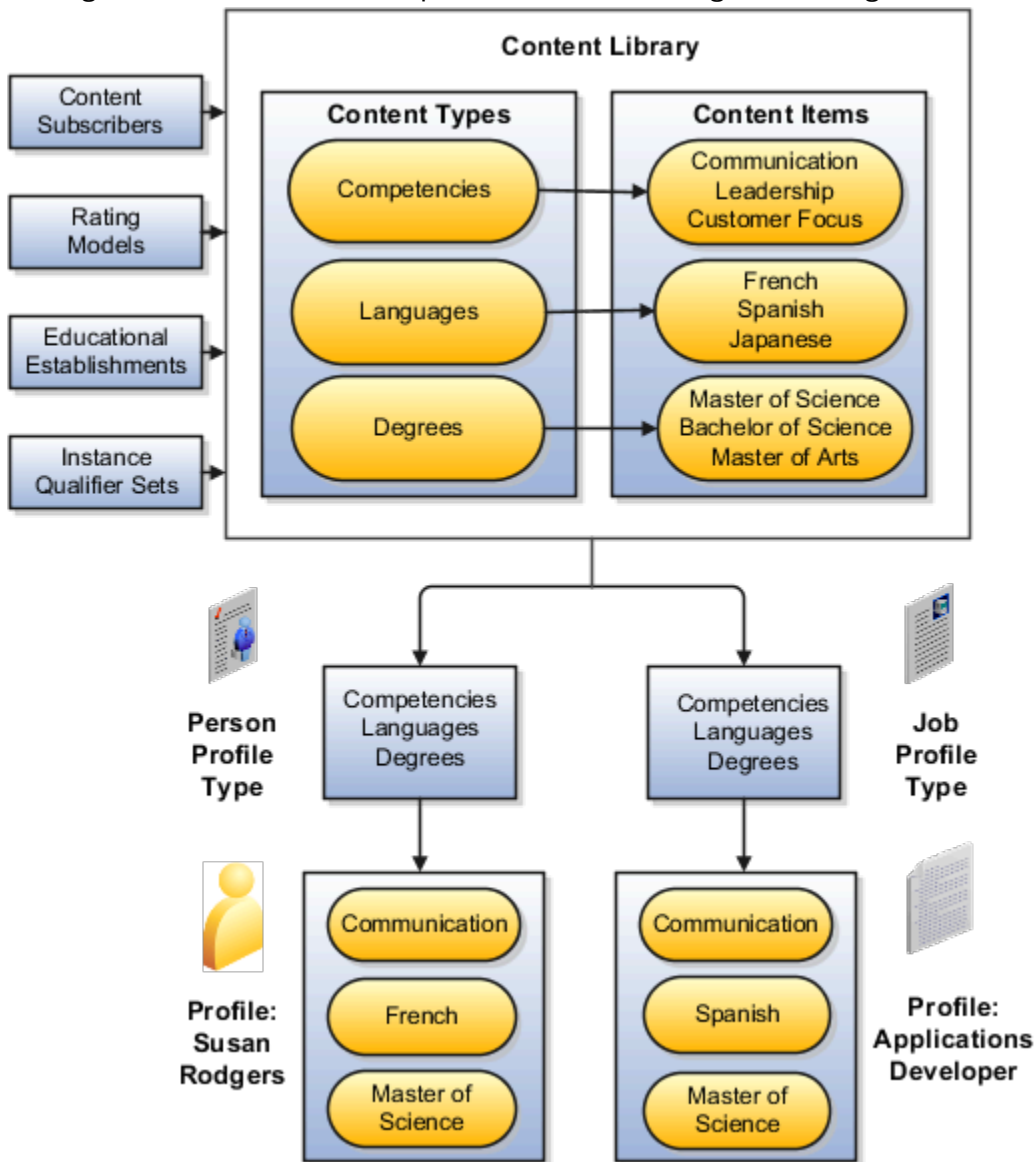
- [Oracle Fusion Profile Management Components: How They Work Together](#)
- [Talent Profile Summary](#)
- [Comparing Items](#)
- [How Best-Fit is Calculated](#)

Oracle Fusion Profile Management Components: How They Work Together

You can configure Oracle Fusion Profile Management to meet your business requirements using these components: the content library, profiles and profile types, content subscribers, educational establishments, instance qualifier sets, and rating models.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. In the Enhanced Talent Profiles feature, the display of the person profile and talent ratings has a more engaging and responsive interface design. The new user experience enables features to be presented on both mobile and web pages. The interfaces are simple, intuitive and are written in a more conversational language. The administration enhancements provide increased product performance and extensibility. The enhanced solution introduces content templates that represent the talent content (for example, Competencies, Certificates, Skills, and Awards) required to support the Oracle Talent Management Suite. Each content template includes unique attributes. These content templates can be used and reused to create the content sections necessary to capture talent data. The templates can be used to design both person and model talent profiles. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

This figure illustrates how the components of Profile Management fit together.



Content Library

The content library provides the foundation for profiles as it stores both content types and content items.

Profile Types

Profile types are templates that you use to create profiles. Profile types determine:

- Whether the profile is for a person or for a workforce structure such as a job or a position.
- The content of the profile.

You select content types from the content library to create content sections for the profile type.

Profiles

You create person profiles for individual workers and model profiles for workforce structures, such as jobs or positions. The profile type that you select for the model profile determines the information that you complete for the profile. For example, a person profile might contain information about a person's education, language skills, competencies, and activities and interests. A job profile might contain information about the requirements for the job, such as competencies, language skills, degrees, or certifications.

Content Subscribers

Content subscribers are applications external to Profile Management that use content types.

Educational Establishments

You can define educational establishments to enable workers to add education information, such as degrees, to their profile.

Instance Qualifier Sets

You assign instance qualifiers to content types. Instance qualifier sets uniquely identify multiple instances of a content item on a profile. For example, if multiple people update a performance rating for a competency on a worker's profile, instance qualifiers provide a unique identifier to each instance of the competency. The unique identifier enables you to determine who provided each rating.

Rating Models

When you create content types in the content library, you can attach rating models to determine the scale for measuring performance and proficiency. You can also use rating models to measure the risk and impact of loss for workers, and to measure their potential.

Related Topics

- [Profile Types](#)
- [Content Types](#)
- [Rating Models](#)
- [Instance Qualifier Sets](#)

Rating Models

Rating Models

Use rating models to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile. You can also use rating models to specify target proficiency levels for items on a model profile, so that the model profile can be compared to workers' profiles. Use the Manage Profile Rating Models task in the Profiles work area to create a rating model.

To rate workers on their performance and proficiency, attach rating models to the content types included in the person profile. Then you can rate workers on the items within the type. For example, you can rate workers on the Communication content item within the Competencies content type.

For model profiles, you can specify target proficiency levels for items on the profile, to compare model profiles with worker profiles. Using the ratings:

- Managers can compare a model profile to workers' profiles with and determine the best person suited to fill a position.
- Workers can compare their profile to model profiles to identify:
 - Suitable positions within the organization.
 - Skill gaps and fill the gaps before applying for other positions.

Rating models that measure workers' potential and the impact and risk of loss are also available.

Rating models can include some or all of the following components, depending on the use for the model:

- Rating levels
- Review points
- Rating categories
- Distributions

Rating Levels

Rating levels identify the qualitative values, such as 1, 2, 3, or 4, that you use to rate a worker.

For rating models that are used by Oracle Fusion Performance Management, you must:

- Define numeric ratings, particularly for rating models in performance documents that use calculated ratings.
- Define rating levels using whole numbers, with the highest number indicating the best rating. Rating levels determine high and low ratings in the analytics.

Review Points

Define review points for rating models in performance documents that use the average, sum, or band calculation method. The review points and point ranges that you define for the rating model are used to calculate ratings.

Rating Categories

Using rating categories you can group rating levels together for analysis tools used in the talent review process, such as the box chart that is used in the talent review process. You can group rating levels into categories such as low, medium, and high, and those categories then become the labels for the analytic. You should not change rating categories after setting them up, as the changes could affect the analytic.

Distributions

Oracle Fusion Compensation Management and Oracle Fusion Performance Management both use rating model distributions to determine the targeted minimum and maximum percentage of workers that should be given each rating level. Compensation Management uses the distribution values that you set up directly on rating models. However, you can set up distributions using the Manage Target Ratings Distribution task for rating models that are used in Performance Management.

Related Topics

- [How You Update Talent Ratings](#)
- [Box Chart Matrix Options](#)

How You Update Talent Ratings

Talent ratings are ratings that are used to evaluate a worker, including performance, potential, proficiency, readiness, and impact. Ratings are used in multiple products within the HCM product family such as Oracle Fusion Profile Management, Oracle Fusion Performance Management, and Oracle Fusion Talent Review.

Talent Rating Types

The following table displays the talent ratings and their description. Depending on application settings and roles assigned, you can view, add, and update these talent ratings across multiple products within the HCM product family.

Talent Ratings	Description
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines.
Performance rating	Evaluate the overall performance document.
Potential level	Evaluate a person based on the execution of the person's work.
Potential score	Evaluate a person's attainable level of excellence or ability to achieve success.
N box cell assignment	Evaluate a person's current contribution and potential contribution to the organization on a box chart matrix with N boxes. N represents the number of boxes in the grid.
Advancement readiness	Evaluate a person's readiness for the next position in their career development.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Impact of loss	Evaluate the real or perceived effects on an organization when the person leaves.
Proficiency	Evaluate a person's skill level for a competency.
Behavior ratings	Evaluate a person's actions for a behavior associated with a competency.

Updating Talent Ratings

You can update talent ratings depending on application settings and roles assigned to you. The following table shows where talent ratings can be updated.

Talent Ratings	Can Be Updated on the Career Planning page?	Can Be Updated in Talent Review?	Can Be Updated in Performance Management?	Can Be Updated in Succession Management?
Talent score	Yes	Yes	No	No
Performance rating	Yes	Yes	Yes	No
Potential level	Yes	Yes	No	No
Potential score	Yes	Yes	No	No
N box cell assignment	No	Yes	No	No
Advancement readiness	Yes	No	No	No
Risk of loss	Yes	Yes	No	Yes
Impact of loss	Yes	Yes	No	Yes
Proficiency	Yes	No	Yes	No

Note: You can update Behavior ratings under Competencies on the Edit Skills and Qualifications page for a person.

When you update talent ratings:

- The performance rating on a performance document is always the one entered by the manager during a worker's performance evaluation in the overall section. The performance rating from the worker's performance document overall section is then displayed on the worker's profile when configured to do so in the performance template.
- In Oracle Fusion Compensation Management, if configured, you can also update the performance, performance goals section, and competencies section ratings, which appear in performance documents.
- The talent review process uses talent ratings on the worker's profile to build talent review information. When a talent review meeting concludes, a worker's profile is automatically updated with the calibrated ratings. Therefore, the performance rating displayed in a worker's performance document might be different from the one displayed in the worker's profile.

Related Topics

- [Rating Models](#)

Content Types and Content Items

Content Types

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 custom content types as needed. You can also create free-form content types. Use the Manage Content Types task in the Profiles work area to create a custom content type.

Depending on your business requirements, you can use predefined content types or create custom content types. A predefined or custom content type, can be a free-form content type or not.

Content Types Other than Free-Form

In addition to a code, name, and description, content types that aren't free-form contain the following details:

- **Properties:** Represents the information that you want to capture for the content type. You define properties for a content type on the Field Properties tab on the Edit Content Type page.

Note: On the Field Properties tab, the values of the following fields are automatically generated and can't be edited:

- Content Type ID
- Content Item ID
- Name
- From Date
- Content Supplier

- **Relationships:** Associations between content types, where one content type is a parent of another, or where one content type supports another. You define relationships for a content type on the Relationships tab on the Edit Content Type page. On the Relationships tab, the Proficiency Calculation Rule field is applicable for the Behaviors content type only. The value of this field is set to Average by default and can't be edited.

You can specify whether one content type is a parent of another, or whether one content type supports another. Content items inherit the relationship of associated content types. After you create a relationship, you

can't delete it. You can only specify an end date for it so that the relationship is no longer applicable from the end date.

You can't create:

- Two kinds of relationships between two content types. For example, the content type A can't be both the parent and child of the content type B.
- A relationship between a content type and itself. For example, a content type can't be related to itself.
- **Subscribers:** Codes that represent other Oracle Cloud products or applications that use content types. To use a content type in an Oracle Cloud application, you must add the predefined subscriber code associated with the application to the content type. Custom subscriber codes aren't supported. You add subscriber codes to a content type on the Subscribers tab on the Edit Content Type page.

Examples of predefined content types that aren't free-form are:

- Categories
- Competencies
- Components
- Degree
- Education Levels
- Goals
- Honors and Awards
- Languages
- Licenses and Certifications
- Memberships
- N Box Cell Assignment
- Platforms
- Platform codes
- Product problem codes
- Technical Post Details

Free-Form Content Types

A free-form content type contains only a code, name, and a description, and does not have any properties defined for it until you add it to a profile type. Free-form content types do not include any content items.

Note: Free-form content types don't contain relationships or properties. You add properties for free-form content types when you add them to a profile type.

You can use free-form content types when you don't need a content item because the attribute captured for the content section is free-formed or less-structured. For example, you can't set up a free-form content type to store information for career-related information.

Examples of predefined free-form content types are:

- Accomplishments
- Advancement Readiness

- Areas of Study
- Career Preferences
- Career Potential
- Career Statement
- Criticality
- Enrollments
- Highest Education Level
- Learning
- Performance Rating
- Previous Employment
- Risk of Loss
- Special Projects
- Talent Score
- Work Requirements

Related Topics

- [Content Type Properties: Explained](#)
- [Content Items: Explained](#)
- [Associating Behaviors with Competencies: Points to Consider](#)
- [Content Type Relationships: Examples](#)
- [Content Subscribers: Explained](#)

Content Type Properties

Content type properties represent the information that you want to capture for a content type. Content items inherit the fields and field properties that you define for the content type to which the item belongs. Use the Manage Content Types task in the Profiles work area to create or edit a content type and define its properties. You view properties for a content type on the Field Properties tab on the Edit Content Type page.

You define properties for content types that aren't free-form. For free-form content types, the properties are defined when you add them as a content section to a profile type.

The values of the following content type properties for content types that aren't free-form content types are automatically generated for a profile item and should not be modified:

- **CONTENT_ITEM_ID**
- **CONTENT_SUPPLIER_CODE**
- **CONTENT_TYPE_ID**
- **DATE_FROM**
- **NAME**

Note: The **DATE_FROM** property stores the start date information of a content item within the content type. This field is used for maintaining the history of content items and isn't recommend to be displayed on the UI

Attributes of Content Type Properties

Each content type property has a field for which you set attributes. You determine attributes for each content type property that will be used for defining the relevant content items. The attributes that you can set for each content type property that you include for a content type are displayed in the following table.

Attribute	Description
Default Value	Value that appears by default for the property on the UI
Display	Determines if the property is editable, hidden, or display only for a content item
Label	Label for the property displayed on UI when the property is included within a content type
Required	Determines if the user is required to populate the field
Source	Name of the lookup type that provides values for the property. This attribute is specified for properties ITEM_TEXT_1 to ITEM_TEXT_10

Content Type Properties List

The following table describes a list of content type properties you can define for a content type that isn't free-form. These properties appear on the Field Properties tab on the Edit Content Type page.

Content Type Property	Specifies
COUNTRY_ID	The country ID associated with the content item within the content type
ITEM_DATE_1 to ITEM_DATE_10	Any date. Use these fields to enter dates for profile items
ITEM_NUMBER_1 to ITEM_NUMBER_7	Any numeric data
ITEM_TEXT_1 to ITEM_TEXT_10	Data that requires selecting values from a list. Each field can store up to 30 characters of data. You provide values for ITEM_TEXT_1 to ITEM_TEXT_10 properties by specifying a lookup type for their Source attribute
ITEM_TEXT_11 to ITEM_TEXT_30	Nontranslatable data, such as a code or serial ID. Each field can store up to 30 characters of data
ITEM_TEXT_TL_1 to ITEM_TEXT_TL_5	Translatable data. Each field can store up to 240 characters of data
ITEM_TEXT_TL_6 to ITEM_TEXT_TL_10	Translatable data. Each field can store up to 2000 characters of data
ITEM_TEXT_TL_11 to ITEM_TEXT_TL_15	Translatable data. Each field can store up to 4000 characters of data

Content Type Property	Specifies
RATING_MODEL_ID	The rating model. The rating model you specify for a content type is also applicable for content items associated with the content type. However, for the content items added to the Competencies content type, the rating model selected for the Competencies content section takes precedence
STATE_PROVINCE_ID	The state ID associated with the content item within the content type

Related Topics

- [Content Types: Explained](#)
- [Content Items: Explained](#)
- [Content Section Properties: Explained](#)
- [Creating Content Types and Content Items: Worked Example](#)
- [Free-Form Content Types: Worked Example](#)

Content Subscribers

Content subscribers are codes that represent functional areas that use content types. You manage subscriber codes using the Manage Content Subscribers task in the Profiles work area.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. In the enhanced Enhanced Talent Profiles feature, the display of the person profile and talent ratings has a more engaging and responsive interface design. The new user experience enables features to be presented on both mobile and web pages. The interfaces are simple, intuitive and are written in a more conversational language. The administration enhancements provide increased product performance and extensibility. The enhanced solution introduces content templates that represent the talent content (for example, Competencies, Certificates, Skills, and Awards) required to support the Oracle Talent Management Suite. Each content template includes unique attributes. These content templates can be used and reused to create the content sections necessary to capture talent data. The templates can be used to design both person and model talent profiles. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

To use a content type in a functional area, you must add the associated predefined subscriber code to the content type.

Example: You add a new custom content type Corporate Citizenship to the Person profile type. To view the content section for Corporate Citizenship in the Skills and Qualifications work area, you must add the HRMS content subscriber code to the new content type.

Note: Custom subscriber codes aren't supported.

By default, the application provides predefined subscriber codes for:

- Oracle Fusion applications such as:
 - Talent Review
 - Succession Management
 - Performance Management
 - Network at Work
 - Resource Management
 - Work areas within Oracle Fusion applications such as:
 - Person Management
 - Profiles
- Note:** Different subscriber codes are used to make content types available for job profiles and person profiles in the Profiles work area.
- Skills and Qualifications
 - Team Talent
- Other Oracle Cloud applications such as Oracle Taleo Recruiting Cloud Service

Predefined Subscriber Codes for Oracle Fusion Applications

To make a content type available within an Oracle Fusion application, you must add the associated predefined subscriber code to the content type.

The following table displays the predefined subscriber codes and the corresponding Oracle Fusion application where the subscribed content types are displayed.

Subscriber Code	Oracle Fusion Application
HRTR	Talent Review
SM	Succession Management
HRA	Performance Management
HRS	Network at Work
RM	Resource Management

Predefined Subscriber Codes for Work Areas

To make a content type available in a work area within the application, you must add the associated predefined subscriber code to the content type.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

The following table displays the predefined subscriber codes, the corresponding work area where the subscribed content types are displayed, and the navigation to the work area.

Subscriber Code	Work Area	Navigation
HRMSSPC	Person Management	Select My Workforce then Person Management on the Home page.
HRMSSPC	Profiles (For person profiles)	1. Select My Workforce then Profiles on the Home page. 2. Select the Person Profiles tab, search for a person, and in the Search Results section, click the person name to view the person's profile on the Skills and Qualifications page.
TM	Profiles (For job profiles)	1. Select My Workforce then Profiles on the Home page. 2. Select the Model Profiles tab, search for a job, and in the Search Results section, click the job name to view the job profile.
HRMS	Skills and Qualifications	Select About Me > Skills and Qualifications to open the Skills and Qualifications work area.
HRMS	Team Talent	Select My Team then Team Talent on the Home page.

Predefined Subscriber Codes for Other Cloud Applications

To make a content type available in Oracle Taleo Recruiting Cloud Service, you must add the predefined subscriber code **TALEO** to the content type.

Related Topics

- [Content Types](#)
- [Content Type Properties](#)
- [Content Section Properties](#)
- [Profile Types](#)

Examples of Content Type Relationships

You can associate content items of related content types with each other using content relationships. Use the Relationships tab on the Edit Content Type page to define content type relationships. The following scenarios illustrate the use of content type relationships.

Tracking Product Expertise

The Resource Manager component of Oracle Fusion Trading Community Model uses content type relationships to track the areas of expertise of workers. Using the predefined content type relationship where the Categories content type is a parent of Products, and Products is a parent of Components; resource managers can keep track of the categories, products, and components that they consider as areas of expertise for their resources.

Note: Because these content types and relationships apply only to the Resource Manager component of Oracle Fusion Trading Community Model, this product is the only predefined content subscriber to these content types.

Specifying Target Outcomes for Goals

Workers can manage their goals by associating their goals with target outcomes, which are content types such as Competencies and Memberships. You can set up a relationship on the Competencies content type where Competencies is supported by Goals. Workers can then set up goals that have a specific competency as a target outcome.

Related Topics

- [Content Types: Explained](#)
- [How can I define a relationship between the Goals content type and other content types?](#)

Content Items

Content items are the individual skills, qualities, and qualifications within the content types in the content library. For example, within the Competencies content type, communication is a content item. Use the Manage Content Items task in the Profiles work area to create content items that meet your business needs.

This topic discusses:

- Item properties
- Related content items
- Proficiency descriptions

Item Properties

Content items inherit the fields and field properties that you define for the content type to which the item belongs. For example, one of the fields defined for the Memberships content type is ITEM_DESCRIPTION field. The attributes of this field are set up so that the label is Description, the field is editable, and the field doesn't require an entry. When you set up a content item for the Memberships content type, the application displays a field labeled Description, in which you can enter text to describe the agency, but the field isn't required.

Related Content Items

If the content type for which you are creating an item has related content types, then you can enter the related content items for the item. For example, if you have a content type relationship where the Goals content type supports the Competencies content type, then on the content items for competencies, you can enter the related goals.

Proficiency Descriptions

If the content item belongs to a content type that has a rating model defined for it, then you can either use the existing descriptions for the ratings within the model, or define descriptions for the ratings that are specific to the content item.

When ratings exist for the content item, the descriptions defined for the item are used instead of those on the rating model.

Related Topics

- [Oracle Fusion Profile Management Components: How They Work Together](#)
- [Why can't I change the relationship type of a content item](#)
- [Content Types](#)

How You Enable Approvals for Content Types

By default, any changes to a talent profile aren't subject to approval. When you edit a talent profile, all changes are visible immediately on the talent profile. HR specialists and implementors can enable approvals for each content type so that worker edits on the worker's talent profile require approval.

Content types are defined as content sections in profile types. You can enable approvals for a content section when you edit or create a profile type by using the Manage Profile Types task. You can open the task:

- In the Setup and Maintenance work area. To open the Setup and Maintenance work area, select **Navigator > Setup and Maintenance**.
- In the Profiles work area. To open the Profiles work area, select **Navigator > My Workforce > Profiles**.

As an HR specialist or implementor, follow these steps to enable approval for a content section when you create or edit the person profile type on the Manage Profile Types page:

1. On the Content Sections tab, click the link to the content section.
2. Click the content section link in the Content Sections region to open the Content Section page.
3. Select the **Approval Required** check box to enable approval for that content section.
4. Click **OK** to save your changes.

Note: You can enable approval for a content section added to only the Person profile type.

Related Topics

- [Managing HCM Approval Rules: Explained](#)
- [What happens if I enable custom approval rules for the person profile type?](#)
- [Profile Types: Explained](#)

Create Custom Content Types and Content Items

This example demonstrates how to set up a new custom content type and content items to track the corporate citizenship activities of your workers so that you can rate them on their involvement in the organization. This example also demonstrates how to set up a rating model to use with the content type and add the new content type to the person profile.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Can a predefined rating model be used to rate corporate citizenship?	No. The predefined rating models don't have relevant rating descriptions.
Should the content type be a free-form content type?	No. Content items are needed, and the content should be stored in the content library.
What field and properties should the content type contain?	Add two fields to the content type: - ITEM_TEXT_20 - RATING_MODEL_ID The ITEM_TEXT_20 field uses a label Comments to enter comments about the workers' corporate involvement. The RATING_MODEL_ID field uses a label Company Contribution to attach the rating model for corporate citizenship to the content type. Both fields should require entry and should be editable.
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
What content items are needed to track the required information?	- Corporate social responsibility - Corporate environmental responsibility - Corporate industrial citizenship - Corporate state citizenship - Corporate borough, council, or municipal citizenship
When the content type is added to the person profile as a content section, what properties should the fields contain?	Both the Comments and the Company Contribution fields: - Display in the detail view of the content section - Are required - Must be included in search results

To track corporate citizenship for your workers, complete the following tasks:

- Create a rating model.
- Create a content type.
- Create content items.
- Add the content type to the person profile type.

Creating a Rating Model

- In the Setup and Maintenance work area, search for the **Manage Profile Rating Models** task and click **Go to Task**.
- On the Manage Rating Models page, click **Create**.

- On the Create Rating Model page, complete the following fields, as shown in this table. Use the default values except where indicated.

Field	Value
Code	Citizenship
Rating Name	Corporate Citizenship
Description	Rating model for corporate citizenship

- On the Rating Levels tab, complete the following fields, as shown in this table.

Rating Level	Name	Short Description
1	Demonstrates limited or unused influence.	Limited
2	Demonstrates clear evidence of influence.	Clear Evidence
3	Provides a successful image of the company as socially responsible in limited environments.	Successful Image
4	Actively called upon to use influence as a corporate representative in selected environments.	Influential in Selected Environments
5	Demonstrates high level of influence and can operate effectively in all environments.	High Level of Influence

- Click **Save and Close**.

Creating a Content Type

- In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task**.
- On the Manage Content Types page, click **Create**.
- On the Create Content Type page, add a content type by completing the following fields, as shown in this table. Use the default values except where indicated.

Field	Value
Code	Citizenship

Field	Value
Name	Corporate Citizenship
Description	Ratings for corporate citizenship behaviors for workers.

- Set up the following field properties, as shown in this table. Use the default values except where indicated.

Field Name	Field Label	Required	Display Option
ITEM_TEXT_20	Comments	Selected	Editable
RATING_MODEL_ID	Company Contribution	Selected	Editable

- Click **Save and Close**.
- On the Manage Content Types page, select the **Corporate Citizenship** content type and click **Edit**.
- On the Edit Content Type page, select the **Subscribers** tab.
- On the Subscribers tab, click **Add**.
- In the Subscriber Code field, select **HRMS**.
- Click **Save and Close**.

Creating Content Items

- In the Setup and Maintenance work area, search for the **Manage Profile Content Items** task and click **Go to Task**.
- On the Manage Content Items page, click **Create**.
- In the **Create Content Item** dialog box, complete the following fields, as shown in this table.

Field	Value
Content Type	Corporate Citizenship
Content Item	Corporate Social Responsibility

- On the Create Content Item: Corporate Social Responsibility page, select the **Corporate Citizenship** rating model in the **Rating** field.
- Click **Save and Close**.
- Repeat steps 2 through 5 to add content items for Corporate Environmental Responsibility, Corporate Industrial Citizenship, Corporate State Citizenship, and Corporate Borough, Council, or Municipal Citizenship.

Adding the Corporate Citizenship Content Type to the Person Profile Type

- In the Setup and Maintenance work area, search for the **Manage Profile Types** task and click **Go to Task**.

2. On the Manage Profile Types page, locate the Person profile type and click **Edit**.
3. On the Edit Profile Type: Person page, select the **Content Sections** tab.
4. In the Content Sections region, click **Add Content Section**.
5. In the Content Types dialog box, select **Citizenship**.
6. In the Content Sections region, click **Citizenship**.
7. On the Content Section page, set up the following field properties, as shown in this table. Use the default values except where indicated.

Column Name	Display	Required	Searchable
ITEM_TEXT240_1	Detail	Selected	Selected
RATING_LEVEL_ID1	Detail	Selected	Selected

8. On the Edit Profile Type: Person page, click **Save and Close**.
9. In the Content Access Section region, click **Add**.
10. In the Role field, select **Employee**.
11. Select the **Update** check box.
12. Click **Add**.
13. In the Role field, select **Manager**.
14. Click **OK**.
15. Click **Add**.
16. In the Role field, select **HR Specialist**.
17. Click **OK**.
18. On the Edit Profile Type: Person page, click **Save and Close**.

Related Topics

- [Rating Models](#)
- [Content Types](#)
- [Content Subscribers](#)
- [Create Free-Form Custom Content Types](#)

Create Free-Form Custom Content Types

This example demonstrates how to set up a free-form custom content type, add it to the HRMS content subscriber code, and then add the content type to the person profile type.

Your company wants to track the previous employment information for workers, including employer name, dates of employment, and job description. However, you don't want to set up and maintain content items for each employer, and this information applies only to person profiles. You decide to use a free-form content type for this information. You can set up the free-form content type with minimal information. Then when you add it to the person profile as a content section, you can define properties for employer name, dates of employment, and job description. Workers can complete their employment information on their profile based on how you set up the content section. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Must the content type be a free-form content type?	Yes. Content items aren't needed, and the content must not be stored in the content library.
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
When the content type is added to the person profile as a content section, what fields are needed?	To capture the previous employer, a text field is needed. To capture employment dates, two date fields are needed. To capture job description, another text field is needed. Therefore, the following fields must be added: • ITEM_TEXT30_1 • ITEM_DATE_1 • ITEM_DATE_2 • ITEM_TEXT240_1
What properties are needed for the ITEM_TEXT30_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows: • Label: Previous Employer • Display: Detail (section must appear in detail view of profile)
What properties are needed for the ITEM_DATE_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows: • Label: From Date • Display: Detail
What properties are needed for the ITEM_DATE_2 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows: • Label: To Date • Display: Detail
What properties are needed for the ITEM_TEXT240_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows: • Label: Job Description • Display: Detail
What role access must be granted for the content section?	Employees, managers, and HR specialists must all have access to update the section.

To set up a free-form content type to track previous employment information for workers, you must:

- Set up a free-form content type
- Add the free-form content type to the person profile type

Setting Up a Free-Form Content Type

1. In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task**.
2. On the Manage Content Types page, click **Create**.
3. On the Create Content Type page, complete the following fields, as shown in this table.

Field	Value
Code	PREVEMP
Name	Previous Employment
Description	Track previous employment information for workers.

4. Select the **Free-Form Type** check box.
5. Click **Save and Close**.
6. On the Manage Content Types page, select the **Previous Employment** content type and click **Edit**.
7. On the Edit Content Type page, select the **Subscribers** tab.
8. On the Subscribers tab, select HRMS in the **Subscriber Code** field.
9. Click **Save and Close**.

Adding the Free-Form Content Type to the Person Profile Type

1. In the Setup and Maintenance work area, search for the **Manage Profile Types** task and click **Go to Task**.
2. On the Manage Profile Types page, select the **Person** profile type, and click **Edit**.
3. On the Edit Profile Type: Person page, select the **Content Sections** tab and click **Add Content Section**.
4. In the Content Types dialog box, select the **Previous Employment** content type.
5. In the Content Sections region, click the **Previous Employment** content type and enter the following properties on the Content Section page, as shown in this table.

Column Name	Label	Display
ITEM_TEXT30_1	Previous Employer	Detail
ITEM_DATE_1	From Date	Detail
ITEM_DATE_2	To Date	Detail
ITEM_TEXT240_1	Job Description	Detail

6. In the Content Access Section region, click **Add**.
7. In the Role field, select **Employee**.
8. Select the **Update** check box.

9. Click **Add**.
10. In the Role field, select **Manager**.
11. Click **OK**.
12. Click **Add**.
13. In the Role field, select **HR Specialist**.
14. Click **OK**.
15. On the Edit Profile Type: Person page, click **Save and Close**.

Related Topics

- [Content Types: Explained](#)
- [What's a free-form content type](#)

Considerations for Associating Behaviors with Competencies

Behaviors are subcomponents of a competency. You must create a relationship between the Competencies and Behaviors content types so that you can associate their content items. You associate behaviors with competencies using the Relationships tab on the Edit Content Type page of the Behaviors or Competencies content type. Open the Edit Content Type page by using the:

- Manage Content Types task in the Profiles work area .
- Manage Profile Content Types task in the Setup and Maintenance work area.

The following features aren't available for the Behaviors content type:

- Print behaviors in the Talent Profile Summary report
- Search for persons or competencies based on behaviors using the advanced search
- Upload behaviors content such as from a third-party supplier or HCM Data Loader
- Support for using behaviors in other Oracle Fusion products

When associating behaviors with competencies, you must decide:

- The type of relationship between the Behaviors and Competencies content types
- The duration of each relationship
- Related content items

Deciding the Relationship

You can define the following relationships between the behavior and competencies content types:

- Parent and child relationship: You can define Behaviors as a child of the Competencies content type. Using this relationship, you define a hierarchy where Behavior content items are added to the Competencies content item. For example, when Behaviors is a child of Competencies, you can add the Behaviors content items to one or more Competencies content items. In this relationship, you must associate the same rating model with Competencies and associated Behaviors.
- Supports or supported by relationship: You can enable Behaviors to support the Competencies content type, and vice versa. The supported or supporting content items are not in a hierarchical relationship with one another. That is, each content item associated with a content type is independent of the content items of the other content type. Therefore, you can associate different rating models with each content type, and then add their content items to a profile and review them together.

Note: The proficiency calculation rule is applicable for the Behaviors content type only. The value of the **Proficiency Calculation Rule** field on the Relationships tab on the Edit Content Type page for Behaviors is set to **Average** by default and can't be edited. Using this rule, the application calculates the proficiency rating for the competency as the average of the behavior ratings. The rating provided at the competency level is ignored by the application.

Deciding the Relationship Duration

You can define a duration for the relationship between the Behaviors and Competencies content types. There can be multiple relationships provided their dates don't overlap. You can delete a relationship only when the content type or its related content type is not added to any profiles (model or person). Once the content type or its related content type is added to a profile, you cannot delete the relationship. However, you can enter a To Date for the relationship to end it. You can also relate the content items of Competencies and Behaviors content types, and define the duration of the relationship between content items. Further, you can delete or end the relationship between content items.

Deciding the Related Content Items

After you establish the relationship between the Behaviors and Competencies content types; you must:

1. Create the content items for each content type.
2. Relate the content items between each content type. You relate a content item of a content type with content items of another content type using the Related Content Items tab. The tab is available on the Edit Content Item page. You open the Edit Content Item page by using the Manage Content Items task in the Profiles work area or Setup and Maintenance work area. On the Related Content Items tab, you can view the relationship type between the two content types. You can also decide the duration until when the content items are related with each other.

Related Topics

- [Content Types: Explained](#)
- [Updating Talent Ratings: Explained](#)
- [Content Type Relationships: Examples](#)

Talent Profiles

Profile Types

Profile types include person profile types and model profile types. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to create a profile type.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

Person Profile Types

The person profile type:

- Is the template that you use to create profiles of your workers or nonworkers.
- Contains the skills, qualities, and qualifications that you want to track for your workers.

Model Profile Types

The model profile type:

- Is a template for workforce structures such as jobs and positions. You can set up multiple model profile types.

Note: You must use the Job profile type to create profiles for jobs or positions.

- Identifies the targeted and required skills and qualifications for a job or position.
- Identifies work requirements, such as work schedule and travel frequency.

About Defining 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. However, to create a position profile you must use the Job profile type as the template. 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

Note: You access the Behaviors content section only after you select the Competencies content section on the Edit Profile Type page.

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. You can't define instance qualifiers for the Behaviors content type.

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.

You define all of the properties for free-form content types.

Role Access

You can specify user roles such as Employee or Manager, which define who can view the content section, and who can update the section.

Effective Dates of Profiles

You can associate multiple profiles with a workforce structure. However, only one profile can be in effect at a time for the workforce structure. Therefore, the effective start and end dates of multiple profiles associated with a workforce structure must not overlap.

Related Topics

- [Content Types](#)
- [Content Section Properties](#)
- [Model Profiles](#)
- [Create Job Profiles](#)
- [Create Position Profiles](#)

How You Create Person Profiles

The person profile is a profile type you create for individual workers. Person profile data, such as the skills, qualifications, accomplishments, and career preferences of a person, is displayed on Skills and Qualifications and Career Planning pages on a worker's person profile. HR specialists or implementors can create person profiles from the application, or implementors can upload them using tools such as HCM Data Loader.

The application provides the functionality to automatically create person profiles for person records. You can enable or disable this functionality using the **Autocreate Person Profiles** check box. By default, this check box is already selected. The **Autocreate Person Profiles** check box is available on the Edit Profile Type page of the person profile type. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to edit the person profile type.

When the **Autocreate Person Profiles** check box is selected:

- The application automatically creates the person profile for that person when someone accesses the Skills and Qualifications page for a person.
- The person profile added for a pending worker is activated on the effective hire date for an employee or the effective placement date for a contingent worker.

If you choose to deselect the **Autocreate Person Profiles** check box for the person profile type and no profile exists for a person, the application displays an error message to create or upload profile when you access that person's Skills and Qualifications page. However, when uploading talent profile data from external sources, you must deselect the **Autocreate Person Profiles** check box to avoid duplication of person profiles.

Related Topics

- [Person Records](#)

How You Upload Talent Profile Data

Talent profile data is the person and job profiles data displayed on Skills and Qualifications and Career Planning pages. You access these pages for a worker in the worker's person spotlight. Examples of talent profile data include ratings and corresponding rating models, content items, and educational establishments. You can upload talent profile data for initial migration or mass data entry.

The following tools support upload of talent profile data:

- Oracle ADF Desktop Integration (ADFdi) workbook (only for Classic Talent Profiles).
- Oracle Fusion HCM Data Loader (for Classic Talent Profiles and Enhanced Talent Profiles).
- Oracle Fusion HCM Spreadsheet Data Loader (for Classic Talent Profiles and Enhanced Talent Profiles).

Note: The tools available to you for uploading talent profile data depend on the setting of the HCM Data Loader Scope parameter. The ADFdi workbook isn't affected by the HCM Data Loader Scope parameter. You can continue to upload competencies using the ADFdi workbook regardless of the parameter setting. The ADFdi workbook is only available for classic Talent Profiles. To load content items in Enhanced Talent Profiles, use HCM Data Loader or the HCM Spreadsheet Data Loader.

For more information about:

- Uploading content items using an ADFdi workbook, see Uploading Competencies and Content Items into Oracle Fusion Profile Management (1453118.1) on My Oracle Support at <https://support.oracle.com>.
- All data loaders mentioned earlier, see Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud Guide.

Uploading Actions

The following table displays the type of talent profile data you typically upload and the actions you perform to load that data.

Note: Use the **Open Competency Excel Template** option to generate the ADFdi workbook for uploading competencies. The option is available on the Manage Content Items page in the Profiles work area.

Uploading Tool	Talent Profile Data Type	Actions
ADFdi workbook	• Content item (only Competency)	• Create • Update
HCM Data Loader	• Educational establishment • Talent profile rating model • Talent profile type (only Person and Job) • Talent profile content item • Talent profile content item relationship	• Create • Update • Delete
HCM Spreadsheet Data Loader	• Educational establishment • Talent profile rating model • Talent profile type (only Person and Job) • Talent profile content item • Talent profile content item relationship	• Create • Update

Add Content to a Worker's Profile

Depending on the content section access settings for HR specialists and managers, they can edit content or add it to a worker's profile. To view, add, or edit content of a worker's profile, they must use the worker's Skills and Qualifications page.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

As an HR specialist, follow these steps to either edit the content or add it to the worker's profile:

1. Click **My Client Groups > Profiles** to open the Search: Profiles page.
2. Click the name of the worker in the Results section to open the Skills and Qualifications page of that worker.

Tip: Alternatively, use the Manage Talent Profile task in the Person Management work area to open a person's Skills and Qualifications page.

3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the worker's profile.

As a manager, follow these steps to either edit the content or add it to a report's profile:

1. Click **My Team > Team Talent**.
2. Click a report's person card to open the Skills and Qualifications page for the report.
3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the report's profile.

Related Topics

- [Can I edit skills and qualification data of a person's profile](#)

Talent Profile Summary

The Talent Profile report provides talent-related information for a worker. This topic describes options that you can select when printing the report. To print the report, select the Manage Talent Profile task in the Person Management work area. On the Edit Profile page, select **Actions - Print Profile**. Talent review meeting participants can also print the report for one or more workers from the Talent Review dashboard.

Note: If you are still using Classic Talent Profiles, you should upgrade to Enhanced Talent Profiles before release 21A. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

Report Sections

The Talent Profile report can contain a person summary and five configurable sections. This table describes the contents of each section.

Report Section	Contents
Experience	Current and previous assignments.
Talent Overview	Performance evaluation information for up three years. The section includes the evaluation period, overall rating, overall comments, and a bar graph comparing the performance ratings. You can also include talent ratings.
Education and Qualifications	Competency ratings and evaluation types, degrees, licenses and certifications, honors and awards, and memberships.
Career Options and Interests	Career preference and advancement readiness information, including willingness to travel, relocate, consider part-time employment, or adopt flexible work schedules. You can also include preferred career moves and any jobs in a worker's interest list.
Goals	Development and performance goal information, such as goal names, completion dates, statuses, and descriptions. This section includes a graph of goal achievements for the worker.

Print Formats

You can print the Talent Profile Summary in the following formats:

Print Format	Description
PDF	Includes a photograph of the worker and all selected graphs.
RTF	Includes a photograph of the worker and all selected graphs.
Microsoft Excel	Includes all selected workers in an Excel workbook, with one profile per worksheet and the worker's name as the tab label. This format doesn't include the photograph, performance history, or goals graphs.
HTML	Includes selected graphs but doesn't include the photograph.

Content Sections

Content Sections

Content sections are sections in a profile, person or model, containing profile items. The properties for the content sections are configured under the profile type. You define properties for each content section. However, the accessibility of a content section for person profiles is dependent on the role and security privileges assigned to you.

Content Section Properties

Content section properties or content properties are attributes that are used to define data included in a profile. A free-form content type doesn't have any properties defined for it until you add it to the profile type as a content section. Therefore, you define all properties for free-form content types. You can change content section properties inherited from the content library and free-form content types or add new properties, as needed. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to select and edit a content section associated with a profile and define its properties. You must have the HR specialist or implementor role or privileges to perform this task.

Content Section Approval

For a content section in a profile type, you can specify whether the approval is required when a worker adds the content section that the worker can access to a profile. Use the **Approval Required** check box on the Content Section page to enable or disable approval for a content section. You open the Content Section page, when you add or edit a content section for the person or job profile type on the Manage Profile Types page in the Profiles or Setup and Maintenance work area. You must have the HR specialist or implementor role or privileges to perform this task.

Content Section Access

For accessing the content for person profiles, you must give the required access for the content section to a role. You can specify the level of access as view, edit, or report for each role. For example, users in the line manager role can be given edit access to add and edit the Competencies content and view access to only read the Degrees content for their workers. You can include content-type data in Oracle Business Intelligence Publisher reports. Use the Manage Profile Content Section Access task in the Setup and Maintenance work area to secure access to content sections in person profiles. You must have the IT Security Manager role or privileges to perform this task.

If you search for person profiles, the search results display profiles that match the search criteria. However, you can view content sections details of a person profile based on the access level given to your role. You search for person profiles on the Search: Profiles page in the Profiles work area.

Content sections in person profiles are unsecured when person profiles are included in:

- Best-fit analyses
- Profile comparisons
- Oracle Transactional Business Intelligence reports

No access is required for content sections added to model profiles as their content aren't secured.

Related Topics

- [Content Section Properties](#)
- [Examples of Person Profile Content Access for Roles](#)
- [What's a free-form content type](#)
- [How You Secure Content Sections in Person Profiles](#)

Content Section Properties

Content sections are sections in a profile, person or model, containing profile items. The properties for the content sections are configured under the profile type. Content section properties are attributes that are used to define data included in a profile. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to select

and edit a content section associated with a profile and define its properties. A free-form content type doesn't have any properties defined for it until you add it to the profile type as a content section. Therefore, you define all properties for free-form content types. You can change content section properties inherited from the content library and free-form content types as needed.

Attributes of Content Section Properties

The following table displays a list of attributes that you can set for each content section property that you included for a content section.

Attribute	Description
Default Value	Value that appears by default for the content section property on the profile
Display	Determines if the content section property is displayed on the profile. If yes, then whether the property is displayed on the content section summary, content section details area, or both
Label	Label for the content section property displayed on the profile when the property is included within a content section
Required	Determines if the user is required to enter a value for the property
Searchable	Determines if the content section property name must be included in profile searches
Value Set Name	Name of the lookup type or a predefined value set that provides values for the content section property. You specify a lookup type for properties ITEM_TEXT30_6 to ITEM_TEXT30_15 . The value set is already defined for a predefined content section property, if applicable. For custom content types, you can specify only a lookup type as the value for this attribute
View Attribute	Specifies the attribute in the predefined value set that provides the list of values for a content section property. You enter a value for this attribute only for predefined content section properties and when you mention a predefined value set in the Value Set Name attribute. The view attribute is already defined for a predefined content section property, if applicable. You can't use this attribute for custom content types

Note: The functionality associated with the **Searchable** attribute isn't available for use in the application.

Content Section Properties List

The following table describes a list of content section properties that appear on the pages with a profile item that belongs to the content section.

Content Section Property	Specifies
COUNTRY_ID	The country ID associated with the profile item. Ensure that the value of the Value Set Name attribute is CountryPVO and View Attribute attribute is GeographyName, where CountryPVO is the name of the value set and GeographyName is the attribute in the CountryPVO value set that provides a list of values for the COUNTRY_ID property

Content Section Property	Specifies
DATE_FROM	The start date information of a content section. This property is used for maintaining the history of profile items and isn't recommend to be displayed on the UI
DATE_TO	The end date information of a content section. This property is used for maintaining the history of profile items and isn't recommend to be displayed on the UI
ITEM_DATE_1 to ITEM_DATE_10	Any date. Use these properties to enter dates for profile items
ITEM_DECIMAL_1 to ITEM_DECIMAL_5	Numeric data that includes decimals. For example, price USD 2.99
ITEM_NUMBER_1 to ITEM_NUMBER_10	Numeric data that doesn't include decimals. For example, age 29 years
ITEM_TEXT30_1 to ITEM_TEXT30_5	Data that requires selecting values from a check box
ITEM_TEXT30_6 to ITEM_TEXT30_15	Data that requires selecting values from a list. Ensure that the value of the Value Set Name attribute is a lookup type. For example, HRT_RISK_REASON is a lookup type for selecting risk of loss reasons
ITEM_TEXT_240_1 to ITEM_TEXT_240_15	A simple text string, such as a name. Each property can store up to 240 characters of data. If the ITEM_TEXT_240_1 property is used in: - A predefined free-form content type, you can't enter duplicate data for this property for a profile item - A custom free-form content type, you can enter duplicate data for this property for a profile item - A predefined or custom content type that aren't free-form, you can't enter duplicate data for this property for a content item
ITEM_TEXT2000_1 to ITEM_TEXT2000_5	Long text data, such as a comment. Each property can store up to 2000 characters of data
IMPORTANCE	The priority of the content section. The value of this property is used in the best-fit algorithm
INTEREST_LEVEL	The level of interest. This property is added to the Competency content section. The value of this property is based on the Interest Rating Model and is automatically generated for a profile item
MANDATORY	Whether the item in a content type is required or not. This property is used by content types that are added to the Job profile type. Ensure that the value of the Value Set Name attribute is YES_NO . If added to a content type, the label for this property, is displayed as a check box column for content items within the content type for a job profile. The default label for this property is Required
QUALIFIER_ID1 to QUALIFIER_ID2	The instance qualifier information assigned to the profile content section. To uniquely identify different instances of competencies, you must not modify the predefined value of the QUALIFIER_ID1 and QUALIFIER_ID2 properties for the Competency content section included in the Person profile type
LAST_UPDATE_DATE	The last updated date of the content section. The value of this property is automatically generated for a profile item
RATING_LEVEL_ID1 to RATING_LEVEL_ID3	The rating level information of a profile content section

Content Section Property	Specifies
RATING_MODEL_ID1 to RATING_MODEL_ID3	The rating model information of a profile content section. The RATING_MODEL_ID1 property is used for storing the rating model information for the Competencies content section associated with a job or person profile type. The default value for this property is Proficiency Rating Model
STATE_PROVINCE_ID	The state ID associated with the profile item. This property is used in conjunction with the COUNTRY_ID property. Ensure that the value of the Value Set Name attribute is StateProvincePVO and View Attribute is GeographyName, where StateProvincePVO is the name of the value set and GeographyName is the attribute in the StateProvincePVO value set that provides a list of values for the STATE_PROVINCE_ID property

Note:

- For content sections associated with free-form content types, the values of the properties **CONTENT_TYPE_ID** and **DATE_FROM** are automatically generated for a profile and should not be modified.
- For content sections associated with content types that aren't free-form, the values of the properties **CONTENT_TYPE_ID**, **CONTENT_ITEM_ID**, and **DATE_FROM** are automatically generated for a profile and should not be modified.
- The **SOURCE_ID** property isn't used by the application and can be ignored.

Related Topics

- [Content Sections: Explained](#)
- [Adding Common Lookup Types to a Content Section Property: Explained](#)
- [Content Type Properties: Explained](#)
- [What's a free-form content type](#)
- [What happens if I don't add a label for a content section property](#)

Examples of Person Profile Content Access for Roles

You must identify which job roles and abstract roles need access to content sections and the level of access each role needs. This topic provides examples of content-section access for some roles and identifies tasks that users with those roles can perform.

Scenario

The First Software organization associates the following content sections with the person profile type. These content sections are available as searchable profile content.

- Competencies
- Degree

- Languages
- Licenses and Certifications

The organization has employee, line manager, and license manager roles. An appropriate person security profile is assigned to each role. According to the person security profile:

- Users with the employee role can search for workers according to their access privileges for person records in the directory and manage their own records.
- Users with the line manager role can manage the person records of their reports.
- Users with the license manager role can manage the person records of workers in their department.

The access level for each content section for a role is defined as shown in the following table.

Content Section	Access Level for the Employee Role	Access Level for the Line Manager Role	Access Level for the License Manager Role
Competencies	Edit	Edit	None
Degree	Edit	Edit	None
Languages	Edit	Edit	None
Licenses and Certifications	View	Edit	Edit

Content Access for Employees

As the employee role has the edit access level for all content sections in the organization, all users associated with the role can do the following tasks:

- Search for all workers in the directory and view the publicly accessible content of a person profile
- Search for their own person profile using the searchable profile content
- View their own person profile content for which they have edit or view access. In the example, all employees can view their competencies, degree, languages, and licenses and certifications content on their profile
- Edit their own person profile content for which they have edit access. In the example, all employees can edit their competencies, degree, and languages content on their person profile
- View, add, and remove attachments for their person profile content

Content Access for Line Managers

As the line manager role has the edit access level for all content sections in the organization, all users associated with the role can do the following tasks:

- Search for direct reports within their own person security profile on the Team Talent page
- View secured content of person profiles of their direct reports within their own person security profile. In this example, all line managers can view competencies, degree, languages, and licenses and certifications content on their reports' person profile

- Edit secured content of person profiles of their direct reports within their own person security profile. In this example, all line managers can edit competencies, degree, languages, and licenses and certifications content on their reports' person profile
- View, add, and remove attachments for person profile content of their direct reports within their own person security profile

Content Access for License Managers

As the license manager role has the edit access level for only the Licenses and Certifications content section in the organization, all users associated with the role can do the following tasks:

- Search for workers within their own person security profile in the directory using the searchable profile content
- View Licenses and Certifications content for person profiles of workers within their own person security profile
- Edit Licenses and Certifications content of person profiles of workers within their own person security profile

Related Topics

- [Content Sections](#)
- [How You Secure Content Sections in Person Profiles](#)

Instance Qualifier Sets

An instance qualifier set is a group of codes that uniquely identify different occurrences of the same profile item such as competency content section or a performance rating. Use the Manage Instance Qualifiers task in the Profiles work area to view and edit predefined instance qualifiers. You can't use any custom instance qualifiers.

Purpose

Instance qualifiers identify the role of a person or the application that updated a content type. 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. Instance qualifiers also affect data entered for content types. For example, if configured, a worker with an employee profile can enter a competency with the **Evaluation Type** instance qualifier as **Self** only.

Properties

Each instance qualifier contains a code and a description, which indicate the role or the application that updated the content type.

The following examples list the instance qualifiers displayed on the UI or BI reports when the content type is updated by:

- An application: If an employee's potential rating is updated in a talent review meeting, the instance qualifier of the rating appears as **TRPOTENTIAL** in BI reports. Similarly, if the rating is updated on the employee's Career Planning page, the instance qualifier appears as **PROFILEPOTENTIAL** in BI reports.
- A role: If a competency is updated by an employee, the value of the **Evaluation Type** instance qualifier appears as **Self** on the employee's Edit Skills and Qualifications page and BI reports. Similarly, if the competency is updated by a manager, the value of the **Evaluation Type** qualifier appears as **Supervisor**.

Each instance qualifier has the following properties:

- Priority
- Employee and manager views
- Search ability
- Default instance qualifier for employee and manager

Priority

Priority determines:

- The order in which different instances of a competency are displayed.
- Which instance to use when searching and comparing profiles. The lowest number indicates the highest priority. The lowest number is displayed on the competency gap chart, comparison results for profiles, and best-fit results for a profile.

Employee and Manager Views

If the security privileges associated with employee and manager roles enables them to view or edit a content section, then you can use employee and manager views to 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

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.

Related Topics

- [Content Section Properties: Explained](#)

Lookups

Profile Management Lookups

This topic identifies common lookups that are profile management-related and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements.

Profile Management Lookups

Profile management lookups are described in the following table.

Lookup Type	Description	Configuration Level
HRT_CONTENT_SUPP_CODE	Codes to identify where the content type originated, such as from the customer or from a third party. Human Resource (HR) Specialists assign supplier codes when setting up new content types.	Extensible
HRT_COMPETENCY_EVAL_TYPE	Types of competency ratings, such as self, supervisor, and peer. Evaluation types are used in instance qualifier sets to identify the role of the person who provided a competency rating for a worker.	User
HRT_DEGREE_LEVEL	Required levels of education for a job or position profile, such as a Bachelor's Degree or Masters degree.	User
HRT_DURATION	Time periods for when a worker would like to make a career move. Workers select a duration for their career move in the career preferences information on the career planning card.	User
HRT_EDUCATION_LEVEL	Types of education that a degree provides, such as a Bachelor's degree or one year college. HR Specialists use education levels when creating content items in the Degrees content type.	User
HRT_IMPORTANCE	Values for the importance level of each content type. Importance values are used in the best-fit analysis calculation.	User
HRT_NOTES_TYPE	Values for categories of notes, such as external and internal.	User
HRT_PAY_FREQUENCY	Frequencies at which a worker is paid. Workers specify a preferred pay frequency when they edit their work requirements on the experience and qualifications card.	User
HRT_READINESS	Time periods in which a worker is ready for advancement to a specified job or position profile. Managers and HR Specialists use readiness levels when editing the talent ratings information on workers' career planning cards.	User
HRT_RISK_REASON	Reasons for why a worker is at risk for leaving the company. Managers and HR Specialists use risk reasons when editing the talent ratings information on workers' career planning cards.	User
HRT_SATISFACTION_METHOD	Methods by which an item such as a competency is verified, such as assessment or demonstration. Managers and HR Specialists	User

Lookup Type	Description	Configuration Level
	use these values to identify the method that was used to evaluate the proficiency of a worker in a particular skill or quality.	
HRT_TASK_PRIORITY	Codes for the priority of a task, such as High and Medium. Talent review facilitators specify a priority when assigning tasks during a talent review.	Extensible
HRT_TASK_TYPE	Categories of tasks, such as Preparation and Presentation. Talent review facilitators specify a task type when assigning tasks during a talent review.	Extensible
HRT_TRAVEL_FREQUENCY	Percentages of time a worker is expected to travel for a job or position, for example, 25 percent or 50 percent. Managers and HR specialists specify the required travel frequency on job and position profiles. Workers also specify a travel frequency when they edit their work requirements on the experience and qualifications card.	User
HRT_VALIDITY_PERIOD	Periods of time for which content items such as licenses and certifications are valid. Managers and human resource (HR) specialists select validity periods when setting up content items for the Licenses and Certifications content type.	User
HRT_WORK_DAYS	Work days for a job or position, such as Monday through Friday. Managers and HR specialists specify the expected work days on job and position profiles.	User
HRT_WORK_HOURS	Work hours for a job or position, such as 9:00 a.m. to 5:00 p.m. Managers and HR specialists specify the expected work hours on job and position profiles.	User

How You Add Common Lookup Types to a Content Section Property

Associate common lookup types with a content section property when defining content sections for a profile type. You can then provide a list of values for the content section property. For example, you can add a list of industries to a content section called Industry Expertise. Use the Manage Profile Types task from the Setup and Maintenance work area to add content sections and associate common lookup types with a content section property. You can use existing common lookup types, or create your own. Common lookups can be associated with these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.

Note: This functionality doesn't apply to these content section properties when they are associated with the following content sections: Career Preferences, Potential, Risk, Advancement Readiness, Career Statement, Talent Score, Performance Rating, and Work Requirements.

Related Topics

- [Lookups: Explained](#)
- [Adding a Common Lookup to a Content Section Property: Example](#)

Add Common Lookups to a Content Section Property

This example illustrates how to use common lookup types to create a list of values for a content section property.

Development Readiness

The Human Resource (HR) department at InFusion Corporation wants to track development readiness for employees using the person profile. They would also like to indicate whether a worker is a candidate for serving as a mentor to another worker.

Values for Development Readiness

The HR department has decided on three possible levels for a worker's development readiness:

- 1 to 2 years
- 3 to 5 years
- Ready Now

To indicate whether a worker is a candidate for being a mentor, they want three choices:

- Yes
- No
- Maybe

InFusion analyzes the existing content types in the content library, and decides that none of the content types works. They must create a free-form content type called Development Readiness. The content type is free-form because content items aren't needed, and the information needn't be stored in the content library.

Next, they analyze the existing common lookups, and determine that they can use an existing lookup type, HRT_READINESS but add lookup codes and meanings to suit their needs. For the indicator for mentorship, they must create a common lookup.

After creating the content type and lookup and changing the lookup codes for HRT_READINESS, they must add the content type as a content section to the person profile. Adding the content section to the person profile enables HR Specialists and managers to add the section to workers' profiles. They can then rate workers on their readiness level and ability to be a mentor.

Note: You can attach lookup values to only these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.

Resulting Setup

To track development readiness for workers, InFusion must complete the following setup:

1. Using the Manage Common Lookups task in the Setup and Maintenance work area, locate the HRT_READINESS lookup type.
2. Add codes for **1 to 2 years**, **3 to 4 years**, and **Ready Now**.
3. Using the Manage Common Lookups task, create a common lookup called HRT_MENTOR, and add the three values of **Yes**, **No**, and **Maybe**.
4. Using the Manage Content Types task in the Setup and Maintenance work area, create a free-form content type called Development Readiness. Add HRMS and TM as the content subscribers.
5. Using the Manage Profile Types task in the Setup and Maintenance work area, select the Person profile type and add Development Readiness to it.
6. Using the Manage Profile Types task, select the Development Readiness content section to access the Content Section page.

Set up the content section by adding two properties as described in this table.

Property	Label	Display	Value Set Name
ITEM_TEXT30_6	Development Readiness	Summary	HRT_READINESS
ITEM_TEXT30_7	Potential Mentor	Summary	HRT_MENTOR

7. In the Content Section Access region on the Content Section page, add the HR Specialist and Manager roles. Select the option for each role to be able to edit the content section.

Note: Don't add the Employee role.

HR specialists and managers can then access worker profiles and add the Development Readiness content section to the profiles.

Related Topics

- [Lookups : Explained](#)

Writing Assistant

How You Upload Writing Assistant Data Using Spreadsheets

Human resource (HR) specialists can upload and associate new Writing Assistant data for competencies using an application-generated spreadsheet. Use the **Export** option on the Manage Content Items page in the Profiles work area to generate the spreadsheet for uploading writing assistant data. The uploaded data is associated with each separate competency.

The application-generated spreadsheet for uploading Writing Assistant data contains the following two worksheets:

- Feedback Suggestions - Upload feedback suggestions for each proficiency level for each competency.
- Development Tips - Upload development tips associated for each competency.

Spreadsheet Generation

You can generate the spreadsheet to upload and associate Writing Assistant data with competencies as follows:

1. Navigate to the Setup and Maintenance work area.
2. Search for and select the **Content Items** task.
3. In the **Search Results** region, click **Actions > Export > Open Writing Assistant Excel Template**. A **File Download** dialog box appears.
4. Click **Save**. Select a destination on your local hard disk to save the CompetencyFeedbackSuggestion.xlsx spreadsheet.

Note: If you are using Enhanced Talent Profiles, see the Using Writing Assistant document on My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

Upload and Update Feedback Suggestions

To upload feedback suggestions, specify all the required columns in the Feedback Suggestions worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the application database.

To update an existing feedback suggestion, click **Download** to download all feedback suggestions for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the feedback suggestions for proficiency levels for associated competencies into the application database.

Note: You can enter the same suggestion text for multiple competencies and for multiple proficiency levels.

Upload and Update Development Tips

To upload development tips, specify all the required columns in the Development Tips worksheet and click **Upload**. After you click **Upload**, click **Save** to commit the development tips for associated competencies into the application database.

To update an existing development tip, click **Download** to download all development tips for competencies into the spreadsheet. You can then update the suggested text and click **Upload**. After you click **Upload**, click **Save** to commit the updated development tips for associated competencies into the application database.

Note: You can enter the same suggestion text for multiple competencies.

Related Topics

- [Writing Assistant](#)
- [How Writing Assistant Works with Performance Documents](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [How You Set up Writing Assistant for Performance Documents](#)

Writing Assistant

Writing Assistant is a tool that provides suggestions for a manager when writing comments or feedback for a worker's competency or rating level during performance evaluation. Writing Assistant suggests statements associated with competencies and proficiency levels within those competencies, to help describe a worker's observed and wanted actions. The Writing Assistant data is displayed in the form of feedback suggestions and development tips. Use the **Export** option on the Manage Content Items page in the Profiles work area to generate the spreadsheet for uploading writing assistant data.

Requirements for Using Writing Assistant Data

To use Writing Assistant, human resource specialists must upload data associated with a competency using an application-generated spreadsheet. The application enables suggestions only for those competencies that have a rating. Using Writing Assistant, managers can select a proficiency level for a competency, view suggested comments for the selected proficiency level or for the competency as a whole, and copy and edit the suggested comments.

Note: If you are using Enhanced Talent Profiles, see the Using Writing Assistant document on My Oracle Support: Upgrading Oracle Cloud HCM Profile Management (Doc ID 2421964.1).

Related Topics

- [How You Upload Writing Assistant Data Using Spreadsheets](#)
- [How Writing Assistant Works with Performance Documents](#)
- [Guidelines for Setting Up Performance Templates](#)

Questionnaires

Questionnaires

You can create questionnaires to gather information in applications that support them. For example, you can use questionnaires to collect feedback in a performance evaluation.

A questionnaire consists of several questions, and you create questionnaires based on questionnaire templates. You can create questions using the question library and then add the questions to questionnaire templates and questionnaires. This topic describes aspects of questionnaire creation and maintenance.

You create and update questions, questionnaire templates, and questionnaires from the Setup and Maintenance work area.

To access this work area, click the arrow next to your photo on the global header, open the **Settings and Actions** menu, and select **Setup and Maintenance**.

Next, select **Workforce Development** from the Setup list, and select **Questionnaires** from the Functional Areas list.

Using these tasks, you can configure each of these sections:

- Question Library

- Questionnaire Templates
- Questionnaires

Subscriber Applications

Applications which are eligible to use questionnaires are called subscriber applications. In addition to Oracle Performance Management, other subscriber applications include Oracle Learning Cloud, Oracle Time and Labor, Oracle Recruiting, and many more. You must select the subscriber application for each questionnaire. When you select the subscriber on the Questionnaires page, you can create questionnaires for the selected subscriber only. In addition, the subscriber filters your search results to display only questionnaires created for that subscriber.

Note: Some subscriber applications use Setup and Maintenance tasks to manage questionnaire components while others provide their own tasks or don't allow modification of questionnaires. See the documentation for the subscriber applications for more information.

Folders

You maintain folders to store questionnaires. For each subscriber application, you can create as many folders as required to differentiate or identify the questionnaires.

Questionnaire Templates

All questionnaires are based on templates, which promote consistency. When creating a questionnaire, you must select a template on which to base the questionnaire. The template can provide default settings or enforce mandatory requirements such as specific sections and questions that must be in all questionnaires created using the template. You can configure templates for:

- Specific applications
- General audiences, such as an entire organization or all internal customers
- Targeted audiences, such as particular roles (managers, for example)
- Specific purposes, such as providing feedback for performance evaluation periods or rate worker potential in an assessment for a talent review

You can create questionnaires only from templates that were created for the same subscriber as the questionnaire.

Questionnaire Presentation

You can specify how the questionnaire appears in the subscriber application. For example, you can:

- Add sections to group questions by type or other classification.
- Define the question order to appear in the sequence defined or in random order in a section.
- Mark questions as required.

When a section is defined for Random question order, you can specify the sample size that isn't less than the required number of questions and more than the number of questions in the section.

Note: Conditional questions aren't included in the random sample questions.

Questionnaire and Question Scoring

For subscriber applications that support scoring, you can configure questions that score the responses provided by respondents. You can configure questionnaires to calculate the cumulative total of responses (Sum), the average score, or the percentage based on the maximum available score.

Tip: You can define a high score for a question that can be more than 3 digits. This facilitates to have higher number of questions with each of these questions having higher scores in a questionnaire. Thus, the high score can result into an overall high score too.

You can define the score for question answers directly in each questionnaire. For questions that are reused across multiple questionnaires, you can define a different score for the question in each questionnaire. If you don't change the question score in the questionnaire, the default score from the question is used.

Questionnaire and Template Access

You can control access to questionnaires and templates by setting privacy options. If you set the **Privacy** option to **Private**, only the named owner can edit the questionnaire or template. Otherwise, anyone with access can edit the questionnaire or template.

How You Create Questions

You create questions in the question library.

To create, review, or edit questions, select these in the Setup and Maintenance work area:

- Setup: Workforce Development
- Functional Area: Questionnaires
- Task: Question Library

Click **Create** in the Questions page that appears.

When creating a question, you define these items:

Question item	Description or sample
Question text	How many states are there in the United States?
Question type	Text, Single Choice, Multiple Choice, No Response
Scoring options	Scored or not scored
Display question on a condition	If respondents say they weren't happy with a class, a text question appears to ask for details.
Optional image	You could show a sign and ask "What does this sign mean?"
Response type	This determines the type of response that a respondent provides to a question. Each question type has a list of response types that you can choose from.

Question item	Description or sample
Allow attachments	When this is selected, respondents can upload attachments with their responses.
Minimum and Maximum Length or Value	This specifies the length of text responses or the start and end dates of date responses.

Four types of questions are available in the **Question Type** list on the Create a Question page:

- Text
- Single choice
- Multiple choice
- No response

For each question type, you also configure responses and select a presentation method. For example, for single-choice questions, you can specify that the possible responses appear either in a list or as radio buttons.

This table describes the types of questions and their response types.

Type	Description	Sample Question	Response Type	Sample Response	Notes
Text	Respondents can either enter free-form text as the answer to the question, or they can enter a date using a date picker.	How can we improve this class?	• Date • Plain Text Box • Rich Text Box	The class is too long and should be broken into 2 half-day classes.	For text responses, you can specify the minimum and maximum number of characters. You can also allow rich text that uses formatting, such as bold and underline. For date responses, you can set the minimum or maximum dates, or both. Respondents must choose a date on or before the maximum date and on or after the minimum date. For example, if respondents have to enter their date of joining between 12/01/2021 and 12/31/2021, set these as the minimum and maximum dates.
Single Choice	Respondent chooses only one correct answer.	Is Performance Management a subscriber application for questionnaires?	• Single Choice from List • Radio Button List • Radio Button with Image	Yes	

Type	Description	Sample Question	Response Type	Sample Response	Notes
Multiple Choice	Respondent can choose more than one answer.	Which applications are subscriber applications for questionnaires?	• Check Multiple Choices • Check Box with Image • Multiple Choices from List	Performance Management, Oracle Learning Cloud, Oracle Health and Safety, Oracle Recruiting Cloud	
No Response	Instructional text only; no response is allowed.				Attach any supporting documentation that relates to this person's performance for this period.

For the **Single-Choice** and **Multiple-Choice** question types, you can create conditional questions by selecting **Display the question conditionally** check box. You need to specify the controlling question code and response. Add both the conditional question and the controlling question to the questionnaire. When the respondent answers the controlling question with the controlling response, the conditional question will appear. Both the conditional question and the controlling question must exist in the questionnaire to display the conditional question.

For example, for a controlling question such as, **Did you receive assistance with this form?** If the controlling response is **Yes**, then you can display the conditional question, **Which type of assistance did you receive?**

You can also add response feedback visible to respondents to display a targeted message to their response, if the subscribing application uses response feedback.

Tip: You can assign your own response codes to the responses that you create in choice-based questions. The application provides the response code by default. But you can remove the response code and enter a code of your choice so that it's meaningful and helpful in organizing your setup.

Subscriber Applications

Subscriber applications are applications that can use questionnaires, for example, Oracle Performance Management. When creating a question, you must select a subscriber application for the question and a folder in which to include it. You can create folders for each subscriber application to store questions for the subscriber. For example, folders for Oracle Recruiting Cloud might be named for locations, where the organization has offices, such as San Francisco, Austin, Los Angeles, Tokyo, Bangalore, and Shanghai. A question is only available to questionnaires with the same subscriber.

Single-Choice and Multiple-Choice Questions

For single-choice questions, respondents select one response from several. You specify whether the responses appear in a list or as radio buttons. An example of a single-choice question is, "Have you completed a similar class?" Only one response for the options is expected, Yes or No.

You can select a rating model to quickly provide consistent responses. When you select a rating model, the rating levels appear as responses. For example, you create the questions "How do you rate your performance in this performance period?" and you associate the Performance Rating Model, which has 5 rating levels defined as Outstanding, Exceeds Expectations, Meets Expectations, Inconsistent, and Unsatisfactory. These 5 rating levels are automatically added as the response choices for the questions. You can add, remove, or edit the responses. If you change the rating model, for

example, to the Language Rating Model, which has 3 ratings (High, Moderate, Low), the response choices will change, but the text for the question stays the same unless you edit it.

You can add feedback to display messages to users reviewing a completed questionnaire if the subscribing application has enabled this feature. The response feedback appears when the respondent submits the questionnaire.

When you configure a single-choice question as a radio button and specify that it isn't required, the **No opinion** response appears automatically as a response. This option allows respondents to change their responses to no opinion if they already selected a response that they can't deselect.

For multiple-choice questions, respondents can provide one or more answers. Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As with single-choice questions, you can associate a rating model with the response type. You can add responses to multiple-choice questions, as with single-choice questions. An example of a multiple-choice question is "Indicate which of the following grades you have taught. Select all that apply." A respondent can check grade levels, such as Kindergarten, first, second, third and so on.

Tip: You can assign your own response codes to the responses that you create in choice-based questions, single-choice or multiple-choice. You can assign meaningful identifiers to the questions by using your own question codes. If you don't want to, you can use the application-generated codes.

For choice-based question responses, you can add images when defining the response. To do this, enable one of these options in the **Allow Response Types** section of the questionnaire template:

- Check box with image
- Radio button with image

Outside the questionnaire, when defining an independent question, you can add an image to any type of question. For responses to choice-based questions, ensure that you select one of these options for **Response Type**.

- Check box with image
- Radio button with image

Response Scoring and Attachments

You can configure single- and multiple-choice questions to be scored. To score the responses, you can either set them up to use user-defined scoring or select a rating model to use the predefined numeric rating. Responses using rating models are only scored when the question is configured for scoring. The application uses the score from the responses to calculate the score of questionnaires that are configured to be scored. With the rating models, you can edit the short description and the score.

For all types of questions, including no-response questions, specify whether respondents can add attachments. For example, you have the question: Provide proof of the right to work in this country. The respondent can upload an attachment to show proof of the right to work.

Randomized Questions and Answers

Just as questions can be randomized in a questionnaire section, the answer choices can be randomized. Randomized questions and answers help prevent users from copying answers from others or memorizing questions and answers to share with others.

You can have two kinds of randomization:

- **Position Randomization** - This refers to the sequence of response choices for a given question. If 5 choices are available (a, b, c, d, e), the order in which these are shown to the respondent is randomized. For example, the choices can appear in the order e, d, c, b, a for one respondent. For another respondent, the choices can appear in the order a, c, b, e, d.
- **Selection Randomization** - This refers to randomizing the response choices shown to the respondent from an available list of choices. For example, you set up a question that has a sample of 10 answer choices. You can show 5 random choices from the list of 10. The correct answer or answers are always included in the selection shown to the respondent.

You can set up single- and multiple-choice responses in random response order.

In addition to randomization in questions and answers, you can randomize the *order of sections* in a questionnaire.

Put Your Sections, Questions, and Answers in Random Order (Position Randomization)

This shows how to put sections and questions in random order. Optionally you can also put answers in random order.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.
3. From **Setup**, select **Workforce Development > Questionnaires**.
4. Search for or create a questionnaire. Note that you can't edit a questionnaire if it's in **Active** status.
5. Select the **Subscriber**, for example, Performance 360.
6. If needed, edit the Basic information and click **Next**.
7. For the **Section Order**, select **Random**.
8. In the Sections area, under the **Question Order** column, select Random.

Note: You can achieve position randomization for *answers* when you select **Random** for the **Response Order** in the Sections area.

Put Your Answers in Random Order (Position Randomization)

This shows how to make the answers for a single **question** appear in random order.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.
3. From **Setup**, select **Workforce Development > Questionnaires**.
4. On the right side of the page, click **Question Library**.
5. Select the Subscriber, for example, Performance 360. If you have multiple libraries, select a specific library.
6. Search for or create a question. Note that you can't edit a question if it's in **Active** status.
7. In the Response area, select **Random** for the **Response Order**.
8. Enter a Sample Size that matches the number of answer choices that you define for the question. Sample size determines the number of answer choices shown to the respondent.
9. Enter the possible answers in the table by clicking the **Add** icon. Make sure that you enter the correct answers in the table and indicate they're correct by selecting **Yes** in the **Correct Response** column.

When the sample size matches, position randomization is enabled.

Create a Question with Randomized Answers (Selection Randomization)

This shows how to enable a higher level of randomization by randomizing the answer choices shown for a question.

1. Go to the **Settings and Actions** menu.
2. In the Administration area, select **Setup and Maintenance**.
3. From **Setup**, select **Workforce Development > Questionnaires**.
4. On the right side of the page, click **Question Library**.
5. Select the Subscriber, for example, Performance 360. If you have multiple libraries, select the library.
6. Search for or create a question. Note that you can't edit a question if it's in **Active** status.
7. For the **Question Type**, select **Multiple Choice** or **Single Choice**.
8. For the Response order, select **Random**.
9. Enter the **Sample Size** for the answers. Sample size determines the number of answer choices shown to the respondent.
10. Enter a number in the **Minimum Number of Selections**, for example, 1. The minimum number of selections determines how many choices the respondent must select at the minimum.
11. Enter a number in the **Maximum Number of Selections**, for example, 2. The maximum number of selections determines the number of correct responses that will be shown to the respondent in the choices presented.
12. Enter the possible answers in the table by clicking the **Add** icon. Make sure that you enter the correct answers in the table and indicate they're correct by selecting **Yes** in the **Correct Response** column.

Example of a Question with Randomized Answers

Question Details	Notes	Sample Information
Question text		Which of these countries is in Asia?
Question type		Multiple Choice
Response order		Random
Sample size	Number of choices shown to the respondent	6
Minimum number of selections	Number of choices the respondent must select	1
Maximum number of selections	Number of <i>correct</i> responses that will be shown to the respondent	2
Number of correct answers		2

In the answer table, you enter the responses and indicate which are the correct ones.

Short Description	Correct Response
India	Yes
South Korea	Yes

Short Description	Correct Response
France	No
Columbia	No
Zimbabwe	No
Lebanon	No
Canada	No
New Zealand	No
Ethiopia	No
Greenland	No

Because you set the sample size as 6, the respondent will see 6 possible answers.

Which of these countries is in Asia?

1. France
2. South Korea
3. Zimbabwe
4. India
5. Greenland
6. Ethiopia

Because you set up selection randomization, another respondent might see the question with different responses, such as:

Which of these countries is in Asia?

1. Lebanon
2. India
3. New Zealand
4. France
5. Columbia
6. South Korea

How You Configure Questionnaire Templates

This topic describes how questionnaire template options determine the features of questionnaires. After creating a questionnaire from a template, you can override or change some of these options in the questionnaire.

To create a questionnaire, go to the Setup and Maintenance work area, and select these options:

- Setup: Workforce Development
- Functional Area: Questionnaires
- Task: Questionnaire Templates

Click **Create** in the Questionnaire Templates page that appears.

Questionnaire Scoring and Calculation Rules

You can select **Score Questionnaire** to configure the questionnaire to calculate scores based on responses. Questionnaires made from the template can then be scored. However, it's not always necessary that a questionnaire created from a scored template has to be scored. To score a questionnaire, you must also select the overall score calculation rule that specifies the formula used to calculate scores.

Note: Scoring only applies to subscriber applications that allow scoring.

If you edit the template and deselect **Score Questionnaire**, existing questionnaires created from the template aren't affected. Only questionnaires created in the future from the template aren't scored.

Section Presentation and Order

A questionnaire has at least one section. You can use sections to group questions by type or category, for example.

The **Section Presentation** option controls how the questionnaire uses sections. This table describes the Section Presentation values.

Value	Description
No Sections	One section appears that contains all questions.
Stack Regions	Multiple sections appear as specified on the Section Order option.

The **Section Order** option controls section order. This table describes the **Section Order** values.

Value	Description
Sequential	One section appears that contains all questions.
Random	Each respondent views the sections in a different order. Reviewers view the sections in sequential order to provide consistency when reviewing responses.

You can specify whether questionnaires based on this template can override these values.

Allowed Response Types

The **Allowed Response Types** controls the types of questions that are included in a questionnaire template. However, this doesn't limit users from adding questions with other response types to a questionnaire created from this template.

Sections

The **Allow Additional Questions** option controls whether authorized users can add questions in the subscriber application. For example, for performance documents, that could be managers or workers.

If you select the **Required** option, then respondents must answer all questions in the section.

Question and Response Order

The **Question Order** and **Response Order** values control the order that questions and possible responses appear to a respondent. Response order only applies to single-choice and multiple-choice questions, which contain a list of responses.

This table describes the Question Order and Response Order values.

Value	Description
Vertical	Questions appear in the specified order.
Random	Each respondent views the questions in a different order. Reviewers view the questions in sequential order to provide consistency when reviewing responses.

You can override the default values of these options for individual sections. You can also specify whether questionnaires based on this template can override these values.

Questions and Responses in Sections

In the Questions section, you manage questions for a selected section. You can:

- Add questions from the question library. You can change the response type for these questions after adding them to the template.
- Create questions, either those that are scored, or aren't. Questions you create become part of the question library. You must also add the question to the section after creating it from the section.
- Edit questions. Your edits are also reflected in the question library.
- Remove questions.
- Change question order by dragging them in the section. Questions appear in this order in the questionnaire if question order is **Vertical** for the section

If the section itself isn't required, then you can mark individual questions as required. Otherwise, respondents must answer all questions.

Note: You can't change the response type to **Plain Text** or **Rich Text** for questions that were originally created to accept date responses. Similarly, you can't change the response type to **Date** for questions that were originally created to accept text responses.

Review

As the final step, you can review the sections, questions, responses, response feedback, and test scoring, before saving the questionnaire template.

How You Create a Questionnaire

This topic tells you how to create a questionnaire.

Select the Questionnaire Template

In the Setup and Maintenance work area, select these options:

- Setup: Workforce Development
- Functional Area: Questionnaires
- Task: Questionnaires

If you use Performance Management, you can also go to **My Client Groups > Performance > Questionnaires**.

1. In the **Folders** section of the Questionnaires page, select the subscriber application for the questionnaire, for example Performance 360, Recruiting, or Learning Assessments.
2. In the **Search Results** section, click **Create**.
3. Enter **Questionnaire Template ID** or **Name** values, if available. Alternatively, click **Search** to list all available templates.
4. In the **Search Results** section, select a template and click **OK**.

Enter Questionnaire Basic Information

1. A unique numeric questionnaire ID appears automatically. You can change this value.
2. If this is a scored questionnaire, an overall score calculation rule appears. You can select a different rule.
3. Enter a **Name** and select a **Folder**. Use folders to organize questionnaires by type or purpose.
4. Leave the **Owner** field blank and the **Privacy** value set to **Public** if anyone who can access the questionnaire can edit it. Otherwise, select an owner and set **Privacy** to **Private**.
5. Leave the **Status** value set to **Draft** until the questionnaire is ready.
6. In the **Instructions and Help Materials** section, enter and format any instructions for questionnaire users. This text appears at the top of page one of the questionnaire.
7. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
8. Click **Next**.

Enter Questionnaire Contents

The **Section Order** and **Section Presentation** values are as specified in the questionnaire template, for example, **Sequential** as the **Section Order** and **Stack Regions** as the **Section Presentation**. Depending on template settings, you may be able to change these values. Depending on template settings, you can edit some or all section settings. You can also delete predefined sections and create additional sections.

1. Select the first section to view its questions in the **Questions** section. You can delete a question or change its response type and **Required** setting.
2. If you create additional sections, you add questions to them. In the **Questions** section, click **Add**. Search for a question, select it, and click **OK**.
3. You can also create questions for a section. Select a section, and in the **Questions** section, click **Create**.
4. Select the **Folder**, and enter question and response details, and click **Save and Close**. The question becomes available in the question library as well. Add the question to the section using the instruction in step 2.

5. Edit questions as required. Select a question and click **Edit**. Enter question and response details, and click **Save and Close**. The question is updated in the questionnaire and the question library.

Note: Although you can override the response types for questions while defining a questionnaire, you can't change the response type to text for questions that accept date responses or change the response type to date for questions that accept text responses.

6. When all sections and questions are complete, click **Next**.
7. Click **Preview** to preview the questionnaire. For scored questionnaires, click **Test** to verify the scoring.
8. Click **OK** and then click **Save**.

Set the questionnaire **Status** value to **Active** when the questionnaire is ready for use.

Note: If a questionnaire isn't in use, you can still add new questions that accept date response types, or create a new version of the questionnaire to add such questions. When you edit the response type for a question in a questionnaire that isn't in use, the updated response type is reflected in the questionnaire definition.

How You Use Questionnaires to Create General Surveys

Use questionnaires to create stand-alone, generic surveys that aren't linked to specific HCM product flows such as performance or recruiting. For example, you can create an organization-wide annual survey to gather employee feedback on specific organization functions or create an end-of-project survey to understand customer satisfaction levels.

To create a general survey questionnaire, define a questionnaire template with the subscriber as **General Surveys**, and then create the questionnaire based on the template. While creating the template and the questionnaire, select the folder as **General Surveys**.

When creating general surveys, you can use all the features of questionnaires such as conditional questions, questions with images, or questions with text or date type of responses. After creating the questionnaire, you use REST APIs for accessing it and publishing it to specific participants.

Using REST APIs to Manage General Surveys and Responses

Use the existing `questionnaire` REST API resource to read and manage questionnaires, questions, and answers for general surveys. In addition, use these REST API resources to manage the responses to general surveys:

- `questionnaireParticipants`
- `questionnaireResponses` (child resource of `questionnaireParticipants`)
- `questionResponses` (child resource of `questionnaireParticipants`)

Using the API resources, you can do these:

- Create a questionnaire for the General Survey subscriber.
- Access the questionnaire to review the questionnaire setup.
- Post responses to the questionnaire and update them.
- Retrieve responses from the questionnaire and view them.

Note: While these APIs allow for setting up questionnaires and posting responses to store them in HCM Cloud, publishing the survey to specific employees is not within their scope. The user interface to publish the survey and collect individual inputs from employees is also external to HCM Cloud.

Secure responses posted to general surveys using a person security profile. You can only access responses from participants that you have access to, through their person security profile.

You must have these security privileges to perform specific operations on the questionnaire Participants REST API:

Security Privilege	Supported Operations
HRQ_REST_SERVICE_ACCESS_QUESTIONNAIRE_PARTICIPANTS_RO_PRIV	• GET
HRQ_REST_SERVICE_ACCESS_QUESTIONNAIRE_PARTICIPANTS_PRIV	• GET • DESCRIBE • POST • PATCH • DELETE

Question Scoring Setup Options

For eligible subscriber applications, you can configure questions to calculate a score based on responses. This topic describes aspects of creating questions that can be used to score questionnaires. Use the Question Library task in the Setup and Maintenance work area.

Eligible Question Types

Two question types are eligible for scoring:

- Single choice
- Multiple choice

If you select single choice, the question score is the value of the selected response. For multiple-choice questions, the total value of all selected responses is the question score.

Score Question

To score the question, select **Score Question**. Scored questionnaires use scored questions to determine the questionnaire score. You set the default calculation rule in the template, but this can be overridden in the questionnaire.

If a question is in use, you can't change whether it's scored or not. To create a scored question, create a new question or copy an existing question.

You can add scored questions to questionnaires that aren't scored. In questionnaires that aren't scored, response scores aren't available.

Tip: Use the Preview feature to ensure that the scoring works as you anticipated.

Minimum and Maximum Calculated Scores

For multiple-choice questions you can define either, or both, minimum and maximum calculated scores. These are the maximum and minimum scores the question can attain, regardless of how many responses the respondent selects, or the score of the responses.

You can define the maximum and minimum calculated scores to keep them within a range that aligns with your business process. For example, you can set maximum and minimum scores to ensure that:

- Questions in a questionnaire have consistent maximum and minimum values
- Questions aren't weighted too heavily with either too high a positive or too low a negative score

If you don't define the maximum calculated score or maximum number of responses, the maximum possible score is the sum of all responses. When you update the score of a question, the maximum possible score of the questionnaires that include this question are automatically updated, provided they aren't in use. However, if you have the scores overridden for these questions at the questionnaire level or if the questionnaire is in use, then these scores will remain unaffected by your updates to the question score.

Response Configuration

To provide responses for users to select, you must add responses. You can then specify additional configuration for the responses.

Minimum and Maximum Number of Selections

For multiple-choice questions, you can optionally define the minimum and maximum number of selections that respondents make to the question. If respondents don't select the specified number of responses, an error message appears.

Short Description

When you add responses, you can define the score for the response. You must enter a short description, which appears to respondents. You can enter any score for the response and as many responses as your business process requires.

The scores can be the same or varied. For example, you can have five responses with 5 as the score for each. Or, you can have five responses with values of 1, 2, 3, 4, and 5.

Tip: After adding responses, use the Preview feature in the questionnaire to ensure that the list of responses isn't too long for respondents to view effectively.

Rating Model

You can select a rating model to provide a predefined short description and score. However, you can edit both the short descriptions and scores.

Response Feedback

You can add feedback to display messages associated with the responses selected by the respondent. This feedback may appear to the respondent or to a reviewer depending upon configuration in the subscribing application.

Preview

Use the **Preview** feature in the Questionnaire to review the questions and responses in the questionnaire. Select answers and click **Test** to see the resulting score and any response feedback. Click **Reset** to clear the scores and test again.

Related Topics

- [How You Configure Questionnaires for Questionnaire Scoring](#)

How You Use Translation Editor with Questionnaires and Questions

You can translate questionnaire templates, questionnaires, and questions using the translation editor. With the translation editor, you can review and translate text for more than one language at a time without signing out of your current session. For each translatable field, the translation editor helps to ensure your data is translated the way you intend. The translations appear wherever the questionnaire templates, questionnaires and questions appear.

Eligible Languages

The languages that you can translate are those that are installed and active in the application. The translated text appears in the application for the respective language a user selects when signing in.

Text that Can Be Translated

Using the translation editor, you can translate any text fields that you can edit in questionnaire templates, questionnaires, or questions. For questionnaires and templates, you can translate:

- Name, description, and introduction
- Section title, description, and introduction

For questions, you can translate:

- Question text
- Question response short description
- Question response feedback

Translation Editor Usage

Click the **Translation Editor** icon to edit the translatable text in a questionnaire, questionnaire template, or question. The icon appears on the pages and sections where the fields you can appear. In the **Edit Translation** dialog box that appears, you can enter text for any available language for each field. The translated text appears in the application for the respective language a user selects when signing in. For example, if you translate a question from English to Spanish, a Spanish-speaking user sees the Spanish translation. If the translated text is in a language that's the same as the language of your current session, you can see the translation apply to the UI immediately.

When you create a new questionnaire, template, or question, you must first save it before using the translation editor. Once the object is saved to the database, the translation editor becomes available.

Translation Inheritance

Questionnaires inherit translations from the template. You can edit the translations to change them. Question translations that you configure are also inherited by that question if it's used later in another questionnaire or template. You can edit the translation either in the Question Library, or in the questionnaire or template in which it's used.

How You Configure Questionnaires for Questionnaire Scoring

You can configure questionnaires to calculate a score based on responses to questions in the questionnaire. This topic describes aspects of creating questionnaires that are scored. You must create a questionnaire template from which to create a questionnaire. Use the Questionnaire Templates and Questionnaires tasks in the Setup and Maintenance work area.

Subscriber Applications

Only eligible subscriber applications can use scored questionnaires. Recruiting is an eligible subscriber to use scored questionnaires.

Questionnaire Scoring Setup

To score a questionnaire, in the questionnaire template, select **Score Questionnaire**. All questionnaires made from the template can then be scored. If you edit the template and deselect **Score Questionnaire**, existing questionnaires made from the template aren't affected. Only questionnaires made in the future from the template aren't scored.

Scored Questions

To create a questionnaire that can be scored, you must add questions that have responses configured for scoring to the section. You can either add questions from the question library or create scored questions in the section itself.

You can add questions that aren't configured for scoring to a scored questionnaire. These questions aren't included in the overall score calculation.

Overall Score Calculation Rule

The calculation rule determines the method used to calculate the overall questionnaire score from the question scores of scored questions. The table shows the calculation rules and the formula each uses to calculate the questionnaire score.

Overall Score Calculation Rule	Formula to Calculate Questionnaire Score
Sum	Sum of question scores
Percentage	$(\text{Sum of question scores} / \text{Sum of maximum possible question scores}) * 100$
Average	$\text{Sum of question scores} / \text{Number of scored questions}$

When calculating the score, questions that are configured for scoring, if no score is provided, the application considers such questions as no value.

Questionnaire Score Calculation Example

As an example for calculating the score, consider a questionnaire with the attributes shown in the table.

Attribute	Value
Calculation rule	Average
Total number of questions	10
Number of questions configured for scoring	9
Number of questions that can't be scored	1
Maximum value of each response	5

For this questionnaire, the maximum possible score is 45 (9×5). The maximum average score is 5 ($45/9$).

A respondent responds to the questionnaire and selects the maximum value of 5 for eight of the nine scored questions, leaving one blank. The respondent also selects a response for the question that isn't scored. The application calculates the questionnaire score in the following manner:

- The sum of the responses is 40 (8×5). The question that isn't scored doesn't affect the score.
- Using the Average calculation rule, the final questionnaire score is 4.44 ($40/9$).

Preview

Click **Preview** to review the questionnaire questions and scoring. Select answers and click **Test** to see the resulting questionnaire score and any response feedback. Click **Reset** to clear the scores and test again.

Related Topics

- [Question Scoring Setup Options](#)

Export and Import of Questionnaire Data

Streamline the mass upload of Questions, Questionnaire Templates, and Questionnaires by using HCM Data Loader and HCM Spreadsheet Data Loader. Import any type of questions within the questionnaire, including the response choices in choice-based questions.

Note: You can import images for questions and responses and import attachments for questionnaire information using HCM Data Loader.

You can create questionnaire objects or manage the existing ones. You can load data for Questions and Question Answer Responses by using the Question data file. You can create questionnaire templates and questionnaires including the sections, questions, and answers that are a part of the questionnaire.

You can load the translation data of these business objects by using the translation data files. To use HCM Spreadsheet Data Loader in the Data Exchange work area, you need to first create a spreadsheet template, then upload it using the Load Spreadsheet Data task.

Related Topics

- [Overview of Loading Questions, Questionnaire Templates, and Questionnaires](#)
- [Guidelines for Loading Questions, Questionnaire Templates, and Questionnaires](#)
- [Examples of Loading Questionnaires](#)
- [Examples of Loading Questionnaire Templates](#)
- [Examples of Loading Questions](#)

What happens if I edit a questionnaire that's in use?

When you edit a questionnaire that's in use, you're prompted to either create a new version of the questionnaire or update the existing version. When you update the questionnaire, the existing responses could become invalid. So it might be better to create a new version of the questionnaire.

Here's what happens when you update an existing questionnaire:

- If respondents answered questions and saved the questionnaire before the update, their saved responses continue to appear when they reopen the questionnaire after the update.
- The status remains **Active**.
- The questionnaire version remains the same.
- The **In Use** status is **Yes**.

Note: You can edit the questionnaire as needed, but it's best to limit the edits to those that have a minimal impact, such as changing text. Adding questions, marking questions as required, or changing responses to choice-based questions can result in issues for questionnaires that are already completed. This applies to questionnaires used in performance documents, anytime performance documents, requested feedback, and check-ins.

You can update these attributes in a questionnaire that's **In Use**:

- Name of the questionnaire
- Folder (category) of the questionnaire
- Owner
- Status
- Privacy
- Description
- Instructions
- Attachment for questionnaire
- Section order (if allowed from base questionnaire template)

- Section presentation (if allowed from base questionnaire template)
- Response order (positional randomization for answers)
- Name, description, and instruction text of section (if allowed from base questionnaire template)
- Position of questions (drag and drop feature is allowed)

The changes take effect as soon as you save the questionnaire. Respondents see the changed version in these scenarios:

- Creating a new performance document that includes a questionnaire
- Editing a questionnaire in a performance document that's in progress
- Reopening a previously completed performance document to edit the questionnaire
- Check-in documents always refer to the latest version of the questionnaire referenced in the check-in template. If you need a new version of a questionnaire for new check-in documents, it's recommended you create a new check-in template that includes a new questionnaire, instead of creating a new version of the existing questionnaire. This helps you preserve the questionnaire responses in existing check-in documents.

Here's what happens when you create a new version of a questionnaire:

- The previous version isn't affected.
- The status of the new version is set to **Draft**.
- The questionnaire version number increases by one.
- The **In Use** status is set to **Prior Version**.

When a questionnaire is completed using this version, the **In Use** status changes to **Yes**. The changes take effect when you set the status to **Active** and save the questionnaire. Respondents see the new version in these scenarios:

- Creating a new performance document that includes a questionnaire
- Editing a questionnaire in a performance document that's in progress:
 - If respondents answered questions and saved the questionnaire prior to the new version, their saved responses don't appear when they reopen the new version. Instead, they see the new version of the questionnaire.
- Reopening a previously completed performance document to edit the questionnaire.
 - The questionnaire version you see for completed performance documents before reopening is the version in which it was completed.
- Creating a new check-in document
- Opening an existing check-in document to edit the questionnaire
- Creating a new requested feedback
- Editing a questionnaire in requested feedback that's in progress:
 - If respondents answered questions and saved the questionnaire prior to the new version, their saved responses don't appear when they reopen the new version. Instead, they see the new version of the questionnaire.

Note: What happens if you edit a question that's in use? Editing questions when responses already exist can invalidate responses. It's recommended that you copy the question over to a new questionnaire and then make the changes you want.

Anytime Feedback

Overview of Anytime Feedback

Anytime feedback is unsolicited feedback you give to anyone in your organization. You may also receive anytime feedback from anyone in the organization. This feedback is independent of the participant feedback process in performance documents.

You can create feedback for yourself or any other person, and also edit and delete the feedback that you create. All feedback have visibility rules set for them, which determines who can see them. The person who provides the feedback decides the visibility rules.

Related Topics

- [Considerations for Configuring Anytime Feedback Visibility Options](#)
- [Anytime Feedback Notifications](#)

View Anytime Feedback Given to You

There are many ways to view anytime feedback that you received. Here are some ways to do it:

- Go to **Me > My Public Info** . Click **Show More** on the left navigation pane and select **Feedback**
- Go to **Me > Career and Performance > Feedback**
- Go to **Me > Quick Actions > Show More > Career and Performance > Feedback**

The Feedback Given to Me section on the Feedback page lists the feedback you received. You can filter the list based on the author of the feedback or period of feedback (for example, past six months).

For each feedback, you can view these details:

- Name of the employee who gave the feedback
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

Note: If the feedback is set to **Visible to Everyone**, you can hide it by clicking the **Hide** link. When you hide the feedback, it won't show up on your manager's Feedback page in the Feedback Given to [Employee Name] section.

The person who receives feedback and the HR specialist who has administrative oversight of the person can hide the feedback, if the content isn't appropriate. Only the person who hides the feedback can unhide it. The author can view the feedback and see that it's hidden.

View Anytime Feedback Given to Others

There are many ways you can view anytime feedback that you gave to others. Here are some ways to do it:

- Go to **Me > My Public Info** . Click **Show More** on the left navigation pane and select **Feedback**.
- Go to **Me > Career and Performance > Feedback**
- Go to **Me > Quick Actions > Show More > Career and Performance > Feedback**

On the Feedback page that's displayed, you can filter the feedback list based on the recipient's name or feedback period.

For each feedback, you can view these details:

- Recipient's name
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

View Anytime Feedback Received for Your Employees

As a manager or HR specialist, there are many ways you can view anytime feedback received for your reports or the employees in your organization.

However, you can view this feedback only if the feedback visibility is set to **Everyone**, **Managers Only**, or **Manager and [Employee]**.

As a manager, you can view anytime feedback in some of these ways, for example:

- Go to **My Team > My Team** . Click the **Actions** menu (shown by three dots) next to the employee's name, and select **Feedback**.
- Go to **My Team > Quick Actions > Career and Performance > Feedback** , and search for, or select the name of the employee.

As an HR specialist, you can use some of these navigation paths, for example:

- Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback** . Select an employee.
- Search for an employee using the Search bar on the global header and click their name from search results. Click **Show More** from the left navigation pane and select **Feedback**.

The Feedback Given to [Employee Name] section on the Feedback page lists the anytime feedback that the employee has received. You can filter the list based on the author's name or period of feedback.

For each feedback, you can view these details:

- Name of the person who gave the feedback
- Date of the feedback
- Visibility of the feedback
- Contents of the feedback

Provide Anytime Feedback as a Manager or HR Specialist

As a manager or HR specialist, you can provide anytime feedback to your report, team member, or others in your organization.

1. You can access the Feedback page in many ways. Here are some options:
 - Go to **My Team > My Team** , and select an employee's name. Click **Show More** on the left navigation pane, and select **Feedback**.
 - Go to **My Client Groups > Quick Actions > Show More > Talent > Feedback** .
2. In the Feedback Given to [Employee Name] section, click **Add**.
3. Select who can view your feedback and enter the feedback comments.
4. Click **Save**.

Provide Anytime Feedback as a Worker

Workers can provide anytime feedback for other workers in several ways. For example, using Person Spotlight or Quick Actions.

Provide Feedback Using Person Spotlight

1. Search for an employee using the Search bar on the global header, and click their name from search results.
2. Click the **More Information** menu (shown by three dots) on the person's image, and select **Feedback**. The Feedback page appears.
3. Click **Add** in the Feedback Given to [Employee Name] section.
4. Select who can view your feedback and enter the feedback comments.
5. Click **Save**.

Providing Feedback Using Quick Actions

1. Go to **Me > Quick Actions > Show More > Career and Performance > Provide Feedback** .
2. Enter the feedback recipient's full or partial name. A list of matching names appears in the list.
3. Select the person you want to provide feedback for.

Note: If you want to provide feedback for another recipient instead of the current one, click the **Remove [Recipient Name]** icon, and select another.

4. Select who can view your feedback and enter the feedback comments.
5. Click **Submit**.

You can also add anytime feedback for yourself by navigating to **Me > Career and Performance > Feedback > Feedback Given to Me** .

Edit or Delete Anytime Feedback

Your role determines whether you can edit or delete anytime feedback and change its visibility settings. The different permissions depending on the role are described here.

Author of the feedback

If you created an anytime feedback for yourself or for others, you can revise, delete, or change the visibility settings of the feedback.

Manager

As a manager, you can't edit or change the visibility settings for anytime feedback that others have given to your reports. You can delete that feedback only if you're the author of the feedback, or if you also have the HR specialist role. If you need edit permissions, contact your administrator for the required privileges.

HR Specialist

HR specialists can delete anytime feedback received by the employees in the organization, when the feedback visibility is set to **Everyone**, **Managers Only**, **Managers and [Employee]**. They can delete any feedback that they create, regardless of the visibility setting.

They can hide public feedback that they haven't authored, if the feedback visibility is set to **Everyone**.

Note: When others provide anytime feedback for you, you can hide the feedback, if the visibility is set to **Everyone**. You can't delete or edit the feedback.

To edit or delete anytime feedback, follow these steps:

1. Go to the Feedback page.
2. In the Feedback Given to [Employee Name] section, you can optionally filter the list by the recipient's name or feedback period.
3. Click **Edit** next to the feedback that you want to revise or delete.
4. Change the visibility or edit comments, as required, and click **Save**. To delete the feedback, click **Delete**.

To edit or delete the anytime feedback you added for yourself, go to **Me > Career and Performance > Feedback > Feedback Given to Me** and follow the same procedure as above.

Note: Using HCM Data Loader, HR specialists can delete anytime feedback responses for multiple employees at once.

Anytime Feedback Notifications

You can configure the application to notify workers and their managers when workers receive feedback.

You can enable or disable notifications sent to the manager or worker using the **Talent Notifications** task. You can access the task in one of these ways:

- Go to the Setup and Maintenance work area, select **Workforce Deployment** from Setup, and select **Workforce Profiles** in Functional Area. Select the **Talent Notifications** task and click the **Profile Management** tab.
- Go to **My Client Groups > Performance > Talent Notifications** and click the **Profile Management** tab.

The settings affect all workers and managers throughout the application.

This table lists the visibility settings and the roles that receive notification for each visibility setting.

Feedback Visible To Setting	Recipient of Notification
Everyone	Worker who receives feedback, and the worker's manager
Managers Only	Manager of the worker for whom the feedback is created
Managers and [Worker Name]	Worker who receives feedback, and the worker's manager

Considerations for Configuring Anytime Feedback Visibility Options

You can configure Feedback visibility options and default options to specify who can see feedback.

Use the Manage Feedback Visibility task in the Setup and Maintenance work area, Workforce Deployment (or Workforce Development) offering, Workforce Profiles functional area.

Feedback Context

You can set feedback for the following contexts:

- **ORA_NO_CONTEXT:** Used for feedback notes for a person in the person spotlight, person smart navigation, and elsewhere throughout Oracle Fusion applications.
- **ORA_TALENT_REVIEW_TYPE:** Used for feedback notes only for talent review meetings. Notes created in a talent review are visible as Feedback elsewhere in Oracle Fusion applications, but no Feedback created elsewhere appears in talent review meetings.

Visibility Options and Defaults

Select roles to make them eligible to view feedback. Users can select the roles when they create feedback so that the roles can view it. All settings are available unless you deselect them.

The options and descriptions for each visibility option are shown in the table.

Visibility Option	Description
Everyone	A public note visible to any person in the organization
Managers only	Managers in the hierarchy of the worker about whom the Feedback is created
Managers and the worker	Managers in the hierarchy of the worker, and the worker who receives the feedback
Only me	A private note created by an author about the author or another person and visible only to the author
Only worker and me	A private note created by an author about the worker and visible only to the worker and author of the note

HR specialists can view all feedback except those with these visibility settings:

- Only me
- Only worker and me

Note: Feedback visibility is also determined by data security; you can only create or see notes for people whom you have authorization to view.

Defaults

You can edit the default value that appears in the **Visibility** choice list when a person creates feedback. If you select the **No default** option, no predefined option appears in the field. Users can select the available options whether a default is set or not. Default settings for the contexts are as follows:

- ORA_NO_CONTEXT: **No default**
- ORA_TALENT_REVIEW_TYPE: **Managers only**

If you don't edit the visibility options or defaults, the default settings apply.

Deleted Context Settings

If you delete context settings, users can still add and view feedback, but you can no longer edit the context settings. When you delete feedback context settings, the following rules apply:

- If you delete only ORA_NO_CONTEXT, the predefined default values for ORA_NO_CONTEXT applies for the person feedback. All visibility options are available, and the default setting is **No default**.
- If you delete only ORA_TALENT_REVIEW_TYPE, the ORA_NO_CONTEXT settings apply for both the person feedback and talent review feedback.
- If you delete both ORA_NO_CONTEXT and ORA_TALENT_REVIEW_TYPE, the predefined default values for ORA_NO_CONTEXT apply for both the person feedback and talent review feedback.

Contextual Notes

Contextual Notes in Application Pages

Enhance Talent Management application pages using the Notes resource catalog component for persons and objects using Oracle Page Composer. The Notes feature is similar to the Feedback feature in employee's Person Spotlight and Performance Document. The Contextual Notes is an extension of the existing Anytime Feedback feature.

You can embed the Notes component on persons and objects using Oracle Page Composer. The Notes component appears with the title, **Feedback** or **Notes**, based on the component configuration, Person Notes and Object Notes.

The screenshot shows the Oracle AddressBook application interface. At the top, there's a blue header with the Oracle logo and the text 'AddressBook Web Application'. Below the header, there's a search bar and a list of contacts. The selected contact is 'Addnew@', which is highlighted in blue. The contact card shows the following details:

- Email Address:** Addnew@
- Name:** Addnew@
- Age:** 20
- Sex:** Male
- Date of Birth:** 2016-01-01 10:00:00
- Social Media:**
 - Google: Addnew@
 - Facebook: Addnew@
 - LinkedIn: Addnew@
 - Twitter: Addnew@
 - YouTube: Addnew@

The contact card also shows a 'Basic Info' section with a 'Edit' button. The 'Basic Info' section includes fields for 'Cool Name', 'Address', 'Age', 'Sex', 'Date of Birth', and 'Social Media'. The 'Cool Name' field is currently empty. The 'Address' field contains 'Addnew@'. The 'Age' field contains '20'. The 'Sex' field contains 'Male'. The 'Date of Birth' field contains '2016-01-01 10:00:00'. The 'Social Media' field contains 'Addnew@'.

- Notes for an employee in the context of an employee's performance goal
- Notes for an employee in the context of an employee's development goal
- Notes for an employee in the context of an employee's career development
- Notes when you explore roles in the context of role details page

- Notes for a talent review meeting
- Notes for a succession plan
- Notes for a talent pool

Considerations for Configuring Contextual Notes

- Context
- User Interface
- Visibility Settings

To configure the context or scope of the notes, you specify the following parameters in implementing a number of scenarios for Person Notes.

Parameters	Description
Object Type	Use string PER_PERSON to implement Person Notes.
Object ID	Use a valid expression to tie notes to a specific object. The expression must yield a valid Person ID value to implement Person Notes cases, for example <code>#{bindings.PersonId.inputValue}</code> .
Context Type	Use a string value that represents a specific context. For Feedback, select one of the following values: - Blank value - ORA_TALENT_REVIEW_TYPE When you select this context type, the Notes component appears in all instances of Feedback. This is an exception.
Context ID	Use a valid expression to tie notes to a specific contextual object, <code>#{bindings.MeetingId.inputValue}</code> . For Anytime Feedback, the Context ID is set to blank value, if the Context Type is a blank value.

If Person Notes is associated with a person without any additional context, the Notes component appears all instances of the Feedback component. If you specify additional context parameters to the Feedback Notes, then it is treated as configured person notes. If notes is associated to a well-defined context with all the context parameters, then it will not appear in any of the Feedback instances but will appear in all instances of the same context.

Context for Object Notes

To configure the context or scope of the object notes, you specify the following parameters in implementing a number of scenarios for Object Notes.

Parameters	Description
Object Type	Use a string representing the object type to tie the object notes, for example <code>ORA_REVIEW_PERIOD</code> .
Object ID	Use a valid expression to tie notes to a specific contextual object. For example <code>#{bindings.ReviewPeriod.inputValue}</code> .
Context Type	Indicates the meaning associated with the context type. For <code>ORA_PERFORMANCE_GOAL</code> .
Context ID	Use a valid expression, for example <code>#{bindings.MeetingId.inputValue}</code> to tie notes to a specific contextual object.

In the configuration of Object Notes, notes created by users will be associated with the specified object without any additional context.

User Interface

You can define the appearance of the Notes component in the application page. In addition to Resource Catalog component standard features, you can use the following features:

Parameter	Description	Used By
Object Title	By default, the title text appears as Notes. If a string expression is provided, the title text for the object appears as: Notes: <PARAMETER VALUE>	Object Notes For Person Notes, you can't change the object title.
Show Details Page	By default, the Notes component appears as an action link that opens a separate view of the notes. When you set this option, the Notes component appears as an embedded region on the page with a list view of notes. If you want Show Details Page, select the arrow in the field and then select Expression Builder . In the Expression Editor window enter the value <code>true</code> in the text box.	Person Notes and Object Notes
Show Quick Create	By default, the Notes component doesn't appear separately. When you set this option, employees can quickly create the Note without the need to go to the list view of Notes. If you want the users to quick create notes, you must select the arrow in the field and then select Expression Builder . In the Expression Editor window enter the value <code>true</code> in the text box.	Person Notes and Object Notes
View Only	When you set this option, the Notes component appears in the View mode for users. If you want the users to view the notes, you must select the arrow in the field and then select Expression Builder . In the Expression Editor window enter the value <code>true</code> in the text box.	Person Notes and Object Notes

Visibility Settings of Person Notes

When you manage Feedback Visibility options, you not only define the visibility options for Feedback, you also specify the default visibility options. You can override the default Visibility settings of Person Notes by performing the following steps:

1. From Functional Setup Manager, search for and select the Manage Common Lookups task.
2. Add the value of your Context Type to the extensible lookup type, ORA_FEEDBACK_CONTEXT_TYPE.

Configure the Feedback with any of the following values:

- ORA_NO_CONTEXT
- ORA_TALENT_REVIEW_TYPE

3. Search for the Manage Feedback Visibility task and review visibility options:

Note: You can delete visibility options for the Feedback context.

Visibility Options	When Selected
Everyone	Enables everyone to view the feedback
Managers only	Enables only their managers to view the feedback
Managers and <Recipient Name>	Enables the manager and notes recipient to view the feedback
Only me	Enables only the creator of notes to view the feedback

Set one of the earlier-mentioned visibility options as the default setting for the person notes or else you can specify the **No default** option and later when creating a note, users can specify the visibility of the note.

Visibility Settings of Object Notes

Contrary to the Person Notes component, you can't change visibility setting of Object Notes.

Visibility Options	When Selected
Everyone	Enables everyone to view the notes
Only me	Enables only the creator of notes to view the notes

For the default visibility setting, you can specify **Everyone**.

Related Topics

- [Considerations for Configuring Feedback Visibility Options](#)

Context Parameter Values of Contextual Notes in Talent Management

When configuring the contextual notes to the mobile-responsive application page, you provide context parameters for the person notes and object notes. The following table provides the Object Type, Object ID, Context Type, and Context ID parameter values for the Talent Management application pages.

Navigation and Application Page	Object Type	Object ID	Context Type	Context ID
Add or Edit Goal page, Performance Goal Details region	Predefined value: PER_PERSON	<code>{pageFlowScope.pWorker</code>	User-defined value: ORA_PERFORMANCE_GOAL Use this value to show notes created in check-in documents	<code>#{pageFlowScope.baseGoalId}</code>
In Career Development for a development goal Development Goal Details page in the drill-down mode	Predefined value: PER_PERSON	<code>#{pageFlowScope.pParam</code>	User-defined value: ORA_DEVELOPMENT_GOAL Use this value to show notes created in check-in documents	<code>#{bindings.BaseGoalId.inputVa</code>
Career Development page	Predefined value: PER_PERSON	<code>#{pageFlowScope.pParam</code>	User-defined value: CAREER_DEV	<code>#{pageFlowScope.pParamMap['pW</code>
In Career Development, when you explore roles and go to the Role Details page	Predefined value: JOB_ROLE	<code>#{pageFlowScope.pProf</code>	Leave the field blank	Leave the field blank
Talent Review Meeting page	User-defined value: EXAMPLE_TALENT_REVIEW_MEETING	<code>#{pageFlowScope.pMeet</code> <code>#{bindings.MeetingId.}</code>	Leave the field blank	Leave the field blank
Create or Edit Succession Plan page	User-defined value: EXAMPLE_SUCCESSION_PLAN	<code>#{bindings.PlanId.inp</code>	Leave the field blank	Leave the field blank
Create or Edit Talent Pool page	User-defined value: EXAMPLE_TALENT_POOL	<code>#{bindings.PoolId.inp</code>	Leave the field blank	Leave the field blank

Before you configure the contextual parameters, ensure that these relevant profile options are enabled.

Profile Option Code or Feature Option	Description
HCM_RESPONSIVE_PAGES_ENABLED	Enables the responsive pages
HRT_NOTES_RESPONSIVE_ENABLED	Enables the adding of Contextual Notes component in pages
HRG_GOALS_RESPONSIVE_ENABLED	Enables Goal Management responsive pages
HRD_CAREER_DEVELOPMENT_RESPONSIVE_ENABLED	Enables Career Development responsive pages
Development Goal Details Drill Down Page Feature Option	Enables you to drill down from the development goal to the development goal details.

Profile Option Code or Feature Option	Description
	To embed contextual notes in the development goal details page in Career Development, you need to enable the Development Goal Details Drill Down Page feature option in the Setup and Maintenance work area>Workforce Development offering>Career Development functional area.
ORA_HRR_TALENT_REVIEW_RESPONSIVE_ENABLED	Enables Talent Review responsive pages
HRM_SUCCESSION_RESPONSIVE_ENABLED	Enables Succession Management responsive pages

Use Contextual Notes in an Employee's Performance Goal

To support continuous performance management processes, managers in your organization are now able to share their feedback on employee performance throughout the review period. As an application implementation consultant, you can embed a Contextual Notes component in an employee's goals page so that managers can add feedback related to the goal.

This table summarizes the key decisions for this scenario.

Decisions to Consider	Who Makes the Decision	In This Example
Which Notes component can I add to the performance goal page?	Application implementation consultant	Person Notes
Override the default visibility options of Person Notes?	Application implementation consultant	No
What visibility setting do I need to use for the Notes component?	Person creating the note, usually the manager	Everyone

This example explains how to add and use a Notes component in a performance goal page.

1. Add Notes component to an employee's performance goal page.
2. Configure contextual notes parameters.
3. Create a note in the goal page.

Add Notes Component

The Contextual Notes container exists in the Talent Management application pages. You need to add the Notes component, define the context parameters, and specify the options to configure it in the application page.

1. Sign into the application as a user with configuration privileges.
2. Activate a sandbox that has Page Composer enabled.
3. Navigate to an employee's performance goal page.
4. On the Setting and Actions menu, select **Edit Pages**.
5. Ensure that the **Edit Layer** is **Site**.
6. Select the **Structure** tab.

7. Select the region where you want to add the note.
8. In the Source window, click the **Add** icon.
9. In the **Add Content** dialog box, click **Add** adjacent to the Notes component.
10. Close the Add Content dialog box.

You can see the Notes component added to the page.

Configure Person Notes for an Employee's Performance Goal

1. In the Source window, select the Notes component and edit its properties.
You can see the Component Properties window.
2. In the Parameters tab, enter the expression values for the parameters shown in this table.

Parameter	Expression
Object Type	PER_PERSON
Object ID	<code># {pageFlowScope.pWorkerPersonId}</code>
Context Type	ORA_PERFORMANCE_GOAL Note: You can use your own string for the Context Type value. But you can see notes created in check-in documents only if you use the ORA_PERFORMANCE_GOAL value.
Context ID	<code># {pageFlowScope.baseGoalId}</code>
Show Detail Page	<code>' true '</code>

You can't change the title text of person notes.

3. You can define Display Options and Style attributes in the other tabs of the Component Properties window.
4. Click **Apply** and then **OK**.
5. Click **Close** to stop editing the page.

You can override the default visibility options of Person Notes using the Manage Common Lookups and Manage Feedback Visibility tasks in Functional Setup Manager. As we are going to use only the default values, we don't need to change or override the visibility settings.

Create a Note in the Goal Page

After the implementation consultant adds the Notes component to the performance goal page, any employee with access to the page can see the Feedback section in the page. To create a note, do these steps:

1. In the Feedback section of the goal page, click **Add**.
2. From the **Who can see my feedback** list, select **Everyone**.
3. In the **What do you want to say?** area, type your feedback.

4. Click **Save.**

You can create multiple notes.

Related Topics

Add an Object Note to a Succession Plan

Succession plan owners and other HR specialists want to add a note to a succession plan. They also want to restrict the visibility of the notes to only themselves as the notes may contain confidential information. As an application implementor, here's what you need to do.

This table summarizes the decisions that must be made.

Decisions to Consider	Who Makes the Decision	In This Example
Which Notes component can I add to a succession plan?	Application implementor	Object notes
Should I change the default visibility setting of the object Notes component?	Plan owners and other HR specialists who can access the plan	Yes. Must change the default Everyone visibility setting to Only Me .

This worked example describes these tasks that need to be done to add the Notes resource catalog component to a responsive succession plan page:

1. Add the Notes resource catalog component to a succession plan.
2. Create notes for a succession plan.

Before You Add the Notes Component

1. Sign in the application as a user with configuration privileges.
2. Activate a sandbox that has Page Composer tool enabled.

Add a Notes Component

1. Open a responsive succession plan page.
2. On the Settings and Actions menu, click **Edit Pages**.
3. Ensure that the **Edit Layer** is **Site**.
4. Select the **Structure** tab.
5. Select the region where you want to add the note.
6. In the Source window, select the **panelGroupLayout** indicated for the page region:
 - o **Plan Info section**: Select the **panelGroupLayout** that encloses all the existing **panelCollectionEdit** components.
 - o **Other regions**: Select the **panelGroupLayout** that's at a level lower than the **FacetWrapper** level.
7. In the Source window, click the **Add** icon.
8. In the Add Content dialog box, click **Add** adjacent to Notes.
9. Close the Add Content dialog box.
10. In the Source window, select the Notes component and edit its properties.
11. In the Component Property dialog box, configure the contextual parameters as shown in this table.

Parameter	Expression
Object Type	SUCCESSION_PLAN_NOTE
Object ID	<code>{bindings.PlanId.inputValue}</code>

12. Configure the display options.
13. Click **Apply**.
14. Click **OK**.
15. Click **Close** to stop editing the page.
16. Publish the sand box.

Create a Note

After the application implementor adds the notes component to a succession plan, it's available in all plans.

A plan owner or an HR Specialist who can access the succession plan can create a note about the succession plan.

1. Navigate to the Succession Plans overview page.
2. Edit the plan for which you want to create a note.
3. Click the Notes component.
4. In the Notes page, click **Add**.
5. From the **Who can see my note** list, select **Only Me**.
6. Add the notes text.
7. Save the note.

Related Topics

- [Add and Hide Components Using Page Composer](#)

What's the difference between Anytime Feedback and Contextual Notes?

Both are Notes features and are similar in many ways. The **Contextual Notes** component is an extension of **Anytime Feedback**. You can embed it into Talent Management application pages where required and configure it as per your requirements.

The Anytime Feedback feature comes with the application in specific pages and can't be moved around in the application.

What's the difference between Person Notes and Object Notes?

Person Notes captures notes about a person, for example Anytime Feedback.

Object Notes captures notes for an object, for example Notes on a succession plan.

The similarities and differences between the Person and Object Notes features are tracked in this table.

Feature	Person Notes Component	Object Notes Component
Display Option	Header text appears as Feedback for <Recipient Name> You can't change the header text.	The default header text of Notes appears as Notes <expression> . You can provide a string expression such as Share Your Thoughts You can change header text for all instances of the component.
Visibility Options	You can override the default visibility settings for any context type.	Can't change the predefined visibility settings
OTBI Reporting	Can create analytical reports for Feedback notes using OTBI	Can't create analytical reports for object notes using OTBI
Security	Access to Person Notes is similar to restrictions for a person record. Data security restrictions defined for data roles are applicable. Access to data is secured using data roles.	You don't need any specific access to view Object Notes. Data security restrictions defined for data roles aren't applicable.

Can I view object notes created by others?

Based on the defined Visibility settings, you can view notes created by others. For Object Notes, the administrator and the creator of Notes can set the visibility of the notes. If it is set to **Everyone**, then you can view it.

Can I delete the contextual notes?

Yes, if you created the notes that is embedded in the page. The administrator can delete the Notes component from the page and not from the database.

FAQs for Workforce Profiles

What's a rating category?

A label for a grouping of rating levels. Rating categories are used in talent management processes such as performance management and talent reviews to group ratings for analysis tools (performance and potential box chart, for example.)

Why are some content type relationships not editable?

Predefined content type relationships aren't editable. You can only edit content type relationships that you define.

How can I define a relationship between the Goals content type and other content types?

Set up the relationship on the content type that you want to relate to goals using the relationship type: Is supported by. For example, to define a relationship between the Goals and the Competencies content types, set up the relationship on the Competencies content type, instead of the Goals content type.

What's a free-form content type?

Free-form content types enable you to capture information in a profile that you needn't store in the content library. For example, you can set up a free-form content type to store information about the previous employment information for your workers. Use the Manage Content Types task in the Profiles work area to create a free-form content type.

A free-form content type contains only a code, name, and a description, and doesn't have any properties until you add it to a profile type. Free-form content types don't include any content items. You can use free-form content types when you don't need a content item because the attribute captured for the content section is free-formed or less-structured. For example, you can set up a free-form content type to store information for accomplishments, career statements, and honors and awards.

Why can't I change the relationship type of a content item?

You can't change a content item's relationship type because it is derived from its content type. You can only change relationships at the content type level from the Edit Content Type page in the Profiles work area. You can't change predefined relationships.

How can I delete an attribute from the person profile?

You must have the HR specialist role to delete an attribute from the person profile.

Note: You can hide predefined attributes, but you can't delete them.

To delete an attribute that isn't a predefined attribute from the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.

4. On the Content Sections tab, select the content section that includes the attribute you want to delete.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select the row for the attribute and click **Delete**.

What happens if I enable custom approval rules for the person profile type?

HR specialists and implementors can enable custom approval rules for the person profile type:

- They can define approval rules for each content section related to the person profile type.
- When a worker submits changes for all approval-enabled content through the Edit Skills and Qualifications page of the worker's talent profile, notification is sent to approvers based on the default approval rules.

To enable the custom approval rules for the person profile type, select the Person profile type on the Manage Profile Types page and click **Edit**. You then select the **Enable Custom Approval Rules** check box on the Edit Profile Type page. For configuring approval rules for person profiles, use the Manage Approval Rules interface.

Related Topics

- [Managing HCM Approval Rules: Explained](#)
- [Managing Approvals for Content Types: Explained](#)
- [Creating Person Profiles: Explained](#)

Can I edit skills and qualification data of a person's profile?

Yes. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content of a worker's profile.

Related Topics

- [How can I add content to my profile](#)
- [Adding Content to a Worker's Profile: Procedure](#)

How can I add content to my profile?

Select **Me > Skills and Qualifications** on the Home page. Click **Edit** on the Skills and Qualifications page to edit or add the content to your profile. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content on your profile.

What happens if I don't add a label for a content section property?

If you don't enter a value in the **Label** field for a content section property, the application uses the value in the **Column Name** field as the default value. To open the Content Section page, click the Manage Profile Types task in the Profiles work area, click **Create** to create a profile type. Then on the Content Sections tab add a content section, and click the link to the added content section in the Content Sections region.

How can I diagnose issues with Oracle Fusion Profile Management data?

After populating the Oracle Fusion Profile Management data tables, you can run the Profile Management Integrity Validations test if you have access to the Diagnostic Dashboard. Select **Run Diagnostic Tests** from the Setting and Actions menu in the global area. The validations test generates a report that contains details of any rows that are invalid, which you can repair or remove.

For Profile Management, the test validates four categories of data integrity:

- **Business Group Validation:** Checks the business group is valid and exists in the Oracle Fusion Global Human Resources business group table.
- **Foreign Key Validation:** Foreign key attributes must not be null.
- **Field Level Validation:** Field level attributes must match the business rules set up in Profile Management
- **Row Count Validation:** The row count on the setup tables must be greater than 0.

15 Workflow Notifications and Approvals

Overview of Notifications and Approvals

Approval management uses human workflow to automate tasks that are passed from a user or an application to another user or group for consideration or action. Workflows are routed in a predefined sequence to achieve an end result. Examples of tasks include approving a time card or completing an employee performance appraisal.

Approval management:

- Controls workflows for business processes such as hiring an employee or managing promotions.
- Enables you to define task routing policies that can be as simple or as complex as needed.
- Is fully integrated with HCM to derive approvers based on the supervisory hierarchy, areas of responsibility (such as HR or Benefit Representatives) and other criteria, such as job levels.

For workflows, Oracle Fusion Applications uses the approval management extensions of the human workflow services from Oracle Service-Oriented Architecture (SOA) Suite as well as the Oracle Business Process Management (BPM) Worklist application.

Oracle SOA Suite:

- Is a comprehensive software suite used to build, deploy, and manage service-oriented architectures.
- Provides a human workflow service that handles all interactions with users or groups in business processes.

For more information about using human workflow in SOA Suite, see *Developing SOA Applications with Oracle SOA Suite*.

Oracle BPM Worklist provides an interface for:

- Users to access tasks assigned to them and perform actions based on their roles in the workflow.
- Implementors to perform approval management setup, to define who should act on which types of transactions under what conditions.

For more information about working on tasks, see *Managing and Monitoring Processes with Oracle Business Process Management*.

Roles That Give Workflow Administrators Access

Users who are workflow administrators for a specific product family need the predefined workflow role that gives access for that family. With that role, they can do things like set up approval rules and manage submitted approval tasks for that family. By default, these roles are assigned to predefined job roles, so if they have one of those job roles, they're usually good to go. If not, you can use the Security Console to assign the job role they need. Or, in some cases, create a custom role with the workflow roles they need and assign them the custom role.

There are a couple of predefined roles for workflow administration that aren't specific to a product family:

- BPM Workflow All Domains Administrator Role

- Gives you access to workflow tasks from all product families
- Isn't assigned to any predefined job roles by default
- BPM Workflow System Admin Role
 - Provides a bit more administration access than the product family roles
 - Is assigned by default to at least one predefined job role for most product families

Predefined Roles

Here are the predefined roles that give access to workflow administration, and the predefined job roles that they're assigned to.

Product Family	Role Name	Role Code	Predefined Job Roles Assigned To
All	BPM Workflow All Domains Administrator Role	BPMWorkflowAllDomainsAdmin	None
All	BPM Workflow System Admin Role	BPMWorkflowAdmin	Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Financial Application Administrator (ORA_FUN_FINANCIAL_APPLICATION_ADMINISTRATOR_JOB) Human Capital Management Application Administrator (ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Incentive Compensation Application Administrator (ORA_CN_INCENTIVE_COMPENSATION_ADMINISTRATOR_JOB) Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB) Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB)

Product Family	Role Name	Role Code	Predefined Job Roles Assigned To
			Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB) Marketing VP (ORA_MKT_MARKETING_VP_JOB) Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB) Project Application Administrator (ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB) Sales Lead Qualifier (ORA_MKL_SALES_LEAD_QUALIFIER_JOB) Supply Chain Application Administrator (ORA_RCS_SUPPLY_CHAIN_APPLICATION_ADMINISTRATOR_JOB)
Financials	BPM Workflow Financials Administrator	BPMWorkflowFINAdmin	Financial Application Administrator (ORA_FUN_FINANCIAL_APPLICATION_ADMINISTRATOR_JOB)
Higher Education	BPM Workflow Higher Education Administrator	BPMWorkflowHEDAdmin	Higher Education Application Administrator (ORA_HEY_HIGHER_EDUCATION_APPLICATION_ADMINISTRATOR_JOB)
Human Capital Management	BPM Workflow Human Capital Management	BPMWorkflowHCMAdmin	Human Capital Management Application Administrator (ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Compensation	BPM Workflow Incentive Compensation Administrator	BPMWorkflowOICAdmin	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Incentive Compensation Application Administrator (ORA_CN_INCENTIVE_COMPENSATION_ADMINISTRATOR_JOB)
Procurement	BPM Workflow Procurement Administrator	BPMWorkflowPRCAdmin	Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB)

Product Family	Role Name	Role Code	Predefined Job Roles Assigned To
Project Portfolio Management	BPM Workflow Project Administrator	BPMWorkflowPRJAdmin	Project Application Administrator (ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB)
Sales	BPM Workflow Customer Relationship Management Administrator	BPMWorkflowCRMAdmin	Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB) Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB) Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB) Marketing VP (ORA_MKT_MARKETING_VP_JOB) Sales Lead Qualifier (ORA_MKL_SALES_LEAD_QUALIFIER_JOB)
Supply Chain Management	BPM Workflow Supply Chain Administrator	BPMWorkflowSCMAdmin	Supply Chain Application Administrator (ORA_RCS_SUPPLY_CHAIN_APPLICATION_ADMINISTRATOR_JOB)

Things to Know About the Roles

Here are some things to know about how these roles should be used and what the roles let administrators do.

- If your administrators manage workflow for multiple product families, you should give those users a custom role with the appropriate family-specific workflow roles added.
- If your administrators manage workflow for all product families, give them a custom role with BPM Workflow All Domains Administrator Role.

CAUTION: Assign BPM Workflow All Domains Administrator Role only if your administrators really do need access to workflow tasks from all product families. For access in multiple product families, but not all, use the roles for the corresponding families instead.

- All administrators can see to-do tasks, no matter which role they have for workflow administration.

- Only administrators with either BPM Workflow All Domains Administrator Role or BPM Workflow System Admin Role would have Skip Current Assignment as an action to take on workflow tasks.

Related Topics

- [Assign Roles to an Existing User](#)
- [Edit Job and Abstract Roles](#)
- [Role Copying or Editing](#)
- [Actions and Statuses for Workflow Tasks](#)
- [Create Roles in the Security Console](#)

Search for Workflow Tasks to Configure

Some workflow setup applies to all tasks, but most of the time you configure specific tasks. To work on a specific workflow task in BPM Worklist, you first run a search and then select the task from the search results.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, run a search in the **Tasks to be configured** pane.
3. If you don't get any results, or the ones you want, change your search term and try again.

Here are some things to know about the search:

- This searches against various attributes, for example the task title (the one on the General subtab that appears on the Task Configuration tab after you select a task from the search results), application name, and category. But, the search doesn't match against the task name you see in the search results.
- The search is case-sensitive.
- Search by * if you want all tasks in the search results.
- Only default tasks are included in the search results. You can click **Show** and select the **Active Versions** check box to get both default and active tasks.

Disable or Enable Workflow Notifications

When workflow tasks are assigned to users, they get notifications through email. They also get in-app notifications in the Things to Finish section on the home page and the notifications list in the global header. From these two places, users can open the Notifications page to see all their in-app notifications. If you have BPM Workflow System Admin Role (BPMWorkflowAdmin), you can disable or enable these email and in-app notifications for all users. For example, you can disable notifications when you're testing changes to approval rules. That way you don't send test notifications to users. And then when you're ready, enable notifications again.

Here are things to know about disabling workflow notifications:

- You disable only email notifications that are sent as part of workflow tasks, not all emails in general.
- Users can still find their workflow tasks in the Worklist: Notifications and Approvals work area.

Set the Notification Mode

Here's how you disable or enable workflow notifications:

1. Click the **Notifications** icon in the global header.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In BPM Worklist, click your user name and select **Administration**.
5. On the Administration tab, open the Application Preferences page and go to the Notification section.
6. Select a value from the **Notification Mode** list:
 - o All: This is the default value.
 - Email notifications are enabled.
 - Workflow notifications are included in the global header, home page, and Notifications page.
 - o None:
 - Email notifications are disabled.
 - Workflow notifications aren't included in the global header, home page, and Notifications page.
 - o Email:
 - Email notifications are enabled.
 - New workflow notifications won't appear in the global header, home page, and Notifications page.
 - o In-app:
 - Email notifications are no longer sent.
 - Workflow notifications in the global header, home page, and Notifications page are enabled.
7. Click **Save**.

Related Topics

- [More Setup for Workflow Email Notifications](#)
- [Send Test Workflow Email Notifications to One Address](#)
- [View and Act On Notifications](#)

Synchronize Notifications in the Global Header and Home Page with Workflow Tasks

When workflow tasks are assigned to users, they can get an email as well as a notification in the global header and in the Things to Finish section on the home page. Updates they make to tasks from the global header, for example approving them, are automatically reflected in the Things to Finish section. Same goes the other way around, too.

But, the notifications don't immediately reflect changes to the task status if users take action through email, the Worklist: Notifications and Approvals work area, or BPM Worklist. For example, after you approve a task from email, you can still see the notification in the global header and home page asking for approval. Another case like that's when a task is assigned to an approval group, and everyone in the group gets a notification. Say you approve that task from the Things to Finish section. Your notification is removed from that section and the notifications list in the global header, but the same notification is still there for everyone else in the approval group.

So, use the **Synchronize Notifications in Global Header** scheduled process to synchronize notifications with the latest task status for all users:

- This affects the notifications list in the global header, the Things to Finish section, and the Notifications page that shows all notifications, not just what's pending for the user.
- The process includes notifications not just for tasks that require action, but also ones that are just FYI.
- The process doesn't update the title of notifications in the global header, home page, or Notifications page. Like email subjects, the notification titles are static.

Note: No matter what the task status is, the scheduled process also removes notifications that are older than 30 days from the notifications list, Things to Finish section, and Notifications page.

Even when notifications aren't in sync with the latest workflow task status, users can still find the latest task status in the Worklist: Notifications and Approvals work area.

Schedule the Process

In the Scheduled Processes work area, submit the Synchronize Notifications in Global Header process to run on a schedule. It's recommended that you schedule the process to run every two hours. But if you need to run it more frequently, don't schedule it to run more often than every 30 minutes.

You need to have the Manage Scheduled Job Definition (FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV) privilege to run this process. Predefined administrator job roles for product families have this privilege.

What Happens After Synchronization

One key thing that affects what users see in the notifications list, Things to Finish section, or Notifications page is whether the workflow task is pending for the user. Here's an example of what happens before and after the scheduled process runs:

1. A notification is pending a user's approval.
2. The user approves the task from email. The task status changes, but the notification requesting approval is still in the global header and Things to Finish section.
3. After synchronization, because the task status is Completed and the task is no longer pending for the user, here's what happens to the notification:
 - It's removed from the list in the global header.
 - It's no longer a card in the Things to Finish section.
 - On the Notifications page, it moves from the Assigned to Me tab to the All tab.

Related Topics

- [Submit Scheduled Processes and Process Sets](#)

How You Define Approvals for Human Capital Management

You can manage approval policies using the tasks Manage Approval Transactions for Human Capital Management and Manage Task Configurations for Human Capital Management.

Managing Approval Transactions

Using the Manage Approval Transactions page, you can configure approval policies for many HCM tasks, including, but not limited to, the following:

- Hire
- Promote
- Transfer
- Terminate

You can select approvers for a task, arrange approvers in the required sequence, define approval rules for each approver, and configure conditions for each rule.

Managing Task Configurations

The Manage Task Configurations for Human Capital Management task navigates to the BPM Worklist. You can use the BPM Worklist to review and configure approval policies for HCM tasks; however, we recommend that you use the Manage Approval Transactions for Human Capital Management task. Using either UI, you can configure the following approval details:

- When to issue approval notifications
- Who can access task contents
- What actions are available to approvers
- What to do when errors occur during approval routing
- When tasks expire or when should tasks be escalated
- When approvers can add additional approvers

Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Approval Flow

Approval Management configuration options for Oracle Fusion Human Capital Management determine most of the actions that are available to the participants in the approval process. For example:

- Either approver can reject the transaction. By default, the approval process stops when the transaction is rejected.

- The second-level manager can push the transaction back to the first-level manager, who then has a second opportunity to review the transaction and either approve or reject it, as appropriate.
- Insertion of approvers in the approval list is permitted.
- Approvers can delegate their approval responsibilities to other approvers.

If you change the default settings of the Approval Management configuration options for a task, then different actions or action outcomes become available to this approval flow.

Related Topics

- [Managing HCM Approval Transactions: Explained](#)

How You Manage HCM Approval Transactions

Use the Transaction Console to easily monitor daily tasks related to HCM approvals. In the Navigator menu, select Tools then Transaction Console.

The Transaction Console provides diagnostic information and search capabilities that enable HCM Administrators to:

- See the current status of all of the approval tasks in the application.
- Monitor tasks that have failed, and take appropriate actions like withdraw or reassign to resolve stuck transactions.
- Search approval tasks based on user defined criteria.
- Save search criteria.
- Export the queried results to a spreadsheet.
- Set up approval rules and routing policies.
- Set up transaction flows to bypass approvals.

Approval Rules Tab

To view or configure the approval rules for a transaction, search for the transaction and click the Configure button in the Rules column in the search results. This opens the Rules configuration page where you can edit and save approval rules.

For more information, see the Basics of Approval Rules document on Oracle HCM Cloud Common Features Release 13 Transaction Console (2430452.1) on My Oracle Support at <https://support.oracle.com>.

Transaction Summary Tab

You can monitor all of the tasks in the application and can search and filter the results based on various criteria. The Transaction Summary tab provides information on whether a process has failed or is pending, and how many instances of the process have failed or are pending. An approval process may fail due to various reasons, for example, if there is a network or database outage or an issue in the approval rules setup. An approval process may also remain in a pending state waiting for approval. For failed processes, you can view the error message generated in the application, and for pending processes, you can view the list of approvers. You can also view the current status of the approval which shows who the transaction is with or who might have already approved it. You can either withdraw a failed process or configure the approval rules and resubmit the process. If you withdraw the process, then the process is canceled and you can either start or submit a new transaction.

Bypassing Approvals

The application automatically initiates the approval process upon submitting a transaction, if the transaction has approvals configured. You can override this behavior by enabling the Bypass Approvals option for the transaction. If you bypass approval for a transaction, the transaction is committed immediately upon submit and is not routed for approval.

Note:

When you submit a termination transaction, you can select the Deferred processing option to postpone processing the transaction until the termination date. This option is typically used in future-dated terminations. However, if you enable Bypass Approvals for the termination transaction, the Deferred processing option will not be available for selection.

For more information, see the Using the Transaction Console document on Oracle HCM Cloud Common Features Release 13 Transaction Console (2430452.1) on My Oracle Support at <https://support.oracle.com>.

Assignments and Routing

How Workflow Task Routing Is Mapped Out

To determine how to route and assign a workflow task, the task configuration has at least one stage and one participant. In BPM Worklist, the Assignees subtab in the Task Configuration tab has a diagram that maps out the stages and participants. A participant represents a single user or group of users to assign the task to, and a stage is a way to organize those participants to map out the routing flow.

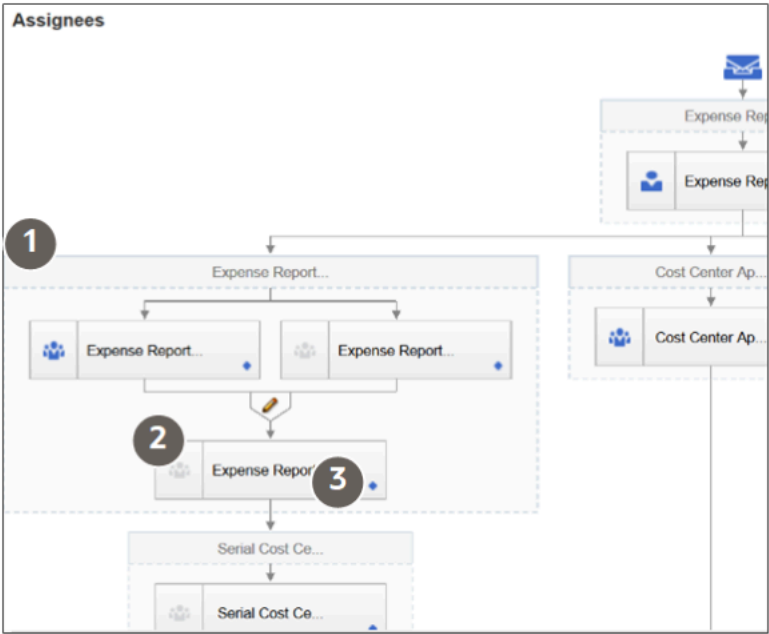
You can have one or more stages in sequence or in parallel. And within each stage, you can have one or more participants in sequence or in parallel:

- Parallel: The task gets assigned and notifications are sent to all of the participants in the stage at once.
- Sequential: The task gets assigned and notifications are sent to one participant and then another, in a specific order. All assignees need to approve sequentially to get the task approved.

Each participant has at least one rule set defined, and each rule set has at least one rule. Rules contain the conditions that must be met for the task to be assigned to a participant, and rules also determine whom to assign the task to.

Example

Let's take a look at a diagram mapping out a workflow task. The flow and placement of the boxes show what's in parallel or in sequence.



Callout Number	What It Is	In This Example
1	Stage	The outermost boxes in the diagram are stages. We see four of the stages in this task, and two of them are in parallel at the second step of the sequence for the task.
2	Participant	Each box within a stage is a participant. Three of the stages have one participant, and one stage has three participants, two of which are in parallel at the beginning of the sequence for the stage.
3	Go to rule icon	Each participant has an icon that you can click to open the rule sets and rules for that participant.

Types of Participants

There are four types of participants for workflow tasks. In the diagram on the Assignees subtab, each participant has an icon that tells you what type it is. If the icon for a participant is grayed out, that means the participant is disabled.

Single

The assignee is a single user or an application role. (Even though LDAP group is also a possibility, it's recommended that they're not used.) For example, the task is assigned to a user's manager, and the manager's approval is all that's needed for the request to go through. With application role, the task is routed to all users with the role, and someone can claim the task to work on it.



Parallel

A set of assignees must work in parallel, usually by voting. For example, the task is assigned to people who must vote to decide whether to hire someone or not.



Serial

A set of assignees must work in sequence, and the set is usually dynamic. For example, the task is routed up a supervisory chain for approval.



FYI

This is like the Single participant type, except that the assignees just get a notification and don't need to act on the task. In some cases, they can add comments or attachments, but they can't affect the outcome of the task.



Disable Stages or Participants

If a stage or participant doesn't apply based on your business requirements, you can disable it.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, select the stage or participant you want to disable.
 - Stage: Click anywhere in the stage except inside the boxes representing participants.
 - Participant: Click in the box representing the participant.
7. In the pane after the diagram, click the Advanced subtab.
8. Select the **Ignore Stage** or **Ignore Participant** check box, depending on what you selected in the diagram.
9. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Create Approval Groups

An approval group is a set of users that can act on workflow tasks. You can set up tasks so that at some point in the approval flow they get routed to an approval group instead of an individual user. An approval group can contain other approval groups.

- When a task is assigned to an approval group in a parallel participant, someone in the group can claim the task and act on it. When the task is claimed, no one else in the group can act on it. But if the person who claimed the task releases it, then someone else from the group can claim it.
- If it's a serial participant instead, the task is routed to each member of the approval group in sequence, so everyone must act on it.
- There are two types of groups in workflow. One is the approval groups we are talking about here that you can use in task configurations to define routing. The other is LDAP groups that are available for users to select when they delegate or reassign tasks, but it's not recommended for them to use LDAP groups.

There aren't any predefined approval groups, so it's up to you if you want to create any. Here's how you go about it:

1. In the Setup and Maintenance work area, go to the **Manage Approval Groups** task in the Application Extensions functional area.
2. In BPM Worklist, on the Approval Groups tab, click the **Create Approval Group** icon in the **Groups** toolbar.
3. On the Details page, enter the group name.
4. In the Members section, click the **Add Member** icon.
5. In the Add to Group dialog box, select **User** or **Approval Group**, depending on what you want to add to your group.
6. Find and select the specific user or group, and click **OK**.
7. Add more members, and edit or delete any if you need to.

Note: For approval groups that you plan to use in serial participants, add members in the order that you want tasks to get assigned. If you add User 1, User 2, and then User 3, the task is first assigned to User 1, then User 2, and finally User 3.

8. Click **Save**.

CAUTION: Don't delete your approval group if it's used in at least one approval rule. You can still edit the group.

Configure Approval Rule Sets and Rules

Rule sets and rules control how a workflow task is routed, assigned, and completed, based on specific conditions. For example, a rule can say that for a transaction that costs more than a certain amount, approvals must go up three levels in the management chain. A workflow task has one or more rule sets, and a rule set has one or more rules. At run time, if a rule set has multiple rules, all the rules are evaluated at the same time. A rule has two parts, an If section that has the conditions, or tests, and a Then section that has the actions to take when the conditions are met.

Configure Rule Sets

First, create or find the rule set you want to work on:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.

Note: You may see a message saying that flexfields have been modified. This means someone used Application Composer to create new fields, which creates flexfields on the back end. Click the Start Synchronization button to get the latest set of flexfields that you can use for the rules in this task.

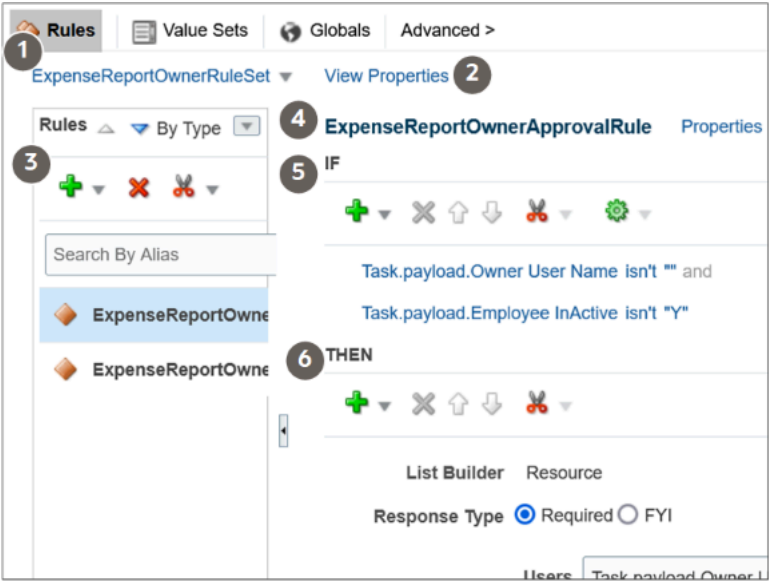
4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, find the participant you want to work on. Click the **Go to rule** icon and select **Go to rule**. Or, select the participant and, in the pane after the diagram, click the link in the **Business rule** field.
7. Go on to work on the rule set that's displayed on the Rules tab. Or, from the drop-down list with rule set names, select another rule set to edit, or select **Add New Rule Set**.
8. Click the **View Properties** link after the rule set name to see the **Effective Date** setting and **Active** check box. The rule set needs to be effective and active to apply when people create workflow tasks. It's a good idea to leave the effective date set to Always.

CAUTION: From here, you can also click the **Delete Rule Set** link. Before you delete any predefined rule sets, make sure you're really not using it and never will. Don't delete the predefined Modification Rules and Substitution Rules rule sets.

9. In the Rules pane, you can add, edit, or delete rules in the rule set. Expand the rule if it's not already. As with the rule set, you can click the **Show Advanced Settings** icon for a rule to make sure that the rule is effective and active.
 - o Create: Click the **Advanced Add or Modify Options** icon and select **General Rule**.
 - o Edit: Select the rule if it's not already.
 - o Delete: Select the rule and click the **Delete** icon in the toolbar in the Rules pane.

For the rule you're creating or editing, you can click the **Properties** link after the rule name to rename the rule and make sure that the rule is effective and active.

Here's a screenshot to help us understand what we see in the Rules subtab on the Assignees tab:



Callout Number	What It Is
1	The rule set drop-down list, where you can select a rule set to work on or create a new rule set.
2	The link to open properties for the rule set.
3	The Rules pane, which lists the rules within the rules set and has a toolbar for working on those rules, for example to add or delete them.
4	The names of the rule that's selected in the Rules pane, followed by a link to open properties for that rule.
5	The If section of the rule, where the conditions are defined and there's a toolbar for working on those conditions.
6	The Then section of the rule, which defines what happens when the conditions are met. There's also a toolbar specific to this section.

Configure the If Section in Rules

In the If section of the rule, define conditions for the rule. Each line in this section is called a test.

- For existing conditions, click on the line that you want to edit, making it active and selected. To add a new line, click the **Advanced Add or Modify Options** icon and select a type to add, for example **simple test**.
- Click the **Left Value** icon to select an attribute in the Condition Browser dialog box.
- Select an operator.
- Click the **Right Value** icon to select something from the Condition Browser dialog box, or enter a value in the corresponding field.

5. If you're not working on the last line, you can click the **and** or **or** link at the end of the line to toggle between the two.

CAUTION: If the attribute you're evaluating in the condition is optional, users might not have entered a value for that attribute in the UI. For your rule to work properly, it's highly recommended that you first have a line in the condition that checks if the attribute isn't blank. So that means you select the attribute, select **isn't** as the operator, and enter **null**. Then add another line with the condition that you're evaluating the attribute for, and make sure you have an and between the two lines.

To delete a line, put your cursor in any field in the line, and click the **Delete** icon.

Configure the Then Section in Rules

In the Then section of the rule, define what happens when the conditions in the If section are met.

1. Edit any existing actions. Or, click the **Insert Action** icon, and you usually select **Add Approver** and then a list builder, which controls how to route the task.
2. Fill in the rest of the section. The fields you get depends on the list builder, but here are some that you might use.

Field	What This Is
Response Type	Required: The assignee needs to take action, for example to approve or reject. FYI: The assignee doesn't need to take action.
Number of Levels	Number of levels required for the task to be completely approved, from the starting participant to the top participant.
Starting Participant	The first assignee in the approval chain.
Top Participant	The last assignee in the approval chain if the chain goes up that high. Approvals don't go beyond this participant, for example in the supervisory hierarchy.
Auto Action Enabled	If set to True, there's an automatic action that is taken on the task when the rule conditions are met.
Auto Action	"APPROVE": The task is automatically approved. "REJECT": The task is automatically rejected.
Rule Name	The name of the rule with the Then section that you want to use. ○ Leave the field with the name of the rule you're working on, to indicate that this rule will use the Then section defined here for this rule. ○ Or, you can enter the name of an existing rule from any task, enclosed with quotation marks, and leave all the other fields in this Then section blank. The Then section in the

Field	What This Is
	rule you entered would apply to this rule you're working on. So basically, you're reusing the Then section from another rule.

To select the starting or top participant:

- a. Click the **Starting Participant** or **Top Participant** icon.
- b. In the Add Hierarchy Participant dialog box, select the **Get User** option for a particular user, or **Get Manager** for an attribute, such as the task creator.
- c. For the Get Manager option only, select the list builder that's used for the rule.
- d. For the Get User option, enter in the **Reference User** field the user ID that the user signs in with, enclosed in quotation marks, for example "KLEE".

For the Get Manager option, here's what you do for the **Reference User** field:

- i. Click the **Expression Builder** icon.
- i. In the Variables tab of the Expression Builder, select the attribute you want in the hierarchy. For example, expand Task > payload and find your attribute there.
- ii. Click the **Insert Into Expression** button.
- iii. Click **OK**.
- e. Leave the **Effective Date** field blank to use the latest hierarchy, for example supervisory hierarchy.
- f. Click **OK**.

What shows up in the **Starting Participant** or **Top Participant** field reflects what you have in the Add Hierarchy Participant dialog box. Here are a couple of examples.

- o `HierarchyBuilder.getManager("supervisory",Task.payload.Owner User Name,-1,"","")`

Part of the Participant Value	What This Means
<code>getManager</code>	You selected the Get Manager option.
<code>"supervisory"</code>	You selected the Supervisory list builder.
<code>Task.payload.Owner User Name</code>	For the Reference User field, you went to Task > payload > Owner User Name in the Variables tab to select the Owner User Name attribute.
<code>-1</code>	This is the default value, which corresponds to the primary employment assignment. That supervisory hierarchy will be used to find assignees for the task.
<code>"", ""</code>	You left the Hierarchy Type and Effective Date fields blank, so there's nothing between the quotation marks.

- o `HierarchyBuilder.getPrincipal("KLEE","", "")`

Part of the Participant Value	What This Means
<code>getPrincipal</code>	You selected the Get User option.
<code>"KLEE"</code>	For the Reference User field, you entered "KLEE".
<code>","", ""</code>	You left the Hierarchy Type and Effective Date fields blank, so there's nothing between the quotation marks.

Example of a Rule

Let's take a look at an example of a rule. In the If section, we have two tests, the first checking if an attribute is a specific value, the second checking if an attribute is more than a certain amount. The attribute names reflect where the attribute is in the hierarchy you get in the Condition Browser dialog box. The **and** connecting the two tests means that both conditions must be met.

IF








Expense Report.Expense Report Total more than 1000 and



In the Then section, there's the action that applies if the conditions are met, and it's defined based on a Supervisory list builder. Assignees must take action, and only one approval is needed.

THEN

List Builder
Supervisory

Response Type
☒ Required
☐ FYI

Number of levels

Starting Participant

☐
Top Participant

Auto Action Enabled
False

Auto Action

Rule Name
- 2. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Overview of Flexfields](#)
- [Define Fields](#)
- [Assignments](#)

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397

List Builders

A list builder is the method to use for routing a workflow task, for example, by going up the supervisory hierarchy or sending to an approval group. When the conditions in a rule are met, the task is assigned based on the action in the Then section of the rule. To define an action, you select a list builder and then provide settings for that list builder to determine whom to assign the task to.

Here are the available list builders:

- Approval Group
- Job Level
- Management Chain
- Position
- Resource
- Supervisory

Let's take a closer look at some of the more widely used list builders.

Approval Group

An approval group is a specific set of users that can act on a task. Depending on the participant type, tasks are routed to an approval group in serial or parallel.

- Parallel: Someone in the approval group can claim the task and act on it. When the task is claimed, no one else in the group can act on it. But if the person who claimed the task releases it, then someone else from the group can claim it.
- Serial: The task is routed to each member of the approval group in sequence, so everyone must act on it.

After you select Approval Group as the list builder, you select the approval group to assign the task to when the rule's conditions are met. If you select True for the **Allow empty groups** list, there won't be any errors if the group you select doesn't have any members when the rule is evaluated. In most cases, the task is then rejected or routed back to the previous assignee, with the same status that the task was in when it was first routed to that assignee.

Job Level

This routing is based on the supervisor hierarchy in Oracle HCM Cloud. Employees must be set up in HCM with job levels and supervisors. The approval chain goes up the hierarchy and includes assignees based on what you define. For the number of levels, enter a positive number in the **At most** or **At least** fields, or both. And select a value from the **relative to** list.

Number of levels

At most

relative to

▼

At least

relative to

▼

- At least: Let's call the corresponding job level X1.
 - Users in the hierarchy are included in the list of assignees if their job level is less than X1. As soon as we get to a user whose job level is the same as or more than X1, the list of assignees includes that user but goes no further.
 - The at least condition takes precedence, so after it's met first, then the at most condition is applied from where the at least condition left off.
- At most: Let's call the corresponding job level X2.
 - We start with the last assignee from the at least condition. If their manager's job level is less than or the same as X2, then their manager is added to the assignees list and becomes the last assignee. The manager of this new last assignee is then evaluated the same way, and so on up the hierarchy.
 - When we reach a job level that's more than X2, the list of assignees ends, and that user isn't included.

The job levels that X1 and X2 represent depend on what you select from the **relative to** list. Here are examples of what X1 and X2 would be if you enter **3** in the **At most** and **At least** fields.

Relative To	What That Means	What X1 and X2 Would Be
Absolute	The first job level, job level 1	Job level 3
Creator	The user who did something to create a workflow task	Job level 5, if the user at job level 2 created the task
Starting Point	What you define in the Starting Participant field	Job level 6, if the starting participant corresponds to the user at job level 3

Also, there are a couple of optional settings you can use for the job level list builder:

- Utilized Participants: Include the entire assignee list or just a part of it.
 - All approvers: Everyone in the list.
 - Final approver only: Just the very last assignee in the list.
 - Manager and final approver: The first assignee in the list and the very last assignee.
- Include all managers at last level: Include all users with a job level that's the same as the last level needed for approval.

Let's take a look at some examples of what the assignee list would be from this reporting hierarchy:

- Clerk (job level 1)

- Manager (job level 2)
- Director (job level 3)
- Vice president (job level 5)
- Senior vice president (job level 6)
- Chief executive officer (job level 6)

For all the examples, the clerk at job level 1 created the task, and the rule has these settings:

- Relative to: Absolute
- Starting Participant: Manager at job level 2
- Top Participant: Job level 6
- Utilized Participants: All approvers

At Least (X1)	At Most (X2)	Include All Managers at Last Level	Assignees
3	3	No	The assignees are the manager (job level 2) and director (job level 3). • Starting participant: Manager at job level 2 is included no matter what. • At least condition: Director at job level 3, the last and only assignee for this condition because he has the first job level that's the same as or more than X1. • At most condition: No match because the director's manager, the vice president, has a job level (5) that's more than X2.
2	5	No	The assignees are the manager (job level 2), director (job level 3), and vice president (job level 5). • Starting participant: Manager at job level 2 is included no matter what. • At least condition: Director at job level 3, the last and only assignee for this condition because he has the first job level that's the same as or more than X1. • At most condition: Vice president at level 5, because she is the director's manager and has a job level that's the same as X2. But, her own manager isn't included because the senior vice

At Least (X1)	At Most (X2)	Include All Managers at Last Level	Assignees
			president's job level (6) is more than X2.
4	6	No	The assignees are the manager (job level 2), director (job level 3), vice president (job level 5), and senior vice president (job level 6). - Starting participant: Manager at job level 2 is included no matter what. - At least condition: Director, whose job level (3) is less than X1, and the vice president, who is the last assignee for this condition because her job level (5) is the first that's the same as or more than X1. - At most condition: Senior vice president at level 6, because he is the vice president's manager and has a job level that is the same as X2.
4	6	Yes	The assignees are the manager (job level 2), director (job level 3), vice president (job level 5), senior vice president (job level 6), and chief executive officer (job level 6). This example is the same as the previous one, except that the Include all managers at last level check box is selected. So in this case, the CEO is also an assignee because she has the same job level as the senior VP, who is the last assignee based on what's defined for the rule.
1	1	No	The only assignee is the manager (job level 2). - Starting participant: Manager at job level 2 is included no matter what. - At least condition: The manager is already the first assignee with a job level that's the same as or more than X1, so the condition is already met. - At most condition: No match because the manager's manager, the director, has a job level (3) that's more than X2.

Resource

You can assign the task to a specific user or application role. (Even though LDAP group is also a possibility, it's recommended that you don't use them.) Select the assignee in the **Users** or **Application Role** field, and leave the other fields for participants with **null**.

Supervisory

This routing is based on the supervisory hierarchy in Oracle HCM Cloud. Employees must be set up in HCM with jobs and supervisors. For example, the clerk reports to the manager, who reports to the director, who reports to the vice president. The list of assignees begins with the starting participant in the rule, then goes up the supervisory hierarchy. The list ends when it has gone through the specified number of levels or reached the top participant, whichever comes first.

Here's an example of an action in the Then section of the rule, based on the supervisory list builder.

Field	Example of a Value	What This Means
Number of Levels	3	Three approvals are needed
Starting Participant	<code>HierarchyBuilder.getPrincipal(Task.Workflow Submitter,-1,"","")</code>	The user who created the task
Top Participant	<code>HierarchyBuilder.getPrincipal("KLEE",</code>	The person with the user ID KLEE, in this case, the vice president

So with the reporting structure from the clerk to the vice president, say the clerk submits a transaction that creates a workflow task. The starting participant is the clerk, so the task would go first to the clerk, the manager, and then the director. Because only three levels of approvals are needed, the task is completely approved without going up to the vice president, who would be the final assignee no matter how many levels are needed.

Define Rules to Automatically Approve or Reject Workflow Tasks

You can configure a rule so that the workflow task is automatically approved or rejected without having to send it to any approver. These are the main things to do for your rule in the Then section:

- Set up the routing so that the task gets assigned to the application (`workflowsystem`) or the submitter (`Task.Workflow Submitter`).
- Select **True** for the **Auto Action Enabled** list.
- Enter **"APPROVE"** or **"REJECT"** in the **Auto Action** field.

Here's an example of the Then section for a rule that's set up to automatically approve.

Field	Value
List Builder	Supervisory

Field	Value
Response Type	Required
Number of Levels	1
Starting Participant	<code>HierarchyBuilder.getPrincipal("workflowsystem",-1,"","")</code> or <code>HierarchyBuilder.getPrincipal(Task.Workflow Submitter,-1,"","")</code>
Starting Participant	<code>HierarchyBuilder.getPrincipal("workflowsystem",-1,"","")</code> or <code>HierarchyBuilder.getPrincipal(Task.Workflow Submitter,-1,"","")</code>
Auto Action Enabled	True
Auto Action	"APPROVE"
Rule Name	Example Approval
Dimension ID	null

For a rule that's set up to automatically reject, the only difference is that the **Auto Action** field has **"REJECT"** instead.

Create Rules in Advanced Mode

Configure rules in advanced mode to optimize how rules perform when they are applied. Usually you use advanced mode when the rule conditions involve business objects that have hierarchical attributes and collections. A collection is a grouping of transactional data. For example, an expense report is a business object that has child attributes, such as expense items. Because each item can have a different cost center, the expense items are a collection of data that the rule needs to evaluate across cost centers. So, the advanced rule can have a condition that looks at all expense items but matches only for specific cost centers.

Here's how you generally go about creating a new rule in advanced mode:

1. Click the **Properties** link after the rule name and select the **Advanced Mode** check box.
2. Click the **Insert Pattern** link in the If section to get a pattern with the is a operator. A pattern is a way to organize sets of lines, or tests, in the If section.
 - o In the field before the operator, enter any term you want that represents the business object. This term is a variable that's used later in the rule.
 - o After the operator, select the attribute for the business object, for example Expense Report.
3. Click the **Advanced Add or Modify Options** icon in the toolbar after the pattern, and select **simple test**.
4. Define a condition that the rule would match on for the business object. Select an attribute under the folder named after the variable you entered earlier.

5. Add more conditions if you need to.
6. In the toolbar for the business object pattern, click the **Add Pattern** icon.
 - In the field before the operator, enter **Lists_collection**.
 - After the operator, select **Lists**.

This pattern is needed because the rule involves collections.

7. In the toolbar for the lists pattern, click the **Add Pattern** icon.
 - In the field before the operator, enter a variable.
 - After the operator, select the attribute that the collection is based on, for example Expense Item.

This pattern defines what the collection contains.

8. In the toolbar for the collection pattern, click the **Surround selected tests with parenthesis** icon, and select **Surround**.

The surround option puts the pattern you just added and other conditions you define later within parentheses, to group them all together. Conditions within parentheses are evaluated in their entirety, in this case, against the collection.

9. In the drop-down list before the collection pattern, select how you want the rule to match against the collection.
 - Each: There's a match every time something in the collection meets the conditions. Notifications are sent for each match.
 - At least one: As soon as the first match is found in the collection, a notification is sent and the rest of the collection isn't evaluated.
 - None: The entire collection is evaluated, and a notification is sent when nothing matches.
 - Aggregate: Use this option if you need operations like sum or average on attributes in the collection.
10. In the toolbar after the collection pattern, click the **Advanced Add or Modify Options** icon, and select **simple test**.
11. Define a condition that the rule would match on within the collection, selecting attributes under the folder named after the variable.
12. Add more conditions if you need to.
13. Configure the Then section as you would any rule.

Here's an example of the If section for a rule in advanced mode. The rule is looking for expense reports that total 1000 or more, where at least one of the expense items is categorized under Travel. **ER** and **item** are the two variables that were entered, and the paths **ER.Expense Report Total** and **item.Expense Source** show that the attributes were selected from folders named after the variables.

Prevent Assigning Approvals to Specific Users

In rare cases, just based on how approval rules are set up, workflow tasks get routed to the person who created the task. Or, to someone else who should not be approving due to a conflict of interest. To make sure that such things don't happen, you can configure tasks so that they skip certain users in the approval chain. Those users can still get FYI notifications about the tasks, but not notifications they can act on.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task or another approval setup task in the Application Extensions functional area or another functional area.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Configuration subtab.
5. In the Prohibit User Self-Approval section, select the **Prohibit self-approval by users named in these payload attributes** check box.
6. In the Payload Attributes subsection, add one or more attributes:
 - a. Click the **Add** icon.
 - b. Click the **Expression Builder** icon.
 - c. In the Expression Builder, expand **Variables > Task > task:task**.
 - d. Select an attribute that represents the users to skip, for example **task:creator** for the task creator. Or, open the **task:payload** node and select an attribute from there instead.

Note: Make sure you select an attribute that gives you user IDs at runtime, the IDs that users enter to sign in to the application.

 - e. Click **Insert into Expression** and then **OK**.

7. Select the **Reassign approvals to those users' managers** check box if you want to reroute tasks to the manager of the skipped user. Otherwise, the task goes to the next assignee in the approval chain.
8. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes. You can also do this setup for specific participants in the task, if it's not an FYI task. In the Assignees subtab, select the participant, click **Advanced**, and find the same Prohibit User Self-Approval section.
 - If you have settings at both the participant and task level, both would apply.
 - If there's any conflict, for example with the setting of the **Reassign approvals to those users' managers** check box, the participant level setting takes precedence.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Limit Whom to Reassign or Delegate Workflow Tasks To

When users reassign or delegate specific workflow tasks, by default they can select any user. This applies even when they're defining vacation rules that control what happens to tasks that are assigned to them while they're out of office. You can create and set a profile option so that users can reassign or delegate tasks only to someone else with the same legal employer, or only from specific legal employers.

Note:

- This data restriction applies only to users defined as employees in Oracle HCM Cloud.
- The setup doesn't apply to UIs where users request more information about a specific workflow task, or where you select users as part of workflow configuration, for example when creating an approval group.

Before You Start

Make sure your security administrator has already restricted the availability of employee data in general, by defining a security profile and assigning it to a custom job role.

Create the Profile Option

Here's what you do:

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Profile Options** task in the Application Extensions functional area for your offering.
2. On the Manage Applications Core Profile Options page, click the **New** icon.
3. On the Create Profile Option page, enter **BPM_RESTRICT_WORKFLOW_USERS_BY_SECURITY_POLICY** as the profile option code.
4. Enter a display name that you can easily remember to help you find the profile option later.
5. From the **Application** list, select **Common Work Setup**.
6. From the **Module** list, select **Application Common**.
7. Specify a start date.
8. Click **Save and Close**.
9. On the Manage Applications Core Profile Options page, make sure your new profile option is selected in the Search Results: Profile Options subsection.
10. In the <Profile Option>: Profile Option Levels subsection, select the **Enabled** and **Updatable** check boxes for the Site level.

11. Save your work.

Set the Profile Option

In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set your profile option at the Site level with **Y** as the profile value.

Related Topics

- [Set Profile Option Values](#)
- [Configure Employee List of Values](#)

How You Can Regularly Reassign Pending Approvals for Workers That Become Inactive

A manager assignment can become inactive due to the end of an assignment or work term, termination, or global transfer. If the manager has any pending approval notifications, you must reassign them.

Run this process: Run Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments Process in the Scheduled Processes work area. You can set a schedule to run it at least once a day. You can run it more frequently if you want things updated faster.

Here's what the process does:

- It reassigns the direct reports of a terminated manager to that person's line manager and also assigns any pending notifications to the line manager. Only actionable notifications will be reassigned.
- It reassigns pending approval notifications based on the number of days you specify using the Past Period in Days Considered for Reassigning Pending Approvals parameter.

Related Topics

- [Submit Scheduled Processes and Process Sets](#)

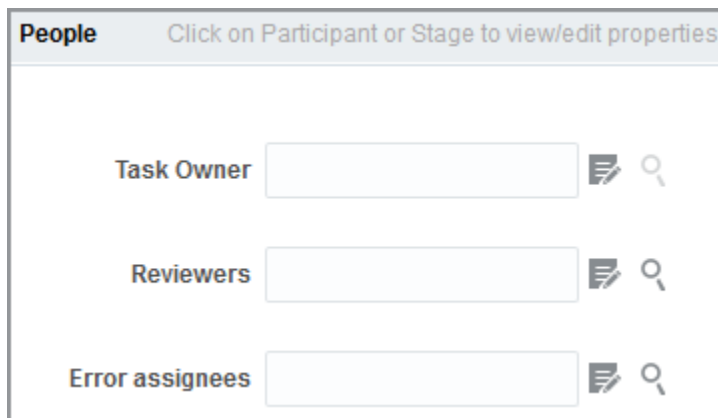
Define People to Support Workflow Tasks

Generally, workflow tasks involve the person who creates the task and the approvers who act on the task. But for any given task, you can also define others who might get involved:

- **Task Owner:** The task owner is an administrator for the business process that the workflow task is related to. Task owners can see the tasks for their business processes and act on behalf of anyone assigned to the task. They can also reassign, withdraw, or escalate tasks.
- **Reviewers:** Reviewers can add comments and attachments to a task without having the task directly assigned to them. They can do this only if you or someone else set them up as reviewers for the task.
- **Error Assignees:** Sometimes workflow tasks run into problems when trying to figure out the next assignee, for example when trying to carry out the escalation policy. You can define whom to automatically assign the task to so that the issue gets fixed. You can have different error assignees for different tasks. Error assignees can route or reassign the task to the appropriate people, or indicate that the issue can't be fixed (in which case, the task is set to the Error status).

Set Up Task Owner, Reviewers, or Error Assignees

This screenshot shows where you define supporting people on the Task Configuration tab in BPM Worklist.



1. In the Setup and Maintenance work area, go to the Manage Task Configurations task or another approval setup task in the Application Extensions functional area or another functional area.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Open the Assignees subtab.
5. Click one of the icons after the **Task Owner**, **Reviewers**, or **Error assignees** field.
 - First icon: Use the expression builder to define who gets assigned, and click **OK**.
 - Second icon: Find the person you want, and click **OK**.
6. Click the **Commit task** icon in the **Tasks to be configured** toolbar when you're ready to roll out your setup.

Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Define When to Send Workflow Notifications](#)

Define the Due Date and Expiration Policies for Workflow Tasks

If you want workflow to finish within a general time frame, you can set a due date, expiration policies, or both.

- Before the due date, the current assignee will be reminded to take action. Even after the due date passes, the task doesn't expire. The assignee, and any approvers after them, can still act on the task.
- But if you set expiration policies, the task can expire based on your settings. Expired tasks are in a final state and no one can make any more updates to them.

Overall Process

Here's how you set the due date, expiration policies, or both for a specific workflow task:

1. In the Setup and Maintenance work area, go to **Manage Task Configurations** or another approval setup task in Application Extensions or another functional area.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Open the Deadlines subtab and make your changes.
5. Click the **Commit task** icon in the **Tasks to be configured** toolbar when you're ready to roll out your changes.

Let's take a look at the Deadlines subtab and what you can set up there.

Deadlines

Due Date ☒ Static Day 14 Hour 0 Minutes 0

Expiration Settings

☐ Do Nothing ☐ Task Level ☒ Assignee Level

Duration ☒ Static Day 30 Hour 0 Minutes 0

Escalation Override Class

☐ Expire only ☒ Escalate ☐ Renew

Take above action when any of the following is met

Maximum Escalation Levels 2

☒ Exclude Saturday and Sunday

Specify a Due Date

On the Deadlines subtab, specify how much time you want to give to approvers. For example, if you enter 14 days for the **Due Date** fields, that means the task is due 14 days after it's created. All approvals should be done by then.

Indicate How Tasks Would Expire

If you want to set expiration policies, do this first:

1. On the Deadlines subtab, expand the Expiration Settings section.
2. Indicate how the task would expire:
 - **Task Level:** If all approvals aren't done within a certain time frame
 - **Assignee Level:** If the assignee doesn't act on the task within a certain time frame
3. Now let's move on with the rest of the setup, which depends on the level you selected.

There's no expiration policy if you leave it at Do Nothing. The task is automatically withdrawn if it's still open after the number of days (180) you see in the **Open Tasks Withdrawn After Number of Days** field. That field is on the Application Preferences page, which you can get to by opening the Administration tab in BPM Worklist.

Define Expiration Policies at the Assignee Level

If you selected Assignee Level, here's how you set expiration policies, including any escalations or renewals:

1. In the Expiration Settings section of the Deadlines subtab, enter a duration and optionally select the **Exclude Saturday and Sunday** check box. Let's say you enter 30 days and select the check box:
 - With sequential routing, the task expires if the last assignee doesn't act on the task within 30 weekdays after the task is routed to them. If the first assignee doesn't act within 30 weekdays, the task is passed to the next assignee, who gets another 30 weekdays. This goes on until the last assignee.
 - With parallel routing, the task expires if the current assignees don't act on the task within 30 weekdays after the task is assigned.
2. If you want to escalate or renew tasks after they expire, select the **Escalate** or **Renew** option. If not, leave the **Expire only** option selected.
3. To escalate, indicate how many times to go up the management chain. Suppose you enter **2** in the **Maximum Escalation Levels** field. Here's what happens when the task expires:
 - With sequential routing, the task goes to the manager (User 2) of the last assignee (User 1).
 - With parallel routing, the task goes to the managers (User 2) of all current assignees (User 1).

When User 2 doesn't act within 30 weekdays, the task is escalated to the manager of User 2, who has another 30 weekdays before the task goes to a final Expired status.

4. To renew, indicate how many times the task can get renewed. For example, you enter **2** in the **Maximum Renewals** field. Here's what happens when the task expires:
 - With sequential routing, the last assignee gets another 30 weekdays.
 - With parallel routing, the current assignees get another 30 weekdays.

If they still don't act within those 30 weekdays, they get another 30 weekdays before the task goes to a final Expired status.

Define Expiration Policies at the Task Level

If you selected Task Level, here's how you set expiration policies, including any escalations or renewals:

1. In the Expiration Settings section of the Deadlines subtab, enter a duration and optionally select the **Exclude Saturday and Sunday** check box. Let's say you enter 30 days and select the check box:

- The task expires if all approvals aren't done 30 weekdays after the task is routed to the first assignee.
 - If there are three assignees and the first two take 25 weekdays to act, then the last assignee gets only five weekdays.
 - 2. If you want to escalate or renew tasks after they expire, select the **Escalate** or **Renew** option. If not, leave the **Expire only** option selected.
 - 3. To escalate, indicate how many times to go up the management chain. Suppose you enter **2** in the **Maximum Escalation Levels** field:
 - When the task expires, it's routed to the manager (User 2) of the current assignee (User 1).
 - When User 2 doesn't act within 30 weekdays, the task is escalated to the manager of User 2, who has another 30 weekdays before the task goes to a final Expired status.
- Don't select anything for the **Highest Approver Title** list. This setting won't apply to your expiration policy.
- 4. To renew, indicate how many times the task can get renewed. For example, you enter **2** in the **Maximum Renewals** field:
 - When the task expires, all pending assignees get another collective 30 weekdays to act.
 - If they all don't act within that period, they get another 30 weekdays before the task goes to a final Expired status.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Approval Management Configuration Options for Oracle Fusion Human Capital Management

Approval Management has the following default configuration options for all applications in the Oracle Fusion Human Capital Management family.

Configuration Option	Default Value	Effect of Default Value
Ad hoc insertion of approvers	True	Ad hoc insertion of approvers in the approval list is allowed. Users who add approvers may also modify or remove the approvers that they add.
Allow delegate	True	Approvers can delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.
Allow push back	True	An approver can push the transaction back to the previous approver, who thereby has a second opportunity to review the transaction.

Configuration Option	Default Value	Effect of Default Value
Allow reassign	True	Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.
Allow request information	True	Approvers can request more information from another approver or the person who submitted the transaction.
Allow self-approval	False	The person who submits the transaction can't approve it.
Allow withdraw	True	The requester or an administrator can withdraw a transaction while the approval process is incomplete. Approvers who have already approved are notified of the withdrawal. The transaction is removed from the worklists of approvers who haven't yet approved.
On error notify	Human Resources Application Administrator	A Human Resources Application Administrator is notified automatically when an error occurs.
Period before task expires	None	Approval tasks don't expire.
Period before task escalates	None	Approval tasks aren't escalated to other approvers.
Escalated approver	None	Approval tasks aren't escalated to other approvers.
Repeated approver frequency	Once per approval	An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.
Re-evaluate approver list	True	The approver list is regenerated after every response.
Rejection outcome	Stop all	When an approver rejects a transaction, the approval process stops and the transaction is canceled.

Guidelines for Managing Approval Rules

Use the Manage Approval Transactions for Human Capital Management task to configure approval policies for HCM tasks such as Hire or Promote. This interface works in conjunction with the BPM Worklist, but enables users to identify approvers and configure approval rules easily for some frequently performed HCM tasks.

Configuring Approval Policies

For a selected task, you can configure the approval policy by arranging approvers in the required order, defining approval rules for each approver, and submitting the approval policy. The approval policy takes effect immediately and supersedes the current approval policy for the selected task; however, in-progress approvals complete as expected and do not switch to the new policy.

Approvers

You can add the following types of approvers:

- Management Hierarchy or Supervisory Hierarchy
- Users
- Approval groups, which you define in BPM Worklist
- Position hierarchy
- Representatives, who are workers with assigned responsibilities, for example Benefits Representative
- Application role
- Job-level based line manager hierarchy
- Self auto approve

When to Use the BPM Worklist

Use the BPM Worklist to:

- Configure notifications, including when notifications are issued
- Configure process details, such as expiration and escalation policies
- Define approval groups
- Define approval rules in advanced mode

You should use the BPM Worklist instead of the HCM Simplified UI if you are configuring complex rules. The simplified UI does not display more than 25 rules and does not allow more than 10 approvers in a single rule.

For any HCM tasks that are not available in the Manage Approval Transactions interface, you can use the BPM Worklist to configure all aspects of approvals. To configure in the BPM Worklist, use the Manage Task Configurations for Human Capital Management task.

Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Related Topics

- [How You Manage HCM Approval Transactions](#)

Approver Types

You can include any number of approvers of various types in your approval sequence by dragging and dropping them into the approval flow. This topic explains each of the approver types.

Management Hierarchy or Supervisory Hierarchy

You can include the following predefined types of managers in your approval sequence:

- Line manager
- Resource manager
- Project manager
- Regional manager

If your enterprise defines additional types of managers, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Users

You can include one or more Oracle Fusion Applications users in the approval sequence.

Approval Groups

You create approval groups using the BPM Worklist. When defining your approval sequence, you can enter the names of one or more existing approval groups.

Position Hierarchy

If you include a position hierarchy in your approval sequence, then position holders are invited to approve the transaction. For positions with more than one position holder, the transaction is approved by the first position holder to approve.

Responsibility Holders

You can include holders of the following predefined responsibilities in your approval sequence:

- Human Resources Representative
- Benefits Representative
- Union Representative
- Payroll Representative

If your enterprise defines additional responsibility types, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Human Resource (HR) Specialists assign responsibilities to workers using the Manage Areas of Responsibility task. A worker becomes an approver for a transaction if he or she has that responsibility for the transaction subject. For

example, if you specify the Benefits Representative as an approver for a promotion, then the Benefits Representative of the worker who is being promoted is invited to approve the promotion.

Note: If you use a responsibility holder, then ensure that responsibility holders are already defined in the application. For example, if you include a HR representative as an approver for an employee process, then all employees must have HR representatives assigned to them.

Application Roles

You can use any of the existing duty roles to include in your approval sequence. If your enterprise defines duty roles for security purposes, then you can enter the duty role to include them in the approval sequence. Users with job or data roles that inherit the duty role become transaction approvers.

Job Level

You can include a job level in your approval sequence.

Job level routings are based on the manager hierarchy defined in Oracle Fusion Human Capital Management. The approval list is generated based on the starting level specified in a rule and continues until an approver with a sufficient job level is found. The approval flow uses the job level defined in the Manage Jobs interface.

Related Topics

- [How You Assign Areas of Responsibility](#)

HCM Approval Rules

Using the Manage Approval Transactions for Human Capital Management task, you can specify one or more approval rules for each task. To create more than one approval rule, you either add a rule or duplicate a selected rule and edit it as appropriate. When you create multiple approval rules for a task, they are evaluated in the order of the rule's priorities. When the priorities are the same for different rules, they are executed in an undefined order, sequentially.

Approval rules comprise one or more IF statements and one or more THEN statements.

IF Statements (Conditions)

IF statements are tests that determine when an approval rule takes effect. For example, you could specify that an approval rule for a promotion takes effect when the worker's department is Sales or the worker's job is Area Manager.

You can specify multiple IF statements. If you join multiple statements with "AND" operators, then all statements must be true before the approval rule takes effect. If you join multiple statements with "OR" operators, then at least one of the statements must be true before the approval rule takes effect.

THEN Statements (Actions)

THEN statements specify:

- Who the approvers are
- What actions approvers can take

The following table summarizes the approval actions.

Approval Action	Description
Approval required	Notifications are issued to the identified approvers and their response is required.
Automatic approval	No notifications are issued to the identified approvers. The transaction is either approved or rejected automatically, and the approvers are recorded as having approved or rejected the transaction. The value of the Set Outcome To attribute for manager hierarchies determines whether the transaction is approved or rejected.
FYI only	Notifications are issued to the identified approvers, but no response is expected.

For more information about creating approval rules, see the Oracle Fusion Middleware User's Guide for Oracle Business Rules.

Related Topics

- [Management Hierarchy Approval-Rule Attributes](#)
- [Position Hierarchy Approval-Rule Attributes](#)

Management Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for manager hierarchies of predefined and locally defined types. This topic describes the values that you can specify in the THEN statements of approval rules for manager hierarchies.

Attributes

The following table summarizes the attributes of the manager-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	• Approval required • Information only • Automatic approval	Approval required
Route Using	Allows users to choose which manager to route through.	• Resource manager • Line manager • Project manager	Line Manager

Attribute Name	Description	Values	Default Value
		- Regional manager - Customer—Defined Manager Types	
Approval Chain of	Allows users to choose which approval chain to use.	- Requester - User - Worker - Worker's Current Line Manager - Worker's Proposed Line Manager	Requester
Start With	- Identifies both the first approver and the manager hierarchy. By default, approval requests are sent to the requester's first-level manager, and the manager hierarchy is the one associated with the requester's primary assignment. The requester is the worker who submits the transaction. - If you select a user in Approval Chain of, then the manager hierarchy is the one associated with that user's primary assignment. For example, when promoting one of your direct reports you could select as initial approver a human resource (HR) specialist who is outside your manager hierarchy; approval requests from this rule would be directed to the manager hierarchy of the HR specialist's primary assignment. - If you select a user who is not a manager, then the rule fails.	- Manager - Employee - Second Level Manager	Manager
Number of Levels	- Controls how far up the selected manager hierarchy approval requests are sent. The first level is based on the Start With value. - Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.	- Worker's Current Line Manager 1 or higher	1

Attribute Name	Description	Values	Default Value
Top Approver	- Specifies an approver above whom approvals are not routed. - Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first. For the top approver value, you can select: - A different manager (first-level or second-level, as appropriate). - A user who is a manager from the same manager hierarchy as the initial approver. If you select a user who is not a manager or is from a different manager hierarchy from the initial approver, then the topmost approver is not found. In this case, routing of approvals stops when the number-of-levels value is reached.	- Worker - Worker's Proposed Line Manager - Requester - User - Manager - Second Level Manager	Manager
Set Outcome To	Specifies the outcome for automatic approvals. If you set this value to Approve, then all identified approvers are recorded as having approved the transaction, even though the approval is automatic. Similarly, if you set this value to Reject, then all identified approvers are recorded as having rejected the transaction.	- Approve - Reject	None

Position Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for a specified position hierarchy.

Attributes

The following table summarizes the attributes of the position-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	- Approval required - Information only - Automatic approval	Approval required
Job Level	- The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value. - You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction. - Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner.	Minimum and maximum values relative to: - Initial approver - Requester Absolute minimum and maximum values	At most 1 relative to initial approver At least 1 relative to initial approver
Position Hierarchy	- The name of the position hierarchy - You can select from all position hierarchies in the enterprise	All position hierarchies in the enterprise	None
Starting Position	- The position of the first approver - The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve	All positions in the selected position hierarchy	None
Job Level	- The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value. - You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either	Minimum and maximum values relative to: - Initial approver - Requester Absolute minimum and maximum values	At most 1 relative to initial approver At least 1 relative to initial approver

Attribute Name	Description	Values	Default Value
	the initial approver or the requester. The requester is the person who submits the transaction. Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner.		
Top Position	- The position of the topmost approver - The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve - Approval routing stops when either the number of levels or the topmost approver is reached, whichever is sooner	All positions in the selected position hierarchy	None
Include	Allows users to choose which approvers to include.	- All Approvers - First and last approvers - Last approver only	All approvers

How You Define an HCM Approval Policy

This example shows how to define an approval policy for employee hires in the Sales department using the Manage Approval Transactions for Human Capital Management task.

If the Department of the new hire is Sales, approvals should route to the first level line manager of the requester and FYI only to the HR Representative of the worker.

If the Department of the new hire is Finance, approvals should route to the second level line manager of the requester and FYI only to the HR Representative of the worker.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Who will approve employee hire requests?	- Managers in the Sales department. - The human resources representative of any new hire doesn't need to approve but is informed of the hire after the relevant manager has approved.
Which approval actions must approvers take?	Managers must approve the hire.

Decisions to Consider	This Example
	The human resources representative receives an approval notification for all hires, but no response is needed.
Can the required level of management approval vary?	The required level of approval varies with the grade of the new hire. The requester's: - First-level manager approves the trainee grades 1 through 3 - Second-level manager approves the professional grades 4 and above

Summary of the Tasks

To define the approval policy in this example, you:

1. Navigate to the Manage Approval Rules: Hire an Employee page.
2. Assemble the approval sequence.
3. Define the approval rule for trainee grades.
4. Define the approval rule for professional grades.
5. Define the approval rule for all grades.

Navigating to the Manage Approval Rules: Hire an Employee Page

1. In the Setup and Maintenance work area, click the Search button and search for the task Manage Approval Transactions for Human Capital Management.
2. In the Search Results region, click the task name.
3. On the Manage Approval Transactions page, enter the search term Hire in the **Name** field.
4. Click **Search**.
5. In the Search Results region, click the Configure button in the Rules column for the transaction Hire an Employee.

Assembling the Approval Sequence

1. On the Manage Approval Rules: Hire an Employee page, confirm that an entry for Line Manager appears in the Approval Sequence region.
2. In the Approvers region, click the **Add** icon on the Human Resources Representative entry to add it to the right of the Line Manager entry in the Approval Sequence region.

Defining the Approval Rule for Trainee Grades

1. In the Approval Sequence region, select the Line Manager entry.
2. Click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresTraineeGrades. (The name can't contain spaces.)
4. In the IF statement for the SalesHiresTraineeGrades rule, click the **Add** icon to the right of the first condition to create an additional condition.

5. Complete the fields of the two condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	<=	3	

6. In the THEN statement for the SalesHiresTraineeGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Route Using	Line Manager
Approval Chain of	Requester
Start with	Manager
Number of Levels	1
Top Approver	Manager

Defining the Approval Rule for Professional Grades

1. Click **Add Rule**.
2. Click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresProfessionalGrades.
4. In the IF statement for the SalesHiresProfessionalGrades rule, click the **Add** icon to the right of the first condition twice to create two additional conditions.
5. Complete the fields of the three condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	>	3	and
Grade	<=	6	

Attribute Name	Operator	Attribute Value	And or Or

6. In the THEN statement for the SalesHiresProfessionalGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Route Using	Line manager
Approval Chain of	Requester
Start with	Second Level Manager
Number of Levels	1
Top Approver	Second Level Manager

Defining the Approval Rule for All Grades

1. In the Approval Sequence region, select the Human Resources Representative entry.
2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresAll Grades.
4. In the IF statement for the SalesHiresAllGrades rule, complete the fields of the condition statement as shown in this table.

Attribute Name	Operator	Attribute Value
Department	==	Sales

5. In the THEN statement of the SalesHiresAllGrades rule, complete the fields as shown in this table.

Field	Value
Action	Information Only
Representative Type	Human Resource Representative
Representative of	Worker's Proposed Representative

Field	Value

6. Click Submit.

Related Topics

- [Managing HCM Approval Transactions: Explained](#)

How You Modify Approval Notifications Using Page Composer

Using the Oracle Page Composer, you can selectively show and hide various components of a notification, including fields, labels, and regions. You can edit labels, color, and page layout.

Users with this role: Human Capital Management Application Administrator role or any other role that has this privilege PER_CUSTOMIZE_APPROVAL_NOTIFICATION_PRIV can modify notifications.

Note: Any modifications made to a notification will affect all notifications of the same transaction type.

Modifying Notifications

To modify a notification using the Page Composer, click the Edit button on the top right corner of the notification. You can edit the notification using either the design view or the source view. The design view:

- Is the basic or default view.
- Supports region changes, such as changing the page layout, showing or hiding regions, and adding customer-defined content in regions.
- Can be easily used by functional users who are not familiar with the Oracle Application Development Framework (ADF).

The source view:

- Supports component changes, such as changing the task flow, editing individual component properties, and showing or hiding individual components.
- Is targeted to technical users and requires an understanding of ADF components.

You can preview the changes before submitting them by clicking the Apply button. The Reset Page option removes all past edits (regardless of when they were made) and restores the page to its default state. Modifications made in a Worklist notification are also visible in an email notification.

Making Changes in Design View

The Design view supports:

- Changing the display, including changing the header font, hiding the region header, hiding the complete region, and enabling or disabling the ability to re-size or remove regions.
- Changing the page style, including specifying a different style sheet for the page.
- Modifying the content style such as font, background, and margins; specifying a different style sheet for the content.
- Adding the following customer-defined content in the notification:
 - A box with content
 - HTML markup tags
 - A link to a page or website
 - A box with content, including options to move and re-size the box
 - Formatted text
 - A web page within the notification

Making Changes in Source View

The Source view supports:

- Defining a header for the notification
- Defining text for the notification body

Related Topics

- [Example of Modifying an Approval Notification Using Page Composer](#)
- [Overview of Page Modification](#)

Example of Modifying an Approval Notification Using Page Composer

This example demonstrates how to modify an approval notification. You received a notification in your worklist to approve a transaction involving creation of a grade. You can add a comment for the subsequent approvers and attach a document to the notification, listing the existing grades and their descriptions. You also want to make changes to certain notification components.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Display the Edit Grade Details link?	No, hide the region containing the link.

Decisions to Consider	In this Example
Display a screenshot of the Grade Creation page?	Yes, add a link to the screenshot in the Details region
Change the notification header?	Yes, change from "Create Grade <Grade Name>, <Grade Code>, <Effective Date>" to "Created New Grade"
Change the Effective Start Date label?	Yes, change to Grade Effective Date
Highlight the Grade Effective Date?	Yes, display the date in bold

Making Changes Using the Design View

1. Click the **Edit** button on the top right corner of the notification page.
2. The Design view appears by default. Click the Edit icon in the Related Links region.
3. In the **Display Options** tab, deselect **Show Component** and click Apply. You can see that the Related Links region disappears. Click OK to confirm.
4. Click the Add Content button below the page header.
5. Click the Open link in the **ADF Faces Components** row.
6. Click the Add link in the **Image** row. An Image region is added in the notification.
7. Click the Edit icon in the Image region and provide the URL of the screenshot in the **Destination** field. The image now includes a link to the screenshot. Move the image region to the end of the **Details** region.

Making Changes Using the Source View

1. Click the View dropdown button on the top of the page and select **Source** to change from Design to Source view.
2. Click the page header to select the **panelHeader** component. Click Edit to open the **Component Properties** window.
3. In the Text field, click **Select Text Resource**. Create a text resource and enter the Display Value **Created New Grade**. Select this text resource and click OK. The page header is now changed.
4. Select the **Effective Start Date** field in the **Transaction Details** region. A warning message appears indicating that the changes will be applied to all instances wherever the task flow is used. Click Edit and follow the same steps as in the previous step to change the label to **Grade Effective Date**.
5. Click the **Content Style** tab in the **Component Properties** window.
6. Select the **Font Style** as bold. The date now displays in bold.
7. Click Save to apply all the changes.

Related Topics

- [Overview of Page Modification](#)

FAQs for Approvals

What happens if I assign an approval task that requires additional information?

If a task requires additional information, you can't reassign it. When users ask for more information, they also select one of two options, Return back to me or Reinitiate the approval process. After the additional information is submitted, the task goes back to the initiator or to the user who asked for more information. The initiator or the user who asked for more information can then reassign the task.

How do I define the approval policy for a task?

Use the Manage Approval Transactions for Human Capital Management task to define the approval policy. On the Manage Approval Rules page for a supported task, such as Hire an Employee, begin by deciding who will approve transactions. Using either drag and drop or the **Add** action, move those approvers from the Approvers section to the approval sequence and arrange them in the required order. By default, an approver is added to the sequence immediately following the currently selected approver, but you can use drag and drop to change the approver order. When you have defined the approval sequence, select the first approver in the approval sequence to display any predefined approval rule for that approver type. You can edit the displayed approval rule and create additional approval rules, as appropriate. Edit the rule settings to specify a name for each rule. Define approval rules for the remaining approvers in the approval sequence. When you have defined the approval rules for all approvers, submit the approval policy.

What happens if I edit or delete an approval rule?

If you edit or delete an approval rule on the Manage Approval Rules page, then approvals currently in progress complete as if the rule had not been edited or deleted.

New approvals follow the latest version of the rule.

Note: For more information about approvals, see Frequently Asked Questions About Approvals (Doc ID 1987850.1) on My Oracle Support at <https://support.oracle.com>.

Why do I see a placeholder like "attribute16" in a list of values in my product??

If you see a placeholder like "attribute16" in a list of values in your product, it is because a flexfield that should be used for the value was not registered and deployed yet or the attribute was not configured. For more information about flexfields, see Flexfields Setup in this guide.

Why can't I find my HR Checklist transactions in the Transaction Console?

HR Checklist transactions have the Initiator set to FUSION_APPS_HCM_SOA_APPID, so they are not displayed in the Transaction Console.

Use the BPM Worklist to view HR Checklist transactions.

Related Topics

- [Use Your Worklist to Manage Workflow Tasks](#)
- [Transaction Security Profiles](#)

Why can't I configure the Add Contact task in Approvals?

The Add Contact approval rule is used for the task when an employee is adding a coworker as a contact, not when an employee is creating a contact. This approval rule ensures that the person, who's being added as a contact, can approve or reject the request. This gives the control to the person being added so that employees don't randomly add a person as a contact.

How does the approval rule determine the worker's current and proposed, and the requester's representative?

The representative is determined based on these rules:

Option	How Representative Is Determined
Worker's Current Representative	• Worker's start date is today or in the past - The current application date is considered • Worker's start date is in the future - The worker's future start date is considered to determine the current representative. If the person record already exists in the application as a contact of an existing worker, then the current application start date is used to determine the worker's current representative,
Worker's Proposed Representative	• Worker's start date is today or in the past - The current application date is considered • Worker's start date is in the future - The worker's future start date is considered to determine the current representative.
Requester's Representative	The current application date is always considered for workers irrespective of the transaction start date.

Can the Change Personal Information approval rule evaluate only the primary phone, email, address, or national identifier?

No. The rule evaluates based on the setting in the `ORA_PER_PERSONAL_INFO_EVALUATE_PRIMARY` profile option. The profile values are **N**, **Y**, and **null**. If you select **N**, the rule evaluates based on the record currently being modified. This is the default value. If you select either **Y** or leave it null, the rule evaluates based on the primary record.

Workflow Email Notification Setup

More Setup for Workflow Email Notifications

You can click the **Expand More** icon on the Notifications subtab to open the More section and see other setup options for email notifications. In general, leave the default settings in this section for every workflow task. Settings in this section include the following check boxes, which, if selected, would:

- **Make notification secure (exclude details):** Exclude business transaction details in email notifications.
- **Hide End User Web URL in notifications:** Remove the default first line in the email body: Access this task in the Workspace Application or take direct action using the links in this email. This line includes a link that opens BPM Worklist. It is recommended to select this check box.
- **Make notification actionable:** Include links in email notifications that users can click to directly take action, for example to approve or reject.
- **Send task attachments with email notifications:** Include files attached to the task as attachments in the email notifications.

Define When to Send Workflow Notifications

When notifications are enabled, each workflow task sends notifications as part of the approval process. For example, to notify assignees whenever they're assigned a task. For any workflow task, you can change the setup to control when notifications are sent and whom they're sent to. This setup applies to email or in-app notifications, or both, depending on what's enabled.

Set Up Notification Scenarios

Here's how you define the scenarios for when to send notifications and whom to send to:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Notifications subtab.
5. Click the **Add Notification** icon if you want more scenarios, or edit what's already there.

- a. In the **Task Status** column, select when to send the notification, for example when the task has expired. Other than the actions or statuses available to end users, you can also select any of these:
 - **Alerted:** Usually, when there's an error that can be fixed. The task is assigned to the error assignee, or someone else if the task doesn't have error assignees.
 - **Update:** Whenever the task is updated without affecting the approval status or routing. For example, when users add a comment or attachment.
 - **Update Outcome:** Whenever the outcome of the task is updated, for example approved or rejected.
 - **All other actions:** Any action that's not already in the list of values.
- b. In the **Recipient** column, select whom to notify.
 - **Assignees:** The users or groups that the task is currently assigned to.
 - **Initiator:** The user who created the task.
 - **Approvers:** The users who already approved the task as part of a sequential approval chain.
 - **Owner:** The task owner, who's responsible for the business process that the task is related to.
 - **Reviewer:** The user who can only add comments and attachments to a task.
6. To remove any notification scenario, select a row and click the **Delete Notification** icon.
7. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

This screenshot shows three scenarios on the Notifications subtab. In this example, notifications are sent to assignees whenever the task is assigned to them. The task initiator also gets a notification when the task is complete, and administrators are notified if the task ends up in error.

Notifications			
	Task Status	Recipient	Notification Header
	Assign	Assignees	
	Complete	Initiator	
	Error	Owner	

Set Up Reminders

Other than what's sent based on the notification scenarios, you can also set up the task to send reminders.

1. On the Notifications subtab, select the **Enable Reminder** check box.
2. From the **Repeat** list, select the number of reminders to send.
3. From the **Initiating Action** list, select an option for when to send a reminder to the assignee:
 - o After Assignment: After the task is assigned to the assignee
 - o Before Expiration: Before the task expires on the assignee
4. Define a frequency for when to send the first reminder and the time between reminders.
5. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Let's take a look at an example. Based on the setup we see in this screenshot, a reminder is sent three days after the user is assigned the task. Just one more reminder is sent three days after that, if the user still hasn't acted on the assigned task.

Note: By default, the word **Reminder** appears at the beginning of the title for reminder notifications. If you don't want that word there, set the **Add Reminder Prefix to Notification Title (BPM_REMINDER_PREFIX)** profile option to false. In the Setup and Maintenance work area, use the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. What you set for this profile option applies to all workflow tasks.

Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Define People to Support Workflow Tasks](#)
- [Set Profile Option Values](#)
- [Actions and Statuses for Workflow Tasks](#)

Aggregate Tasks to Minimize the Number of Notifications to Send

Depending on the rules in a workflow task, it's possible that a task is assigned to the same user more than once. For example, the rules in a stage can result in assigning a task to you, but then a later stage in the same task also results in assigning the task to you. You can aggregate the task so that a separate notification isn't sent to the assignee every time they're assigned the same task.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Configuration subtab.
5. In the Miscellaneous section, select a value from the **Task Aggregation** list:
 - None: Send separate notifications every time the task is assigned to the same assignee.
 - Once per task: Send a single notification to the assignee no matter how many times they're assigned the same task.
 - Once per stage: Send a single notification to the assignee if they're assigned the same task more than once within a stage. If they're assigned the same task again because of another stage, they would get another notification for that stage.
6. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Note: When users select the Request Information action for an aggregated task, it doesn't matter what they select as the return option. When the requested information is submitted, the task is always assigned back to the requester.

Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Actions and Statuses for Workflow Tasks](#)

Show Approve and Reject Options in Notifications

Without going to the Worklist: Notifications and Approvals work area, users can approve or reject workflow tasks from email notifications or in-app notifications, for example the notifications list in the global header. Here's what you do to make sure that the Approve and Reject options appear in email and in-app notifications for certain tasks.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Access subtab.
5. In the Actions section, select **No Signature Required** for the Signature Policy list, if it's not set that way already.
6. Click the Configuration subtab.
7. In the Approval Pre-conditions section, select **Optional** for the Approve and Reject lists.
8. Make sure that the **Perform update outcome only from task form** check box isn't selected.
9. Click the **Commit task** icon in the **Tasks to be configured** toolbar when you're ready to roll out your changes.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Set Up Attachments in Workflow Email Notifications

Workflow email notifications can have attachments. For example, when you request information from someone as part of the workflow, they might respond with a message and a file attachment. The email notification you get when they respond would include their attachment. Many workflow tasks have this already set up by default. Here's how you can enable email attachments or change the default setup.

Enable or Disable Email Attachments

You can turn on or off email attachments for specific workflow tasks.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Click the Notifications subtab.

5. Expand the More section.
6. Select or deselect the **Send task attachments with email notifications** check box.
7. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Set Maximum Number and Size of Attachments

These settings apply to all workflow tasks that have email attachments enabled.

1. Click the **Notifications** icon in the global header.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In BPM Worklist, click your user name and select **Administration**.
5. On the Application Preferences page, go to the Notification section.
6. In the **Maximum Number of Email Attachments** field, enter a whole number to limit the number of attachments in a single email.
7. In the **Maximum Size of Email Attachments (in MB)** field, enter a whole number up to 10 to limit the size of individual attachments in the email. No matter what you enter here, the total size of an email, including all attachments, can't be more than 15 MB.

Tip: If you want the emails to have links to files instead of having the files attached to the email, enter **0** in at least one of these two fields.

8. Click **Save**.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Add Header Content to Workflow Email Notifications

Each workflow task is configured with scenarios for sending email notifications as part of the approval process. For each notification scenario in the Notifications subtab, the **Notification Header** column determines what's in the email header, a region that appears before the email body.

- By default, all predefined notification scenarios have emails with blank headers.
- Any notification scenarios you add in the Notifications subtab would have the following header value:
`concat(string('Task '), /task:task/task:title, string(' requires your attention.')).` It is recommended to change that value to `null`.

For some workflow tasks, you can enable configurable email notifications based on report layouts to be used instead of the standard email notifications. The Notification Header setting doesn't apply to those configurable email notifications.

Adding Company Name or Logo

If you do want to add, for example, your company name or logo to the email header:

1. In the Setup and Maintenance work area, go to the Manage Task Configurations task or another approval setup task in the Application Extensions functional area or another functional area.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Open the Notifications subtab.

5. For the specific notification scenario on the Notifications subtab, click the icon in the **Notification Header** column.
6. In the Edit Notification Message dialog box, delete any existing content and enter the following in the **Notification Message** field.
 - **For company name:** Enter text in single quotes, for example 'oracle'. You can also use HTML formatting, for example '<h2>oracle</h2>'.
 - **For company logo:** Enter the URL to your logo, following this syntax: ''. Replace the URL and alternative text with your own.
7. Click the **Save** icon in the **Tasks to be configured** toolbar.

Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Define When to Send Workflow Notifications](#)
- [Add a Branding Logo and Change Other Shared Components in Workflow Notifications](#)

Set Up the From Field in Workflow Email Notifications

By default, the From field in workflow email notifications shows an email address without a sender name. You can't change the email address, but you can specify the sender name. For example, if you indicate that Your Company is the text to display, then the From field shows: `Your Company <<your pod>.fa.sender@workflow.mail.<your data center>.cloud.oracle.com>`.

You can set up the sender name in application preferences for all workflow tasks, or have different setup for specific workflow tasks. If not specified at the task level, the sender name setting defaults from the preferences.

Note: Your users might get other types of email notifications, for example for things not related to workflow. Your setup here doesn't affect those emails, and you might not be able to specify the sender name for those emails.

Setting Up for All Workflow Tasks

To define the sender name for all workflow tasks that have no other applicable setup:

The screenshot shows the 'Application Preferences' page under the 'Administration' tab. The page has a header with four tabs: 'Administration' (selected), 'Evidence Search', 'Approval Groups', and 'Task Configuration'. Below the tabs, there are 'Save' and 'Revert' buttons. The main content area is titled 'Notification' and contains three sections: 'Notification Mode' with a dropdown menu set to 'All'; 'Test Notification Email Address' with a text input field and a pencil icon; and 'Email "From:" Display Name' with three radio button options: an empty field, 'Submitter', and 'Previous Approver' (which is selected).

1. Open the Administration tab. If you're not in BPM Worklist:
 - a. Click the **Notifications** icon in the global header.
 - b. Click **Show All**.
 - c. On the Notifications page, click the **Worklist** button.
 - d. In BPM Worklist, click your user name and select **Administration**.
2. On the Application Preferences page that's on the Administration tab, select one of the **Email "From:" Display Name** options.
 - o Select to specify the text to display. Enter your value or leave blank if you want nothing to appear in the From field.
 - o Select **Submitter** to show the person who created the task.
 - o Select **Previous Approver** to show the previous assignee in the approval chain. When the notification is sent to the first assignee in the approval chain, the From field shows the person who created the task.
3. Click **Save**.

Setting Up for a Specific Workflow Task

To specify the sender name for a specific workflow task:

1. In the Setup and Maintenance work area, go to the Manage Task Configurations task or another approval setup task in the Application Extensions functional area or another functional area.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Open the Notifications subtab.
5. On the Notifications subtab, click the **Expand More** icon.
6. Select one of the **Email "From:" Display Name** options.
 - o Select **Not Applicable** so that what appears in the From field depends on the application preferences that apply to all workflow tasks.
 - o Select to specify the text to display. Enter your value in quotes, for example **"Oracle"**, or leave blank if you want nothing to appear in the From field.
 - o Select **Previous Approver** to show the previous assignee in the approval chain. When the notification is sent to the first assignee in the approval chain, the From field shows the person who created the task.
7. Click the **Save** icon in the **Tasks to be configured** toolbar.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Send Test Workflow Email Notifications to One Address

While you're testing workflow setup, you can send all email notifications to a single address so that your users don't receive any test emails. The test emails are still sent based on the notification scenarios defined for the particular workflow task.

Specifying the Email Address

To enter the email address to send test emails to:

1. Click the **Notifications** icon in the global header.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In BPM Worklist, click your user name and select **Administration**.
5. On the Application Preferences page that's on the Administration tab, click the **Test Notification Email Address** icon.
6. In the dialog box, enter an email address in the **Test Notification Email Address** field.
7. Click **OK** and then **Save**.

After you're done testing, go back and delete the email address that you entered.

Related Topics

- [More Setup for Workflow Email Notifications](#)
- [Define When to Send Workflow Notifications](#)
- [Disable or Enable Workflow Notifications](#)

Configurable Workflow Notifications

Overview of HCM Configurable Workflow Notifications

As part of workflow tasks, the workflow automatically sends notifications to your users. For example, when a user submits a performance goal for approval, the approvers receive a notification with the approval request. For some flows, Oracle Business Intelligence (BI) Publisher reports determine the notification content and format, and you can edit the report to configure the email and in-app notifications. These report-based notifications are configurable, and optimized for viewing on mobile devices. In addition to getting notifications in email, users can also view in-app notifications, for example by

- Clicking the **Notifications** icon in the global header and opening a notification
- Going to the Worklist: Notifications and Approvals work area and opening a notification
- Clicking the **In-App Notification** link at the end of an email notification

Such business flows include the following HCM workflow tasks:

- Absence recording approvals
- Add contact
- Add contingent worker
- Add nonworker
- Add pending worker
- Add terms
- Additional Assignment Info
- Approve time cards
- Cancel work relationship

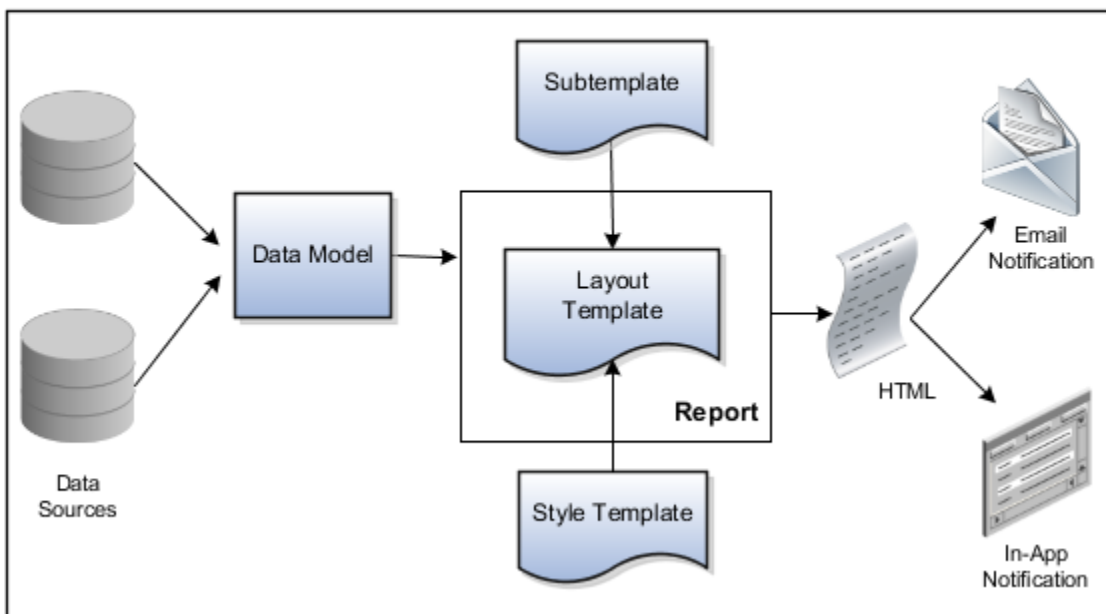
- Career development
- Change assignment
- Change location
- Change manager
- Change work schedule
- Change working hours
- Delete assignment
- Discretionary disbursement approvals
- Donation approvals
- Employment start dates
- Feedback
- Goal approvals
- Goal management
- Local and global transfer
- Manage areas of responsibility
- Manage allocated checklists
- Manage contracts
- Manage directs
- Manage document records
- Manage eligible jobs
- Manage employment
- Manage grades
- Manage grade ladders
- Manage grade rates
- Manage jobs
- Manage locations
- Manage organizations
- Manage positions
- Manage work relationship
- New assignment
- New hire
- New work relationship
- Performance document approvals
- Performance management
- Person external identifiers
- Person notes
- Personal information
- Promote
- Share information

- Talent review
- Termination
- Transfer

Process Overview

The process to generate email and in-app notifications is the same as generating other types of report output. The process involves various types of objects in the business intelligence catalog, including data models, subtemplates, style templates, and reports.

This figure shows how these BI objects work together to generate the notification content.



- **Data Sources:** Store the attributes and attribute values for business objects and transactions in the application (example of data sources being transaction tables)
- **Data Model:** Determines which attributes from data sources are available to be included in the notification and how that data is retrieved
- **Subtemplate:** Provides common components, for example a branding logo and buttons, that can be reused in multiple reports
- **Style Template:** Provides styles such as the type of lines and fonts to use in tables, or the font type, size, and color to use for headings
- **Report:** Contains a **layout template** that determines:
 - Which attributes appear in the notification, from the data model used for the report
 - What the notification looks like, leveraging components from the subtemplate and styles from the style template used for the report
- **HTML:** Is the output generated from the report
- **Email Notification:** Has the HTML output embedded in the email body
- **In-App Notification:** Has the HTML output embedded in the application UI

Each workflow task with configurable notifications has a corresponding predefined report in the BI catalog. For example, the goal management approval notifications report contains the PerformanceGoalApprovalNotificationsReport layout template and uses the PerformanceGoalApprovalNotificationsDM data model. The generated output is included in emails that are sent to users for goal approval.

Notification Modifications

After you enable configurable email and in-app notifications, the predefined reports and related objects in the BI catalog work by default. The report-based notifications provide the same information as the standard notifications, but in a format optimized for mobile devices. If you must modify the notifications, you can edit copies of the predefined reports and data models, but not the style template. You proceed as you would to edit any report or data model in the catalog, for example:

1. Find a predefined report for goal approvals in the business intelligence catalog.
2. Use the `customize` option to create a copy of the report that's linked to the original.
3. Edit the copied report layout template.

For more information about configuring reports, see Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports. You should get familiar with reports and BI Publisher in general before configuring workflow email and in-app notifications. Aspects specific to email and in-app notifications include:

- You use only the Template Builder for Word add-in to configure the .rtf template in Microsoft Word. You don't use the layout editor or other tools available for configuring report layout.
- You usually edit a copy of predefined layout templates, rather than create reports or layout templates.

Security

To configure reports and data models for email and in-app notifications, you must have one of these duty roles or privilege:

- BI Platform Administrator duty role
- Publisher Data Model Developer duty role
- Manage BI Publisher Template privilege

Related Topics

- [Best Practices for Workflow Notifications](#)
- [Set Up for RTF and Excel Report Layout Templates](#)
- [Templates and Data Models Used for HCM Notifications Based on Reports](#)
- [More About Oracle Business Intelligence Components](#)

Set Up Profile Options for Configurable Workflow Notifications

You configure profile options to specify the HCM applications that use the BI Publisher reports rather than the default FYI and approval notifications. To use BI Publisher reports rather than the default workflow and approval notifications, you need to:

- Configure profile options for email and in-app notifications to specify the HCM applications that use the BI Publisher reports.
- Download and install the Template Builder for Word add-in.

You configure profile options using the Manage Administrator Profile Values task in the Setup and Maintenance work area. The application will always first check individual product profile values and only then the family-level profile option. If both are specified then the product-level profile option takes precedence over the family-level profile option. Let's look how to configure these profile options

1. In the **Setup and Maintenance** work area, go to the **Manage Administrator Profile Values** task.
2. Search and select the profile option.
3. Click **New** to add a new profile value.
4. Select profile level as **Site**.
5. Enter **True** in the **Profile Value** field
6. Click **Save and Close**.

This table shows the profile option codes that determine which business processes use BI Publisher templates for email notifications. It also describes the effect of each code.

Business Processes	Profile Option Code	Profile Display Name	Effect
All Absence Management	BIP_EMAIL_NOTIFICATION_HCM_ANC	BI Publisher Notifications Enabled for Absence Management	The application first checks this setting. If set to true , all Absence Management business processes that can use BI Publisher reports for workflow notifications use them.
All Compensation	BIP_EMAIL_NOTIFICATION_HCM_COMPENSATION	BI Publisher Notifications Enabled for Compensation	The application first checks this setting. If set to true , all Compensation business processes that can use BI Publisher reports for workflow notifications use them.
All Global Human Resources	BIP_EMAIL_NOTIFICATION_HCM_PER	BI Publisher Notifications Enabled for Global Human Resources	The application first checks this setting. If set to true , all Global Human Resources business processes that can use BI Publisher reports for workflow notifications use them.
All Recruiting	BIP_EMAIL_NOTIFICATION_HCM_IRC	BIP_EMAIL_NOTIFICATION_IRC_PRODUCT_LEVEL	The application first checks this setting. If set to true , all Recruiting business processes that can use BI Publisher reports for workflow notifications use them.
All Talent Management	BIP_EMAIL_NOTIFICATION_HCM_TALENT	BI Publisher Notifications Enabled for Talent Management	The application first checks this setting. If set to true , all Talent Management business processes that can use BI Publisher reports for workflow notifications use them.
All Time and Labor	BIP_EMAIL_NOTIFICATION_HCM_HXT	BIP_EMAIL_NOTIFICATION_HCM_HXT	The application first checks this setting. If set to true , all Time and Labor business processes that can use BI Publisher reports for workflow notifications use them.

Business Processes	Profile Option Code	Profile Display Name	Effect
All Work Life	BIP_EMAIL_NOTIFICATION_HCM_WLF	BI Publisher Notifications Enabled for Work Life	The application first checks this setting. If set to true , all Work Life business processes that can use BI Publisher reports for workflow notifications use them.
All HCM	BIP_EMAIL_NOTIFICATION_HCM	BIP EMAIL NOTIFICATION PER FAMILY LEVEL	The application checks this setting next. If set to true , all HCM business processes that can use BI Publisher reports for workflow notifications use them.

This table shows the profile option codes that determine which business processes use BI Publisher templates for in-app notifications. It also describes the effect of each code.

Business Processes	Profile Option Code	Profile Display Name	Effect
All Absence Management	BIP_ONLINE_NOTIFICATION_HCM_ANC	BIP_ONLINE_NOTIFICATION_HCM_ANC	The application first checks this setting. If set to true , all Absence Management business processes that can use BI Publisher reports for in-app notifications use them.
All Compensation	BIP_ONLINE_NOTIFICATION_HCM_COMPENSATION	BI Publisher Worklist Notifications Enabled for Compensation	The application first checks this setting. If set to true , all Compensation business processes that can use BI Publisher reports for in-app notifications use them.
All Global Human Resources	BIP_ONLINE_NOTIFICATION_HCM_PER	BI Publisher Worklist Notifications Enabled for Global Human Resources	The application first checks this setting. If set to true , all Global Human Resources business processes that can use BI Publisher reports for in-app notifications use them.
All Goal Management	BIP_ONLINE_NOTIFICATION_HCM_GOALS	BI Publisher Worklist Notifications Enabled for Goals and Career Management	The application first checks this setting. If set to true , all Goal and Career Management business processes that can use BI Publisher reports for in-app notifications use them.
All Recruiting	BIP_ONLINE_NOTIFICATION_HCM_IRC	BIP_ONLINE_NOTIFICATION_IRC_PRODUCT_LEVEL	The application first checks this setting. If set to true , all Recruiting business processes that can use BI Publisher reports for in-app notifications use them.
All Talent Management	BIP_ONLINE_NOTIFICATION_HCM_TALENT	BI Publisher Worklist Notifications Enabled for Talent Management	The application first checks this setting. If set to true , all Talent

Business Processes	Profile Option Code	Profile Display Name	Effect
			Management business processes that can use BI Publisher reports for in-app notifications use them.
All Time and Labor	All Time and Labor	BI Publisher Worklist Notifications Enabled for Time and Labor	The application first checks this setting. If set to true , all Time and Labor business processes that can use BI Publisher reports for in-app notifications use them.
All Work Life	BIP_ONLINE_NOTIFICATION_HCM_WLF	BI Publisher Worklist Notifications Enabled for Work Life	The application first checks this setting. If set to true , all Work Life business processes that can use BI Publisher reports for in-app notifications use them.
All HCM	BIP_ONLINE_NOTIFICATION_HCM	BI Publisher Worklist Notifications Enabled for Human Capital Management	The application checks this setting next. If set to true, all HCM business processes that can use BI Publisher reports for workflow notifications use them.

For configurable email notifications, make sure that the email domain setup is correct in BI Publisher so that the emails get sent.

Apply Changes to Workflow Notifications Soon After Upload

Configurable workflow notifications are refreshed every 24 hours so that they perform better for your users. But when you're making changes to reports, subtemplates, or data models, you can apply your changes sooner so they're available for testing. Create profile options to control when notifications reflect your changes after you upload them to the BI catalog. When you're done configuring notifications, use the same profile options to turn the refresh back to every 24 hours, to optimize performance. But even if you don't, the refresh automatically resets to 24 hours when it's been more than eight hours since you set the profile options.

Note: The refresh applies only to changes uploaded to the BI catalog and the actual notifications that are then sent out with your changes. You can always preview changes to layout templates while you're editing in Microsoft Word or view the report in Oracle Analytics Publisher.

Create Profile Options to Control the Refresh

Your profile options can apply to all workflow tasks, a product family, or a product. Based on the scope you want, your profile option must have a profile option code that follows a certain format.

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME

Scope	Profile Option Code	Examples
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	• BIP_CLIENT_REFRESH_TIME_FIN • BIP_CLIENT_REFRESH_TIME_HCM • BIP_CLIENT_REFRESH_TIME_PRC • BIP_CLIENT_REFRESH_TIME_PRJ • BIP_CLIENT_REFRESH_TIME_SCM
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	• BIP_CLIENT_REFRESH_TIME_FIN_AP • BIP_CLIENT_REFRESH_TIME_HCM_PER • BIP_CLIENT_REFRESH_TIME_PRC_PON • BIP_CLIENT_REFRESH_TIME_PRJ_PJE • BIP_CLIENT_REFRESH_TIME_SCM_EGO

The profile options with a smaller scope take precedence. For example, you have profile option A with a global scope and profile option B with a product scope. If you're currently configuring notifications for a particular product, use profile option B to adjust the refresh time just for that product. But based on profile option A, the refresh is still at 24 hours for all other configurable notifications in all other products. Profile option B takes precedence over profile option A only for that one product.

Tip: To find the product family or product code, go to the Setup and Maintenance work area. Use the **Manage Taxonomy Hierarchy** task in the Application Extensions functional area for any offering. In the hierarchy, expand the root node and then the Oracle Fusion node. Find the row for the family or product and look in the **Module Key** column for the code.

Now you're ready to create your profile options!

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Profile Options** task in the Application Extensions functional area for your offering.
2. On the Manage Applications Core Profile Options page, click the **New** icon.
3. On the Create Profile Option page, enter the profile option code in the format that corresponds to the scope you want.
4. Enter a display name that you can easily remember to help you find the profile option later.
5. From the **Application** list, select **Oracle Middleware Extensions for Applications**.
6. From the **Module** list, select **Application Core**.
7. Specify a start date.
8. Click **Save and Close**.
9. On the Manage Applications Core Profile Options page, make sure your new profile option is selected in the Search Results: Profile Options subsection.
10. In the <Profile Option>: Profile Option Levels subsection, select the **Enabled** and **Updatable** check boxes for the Site level.
11. Save your work.

Set the Refresh Interval

In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set your profile option at the Site level and enter 15 or higher for the refresh interval in minutes. For example, if you enter 15, then your changes are applied to notifications 15 minutes after you upload to the BI catalog.

CAUTION: Make sure to enter a whole number.

When you're done making and testing your changes, set the profile option back to 1440, which is 24 hours in minutes. If you forget and leave your profile option as is for longer than eight hours, don't worry! At that point, the profile option resets itself back to 1440 minutes.

Related Topics

- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)
- [Update Existing Setup Data](#)

Templates and Data Models Used for HCM Notifications Based on Reports

You can configure Oracle Business Intelligence (BI) Publisher reports to send notifications (email and in-app) for some HCM workflow tasks. Each business process uses different BI Publisher templates and data models for the email and in-app notifications.

Templates and Associated Data Models

This table shows the BI Publisher templates and the associated data models that are available for each business process.

Business Process	Template (Data Model)
Career Development	CareerDevelopmentApprovalFYIReport (CareerDevelopmentApprovalNotificationDM) CareerDevelopmentApprovalReport (CareerDevelopmentApprovalNotificationDM) CareerDevelopmentFYINotification (CareerDevelopmentFyiDM)
Feedback	NoteSentToManagerReport (PersonNotes) NoteSentToWorkerReport (PersonNotes)
Goal Management	PerformanceGoalApprovalNotificationsReport (PerformanceGoalApprovalNotificationsDM) PerformanceGoalNotificationsReport (PerformanceGoalNotificationsDM)
Performance Management	PerformanceApprovalNotificationsReport (PerformanceApprovalDM) PerformanceFyiNotificationsReport (PerformanceFYIDM)
Profile Management	ProfilesApprovalNotificationFYIReport (ProfilesApprovalNotificationDM) ProfilesApprovalNotificationReport (ProfilesApprovalNotificationDM) ProfileChangeNotificationReport (ProfileChangeNotification)

Business Process	Template (Data Model)
Talent Review	TalentCalibFYIReport (TalentCalibFYIDM)
Time and Labor	ApprovalEmailNotification (ApprovalEmailNotification)
Workforce Deployment	AddAssignmentReport (EmploymentCreateProcesses) AddContactReport (AddContact) AddCWKReport (EmploymentCreateProcesses) AddNWKReport (EmploymentCreateProcesses) AddPWKReport (EmploymentCreateProcesses) AddTermsReport (EmploymentCreateProcesses) AddWorkRelationshipReport (EmploymentCreateProcesses) AssignmentChangeReport (EmploymentUpdateProcesses) CancelWorkRelationshipReport (EmploymentWRPProcesses) ChangeLegalEmployerReport (EmploymentCreateProcesses) ChangeLocationReport (EmploymentUpdateProcesses) ChangeManagerReport (EmploymentUpdateProcesses) ChangeSalaryReport (ChangeSalary) ChangeWorkHoursReport (EmploymentUpdateProcesses) ChecklistWelcomeReport (ChecklistWelcomeDataModel) CreateGradeLadderReport (ManageGradeLadders) CreateGradeRateReport (ManageGradeRates) CreateGradeReport (ManageGrades) CreateJobReport (ManageJobs) CreateLocationReport (ManageLocations) CreateOrganizationReport (ManageOrganizations) CreatePositionReport (ManagePositions) DeleteGradeLadderReport (ManageGradeLadders) DeleteGradeRateReport (ManageGradeRates) DeleteGradeReport (ManageGrades) DeletePositionReport (ManagePositions) DTDeleteJobReport (ManageJobs) DTDeleteLocationReport (ManageLocations) DTDeleteOrganizationReport (ManageOrganizations)

Business Process	Template (Data Model)
	EligibleJobsReport (EmploymentUpdateProcesses) EmploymentStartDatesReport(EmploymentStartDates) ExternalIdentifierReport (ExternalIdentifier) LocalAndGlobalTransferReport(LocalAndGlobalTransfer) ManageAssignmentEFFReport(AdditionalAssignmentInfo) ManageContractsReport(ManageContracts) ManageEmploymentReport(EmploymentUpdateProcesses) ManageDirectsReport (EmploymentUpdateProcesses) ManageDorReport (ManageDOR) ManageEmploymentReport (EmploymentUpdateProcesses) ManageWorkRelationshipReport (EmploymentWRProcesses) NewHireReport (EmploymentCreateProcesses) NoteSentToManagerReport (PersonNotes) NoteSentToWorkerReport (PersonNotes) NotifyCopyConflictReport (EmploymentWRProcesses) NotifyDeleteConflictReport (EmploymentWRProcesses) NotifyMultipleConflictReport (EmploymentWRProcesses) NotifyWithdrawConflictReport (EmploymentWRProcesses) PersonallInformationReport (PersonallInformation) PersonallInformation_AddressReport (PersonallInformation) PersonallInformation_BiographicalReport (PersonallInformation) PersonallInformation_CitizenshipReport (PersonallInformation) PersonallInformation_CommunicationReport (PersonallInformation) PersonallInformation_ContactRelationshipReport (PersonallInformation) PersonallInformation_DemographicReport (PersonallInformation) PersonallInformation_DisabilityReport (PersonallInformation) PersonallInformation_DriversLicenseReport (PersonallInformation) PersonallInformation_NameReport (PersonallInformation) PersonallInformation_PassportReport (PersonallInformation) PersonallInformation_VisaPermitReport (PersonallInformation) PromotionReport (EmploymentUpdateProcesses)

Business Process	Template (Data Model)
	ResponsibilityInfoFYIReport (ManageAOR)
	ResponsibilityInfoReport (ManageAOR)
	ShareInfoApprovalFYIReport (ShareInformation)
	ShareInfoApprovalReport (ShareInformation)
	ShareInfoFYIReport (ShareInformation)
	ShareInfoRejectFYIReport (ShareInformation)
	TaskActionRequiredReport (TaskNotificationDataModel)
	TaskFYIReport (TaskNotificationDataModel)
	TerminationReport (EmploymentWRProcesses)
	TransferReport (EmploymentUpdateProcesses)
	UpdateGradeLadderReport (ManageGradeLadders)
	UpdateGradeRateReport (ManageGradeRates)
	UpdateGradeReport ((ManageGrades))
	UpdateJobReport (ManageJobs)
	UpdateLocationReport (ManageLocations)
	UpdateOrganizationReport (ManageOrganizations)
	UpdatePositionReport (ManagePositions)

Best Practices for Workflow Notifications

Predefined workflow notifications based on report layout templates all follow a general format. When you edit a copy of these layout templates in Microsoft Word, follow the predefined layout as closely as possible for consistency. Also keep in mind shared components and mobile considerations.

General Structure

In general, the workflow notifications contain a set of components that are displayed in a certain order.

The callouts in this figure identify the email notification components listed in the following table.

Task Approval

3,700.00 USD

Vision Corporation

Task Example

8/29/17

Approve

Reject

Request Information

Details

From

Emily Thorne

Description

Example of a task for approval

Task Information

Detail Line	Amount
1. Example A	2,200.00
Additional detail	
Additional Detail	1000183-2-1
Additional Detail	
Additional detail	8
2. Example B	1,000.00
3. Example C	500.00
Additional detail	
Total	3,700.00

Approvals

8/29/17 7:40 AM

Assigned to Mateo Lopez

8/29/17 7:40 AM

Submitted by Emily Thorne

Approve

Reject

Request Information

Transaction Details

In-App Notification

The callouts in this figure identify the in-app notification components listed in the following table. In addition to describing each component, the table also indicates if the component appears in the email notification, in-app notification, or both.

The screenshot shows a 'Task Approval' notification interface. At the top, there is a header bar with a green circle containing the number '1' next to a set of buttons: 'Edit', 'Actions' (with a dropdown arrow), 'Approve', and 'Reject'. Below this is a main content area with a green circle containing the number '2' next to the text 'Task Approval', '3,700.00 USD', 'Vision Corporation', 'Task Example', and '8/29/17'. Below this is a 'Details' section with a green circle containing the number '4' next to it. The 'Details' section includes 'From: Emily Thorne' and 'Description: Example of a task for approval'. Below this is a 'Task Information' section with a table. The table has two columns: 'Detail Line' and 'Amount'. The table contains three rows: '1. Example A' with '2,200.00', '2. Example B' with '1,000.00', and '3. Example C' with '500.00'. There is also a 'Total' row with '3,700.00'. The table has a dashed line between '1. Example A' and '2. Example B'. There is also a section for 'Additional Detail' with a table containing two rows: '1000183-2-1' and '8'.

Callout	Component	Notification Type
1	Buttons with the primary actions to take on the task, such as Approve and Reject . These buttons aren't part of the configurable, report-based notification content.	In-app
2	Notification header listing key attributes of the workflow task and the associated transaction.	Both
3	Buttons for the primary actions to take on the task, such as Approve and Reject .	Email
4	Notification body that usually includes transaction and line level details, displayed in tables or sets of attributes with corresponding values. The data model for the report restricts the total number of rows displayed in some of the tables. If the limit is exceeded, the table footer provides a link to the transaction details page, where users can view all the rows. To change this limit, you can edit a copy of the data model.	Both
5	Approval history, including any attachments that users in the history uploaded for the task. You can't edit the approval history component, which usually appears in the body of only email notifications. For in-app notifications, you can	Email (or both, in rare cases)

Callout	Component	Notification Type
	usually view the history by clicking the Actions button and selecting History .	
6	Buttons for the primary actions again.	Email
7	A link to the corresponding transaction page, and another link to the in-app notification.	Email

When you modify notifications, try to keep to this general structure and don't remove essential elements such as the action buttons. Likewise, don't change the styles in your layout template. The predefined style template should still apply to your notification; don't edit a copy of the style template and apply that to your notification.

To add components to your notification, for example another table, consider first downloading another style template from My Oracle Support. This template contains Quick Parts content that you can use in Word when you do more advanced work on layout templates. For example, from the Quick Parts gallery, you can select and add the table that's consistent in format with predefined tables already on your notification.

Here are other things to consider:

- By default, the components that you add in the layout template appear in both email and in-app notifications, where available. You can add conditions to explicitly make a particular element, for example a field, appear only in one type of notification and not the other.
- If you don't know which data model a report is using, find the report in the BI catalog and click the **Edit** link. From there, you can see the name of the data model, and also click the **Select Data Model** icon to see where it's at in the catalog.
- Don't rename any predefined reports, style templates, or subtemplates.
- To go back to a predefined layout, you can select the predefined layout template as the default.
- To go back to using the predefined report or data model for notifications, you just need to remove the custom report or data model from the Custom folder.

Shared Components

A predefined subtemplate in the business intelligence (BI) catalog applies to all predefined layout templates for workflow notifications. The subtemplate contains components that are shared among the notifications, for example:

- Branding logo, if you add one to the subtemplate, which would appear as the first component in the email body. The logo appears in email notifications only.
- Action buttons in email notifications.
- Links at the end of the email notification, one to the corresponding transaction page, and another to the in-app notification.

When you make a copy of a predefined layout template to edit, the copy automatically inherits the same predefined subtemplate. To edit these shared components, make a copy of the predefined subtemplate, edit the copied version, and apply it to your own layout templates.

Mobile Considerations

Because users can view the workflow notifications on mobile devices, always consider mobile first and keep the notifications as simple as possible. For example:

- Don't put too much content horizontally, such as too many columns in tables.
- Keep all text, including attributes and column headings, as short as possible.
- Center align lists of attributes and their values, if they appear outside tables.

Make sure to test your email notifications on mobile devices.

Related Topics

- [Add a Branding Logo and Change Other Shared Components in Workflow Notifications](#)
- [Use Quick Parts for Workflow Notifications](#)
- [Set Up Content to Appear in Only Email or In-App Workflow Notifications](#)
- [Create RTF Templates Using the Template Builder for Word](#)

Add a Branding Logo and Change Other Shared Components in Workflow Notifications

A predefined subtemplate has common components for all workflow notifications based on predefined report layouts. For example, the subtemplate has a place for you to add a branding logo, which would appear at the beginning of email notifications. You can change other shared components so that the same changes apply to your notifications. For example, for email notifications, you can also change the text on action buttons, or the text of the links that appear at the end of emails.

Note:

- Other than this central subtemplate for all notifications, you might also find predefined subtemplates specific to a product family. We talk about the central one here, but you would generally follow the same steps for other subtemplates.
- You must edit a copy of the subtemplate in the Custom folder of the business intelligence (BI) catalog. Don't directly update the predefined subtemplate, including renaming it.
- When you work on your copy of the subtemplate, add your own content or edit what's already there, but don't remove anything.
- The exact steps can vary depending on your version of Microsoft Word.

Modify Shared Components in the Subtemplate

Here's how you edit a copy of the predefined subtemplate that has the shared components:

1. Click **Navigator > Tools > Reports and Analytics**.
2. Click the **Browse Catalog** icon.
3. In the BI catalog (the Folders pane), expand **Shared Folders > Common Content > Templates**.
4. For **Workflow Notification Subtemplate**, click **More** and select **Customize**.

If you're not using the Customize option, even though it's recommended:

- a. Click **Copy** in the toolbar with Workflow Notification Subtemplate selected.
 - b. In the BI catalog, expand **Shared Folders > Custom > Common Content > Templates**. Create a Templates folder in this location if it doesn't exist.
 - c. Click **Paste** in the toolbar.
5. In the BI catalog, with the Templates folder open under the Custom folder, click **More** for the subtemplate and select **Rename** to give it a new name.
 6. Click the **Edit** link for the renamed subtemplate.
 7. In the Templates section, click the link in the Locale column.
 8. Save the subtemplate .rtf file to your computer.
 9. Open the .rtf file with Microsoft Word.
 - o To add a logo, insert your own image in the subtemplate.
 - o To change button or link text, edit the text accordingly. Make the same edits wherever that button or link text appears in the subtemplate.
- CAUTION:** To make sure that your layout templates reflect these changes without more rework, don't edit any other text in the subtemplate .rtf file.
10. Update Word options so that existing links remain intact in the subtemplate.
 - a. Click **File > Options > Advanced**.
 - b. In the Word Options dialog box, click **Web Options** in the General section.
 - c. In the Web Options dialog box, open the Files tab.
 - d. Deselect the **Update links on save** check box.
 11. Save your changes in Word.

Upload the Modified Subtemplate

Now you upload your subtemplate to the BI catalog:

1. In the BI catalog, expand **Shared Folders > Custom > Common Content > Templates**.
2. Click **Edit** for your subtemplate.
3. In the Templates section, click the **Upload** icon.
4. Select your modified .rtf subtemplate and a locale, and click **OK** to replace the original subtemplate.

Point Layout Templates to Your Subtemplate

Update all the report layout templates that you want to apply your subtemplate to:

1. In Microsoft Word, open the .rtf file for the layout template, as you would to make any other changes to the notification.

2. At the beginning of the document, change the subtemplate reference. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:xdoxsl:///Custom/Common Content/Templates/My Workflow Notification Subtemplate.xsb?>`.
3. Save your work.
4. Test things out to make sure you see your subtemplate changes in the notification output.

Related Topics

- [Best Practices for Workflow Notifications](#)
- [What is a subtemplate?](#)
- [Customize Pixel-Perfect Reports](#)

Use Quick Parts for Workflow Notifications

Use the Quick Parts feature in Microsoft Word to easily insert reusable pieces of formatted content. When you edit copies of predefined report layout templates for workflow notifications in Word, you can add predefined Quick Parts content to your .rtf file. For example, you can insert a table in a format that's consistent with predefined notifications. The predefined Quick Parts content is available in a style template .dotx file on My Oracle Support.

Note: The exact steps can vary depending on your version of Microsoft Word.

Prerequisites

To get the predefined Quick Parts content into your Quick Parts gallery:

1. Open Configurable Workflow Notifications: Implementation Considerations (2215570.1) on My Oracle Support at <https://support.oracle.com>.
2. Download the .dotx file and save it to your Microsoft Word template folder, for example `C:\Users\<user name>\AppData\Roaming\Microsoft\Templates`.

Also, to preview your layout template changes before uploading the .rtf file back to the business intelligence (BI) catalog:

- Generate sample report data from the data model for the report that you're editing.
- Download a local copy of the subtemplate that applies to the layout template.

Adding Quick Parts Content to Workflow Notifications

To insert content from the Quick Parts gallery into a layout template:

1. In the BI catalog, find the predefined report with the layout template that you want to modify.
2. For the report, click **More** and select **Customize**.
If you're not using the Customize option:
 - a. Copy the predefined report and paste it in an appropriate subfolder within the Custom folder.
 - b. Click the **Edit** link for the copied report.
3. Click **Edit** for the layout template to insert Quick Parts content into, and save the .rtf file to your computer with a new file name.
4. Open the .rtf file with Microsoft Word.
5. Put your cursor where you want to insert new content.

6. From the Insert tab on the ribbon, click **Quick Parts** within the Text group, and select the component to insert.
7. Edit the inserted component as needed and add any other components.
8. Save your changes in Word.

Previewing the Layout Template Changes

To preview your edits before uploading your layout template to the BI catalog:

1. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group to import sample data from the data model. Skip this step if you already loaded sample data.
2. At the beginning of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:///C:/Template_Directory/FinFunWorkflowNotificationSub.rtf?>`.
3. From the Analytics Publisher tab on the ribbon, click **HTML** in the Preview group.
4. If the preview reflects your changes as expected, then change the path back to the original location.
5. Save your changes in Word.

Uploading the Modified Layout Template

To upload your layout template to the BI catalog after previewing the changes:

1. Back in the BI catalog, click **Edit** for the report within the Custom folder, if that page isn't still open.
2. Click the **View a list** link.
3. Click the **Create** icon on the table toolbar.
4. In the Upload or Generate Layout section, click **Upload**.
5. Upload your edited .rtf file with a unique layout name.
6. Back on the page for editing the report, click Delete for the layout template that you downloaded earlier.
7. Click the **Save Report** icon.

Related Topics

- [Best Practices for Workflow Notifications](#)
- [Understand Style Templates](#)
- [Test Data Models and Generate Sample Data](#)
- [Customize Pixel-Perfect Reports](#)

Set Up Content to Appear in Only Email or In-App Workflow Notifications

For workflow tasks that have configurable email and in-app notifications, the same .rtf report layout template is used for both types of notifications. When you edit a copy of predefined templates in Microsoft Word to modify the notifications, you can make content conditional. For example, you can add an attribute from the data models used for the report, and set the attribute to appear only in in-app notifications.

The logo, action buttons, and links at the end of email notifications are predefined to appear only in emails, based on the subtemplate. The approval history is usually predefined to also appear in the body of only email notifications. Any conditional setting you apply to these components in the .rtf template won't override the predefined setup.

Prerequisites

Generate sample report data from the data model used for the report, and save the .xml file to your computer.

Defining Conditional Regions

To define a conditional region of content that appears only in email or in-app notifications:

1. Open your .rtf report layout template in Microsoft Word.
2. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group.
3. Select the .xml file you downloaded to import sample data from the data model.
4. In your .rtf document, select the content you want to make conditional.
5. On the ribbon, click **Conditional Region** within the Insert group.
6. In the Conditional Region dialog box, on the Properties tab, select `BINDISONLINENOTIF` from the **Data field** list in the General section. The values in this list come from the sample data you imported from the data model.
7. Select **Date/Text** from the next list.
8. In the Condition 1 section, select **Equal to** from the **Data field** list.
9. In the corresponding text field, enter **true** for content to appear only in in-app notifications, or **false** for content to appear only in emails.
10. Make sure that form fields containing the conditional logic are inserted around your selected content. The beginning form field, `c`, should be immediately before the conditional content, and the closing form field, `ec`, should be immediately after. Move the form fields as needed.

Tip: To make sure you're looking at the correct form fields, double-click the `c` form field to open the Conditional Region dialog box and see the `BINDISONLINENOTIF` setting.

11. Save your changes in Word.

Entering Conditional Code

If the data model for your report doesn't have the `BINDISONLINENOTIF` attribute, then:

1. In your .rtf report layout template, put your cursor immediately before the content you want to make conditional.
2. Enter the following code, which functions the same as the `c` form field:
 - `<?if:BINDISONLINENOTIF='true' ?>` for in-app only
 - `<?if:BINDISONLINENOTIF='false' ?>` for email only
3. Put your cursor immediately after your conditional content.
4. Enter `<?end if?>`, which functions the same as the `ec` form field.
5. Save your changes in Word.

Related Topics

- [Best Practices for Workflow Notifications](#)
- [Add a Branding Logo and Change Other Shared Components in Workflow Notifications](#)
- [Test Data Models and Generate Sample Data](#)

Securing In-App Notifications

In-app notifications are secured using data privileges so that only approvers with appropriate privileges can view or edit transactions.

You can secure approval notifications in these responsive employment flows using data privileges:

- Edit Pending Worker
- Work Relationship
- Cancel Work Relationship
- Employment Details
- Employment Contract
- Eligible Jobs
- Additional Assignment Info
- Manage Directs
- Delete Assignment
- Termination
- Resignation
- Reverse Termination
- Withdraw Resignation
- Correct Termination

Example of Securing In-App Notifications

Here's what approvers can access in the Work Relationship flow based on the privileges and functions assigned to them:

Approver	Access	View Access	Edit Access
A1	A1 has only view access - PER_VIEW_WORK_RELATIONSHIP_I	A1 can view the current and proposed work relationship changes in the notification.	A1 can't edit the transaction.
A2	A2 is an HR Analyst and can view a worker's data, but has edit work relationship access only for department 1. A2 doesn't have access to the worker's department 2 assignment information.	A2 can view the current and proposed work relationship changes in the notification.	When A2 clicks Edit in the notification, an error message is displayed in the transaction page indicating A2 doesn't have access to the worker's assignment info.
A3	A3 is a line manager and has edit access but doesn't have access to a worker's assignment information.	A3 can't view the current and proposed work relationship change section in the in-app notification. An error message is displayed in the notification page indicating A3 doesn't have access to the worker's assignment info.	When A3 clicks Edit in the notification, an error message is displayed in the transaction page indicating A3 doesn't have access to the worker's assignment info.
A4	A4 has functional privilege and edit access to a worker's assignment information. Functional Privilege: PER_EDIT_WORK_RELATIONSHIP Data Privilege :PER_VIEW_WORK_RELATIONSHIP_DATA, PER_	A4 can view the current and proposed work relationship changes in the notification	A4 can edit the transaction.

Approver	Access	View Access	Edit Access
	EDIT_WORK_RELATIONSHIP_DATA, PER_MANAGE_WORK_RELATIONSHIP_DATA		

Related Topics

- [Regenerate Roles](#)
- [Guidelines for Copying HCM Roles](#)

Configure Notifications in Career Development Using Reports

This example shows how to configure workflow email and in-app notifications for the career development business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	CareerDevelopmentFYINotification, for changes to worker development goal content
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Goal ID
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a career development notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your custom own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate .rtf file to your computer.
4. Click **Catalog** to open the Catalog page.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under CareerDevelopmentFyiDM, click **Edit** to open the Diagram tab on the CareerDevelopmentFyiDM Data Model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.

6. Enter the following attributes for an existing goal that are key attributes and enable you to pull in all the goal attributes:
 - **GoalID**
 - **NotificationType**
7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export** to open the **Opening CareerDevelopmentFyiDM** dialog box.
9. Select **Save File** and click **OK**.
10. Save the **CareerDevelopmentFyiDM_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **CareerDevelopmentFYINotification**, click **More**, and then select **Customize**. A copy of the CareerDevelopmentFYINotification is created automatically in the Custom folder.
5. On the CareerDevelopmentFYINotification page, under **CareerDevelopmentFYINotification**, click **Edit**.
6. Save the template to your local drive with the name UpdatedCareerDevelopmentFYINotificationLayout.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedCareerDevelopmentFYINotificationLayout.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the career development business process except approval notifications.
2. Scroll to the notification with the header **Development Goal Added**.
3. Place your cursor at the end of the **Development Goal Added** header.
4. Enter **to Your Development Plan**. The text now reads: **Development Goal Added to Your Development Plan**.
5. Place the cursor at the end of the text **PPERFORMERNAME added development goal GOAL_NAME for you..**
6. Enter a new sentence: **You can access the goal to track your development**.
7. Save the document.
8. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the CareerDevelopmentFyiDM).xml file you downloaded to import sample data from the data model.

3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change **<? import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>** to **<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>**.
5. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model. You will add the Goal ID and Category Meaning data model attributes to the template.

1. Open the UpdatedCareerDevelopmentFYINotificationLayout.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **CareerDevelopmentFyiDM_.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Scroll to the **Development Goal Added** notification.
7. Place the cursor after the sentence: **PPERFORMERNAME added development goal GOAL_NAME for you.** and press the Enter key.
8. On the new line, enter **Goal ID:**.
9. Enter a space after **Goal ID:**.
10. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
11. In the DATA_DS folder, select **PGOALID** and click **Insert**. The field appears in the document.
12. Click **Close** to return to the UpdatedCareerDevelopmentFYINotificationLayout.rtf template.
13. Preview the template using the steps in the Previewing the Document task.
14. Save and close the document.
15. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under **CareerDevelopmentFYINotification**, click **Edit**.
5. On the CareerDevelopmentFYINotification Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Career Development Notifications Template**.
8. In the **Template File** field, browse for the modified **UpdatedCareerDevelopmentFYINotificationLayout.rtf template** on your local drive, select the template, and click **Open**.

9. On the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box.
12. On the CareerDevelopmentFYINotification Data Model page, on the right side, click **View a list** to open the Layout page.
13. In the row for the **Updated Career Development Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Set Up for RTF and Excel Report Layout Templates](#)
- [How You Modify Copies of Predefined Reports](#)

Configure Notifications in Goal Management Using Reports

This example shows how to configure workflow email and in-app notifications for the goal management business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	PerformanceGoalNotificationsReport, for updates to notifications about goal content
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for Goal ID and Goal Plan ID
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a goal management notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under Performance Goal Notifications Data Model, click **Edit** to open the Diagram tab on the Performance Goal Notifications Data Model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for an existing goal that are key attributes and enable you to pull in all the goal attributes:
 - **GoalID**

- **NotificationType**

7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export**.
9. In the **Opening PerformanceGoalNotificationsDM** dialog box, select **Save File** and click **OK**.
10. Save the **PerformanceGoalNotificationsDM.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **PerformanceGoalNotificationsReport**, click **More**, and then select **Customize**. A copy of the PerformanceGoalNotificationsReport is created automatically in the Custom folder.
5. On the PerformanceGoalNotificationsReport page, under **PerformanceGoalNotificationsTemplate**, click **Edit**.
6. On the **Opening PerformanceGoalNotifications.rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedPerformanceGoalNotifications.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedPerformanceGoalNotifications.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the goal management business process.
2. Scroll to the notification with the header **Realign the Goal ALIGNED_GOAL_NAME Because the Goal GOAL_NAME was Canceled**.
3. Place the cursor in front of the **Description** header text.
4. Enter **Goal**. The text now reads **Goal Description**.
5. In the header **Realign the Goal ALIGNED_GOAL_NAME Because the Goal GOAL_NAME was Canceled**, place your cursor after **Realign**, enter **Your**, and delete **the**. The text now reads **Realign Your Goal ALIGNED_GOAL_NAME Because the Goal GOAL_NAME was Canceled**.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the PerformanceGoalNotificationsDM.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.

4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<? import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>`.
5. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model. You will add the Goal ID and Category Meaning data model attributes to the template.

1. Open the UpdatedPerformanceGoalNotifications.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **PerformanceGoalNotificationsDM_.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Scroll to the **Aligned Goal Canceled** notification.
7. Place the cursor after **Goal Name** and press the Enter key.
8. On the new line, enter **Goal ID**.
9. Place the cursor after the data code **GOAL_NAME** and press the Enter key to enter a new line.
10. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
11. In the GOALDETAILS folder, select **GOAL_ID** and click **Insert**. The field appears in the document.
12. Place the cursor after the data code **Goal Description** and press the Enter key.
13. On the new line, enter **Goal Category**.
14. Place the cursor after the data code **DESCRIPTION** and press the Enter key to enter a new line.
15. On the **Field** dialog box, in the GOALDETAILS folder, select **CATEGORY_MEANING** and click **Insert**. The field appears in the document.
16. Click **Close** to return to the PerformanceGoalNotifications.rtf template.
17. Preview the template using the steps in the Previewing the Document task.
18. Save and close the document.
19. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under the **PerformanceGoalNotificationsReport**, click **Edit**.
5. On the Performance Goal Notifications Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Performance Goal Notifications Template**.

8. In the **Template File** field, browse for the modified **UpdatedPerformanceGoalNotificationsTemplate.rtf template** on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the Performance Goal Notifications Data Model page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated Performance Goal Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Setting Up for RTF and Excel Report Layout Templates: Procedure](#)
- [Using the Customize Option for Predefined Reports: Points to Consider](#)

Configure Performance Management Notifications Using Reports

This example shows how to configure workflow email and in-app notifications for the performance management business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	PerformanceFyiNotificationsReport
Do I add prompts and headers to the template?	Yes
Do I add predefined data model attributes to the template?	Yes, for Evaluation ID
Which language do I use for the .rtf template?	English

Summary of the Tasks

Configure a performance management notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under PerformanceFyiNotificationsReport Data Model, click **Edit** to open the Diagram tab on the Performance Fyi NotificationsReport Data Model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the Evaluation ID of an actual performance evaluation in the **EvaluationID** field to pull in all the performance document attributes. The Evaluation ID is a key attribute that enables you to see all available data attributes. Leave any existing sample data in these fields for any other fields.
7. Click **View** to see the sample data in the report, and all the available attributes.

8. Click **Export**.
9. In the **Opening PerformanceFYIDM** dialog box, select **Save File** and click **OK**.
10. Save the **PerformanceFYIDM.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **PerformanceFyiNotificationsReport**, click **More**, and then select **Customize**. A copy of the PerformanceFyiNotificationsReport is created automatically in the Custom folder.
5. On the PerformanceFYINotificationsReport page, under **PerformanceFyiNotificationsReport**, click **Edit**.
6. On the **Opening PerformanceFyiNotificationsReport .rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedPerformanceFyiNotificationsReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedPerformanceFYINotifications.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the performance management business process.
2. Scroll to the **Performance Document Reopened** notification.
3. Select the **Performance Document Reopened** header text.
4. Change the text to **Your Manager Reopened Your Performance Document**.
5. Scroll to the body text **MGR_NAME reopened your performance document CUSTOMARY_NAME** and place your cursor after the period.
6. Enter **You can continue your evaluation**.
7. Scroll to the **Review Period** text.
8. Place the cursor right before Review Period. Enter **Performance Document**. The text now reads Performance Document Review Period. (For TR, using Meeting Date - Enter Talent Review. The text now reads Talent Review Meeting Date.)
9. Save the document.
10. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the PerformanceFYIDM_.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.

5. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
6. Also in the Tools group, click **Check Accessibility**.
7. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model.

1. Open the UpdatedPerformanceFYINotifications.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **PerformanceFYIDM.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Scroll to the **Performance Document Reopened** notification.
7. Place the cursor after **Review Period** and press the Enter key.
8. On the new line, enter **Person ID**.
9. Place the cursor after the data code **REVIEW_PERIOD_NAME** and press the Enter key to create a new line.
10. On the BI Publisher menu bar, in the Insert section, click the **123 Field** button to open the Field dialog box.
11. In the PERSON_DETAILS folder, select **PERSON_ID** and click **Insert**. The field appears in the document.
12. Place the cursor after the **Person ID** text you entered in step 8 and press the Enter key.
13. On the new line, enter **Current Date**.
14. Place the cursor after the data code **PERSON_ID** you added in step 11 and press the Enter key to add a new line.
15. In the DATA_DS folder, select **PCURRENTDATE** and click **Insert**. The field appears in the document.
16. Click **Close** to return to the PerformanceFYINotifications.rtf template.
17. Preview the template using the steps in the Previewing the Document task.
18. Save and close the document.
19. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report to the Oracle BI Publisher Server

You must perform this task to use the customized template for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under the **PerformanceFYIDM**, click **Edit**.
5. On the PerformanceFyiNotificationsReport page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Performance FYI Notifications Report Template**.
8. In the **Template File** field, browse for the modified **UpdatedPerformanceFyiNotificationsReport.rtf** template on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the Performance FYI Notifications Data Model page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated Performance FYI Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Setting Up for RTF and Excel Report Layout Templates: Procedure](#)
- [Using the Customize Option for Predefined Reports: Points to Consider](#)

Configure Profile Management Notifications Using Reports

This example shows how to configure workflow email and in-app notifications for the profile management business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	ProfileChangeNotificationReport, for changes to worker profile content
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for Content Type Name
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a profile management notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word: http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm).

3. To preview the configured templates, download a local copy of the subtemplate that applies to your custom own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate .rtf file to your computer.
4. Click **Catalog** to open the Catalog page.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under **ProfileChangeNotification**, click **Edit** to open the Diagram tab on the Profile Change Data Model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select **Include Empty Tags for Null Elements**.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for an existing worker profile that are key attributes and enable you to pull in all the available profile attributes for changes to worker profile content data:
 - **Context Name**
 - **Profile Item Id**
 - **Content Item Name**
 - **Profile Name**
 - **Content Item Id**
 - **Content Type Id**
 - **Notification Name**

Leave any existing sample data in these fields for any other fields.

Note: To configure a template for worker job profile interest, use the following key attributes:

- **Image Person Id**
- **Person Id**
- **Job Profile Id**
- **Profile Interest Id**
- **Notification Name**

7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export**.
9. Save the **ProfileChangeNotification_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **ProfileChangeNotificationReport**, click **More**, and then select **Customize**. A copy of the ProfileChangeNotificationReport is created automatically in the Custom folder.
5. On the ProfileChangeNotificationReport page, under **ProfileChangeNotificationReport**, click **Edit**.
6. On the **Opening ProfileChangeNotificationReport.rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedProfileReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedProfileReport.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the profile management business process that involve changes to worker profile content or job profile interest data. It doesn't include approval notifications.
2. Scroll to the notification with the header **CONTENT_TYPE_NAME Added**.
3. Place the cursor at the end of the text **A competency was added to PPROFILENAME talent profile by PLOGGEDINPERSONNAME**.
4. Enter **to fulfill update job requirements..**
5. Place your cursor in front of the label **Competency**, and enter **New**.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the ProfileChangeNotification_.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<? import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>`.
5. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model. You will add the Content Type Name data model attribute to the template.

1. Open the UpdatedProfileReport.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **ProfileChangeNotification_.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Scroll to the **CONTENT_TYPE_NAME Added** notification.
7. Place the cursor after **Description** and press the Enter key.
8. On the new line, enter **Content Type**.
9. Place the cursor after the data code **DESCRIPTION_COMP** and press the Enter key to create a new line.
10. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
11. In the CONTENT_TYPES folder, select **CONTENT_TYPE_NAME** and click **Insert**. The field appears in the document.
12. Click **Close** to return to the UpdatedProfileReport.rtf template.
13. Preview the template using the steps in the Previewing the Document task.
14. Save and close the document.
15. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under the **ProfileChangeNotificationReport**, click **Edit**.
5. On the ProfileChangeNotification Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.

6. In the Upload or Generate Layout section, click the **Upload** icon to open the **Upload Template File** dialog box.
7. In the **Layout Name** field, enter **Updated Profile Notifications Template**.
8. In the **Template File** field, browse for the modified **UpdatedProfileReport.rtf template** on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box.
12. On the ProfileChangeNotification Data Model page, on the right side, click **View a list** to open the Layout page.
13. In the row for the **Updated Profile Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Set Up for RTF and Excel Report Layout Templates](#)
- [How You Modify Copies of Predefined Reports](#)

Configure Notifications in Talent Review Using Reports

This example shows how to configure workflow email and in-app notifications for the talent review business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	TalentCalibFYIReport, for updates to notifications about talent review meetings
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for meeting date and meeting ID
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a talent review notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your custom own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the **Locale** column.
 - Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select **Data Models** to display the data models in the right pane.
4. Under TalentCalibFYIDM, click **Edit** to open the Diagram tab on the Talent Calib FYI Data Model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select **Properties**.
- In the Properties section, select **Include Empty Tags for Null Elements**.
- In the Data Model section, select **Data Sets**.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for an existing meeting that are key attributes and enable you to pull in all the meeting attributes:

- MeetingId
 - ParticipantId
 - FYINotificationName
7. Click **View** to see the sample data in the report, and all the available attributes.
 8. Click **Export**.
 9. In the Opening TalentCalibFYIDM dialog box, select **Save File** and click **OK**.
 10. Save the **TalentCalibFYIDM_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **TalentCalibFYIReport**, click **More**, and then select **Customize**. A copy of the TalentCalibFYIReport is created automatically in the Custom folder.
5. On the TalentCalibFYIReport page, under **TalentCalibFYIReport**, click **Edit**.
6. On the TalentCalibFYIReport dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedTalentCalibReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedTalentCalibReport.rtf report template using MS-Word. The document contains all notifications for the talent review business process.
2. Scroll to the first notification with the header **Talent Review Meeting Scheduled**.
3. Place the cursor after the **You are invited to the talent review meeting MEETING_TITLE. Meeting details are listed in this notification.** body text.
4. Enter **Ensure that you update content for your reports before the meeting.**
5. Place the cursor right in front of **Meeting Date**. Enter **Talent Review**. The text now reads **Talent Review Meeting Date**.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the TalentCalibFYIDM_.xml file you downloaded to import sample data from the data model.
3. In the Data Loaded Successfully dialog box, click **OK**.
4. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.

5. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
6. Also in the Tools group, click **Check Accessibility**.
7. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model. You will add the Meeting Date and Meeting ID data model attributes to the template.

1. Open the UpdatedTalentCalibReport.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **TalentCalibFYIDM_.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the Data loaded successfully dialog box, click **OK**.
6. Scroll to the first notification with the header **Talent Review Meeting Scheduled**.
7. Place the cursor after **Meeting Date** and press the Enter key.
8. On the new line, enter **Meeting ID**.
9. Place the cursor after the data code **MEETING_DATE** and press the Enter key to create a new line.
10. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
11. In the G_1 folder, select **MEETING_ID** and click **Insert**. The field appears in the document.
12. Click **Close** to return to the UpdatedTalentCalibReport.rtf template.
13. Preview the template using the steps in the Previewing the Document task.
14. Save and close the document.
15. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog** to open the Catalog page.
3. In the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select **Workflow Notifications**.
4. Under **TalentCalibFYIReport**, click **Edit**.
5. On the TalentCalibFYIReport page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the Upload Template File dialog box, in the **Layout Name** field, enter **Updated Talent Review Notifications Template**.
8. In the **Template File** field, browse for the modified **UpdatedTalentCalibReport.rtf template** on your local drive, select the template, and click **Open**.
9. In the Upload Template File dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the Processing dialog box and return to the TalentCalibFYIDM Data Model page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated Talent Review Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Setting Up for RTF and Excel Report Layout Templates: Procedure](#)
- [Using the Customize Option for Predefined Reports: Points to Consider](#)

Configure Workforce Deployment Notifications Using Reports

This example shows how to configure the promotion workflow email and in-app notification for the workforce deployment business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	PromotionReport, for updates to notifications about a worker's promotion
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for Person Type and Annual Salary
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a promotion notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - o Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.

- Click **Catalog**.
- In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
- Click Edit for Workflow Notification Subtemplate.
- In the Templates section, click the link in the Locale column.
- Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under Promotion data model, click **Edit** to open the Diagram tab on the Promotion data model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for the promotion that are key attributes and enable you to pull in all the goal attributes:
 - **TransactionID**
7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export**.
9. In the **Opening Promotion_.xml** dialog box, select **Save File** and click **OK**.
10. Save the **Promotion_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.

4. Under **PromotionReport**, click **More**, and then select **Customize**. A copy of the PromotionReport is created automatically in the Custom folder.
5. On the PromotionReport page, under **PromotionReport**, click **Edit**.
6. On the **Opening PromotionReportR11.rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedPPromotionReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedPromotionReportR11.rtf.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the workforce deployment business process.
2. Scroll to the notification with the header **Promotion Details**.
3. Place the cursor in front of the **Description** header text.
4. Enter **Your**. The text now reads **Your Promotion Details**.
5. Scroll to the prompt **Mail Stop**. Replace Mail Stop with **Post Office Box**.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails and in-app notification sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the PromotionReportDM_.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<? import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>`.
5. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes to data model. You will add the Person Type and Annual Salary data model attributes to the template.

1. Open the UpdatedPerformanceGoalNotifications.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **Promotion_.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.

6. Scroll to the **Employee Details** notification.
7. Place the cursor after **Name** and press the Enter key.
8. On the new line, enter **Person Type**.
9. Place the cursor after the data code **ParentEntityName** and press the Enter key to enter a new line.
10. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
11. In the EMPLOYEEDETAILS folder, select **PERSON_TYPE** and click **Insert**. The field appears in the document.
12. Place the cursor after the data code **Department** and press the Enter key.
13. On the new line, enter **Annual Salary**.
14. Place the cursor after the data code **Department** and press the Enter key to enter a new line.
15. On the **Field** dialog box, in the EMPLOYEEDETAILS folder, select **ANNUAL_SALARY** and click **Insert**. The field appears in the document.
16. Click **Close** to return to the PromotionReportR11.rtf template.
17. Preview the template using the steps in the Previewing the Document task.
18. Save and close the document.
19. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under the **PromotionReport**, click **Edit**.
5. On the PromotionReport Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Promotion Template**.
8. In the **Template File** field, browse for the modified **Updated PromotionReportR11.rtf template** on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the PromotionReport page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated Promotion Report Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Setting Up for RTF and Excel Report Layout Templates: Procedure](#)
- [Using the Customize Option for Predefined Reports: Points to Consider](#)

Configure Document Records Notifications Using Reports

This example shows how to configure the document records workflow email and in-app notification for the document records business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit

the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	ManageDorReport, for updates to notifications about a worker's document records
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for Person Name and Person Number
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a document record notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - o Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - o Click **Catalog**.
 - o In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - o Click Edit for Workflow Notification Subtemplate.
 - o In the Templates section, click the link in the Locale column.

- Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under ManageDOR data model, click **Edit** to open the Diagram tab on the ManageDOR data model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for the document record that are key attributes and enable you to pull in all the attributes:
 - **TransactionID**
7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export**.
9. In the **Opening ManageDOR_.xml** dialog box, select **Save File** and click **OK**.
10. Save the **ManageDOR_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **ManageDorReport**, click **More**, and then select **customize**. A copy of the ManageDorReport is created automatically in the Custom folder.
5. On the ManageDorReport page, under **ManageDorReport**, click **Edit**.
6. On the **Opening ManageDorReportR13.rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name ManageDorReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the ManageDorReportR13.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the workforce deployment business process.
2. Scroll to the notification with the header **New Document Record**.
3. Place the cursor in front of the **Description** header text.
4. Enter **Your**. The text now reads **Your New Document Record**.
5. Scroll to the prompt **Issuing Authority**. Replace Issuing Authority with **Issuing Agency**.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails and in-app notification sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the ManageDorDM.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<? import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>`.
5. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes to data model. You will add the Person Name and Person Number attributes to the template.

1. Open the ManageDorReport.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **ManageDOR.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Place the cursor after the data code **ParentEntityName** and press the Enter key to enter a new line.
7. On the BI Publisher tab, in the Insert section, click the **123 Field** button to open the **Field** dialog box.
8. In the PersonHeader folder, select **PERSON_NAME** and click **Insert**. The field appears in the document.
9. Place the cursor after the data code **PERSON_NAME** and press the Enter key to enter a new line.
10. In the PersonHeader folder, select **PERSON_NUMBER** and click **Insert**. The field appears in the document.
11. Click **Close** to return to the ManageDorReportR13.rtf template.
12. Preview the template using the steps in the Previewing the Document task.

13. Save and close the document.
14. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under the **ManageDorReport**, click **Edit**.
5. On the ManageDorReport Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated ManageDor Template**.
8. In the **Template File** field, browse for the modified **Updated ManageDorReportR13.rtf template** on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the ManageDorReport page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated ManageDor Report Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Setting Up for RTF and Excel Report Layout Templates: Procedure](#)
- [Using the Customize Option for Predefined Reports: Points to Consider](#)

Configure Checklist Notifications Using Reports

This example shows how to configure the checklist task workflow email and in-app notification for the workforce deployment business process using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	TaskFYIReport, for updates about a worker's checklist task
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for Task Contact Details

Decisions to Consider	This Example
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a checklist notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see *Creating RTF Templates by Using BI Publisher 11g Template Builder for Word*: <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click Catalog.
 - In the BI catalog, go to Shared Folders > Common Content > Templates for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate.rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click Catalog.
3. On the Catalog page, in the Folders section, expand Shared Folders > Human Capital Management > Workflow Notifications and select Data Models to display the data models in the right pane.
4. Under TaskNotification data model, click Edit to open the Diagram tab on the TaskNotification data model page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter the following attributes for the checklist that are key attributes and enable you to pull in all the attributes:
 - TransactionID
7. Click View to see the sample data in the report, and all the available attributes.
8. Click Export.
9. In the Opening TaskNotification_.xml dialog box, select Save File and click OK.
10. Save the TaskNotification_.xml file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click Catalog.
3. On the Catalog page, in the Folders section, expand Shared Folders > Human Capital Management and select Workflow Notifications to display the templates in the right pane.
4. Under TaskFYIReport, click More, and then select Customize. A copy of the TaskFYIReport is created automatically in the Custom folder.
5. On the TaskFYIReport page, under TaskFYIReport, click Edit.
6. On the Opening TaskFYIReport.rtf dialog box, select Save File and click OK to save the document to your local hard drive. Save the template with the name UpdatedTaskFYIReport.rtf to distinguish it from the original template.

Editing Prompts and Headers in the Template

To modify email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedTaskFYIReport.rtf template in Microsoft Word with the Template Builder installed, if not already open. The document contains all notifications for the workforce deployment business process.
2. Scroll to the notification with the header FYI: Task.
3. Place the cursor in front of the FYI: header text.
4. Enter Checklist. The text now reads FYI: Checklist Task.
5. Save the document.
6. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails and in-app notification sent to users.

1. In the Ribbon, open the BI Publisher tab and click Sample XML within the Load Data group.
2. Browse to and select the TaskNotification_.xml file you downloaded to import sample data from the data model.
3. In the Data Loaded Successfully dialog box, click OK.
4. At the top of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:C:///Template_Directory/Workflow Notification Subtemplate.rtf?>`.
5. From the BI Publisher tab in the Ribbon, click HTML in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the BI Publisher tab in the Ribbon, click Validate Template in the Tools group.
8. Also in the Tools group, click Check Accessibility.
9. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes to data model. You will add the Task Contact Details data model attributes to the template.

1. Open the UpdatedTaskFYIRReport.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click Sample XML.
4. In the dialog box to select XML data that appears, browse to open the TaskNotification_.xml file you saved in the Exporting the Data Model XML File task and click Open.
5. In the Data loaded successfully dialog box, click OK.
6. Scroll to the Task Details notification.
7. Place the cursor after Status and press the Enter key.
8. On the new line, enter Task Contact Details.
9. Place the cursor after the data code MEANING and press the Enter key to enter a new line.
10. On the BI Publisher tab, in the Insert section, click the 123 Field button to open the Field dialog box.
11. In the AllocatedTaskDetails folder, select CONTACT_DETAILS and click Insert. The field appears in the document.
12. Click Close to return to the TaskFYIRReport.rtf template.
13. Preview the template using the steps in the Previewing the Document task.
14. Save and close the document.
15. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click Catalog
3. On the Catalog page, in the Folders section, expand Shared Folders > Custom > Human Capital Management and select Workflow Notifications.
4. Under the ChecklistReport, click Edit.

5. On the TaskNotification Data Model page, on the right side of the page, click Add New Layout to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the Upload icon.
7. In the Upload Template File dialog box, in the Layout Name field, enter Updated TaskFYIReport Template.
8. In the Template File field, browse for the modified Updated TaskFYIReport.rtf template on your local drive, select the template, and click Open.
9. In the Upload Template File dialog box, from the Type list, select RTF Template.
10. From the Locale list, select English (United States).
11. Click Upload to open the Processing dialog box and return to the TaskFYIReport page.
12. On the right side of the page, click View a list to open the Layout page.
13. In the row for the Updated TaskFYI Report Template, select the Default Layout check box.
14. On the right side of the page, click the Save Report icon.

Configure Feedback Notifications Using Reports

This example shows how to configure workflow email and in-app notifications for feedback using Oracle Business Intelligence (BI) Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications. You can modify the BI Publisher templates only if you have the BI Administrator role.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	NoteSentToManager, for updates to notifications about feedback sent to managers
Do I add prompts and headers to the template?	Yes
Do I add data model attributes to the template?	Yes, for DISPLAY_NAME and WORKER_DISPLAY_NAME
Which language do I use for the .rtf template?	English (United States)

Summary of the Tasks

Configure a goal management notification by:

1. Exporting the data model XML file.
2. Downloading the report layout template.
3. Editing prompts and headers in the template.
4. Previewing the document.
5. Adding data model attributes to the template.
6. Uploading the modified report layout to the BI Publisher catalog.

If you only want to add or edit prompts and headers in the template, use tasks 1, 2, 3, 4, and 6. To only add data model attributes to the template, use tasks 1, 2, 4, 5, and 6.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see [Creating RTF Templates by Using BI Publisher 11g Template Builder for Word](http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm): <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.
3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - Click **Catalog**.
 - In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - Click Edit for Workflow Notification Subtemplate.
 - In the Templates section, click the link in the Locale column.
 - Save the subtemplate .rtf file to your computer.

Exporting the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required if you intend to add data model attributes to the template.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management > Workflow Notifications** and select Data Models to display the data models in the right pane.
4. Under Person Notes, click **Edit** to open the Diagram tab on the PersonNotes page.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. In the empty text field, enter the Note_ID for an existing feedback note to pull in all the feedback attributes.
7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export**.
9. In the **Opening PersonNotes** dialog box, select **Save File** and click **OK**.
10. Save the **PersonNotes_.xml** file to a local drive.

Downloading the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local hard drive to modify it.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
4. Under **NoteSentToManagerReport**, click **More**, and then select **Customize**. A copy of the NoteSentToManagerReport is created automatically in the Custom folder.
5. On the NoteSentToManagerReport page, under **NoteSentToManagerReport**, click **Edit**.
6. On the **Opening NoteSentToManagerReport.rtf** dialog box, select **Save File** and click **OK** to save the document to your local hard drive. Save the template with the name UpdatedNoteSentToManagerReport.rtf to distinguish it from the original template.

Editing the Template

To modify workflow email and in-app notifications, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedNoteSentToManagerReport.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Place the cursor at the end of the text **AUTHOR_DISPLAY_NAME added feedback about WORKER_DISPLAY_NAME**.
3. Enter **recently..** The text now reads **AUTHOR_DISPLAY_NAME added feedback about WORKER_DISPLAY_NAME recently**.
4. Place the cursor in front of the feedback code that includes **<html2fo: NOTE_TEXT>** and press the **Enter** key to add a line.
5. Enter **Check out this feedback:.** When you preview the document, the feedback note appears below the text that you entered.
6. Save the document.
7. Proceed to the task Previewing the Document.

Previewing the Document

Before uploading the .rtf files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.

1. In the Ribbon, open the BI Publisher tab and click **Sample XML** within the Load Data group.
2. Browse to and select the PerformanceGoalNotificationsDM_.xml file you downloaded to import sample data from the data model.
3. In the **Data Loaded Successfully** dialog box, click **OK**.
4. From the BI Publisher tab in the Ribbon, click **HTML** in the Preview group.
5. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
6. Also in the Tools group, click **Check Accessibility**.
7. Save your changes in Word.

Adding Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model. You will add the `DISPLAY_NAME` and `WORKER_DISPLAY_NAME` data model attributes to the template.

1. Open the `UpdatedNoteSentToManagerReport.rtf` template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **PersonNotes.xml** file you saved in the Exporting the Data Model XML File task and click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Place the cursor after the code containing `<html2fo: NOTE_TEXT>` and press the **Enter** key twice to add two new lines.
7. On the new line, enter **Author Name:**.
8. On the BI Publisher tab, in the Insert section, click the **Field** button to open the **Field** dialog box.
9. In the AUTHORNAME folder, select **DISPLAY_NAME** and click **Insert**. The field appears in the document.
10. Place the cursor after the data code **DISPLAY_NAME** and press the Enter key.
11. On the new line, enter **Worker Name:**.
12. On the **Field** dialog box, in the WORKERNAME folder, select **WORKER_DISPLAY_NAME** and click **Insert**. The field appears in the document.

Note: Ensure that you don't alter or remove the code **WORKER_DISPLAY_NAME** or **Online Notification** that appear at the bottom of the template.

13. Click **Close** to return to the `UpdatedNoteSentToManagerReport.rtf` template.
14. Preview the template using the steps in the Previewing the Document task.
15. Save and close the document.
16. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Uploading the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Business Intelligence Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select Workflow Notifications.
4. Under **NoteSentToManagerReport**, click **Edit**.
5. On the NoteSentToManagerReport Data Model page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Feedback Notifications Template**.
8. In the **Template File** field, browse for the modified **UpdatedNoteSentToManagerReport.rtf** template on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the NoteSentToManagerReport Data Model page.
12. On the right side of the page, click **View a list** to open the Layout page.

13. In the row for the **Updated Feedback Notifications Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Workflow Task Life Cycle Setup

Define Where and How Users Can Act On Workflow Tasks

By default, users can act on workflow tasks from email notifications, their worklist, and anywhere else they get to the task. Also, users can add comments while updating the task outcome, for example to explain why they're rejecting something. Here are some of the things you can configure for any workflow task:

- Set it up so that users can act on tasks only when they're in the application, not from emails.
- Make it mandatory, optional, or not allowed to enter comments when approving or rejecting tasks. For example, you might require comments for auditing or regulatory purposes.
- Require users to verify their identity before updating the task outcome from the application.

Here's how you go about it:

1. In the Setup and Maintenance work area, go to **Manage Task Configurations** in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.
4. Open the Configuration subtab.
5. If you want users to update tasks only from the application, not from email, select the **Perform update outcome only from task form** check box in the Approval Pre-conditions section.
6. To make comments required, optional, or not allowed when users approve or reject tasks, select an option for the **Approve** and **Reject** lists. For example, select the **Required** option for both **Approve** and **Reject** lists to make comments mandatory.

Note:

- These settings apply only to new tasks that are submitted after you finish these steps, not to tasks that are already in progress.
- For in-app UIs, the validation applies right before the user approves or rejects. For example, let's say comments aren't allowed for approval. The user adds a comment and then do something else immediately to the task, like save, if such actions are available on the UI they're using. When they then click **Approve**, they won't get an error. If they add a comment and then immediately click **Approve**, they would get an error.

7. Click the Access tab.
8. Select a value for the **Signature Policy** list to determine what users need to do or not before updating the task outcome.
 - No Signature Required: Users don't need to verify their identity.

- Password Required: Users need to enter a password or more, depending on the task.
- 9. Click the **Commit task** icon on the **Tasks to be configured** toolbar when you're ready to roll out your changes.

Related Topics

- [Search for Workflow Tasks to Configure](#)

Define When to Automatically Dismiss or Withdraw Workflow Tasks

For a workflow task to be purged and removed from users' worklists, it must have a final status, like Completed or Withdrawn. Tasks go from the Assigned status to the Completed status when the final assignee approves or rejects the tasks. For your information (FYI) tasks get a final status when assignees explicitly dismiss the tasks. If assignees don't do anything within a certain period of time that result in a final task status, the tasks are automatically dismissed (FYI tasks) or withdrawn (all other tasks).

When FYI Tasks Are Eligible to Be Automatically Dismissed

The **FYI Notifications Expiration Period** (FND_NOTIFICATION_EXP_PERIOD) profile option controls when FYI tasks are eligible to be automatically dismissed.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
2. On the Manage Applications Core Administrator Profile Values page, leave the profile option with the default value of **7** at the Site level, or replace it with a different number.

The profile value represents the number of days after the FYI task is created. When assignees don't read or dismiss an FYI task within this many days after the task was created, the task is then eligible to get automatically dismissed.

When All Other Tasks Are Eligible to Be Automatically Withdrawn

All other tasks (the ones that aren't FYI) are eligible to be automatically withdrawn if both of these things happen:

- The expiration settings for the particular task is set to **Do Nothing** on the Deadlines subtab, within the Task Configuration tab in BPM Worklist.
- Assignees don't take action to send the task to a final status within 180 days after the task was created. This number is reflected in the **Open Tasks Withdrawn After Number of Days** field on the Application Preferences page, which you can open by clicking the Administration tab in BPM Worklist.

When Eligible Tasks Are Automatically Dismissed or Withdrawn

Now we know when tasks are eligible, but when are they actually dismissed or withdrawn automatically?

- FYI tasks: A process runs every three days, starting the first day of each month. For example, it runs on May 1, 4, 7, and so on, and again on June 1 and every three days after. So, if you leave the FYI Notifications Expiration Period profile value at 7, depending on when the process runs, an FYI task can be automatically dismissed within seven to ten days after it's created. The process changes the task status from Assigned to Completed.
- All other tasks: A process runs every three days, starting the second day of each month. For example, it runs on May 2, 5, 8, and so on, and again on June 2 and every three days after. The process changes the task status to Withdrawn.

Related Topics

- [Set Profile Option Values](#)
- [Define the Due Date and Expiration Policies for Workflow Tasks](#)
- [Update Existing Setup Data](#)

How Workflow Tasks Are Archived and Purged

Workflow tasks with a final status of Completed, Errored, Expired, or Withdrawn can be archived and purged. In progress tasks with statuses like Assigned, Information Requested, or Suspended aren't eligible.

- Archiving keeps a copy of the task data for audit, data retention or analysis, and other purposes.
- Purging removes the completed tasks from users' worklists and permanently deletes the original data.

Archive

Tasks are automatically archived once a day without you having to set anything up. You can't change or stop this automatic archive, which includes all eligible tasks that aren't archived yet. These scheduled processes run in this order to get the daily archive done:

- Extract Workflow Tasks for Archive
- Process Translations for Workflow Tasks Archive
- Upload Workflow Task Attachments for Archive

Here are some things to know about these processes:

- All three scheduled processes must complete for tasks to get archived. But, as soon as the Extract Workflow Tasks for Archive is done, the tasks are available for purge.
- Though unlikely, if you ever need to archive more frequently, you can use the Scheduled Processes work area to manually run these processes in the same order. Make sure one process finishes before you submit another.

You have the option to set parameters for the Extract Workflow Tasks for Archive process. But let's say you leave the default with 50000 as the number of tasks in a batch and a maximum runtime of 120 minutes. That means the process will archive in batches of 50000 workflow tasks. If it's still running after two hours, the process finishes archiving the current batch and then stops. You can check the log file of the process to see how many tasks are included in the archive.

Archived data includes task details, approval history, comments, and attachments. How you view or use the archived data depends on the products you're using. For example, the data might be displayed in a table on a page, or available through a business intelligence subject area that you can select to create an analysis.

These are the database tables that store the archived data:

- FND_BPM_TASK_B
- FND_BPM_TASK_TL
- FND_BPM_TASK_HISTORY_B
- FND_BPM_TASK_HISTORY_TL
- FND_BPM_TASK_ASSIGNEE

- FND_BPM_TASK_COMMENT
- FND_BPM_TASK_ATTACHMENT

Purge

Archived tasks that were last updated over 30 days ago are purged without you doing any setup. The purge runs daily at midnight. You can't change or stop this automatic purge.

After a task is purged, users can no longer find it in BPM Worklist or the Worklist: Notifications and Approvals work area. The task's approval history won't be available either. But, the tasks are still in the archive tables and available in analytics or anything else that reflects the archived data

Related Topics

- [Submit Scheduled Processes and Process Sets](#)
- [View Status and Other Details for Scheduled Processes](#)
- [Oracle Applications Cloud Tables and Views for Common Features](#)

Set Up the Worklist Region on My Dashboard

You can add the Worklist: Notifications and Approvals region to My Dashboard, which is a blank dashboard by default. This region displays the workflow tasks assigned to the person using My Dashboard. After you add the Worklist region, select a value for the Welcome Dashboard Worklist Timeout Interval (ATK_HOME_PAGE_WORKLIST_TIMEOUT) profile option.

Adding the Region

To add the Worklist: Notifications and Approvals region to My Dashboard:

1. Click **Navigator > Others > My Dashboard**.
2. Click your user image or name in the global header, and select **Edit Pages** in the Administration menu group.
3. Click the **Add Content** button where you want to place the region.
4. Open the Application Content folder in the Add Content dialog box.
5. Click **Add** for the Worklist: Notifications and Approvals item.
6. Click **Close**.
7. Save your work, and then click the **Close** button.

Defining the Timeout Interval

When users open My Dashboard and it contains the Worklist: Notifications and Approvals region, data for the region is retrieved. The Welcome Dashboard Worklist Timeout Interval profile option determines how long to continue retrieving before timing out and displaying no data. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Manage Application Toolkit Administrator Profile Values

Note: If you don't see this task, then make sure that the Application Toolkit Component Maintenance feature is enabled at the offering level in the Offerings work area.

On the Manage Application Toolkit Administrator Profile Values page, set the Welcome Dashboard Worklist Timeout Interval profile option.

- If you don't set a value for this profile option, which is blank by default, then the region doesn't time out.
- Retrieving data for the Worklist region affects the performance of My Dashboard as a whole. So, select a value for this profile option if your users have the Worklist region on My Dashboard and notice performance issues.

After the timeout, users can refresh the region to try retrieving the data again.

Related Topics

- [Set Profile Option Values](#)
- [Configure Offerings](#)
- [Update Existing Setup Data](#)

Monitor and Troubleshoot

Audit the Changes Made to Task Configurations

To help you troubleshoot or manage workflow setup, you can get audit information about changes to task configurations. For example, which task was updated, who made the change and when. Use the Audit Reports work area to get audit results. Here's what you search on:

- Product: Oracle SOA Suite (SOA)
- Event Type: SOA DT@RT Change

Setup

Workflow tasks are audited as long as the audit level is set to Low, Medium, or High for Oracle SOA Suite on the Manage Audit Policies page. You get the same audit results for workflow tasks no matter which of these levels is selected. To check the setup, in the Setup and Maintenance work area, use the **Manage Audit Policies** task in the Application Extensions functional area. If you don't see this setup task, make sure the Maintain Common Reference Objects feature is enabled at the offering level.

Related Topics

- [Audit Policies](#)
- [Audit History](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)

Manage Workflow Transactions

After workflow tasks are created, it's helpful to keep track of them and jump in when you need to, especially when something goes wrong. If you have the appropriate roles, you can monitor and troubleshoot workflow tasks for others

and for yourself. Use the Transaction Manager: Transactions page in the Transaction Console work area to manage transactions. A transaction is a business process that involves a workflow task.

Here are some of the things you can do:

- Track transaction statuses and download spreadsheets with information about transactions.
- Download and review diagnostic logs for transactions with errors. For example, you can see the conditions in the approval rules that might have caused the error.
- Depending on what's going on with the transaction and what roles you have, you might be able to, for example, reassign or recover the transaction.

Find Transactions

Follow these steps:

1. Click **Navigator > Tools > Transaction Console**.
2. If you see tabs, make sure you're on the Transaction Summary tab.
3. On the Transaction Manager: Transactions page, check the **Last Refresh** time stamp after the page title to see when the transaction statuses were last updated. Click the **Refresh** icon if needed. You can refresh any time as long as someone else didn't already start a refresh.
 - Also, the **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs every hour to refresh the statuses. If you find that's not enough, you can submit the process to run on a more frequent schedule. Your process would run instead of the automatic hourly one.
 - If you open the details for a specific transaction (step 5), its status also refreshes and you see the latest on the details page.
4. View the transactions with a status that matches the default Status filter, for example Failed. You can remove this filter to get results for all statuses. Or, use the search and filters to apply your own criteria, for example, to find transactions that are priority 1 or submitted by a specific person.
 - You can use the search to find results based on keywords in the **Name** or **Process Name** column, or specifically use the Name or Process Name filters. Name is the person or object the workflow task applies to, and the process reflects the type of workflow task.
 - You can personalize filters to add or hide filters, and create saved searches for future use.
5. Select and act on the transactions right there from the results table, or click the transaction in the **Name** column to see details, such as diagnostic information for failed transactions, and go from there.

Act On Transactions Without Opening Details

Here's what you do:

1. Select one or more transactions from the results table.
2. Optionally use the **Priority** menu to set an issue priority, so that you can later filter on the priority to find these transactions.
3. Open the **Actions** menu and select an action. If you selected more than one transaction, you see only the actions that can apply to all of them.

Use Transaction Details

What you can see and do in the transaction details depends on the transaction status and what roles you have. For example, for transactions that are in progress or completed, you might see the approval history, which shows who already approved and who the current assignee is, if any.

For failed transactions, you can get information about the issues and, if you're an administrator, usually take some action:

1. Select an issue from the **Issues** list, if the transaction has more than one issue.
2. Review the information in the Instructions and Details sections, including any description and resolution for the issue, as well as the related workflow task and approval rule.
3. Click the **Download** link to get the diagnostic log.
4. Use the **Issue Priority** list to set an issue priority, if you want to later filter on the priority to find this transaction.
5. From the **Assigned To** list, select the person who should fix the issue, for tracking and filtering purposes.
6. Add comments, for example to track what you're doing to address the issue, or note down any service request IDs. You and others can see these comments only in the Transaction Console, not with the workflow task in the worklist.
7. If you can, take action to address the issue. Here are some examples of how you might go about it:
 - Open the **Actions** menu and select an action to manage the transaction.
 - Follow up with the person you assigned the issue to or your help desk. Give them the diagnostic log and other information from the transaction details.
 - Reconfigure the approval rule that the transaction is based on, and have the workflow task resubmitted.
8. Select another issue from the **Issues** list, if any, and go through the same process.
9. Click **Save and Close**.

Download a Spreadsheet of Transactions

This is all you need to do:

1. In the results table, select the transactions you want to include in the spreadsheet. To get all transactions, either select all of them or none at all.
2. On the **Actions** menu, click **Download**.

Related Topics

- [Statuses for Filtering Transactions](#)
- [Actions for Managing Transactions](#)
- [Use Filters with Keyword Searches](#)
- [Save Keyword Searches with Filters](#)
- [Submit Scheduled Processes and Process Sets](#)

Statuses for Filtering Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to track the status of transactions. For example, you can filter the transactions by status to see just the transactions that are in progress or stuck. These statuses aren't the actual workflow task statuses that you see in the worklist or in notifications.

Status	Description
Auto Recovery	The transaction ran into some issues, but the application is trying to fix them without any action on your end.

Status	Description
Completed	All approvals are done and the transaction successfully went through all processes.
Draft	The transaction is saved but not submitted yet. This status doesn't apply to all product families.
Failed	The transaction has one or more errors, for example, due to a network or database outage, or an issue in the approval rules setup.
In Progress	At least one approval is still pending for the transaction before it's all done.
Stuck	The transaction was submitted, but ran into issues so the workflow task doesn't exist yet.
Submitted	The transaction was just created and hasn't moved on yet to another status. This status doesn't apply to all product families.

Related Topics

- [Manage Workflow Transactions](#)
- [Actions and Statuses for Workflow Tasks](#)

Actions for Managing Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to manage and troubleshoot transactions. For example, you can withdraw a transaction even if you're not the one who submitted it. What you can do depends on the transaction status and the roles you have. Some actions, such as approve and reassign, are the same as the ones you can take on the workflow tasks from the worklist or from notifications.

Action	Description
Add Comment	Add your notes for the transaction, for example to track what you're doing to address the issue, or to jot down any service request IDs. You and others can see these comments only in the Transaction Console.
Alert Initiator on Error	Notify the submitter if the transaction ends up in error.
Approve	Approve the transaction if the workflow task is currently assigned to you to approve or reject.
Download	Get a spreadsheet with information about the selected transactions.
Reassign	Reassign the workflow task to an approver, the submitter, or someone else.
Recover	Restart the process after the transaction stopped due to errors. After you address the issue, use this action to get the application to pick up where the process last left off and retry whatever had ended up in error.

Action	Description
Reject	Reject the transaction if the workflow task is currently assigned to you to approve or reject.
Terminate Process	Completely end the transaction so that no one can see or act on the workflow task again.
Withdraw	Remove the workflow task from the workflow. You can ask the submitter to submit again, for example, after an issue is resolved.

Related Topics

- [Manage Workflow Transactions](#)
- [Statuses for Filtering Transactions](#)
- [Actions and Statuses for Workflow Tasks](#)

Things to Check If There Are Issues with Workflow Tasks

After you configure workflow tasks, it's possible to run into some issues when they're actually in use. In general, use the Transaction Console work area to monitor tasks and review details about errors. Let's take a look at some issues that might come up and how you can proceed when they do.

Task Isn't Getting Assigned to Approvers

One main way to tell this is happening is that when users open a workflow task, they see a message saying that the approval history can't be displayed. That usually means something about the related approval rule is not quite right, so approvers can't be found. Here are some things to check to make sure the rules are working correctly:

- Click the **Show Advanced Settings** icon for the rule set and rules to make sure that both are active and effective.
- If the rule is routing to an approval group, make sure that the group actually exists and has members.
- If the list builder is using the supervisory hierarchy, check for these things:
 - Are there enough manager positions to fulfill the number of levels needed for approval?
 - Does the supervisor hierarchy go up that far from the task creator or the person the task is created for, depending on which is the starting participant?
 - Is there a top participant defined in the rule?
 - Is the rule configured to always route to an implementation user instead of managers in the hierarchy?
- Review the rules in general to make sure the conditions have enough information to be true.
- If the rule is defined to automatically approve or reject, ask the task creator to try and submit their transaction again.

Assignees Don't Get a Notification

In the Transaction Console work area, look for the transaction, which would have an error. If available as an option, withdraw the transaction. Otherwise, review the error and logs, if any, and address the issue.

To confirm that something went wrong with the notification, the task creator or the current assignee can also check for tasks with errors, for example in the notifications list in the global header or the Worklist: Approvals and Notifications work area.

Assignees Can't Approve By Email

Here are some things to check:

- Is this an email-only issue? Can the assignee can approve from somewhere else, for example the notifications list in the global header or the Worklist: Approvals and Notifications work area?
- Does the email have links that the assignee can click to take action? If not, open the task configuration and make sure that the Make notification actionable check box is selected in the More section of the Notifications subtab.
- Did the assignee already take action on the task elsewhere, outside email?

Pending Task Prevents Further Update

If there's no movement on a task for a while, future approvers can't act on the task and move things along.

- It could be that there's nothing wrong. The task is just pending action from the current assignee. In which case, remind them to act on the task.
- Find out who created the task and check if there's an error with the task.
 - If you recently had an upgrade and the error wasn't already there before the upgrade, make sure to resolve the issue.
 - If the creator wants to withdraw the task, whether there's an error or not, they can do that themselves or have you withdraw for them from the Transaction Console work area.

Approvals Are Complete But Result Isn't Reflected

Even though a workflow task has a Completed status, it could be that what you expect to happen next due to the approval hasn't happened yet. In which case, check on these things:

- Did all approvers act on the task? Did any approver reject?
- Has the task expired? Check the task configuration to see if expiration policies are set on the Deadlines subtab. Also, the task creator should have received a notification if it expired.
- Did the task creator get any notifications about errors with the task? In the Worklist: Notifications and Approvals work area, they should select Any for the Status filter to make sure they review all notifications.

16 Alerts Composer

Overview

Alerts Composer is a tool that enables you to send informational notifications to Oracle HCM Cloud users by email and worklist. You can configure the notification templates and add recipients. On the home page, click **Navigator > Alerts Composer** to open the tool.

Notifications are triggered based on predefined conditions for two types of alerts.

- **Event Alerts:** Event Alerts are based on the context provided by the calling client. They're triggered when a specific event occurs in the application. You can't modify the triggering criteria for notifications. For example, Time Exceptions from Compliance Rules is a predefined Event alert which is triggered when compliance exceptions are available. Notifications are sent to managers informing them of the exceptions.
- **Resource Alerts:** Resource Alerts are based on Oracle HCM Cloud REST API resources. The resources must be deployed in the environment. You can modify the triggering criteria for notifications by defining filters on the resource attributes if you have the required privileges to access the REST resources. For example, Visa Expiration is a sample Resource alert which is triggered when a worker visa is approaching expiration. A filter is defined on the `workers` resource for the visa attribute. Notifications are sent to the worker and the manager informing them of visa expiration.

Key Features

Using the Alerts Composer tool, you can:

- Configure the notification templates and email formats and define language-specific templates.
- Define multiple templates for the same triggering criteria.
- Use Groovy expressions and define variables to substitute runtime values.
- Schedule jobs for processing the Resource alert notifications.
- Verify the alerts history and notifications activity.
- Leverage DKIM and DMARC support for custom **From Address**.

Related Topics

Functional Privileges and Access Levels

To use the Alerts Composer tool and run the alerts, you require these functional privileges.

Functional Security Privilege	Description	Assigned to Job Role
Access Alerts Composer <code>HRC_ACCESS_ALERTS_COMPOSER_PRIV</code>	Allows access to Alerts Composer.	Human Capital Management Integration Specialist

Functional Security Privilege	Description	Assigned to Job Role
Process a Predefined Alert <i>HRC_PROCESS_PREDEFINED_ALERT_PRIV</i>	Allows processing of predefined alerts.	Human Capital Management Integration Specialist

Additionally, you require functional privileges to access REST API resources to create or modify user-defined and predefined resource alerts. For example, you require the functional privilege *Use REST Services - Employees* to access the **emps** resource and its child resources to manage the alert templates that are based on this resource.

Access Levels

Access levels are predefined for alerts to control the actions that can be performed on the alerts. For example, you can add new templates and modify predefined templates for an alert if its Access Level is set to *Extensible* or *User* but not if its Access Level is set to *System*.

You can view the access level for an alert when editing the alert; however, you can't modify it. Alerts that are predefined with access levels *System* or *Extensible* are always enabled. You can't disable them. Alerts that are user-defined are enabled by default. You can disable them.

The following table shows the access levels for alerts.

Access Level	System	Extensible	User
View alerts	Yes	Yes	Yes
Disable alerts	No	No	Yes
Add new templates	No	Yes	Yes
Modify templates	No	Yes	Yes
Delete templates	No	No	Yes
Disable templates	No	Yes	Yes
Add recipients	Yes	Yes	Yes

Related Topics

- [Define Alert Notifications](#)
- [Process Alert Notifications](#)

Functions and Groovy Expressions

This topic describes various functions and Groovy expressions that you can use when configuring alerts using the Alerts Composer.

The return attributes for the person can be one of these:

- PersonId
- WorkEmail
- DisplayName
- FirstName
- LastName
- UserName

Functions

This table describes the functions that are supported for alerts. A maximum of 25 results are retrieved. If the results exceed 25, warning messages will be displayed in the log.

Function	Description	Usage	Example
• Name: hrRepList • Display name: Human resources representative	Returns HR Representative person attributes for the PersonId .	Recipient Section Email is : <code>\${AlertUtils.toString(Alert</code> User name : <code>\${AlertUtils.toString(Alert</code> Body or Subject Section First Name is: <code>\${AlertUtils.hrRepList(Pers</code> First Name is: <code>\${AlertUtils.toString(Alert</code> Loop Example First Name is: <code>\${AlertUtils.loop('emps',</code> <code>'\${AlertUtils.toString(Alert</code>	Recipient Section Email is: Christopher.Brown@example.com William.Jones@example.com User Name is: Christopher.Brown, William.Jones Body or Subject Section First Name is: [Christopher,William] First Name is: Christopher,William Loop Example First Name is: Christopher,William
• Name: payRepList • Display name: Payroll representative	Returns Payroll Representative person attributes for the PersonId .	Recipient Section Email is : <code>\${AlertUtils.toString(Alert</code> User name : <code>\${AlertUtils.toString(Alert</code> Body or Subject Section	Recipient Section Email is: Christopher.Brown@example.com William.Jones@example.com User Name is: Christopher.Brown, William.Jones

Function	Description	Usage	Example
		First Name is: <code>\${AlertUtils.toString(Alert</code> Loop Example First Name is: <code>\${AlertUtils.loop('emps',</code> <code>'\${AlertUtils.toString(Alert</code>	Body or Subject Section First Name is: Christopher,William Loop Example First Name is: Christopher,William
- Name: benRepList - Display name: Benefits representative	Returns Benefits Representative person attributes for the PersonId .	Recipient Section Email is : <code>\${AlertUtils.toString(Alert</code> User name : <code>\${AlertUtils.toString(Alert</code> Body or Subject Section First Name is: <code>\${AlertUtils.toString(Alert</code> Loop Example First Name is: <code>\${AlertUtils.loop('emps',</code> <code>'\${AlertUtils.toString(Alert</code>	Recipient Section Email is: Christopher.Brown@example.com;Email William.Jones@example.com User Name is: Christopher.Brown, William.Jones Body or Subject Section First Name is: Christopher,William Loop Example First Name is: Christopher,William
- Name: unionRepList - Display name: Union representative	Returns Union Representative person attributes for the PersonId .	Recipient Section Email is : <code>\${AlertUtils.toString(Alert</code> User name : <code>\${AlertUtils.toString(Alert</code> Body or Subject Section First Name is: <code>\${AlertUtils.toString(Alert</code> Loop Example First Name is: <code>\${AlertUtils.loop('emps',</code> <code>'\${AlertUtils.toString(Alert</code>	Recipient Section Email is: Christopher.Brown@example.com;WorkEmail William.Jones@example.com User Name is: Christopher.Brown, William.Jones Body or Subject Section First Name is: Christopher,William Loop Example First Name is: Christopher,William
- Name: empManagerList - Display name: Employee manager	Returns employee's manager person attributes for the PersonId .	Recipient Section Email is : <code>\${AlertUtils.toString(Alert</code> User name : <code>\${AlertUtils.toString(Alert</code> Body or Subject Section First Name is: Diane.Brown@example.com Loop Example First Name is: Diane.Brown	Recipient Section Email is: Diane.Brown@example.com User Name is: Diane.Brown Body or Subject Section First Name is: Diane

Function	Description	Usage	Example
		First Name is: <code>\${AlertUtils.toString(Alert</code>	<code>Id) .First</code>
- Name: roleMemberList - Display name: Role members by role	Returns all the active users who are assigned to a particular role for the role code provided.	Recipient Section Returns the users with person details who have been assigned the provided Role_Name or Role_Code Email is: <code>\${AlertUtils.toString(Alert</code> <code>X_JOB_ROLE_</code> <code>CODE") .WorkEmail) }</code> User name is: <code>\${AlertUtils.toString(Alert</code> <code>X_JOB_ROLE_</code> <code>CODE") .UserName) }</code> Body or Subject Section First Name is: <code>\${AlertUtils.toString(Alert</code> <code>X_JOB_ROLE_</code> <code>CODE") .FirstName) }</code> Loop Example First Name is: <code>\${AlertUtils.loop('emps',</code> <code>'\${AlertUtils.toString(Alert</code> <code>X_JOB_ROLE_</code> <code>CODE") .FirstName) }') }</code>	Recipient Section Email is: <code>Christopher.Brown@example.com,</code> <code>William.Jones@example.com</code> User Name is: <code>Christopher.Brown,</code> <code>William.Jones</code> Body or Subject Section First Name is: <code>Christopher,William</code> Loop Example First Name is: <code>Christopher,William</code>
- Name: toString - Display Name: None	Converts an array of objects into comma separated strings.	<code>\${assignments.AssignmentName</code> <code>\${AlertUtils.toString(assign</code>	<code>[Assignment A, Assignment B]</code> <code>Assignment A, Assignment B</code>
- Name: person - Display name: Person details	Returns person attributes for the PersonId .	Person Name is <code>\${AlertUtils.person(emps.Pe</code>	Person Name is Edward
- Name: userName - Display name: User name	Returns person attributes for the UserName provided.	<code>\${AlertUtils.userName(emps.</code>	<code>simon.stringer@example.com</code>
- Name: getSysdate - Display name: System date	Returns the system date.	<code>\${AlertUtils.getSysdate() }</code>	Date : 2016-04-25
- Name: getSystemtimestamp - Display name: System time stamp	Returns the system date and time.	<code>\${AlertUtils.getSystemstamp</code>	TimeStamp: 2016-04-25 23:44:52.0
Name: formatNumber	Formats the number to the specified Java number format. Supported formats are available	Salary is <code>\${AlertUtils.formatNumber(a</code> <code>'9,999,999') }</code>	Salary is 46,064

Function	Description	Usage	Example
Display name: Format number	at https://docs.oracle.com/javase/7/docs/api/java/text/NumberFormat.html.		
- Name: formatDate - Display name: Format date	Formats the date to the specified Java date format. Supported formats are available at https://docs.oracle.com/javase/7/docs/api/java/text/SimpleDateFormat.html Note: Date provided must be in the [yyyy-MM-dd] format, which is the default date format for Application Developer Framework (ADF) REST response.	Date is : <code>\${AlertUtils.formatDate(emp 'dd-MMM-yyyy') }</code>	Date is : 21-Apr-2007
- Name: formatJSON - Display name: Format JSON	Returns formatted JSON (in a hierarchy, if it exists) for a given set of attributes provided in the AttributeList parameter.	Format Jsonnull <code>\${AlertUtils.formatJSON('em 'emps.DisplayName', 'assignments.AssignmentName 'assignments.AssignmentId', 'visas.VisaPermitNumber', 'visas.VisaPermitExpiration</code>	Format Jsonnull{ "emps" : { "PersonId" : "300100016699983", "DisplayName" : "ANC_Manager_Vision1 Absence", "assignments" : [{ "AssignmentName" : "E955160008173479", "AssignmentId" : "300100016700747" }], "visas" : [{ "VisaPermitNumber" : "US85966798", "VisaPermitExpiration" : "2018-05-13" }, { "VisaPermitNumber" : "US85966798", "VisaPermitExpiration" : "2014-05-13" }, { "VisaPermitNumber" : "US85966798", "VisaPermitExpiration" : "2014-05-13" } } }] } }
- Name: formatXML - Display name: Format XML	Returns formatted XML (in a hierarchy, if it exists) for a given set of attributes provided in the {{AttributeList}} parameter.	Format Xml <code>\${AlertUtils.formatXML('emp 'emps.DisplayName', 'assignments.AssignmentName 'assignments.AssignmentId', 'visas.VisaPermitNumber', 'visas.VisaPermitExpiration</code>	Format Xml <code><emps> <data> <PersonId>300100016699983</ PersonId> <DisplayName>ANC_Manager_Vision1 Absence</DisplayName> <assignments> <data> <AssignmentName>E955160008173479</ AssignmentName> <AssignmentId>300100016700747</ AssignmentId> </ data> </assignments> <visas> <data> <VisaPermitNumber>US85966798</</code>

Function	Description	Usage	Example
			<pre> VisaPermitNumber> <VisaPermitExpiration>2018-05-13</ VisaPermitExpiration> </data> <data> <VisaPermitNumber>US85966798</ VisaPermitNumber> <VisaPermitExpiration>2014-05-13</ VisaPermitExpiration> </data> <data> <VisaPermitNumber>US85966798</ VisaPermitNumber> <VisaPermitExpiration>2014-05-13</ VisaPermitExpiration> </ data> </visas> </data> </ emps> </pre>
- Name: showDisplayValue - Display name: Show display value	Returns the display value for the LOV attribute.	Gender is \${AlertUtils.showDisplayVal	Gender is Male
Name: getLookupMeaning	Returns the Lookup meaning based on the user's preference language.	Lookup meaning \${AlertUtils.getLookupMeani <LookupCode> } \${AlertUtils.getLookupMeani NO', 'Y') }	Yes
Name: getLookupMeaning	Returns the Lookup meaning based on the user's preference language for the legislation stripe	<pre> \${AlertUtils.getLookupMeani <LookupCode>, <LegislationCode> } \${AlertUtils.getLookupMeani 'M', 'US') } </pre>	Male
- Name: getURI - Display name: URI	Constructs the URI for the application name and context provided.	<pre> Url is \${AlertUtils.getURI ('HcmCor ' /hcmRestApi/ resources/11.13.18.05/ locations') } </pre>	<pre> Url is http:// <host>:<port> //hcmRestApi/ resources/11.13.18.05/ locations </pre>
- Name: loop - Display name: Loop	Loops through a collection. This function can be used to construct tables in the message content as follows: <pre> \${AlertUtils.loop('Resource ResourceName2' , 'Content1', 'Content2') } </pre> The resource names are separated by commas and the contents that follow are used to append data in the given order. For each Resource Name1 record, the respective content for Resource Name2 is appended. This happens in a nested manner.	Sample 1 <pre> Hello \${FirstName} , Visas of these employees expire in the next 30 days: <table> \${AlertFct.loop('visas' , '<tr><td> \${VisaPermitCountry}</ td><td> \${VisaPermitNumber}</td></ tr>') } </table> </pre>	Sample 1 Hello John, Visas of these employees expire in the next 30 days: <pre> Country Visa Number US NBC-88457 US 234234 Thank you. Sample 2 Hello John, </pre>

Function	Description	Usage	Example																								
	Rules - The list of resource names must be in hierarchical order. Every child resource must be preceded with the parent resource (unless it is a root-level child resource). For example, consider a hierarchy with root as emps, child as assignments, and grandchild as empreps. To create a loop on empreps, you must also include the assignments resource in the API. <pre><code>\${AlertUtils.loop('assi empreps', '<tr><td> \${AssignmentNumber}</ td>', '<td>\${Name}</ td></tr>') }</code></pre> - An attribute at each level can be referenced directly. A parent attribute can be accessed in the child content using the expression <code>\${parentResourceName.At</code> For example, <pre><code>\${emps.PersonId}</code></pre> - For Event alerts, you can use the root keyword to access the top-level parent. - The content can be empty for any resource. Insert an empty string as the content. (See sample 2 where the emps resource content is empty.)	Thank you. Sample 2 Hello <code>\${FirstName}</code>, Visas of these employees expire in the next 30 days: <pre><code><table border=1> \${AlertUtils.loop('emps, visas', '', '<tr><td> \${emps.LastName}</td><td> \${VisaPermitCountry}</ td><td> \${VisaPermitExpiration}</ td></tr>') } </table></code></pre> Thank you.	Visas of these employees expire in the next 30 days: <table><thead><tr><th>Name</th><th>Issuing Country</th><th>Expiration Date</th></tr></thead><tbody><tr><td>Employee1</td><td>US</td><td>2016-03-14</td></tr><tr><td>Employee1</td><td>IN</td><td>2016-03-20</td></tr><tr><td>Employee2</td><td>US</td><td>2016-02-18</td></tr><tr><td>Employee3</td><td>US</td><td>2015-05-01</td></tr><tr><td>Employee4</td><td>US</td><td>2015-12-14</td></tr><tr><td>Employee5</td><td>US</td><td>2015-05-17</td></tr><tr><td>Employee5</td><td>UK</td><td>2015-09-17</td></tr></tbody></table> Thank you.	Name	Issuing Country	Expiration Date	Employee1	US	2016-03-14	Employee1	IN	2016-03-20	Employee2	US	2016-02-18	Employee3	US	2015-05-01	Employee4	US	2015-12-14	Employee5	US	2015-05-17	Employee5	UK	2015-09-17
Name	Issuing Country	Expiration Date																									
Employee1	US	2016-03-14																									
Employee1	IN	2016-03-20																									
Employee2	US	2016-02-18																									
Employee3	US	2015-05-01																									
Employee4	US	2015-12-14																									
Employee5	US	2015-05-17																									
Employee5	UK	2015-09-17																									

Groovy Expressions

Alerts Composer supports Groovy expressions to substitute variables and add conditions based on the values provided at runtime. The following table shows some examples.

Groovy Expression	Example
<pre> Hello \${FirstName}, Your visa issued in \${visas[0].Country} expires on \${visas[0].ExpirationDate}. </pre>	Hello John, Your visa issued in GB expires on 2018-09-28.
<pre> Hi \${FirstName} </pre>	Hi John,

Groovy Expression	Example
<pre><% asgStr = ""; for(visa in visas) { asgStr = asgStr + visa.VisaPermitCountry+" "; } print("Multiple visas are issued for employee: "+asgStr); %> Regards, Administrator</pre>	Multiple visas are issued for employee: US IN Regards, Administrator

Define Alert Notifications

Using the Alerts Composer tool, you can set up notifications for Event alerts and Resource alerts. The access level of an alert determines the extent of configuration that can be done for the alert. See the security considerations before you set up alert notifications.

Security Considerations

To define alerts notifications:

- You must be granted the function privilege **Access Alerts Composer** (HRC_ACCESS_ALERTS_COMPOSER_PRIV).
- You must be granted the required function privilege to create Resource alerts, which are based on REST resources. For example, to create a Resource alert based on the **workers** REST resource, you must have the function privilege to access the **workers** resource.
- You must not include sensitive information in the body template. For example, when sending visa expiring notifications to a line manager, don't include the visa permit number of the worker in the template.
- You must not include any recipient who should not get access to the information provided in the message template.

Related Topics

- [Functional Privileges and Access Levels](#)
- [Configure Resource Alerts](#)
- [Configure Event Alerts](#)

Define Templates

Use the Templates tab on the Edit Alert page for defining templates. A template is the format for an alert notification. It includes the message text and Groovy expressions defined for the variables in the message. For alerts with access levels **Extensible** and **User**, you can define multiple templates and modify and disable the templates. For alerts with access level **User**, you can delete templates.

Alerts Composer supports multiple language templates. You can set the default language when creating the template. When you save the template, language-specific templates are created in the application based on the installed languages.

You can define Groovy expressions in the templates and add conditions to substitute variables with runtime data.

You can set alert notifications to be delivered to recipients by email and worklist. If you provide an expression for email, the notification is delivered by email. If you provide an expression for user name, the notification is delivered by both email and worklist.

Related Topics

- [Define Resource Alert Templates](#)
- [Modify Event Alert Templates](#)

Define Filters

Use the Filters tab for defining filters on Resource alerts. If you have the required privileges to access REST resources, you can define filters on specific resources and set the triggering criteria for notifications. You can define multiple filters on a resource by adding filter expressions for specific attributes. For example, you can define filters on the **workers** resource and its child resources for location, organization, legal entity, and so on.

Use the predefined alerts utility date functions where applicable. To retrieve the current date, use the Alerts utility function `AlertFilterUtils.getCurrentDate()`. To retrieve date for n number of days added to the current date, use the `AlertFilterUtils.addDays(AlertFilterUtils.getCurrentDate(),n)` utility function.

For example `${resource.assignedDate} = ${AlertFilterUtils.getCurrentDate()} or ${resource.assignedDate} = ${AlertFilterUtils.addDays(AlertFilterUtils.getCurrentDate(),10)}`

To filter records that were already processed in previous alert runs, use the Alerts utility function `AlertFilterUtils.getAlertLastRunDate()` as the filter criteria.

It's recommended that you define filters to process data in smaller logical sets for better performance. For example, you can define additional filters to logically group data. You can also define filters on attributes such as **Legal Entity**, **Location**, or **Department** to process notifications for specific organizations in separate runs, instead of processing for all organizations in a single run.

Related Topics

- [Functions and Groovy Expressions](#)
- [Define Resource Alert Filters](#)

Define Recipients

You can set alert notifications to be delivered to recipients by email and worklist. Use the expression builder function to specify recipients as representatives with predefined areas of responsibility.

Related Topics

- [Functions and Groovy Expressions](#)
- [Set Delivery Options](#)

Set Run Options

Use the Run Options tab for specifying the runtime settings of an alert such as the start date and frequency. You can also enable the activity log for an alert to view the activity on the Alerts History page.

To process large volume of data, it's recommended that you schedule the alert more frequently, for example daily or weekly. For better performance, process smaller sets of data incrementally, instead of processing in a single run.

Additionally, enable the feature to stop duplicate messages and provide a desired time interval to prevent duplicate alert notifications from being sent for recurring scheduled alert jobs. For example, if notifications are scheduled for daily run and you've enabled the stop duplication messages feature for the Workers Visa Expiration alert say for 15 days, the recipients will not receive duplicate notifications daily for 15 days.

Related Topics

- [Resolve Alert Run Errors](#)
- [Set Resource Alert Run Options](#)
- [Set Event Alert Run Options](#)

Process Alert Notifications

You can process alert notifications on demand or schedule them for a specific date and frequency. See the security considerations before you process alert notifications.

Security Considerations

To process alert notifications:

- You must be an application administrator with the Integration Specialist role.
- You must be granted the function privilege **Process a Predefined Alert** (HRC_PROCESS_PREDEFINED_ALERT_PRIV).
- Ensure that only those recipients who should get access to the specified information are included in the message template. Alerts Composer doesn't apply data restrictions on the message content while sending notifications to recipients.

Related Topics

- [Functional Privileges and Access Levels](#)

Set Delivery Options

Alerts are delivered to recipients based on the notification methods specified when defining the alerts. If an expression for email is specified, notifications are delivered by email. If an expression for user name is specified, notifications are delivered by both email and worklist.

During runtime, worklist notifications are sent based on the recipient's user language preference. If the corresponding language template isn't found, then Alerts Composer uses the template in the default language.

DKIM and DMARC Support for Custom From Address

To ensure that spam filters don't block the email notifications sent by Oracle HCM Cloud on behalf of your company, the following internet standards are used to verify that incoming email notifications are originating from a trusted source.

- **Sender Policy Framework (SPF):** Specifies the servers that can send email for a domain.
- **DomainKeys Identified Mail (DKIM):** Verifies that message content is authentic and not changed.
- **Domain-based Message Authentication, Reporting, and Conformance (DMARC):** Specifies how your domain handles suspicious incoming emails.

If you have a requirement to change the default email **From Address** originating from Oracle HCM Cloud, for example, `podname@workflow.mail.xyz.oraclecloud.com`, to your company-specific **From Address**, you've to follow the steps for the required SR process specified in the document [DKIM Support for Fusion Cloud on OCI](#) (Doc ID 2702234.1) on My Oracle Support.

This uptake requires the pods to be in Oracle Cloud Infrastructure (OCI) to leverage the new Cloud Notification Structure (CNS) that supports DKIM and DMARC functionalities required for your company-specific **From Address**.

The current support is only for single custom **From Address** across different applications that send outbound email notifications.

View Alerts History

You can view the history of alerts that are enabled for activity logging on the Alerts History page. You can view statistics such as alert status, start date, duration, messages, and processing errors. Click the alert name to view detailed information about an alert.

Alerts on the Alerts History page are classified into three categories.

- **Processed:** Displays the alerts that are processed.
- **Running:** Displays the alerts that are currently being processed.
- **Scheduled:** Displays the alerts that are scheduled to run on a future date.

Configure Resource Alerts

To configure resource alerts, you must have:

- The required functional privileges and access levels to create and modify user-defined and predefined alerts.
- The required functional privileges to access REST API resources.

Create a Resource Alert

Creating a Resource alert is a three-step process:

1. Defining Filters
2. Defining Templates
3. Setting Run Options

Follow these steps to create a Resource alert:

1. Click **Navigator > Alerts Composer**.
2. On the Alerts page, select **Add > Resource Alert**.
3. On the Add Resource Alert page, enter the name and description for the alert.

The character limit for name is 80 and description is 2000.

4. In the **Resource** field, select the REST resource for which you want to create the alert. For example, to create an alert for the Employees resource, select `emps`.

Related Topics

- [Functional Privileges and Access Levels](#)

Define Filters

Filters enable you to specify the triggering criteria for alert notifications.

To define filters for a Resource alert:

1. On the Filters tab, click **Add Filter**.
2. On the Add Filter page, in the **Resource** field, select the specific parent or child resource such as `emps/assignments`.
3. Click **Add Expression** to define filter expressions on specific attributes of the resource.
4. In the Edit Expression dialog box, select the parameters to build the filter expression.
 - a. Enter a name for the expression.
 - b. Use the **Prefix With** option to specify any prefix operators on the expression.
 - c. In the **Attribute** field, select the resource name and the attribute that you want to specify the filter condition on.
 - d. In the **Operator** field, select the logical operator.
 - e. In the **Value** field, specify the value for the condition.
 - f. Click **Insert into Expression**.

- Click **Apply**. The expression appears on the Add Filter page.
 - Repeat steps 3 and 4 to add more filter expressions.
- Click **Apply** to return to the Add Resource Alert page.
- Repeat steps 1 to 4 to define more filters on the Resource alert.

Define Templates

Templates enable you to define the format for alert notifications.

To define templates for a Resource alert:

1. On the Add Resource Alert page, click the Templates tab and then click **Add Template**.
2. Enter a name for the template and select the default language. The character limit for template name is 80.
By default, the template is enabled.
3. Click **Edit** and select **Manage Recipients and Message**.
4. On the Edit Template page, click **Add Recipient**.
5. In the **Communication Method** column, select **email** or **worklist** from the list of values.
6. In the **Expression** field:
 - o Add the expression for the email address or user name of the recipient.
 - o Add comma-delimited expressions for email addresses or user names of multiple recipients.or
 - i. Click the **Expression** icon to build the expression.
 - ii. In the Edit Expression dialog box, follow one of these steps:
 - o In the **Literal** field, enter the expression directly, for example, john.smith@oracle.com.
 - o Select the parameters to build the expression, for example, `${emps.WorkEmail}`. See Alerts Composer Functions and Groovy Expressions: Explained for more examples.
 - iii. Click **Apply**. The expression appears on the Edit Template page.
7. In the Message section, set up the notification format.
 - a. Select the HTML or Text format for the message text.
 - b. Enter the message subject. You can also insert expressions in the subject using the **Expression** icon.
 - c. In the **Group By** field, specify an expression for the attribute that the message should be grouped by.
 - d. Use the rich text editor to format the message text. You can select options such as font, size, style, and so on.
 - e. Enter the message text. You can also include expressions in the text.Use the **Insert Expression** option to build expressions and insert them into the message text.
8. Click **Apply** to save the changes and return to the Add Resource Alert page.

Set Run Options

Run Options enable you to specify the runtime settings for an alert.

To set the run options for a Resource alert:

1. On the Add Resource Alert page, click the Run Options tab.
2. In the **Automatically Run** field, select one of these options:
 - **On demand** to run the alert notification immediately.
 - **Schedule** to run the notification at a specified time. Specify the notification frequency and the start date and time.
3. Set the **Log Activity History** field to **Yes** to enable activity logging for the alert on the Alerts History page.
4. Specify the settings for the **Stop Duplicate Messages** option.
5. Set the **Simulate Run** option to **Yes** to do a test run of the alert. Notifications are not triggered in a nonproduction environment. However, you can review the notification content on the Alerts History page.
6. Click **Schedule** to return to the Alerts page.
7. Select the resource alert and click **Action Run** to run the alert.

Resource Alerts Tutorial

A tutorial is available to help you get started with setting up resource alerts and understand how they correspond to REST API resources. Click this link to see the tutorial.

[Resource Alerts Tutorial](#)

Related Topics

Import and Export Resource Alerts Tutorial

You can import and export the setup data for resource alerts from one application environment to another environment. Use the Functional Setup Manager to import and export Resource alert packages across environments.

A tutorial is available to help you get started with importing and exporting resource alerts using FSM. This tutorial also shows you how to copy a resource alert from the alerts composer tool.

Click this link to see the tutorial.

[Import and Export Resource Alerts Tutorial](#)

Related Topics

Configure Event Alerts

Event alerts are based on predefined triggering criteria. You can't modify these criteria or create new alerts. However, based on the access level privileges defined for the alert, you can edit the notification templates and add new templates for a predefined alert.

All tokens are predefined for Event alerts. You can't modify them or add custom tokens. The predefined templates expose the tokens that are supported for a particular predefined Event alert. Only those tokens can be used in the

custom template for the predefined alert. You've to manually type these tokens in the template, which is a one-time setup. You can refer to the predefined template to get the predefined tokens for Event alerts.

Related Topics

- [Functional Privileges and Access Levels](#)

Modify Templates

Templates enable you to define the format for alert notifications.

To modify an existing template for an Event alert:

1. On the Templates tab, click **Edit** and select **Manage Recipients and Message** for the template.
2. On the Edit Template page, click **Add Recipient** to add a new recipient.
3. In the **Communication Method** column, select **email** or **worklist** from the list of values.
4. In the **Expression** field:
 - o Edit or add the expression for the email address or user name of the recipient.
 - o Edit or add the expressions for comma-delimited email addresses or user names of multiple recipients.
5. In the Message section, set up the notification format.
 - a. Select the HTML or Text format for the message text.
 - b. Edit the message subject.
 - c. Use the rich text editor to format the message text. You can select options such as font, size, style, and so on.
 - d. Edit the message text.
6. Click **Apply** to save the changes and return to the Edit Event Alert page.

Set Run Options

Run Options enable you to specify the runtime settings for an alert.

To set the run options for an Event alert:

1. On the Edit Event Alert page, click the Run Options tab.
2. Specify the settings for **Stop Duplicate Messages** option.
3. Set the **Log Activity History** field to **Yes** to enable activity logging for the alert on the Alerts History page.
4. Set the **Simulate Run** option to **Yes** to do a test run of the alert. Notifications are not triggered in a nonproduction environment. However, you can review the notification content on the Alerts History page.
5. Click **Save and Close** to return to the Alerts page.

Resolve Alert Run Errors

This topic explains how to identify and resolve errors that may occur when running alerts.

Follow these steps:

1. Enable the **Log Activity History** option on the Run Options tab when setting up an alert.
2. Use the Alerts History page to review the success, warning, and error messages for the alert.
3. Review the alert log to identify any processing errors of templates and filters.
4. Verify the application logs for Event alerts, if required, and take necessary action.
5. Verify the diagnostic logs on the Scheduled Processes page for Resource alerts, if required, and take necessary action.

Related Topics

- [Set Resource Alert Run Options](#)
- [Set Event Alert Run Options](#)

Purge Alerts

Successful alert process logs are purged automatically every 14 days, while runs with errors and alert message history that are older than 90 days are purged on the fourth Sunday of every month. This is a predefined schedule and can't be updated. However, you can create a new schedule or submit additional purge processes as per your requirements.

You can manually create a new schedule by using the Purge Alert Processing and Log Entries process in the Schedule Processes work area. On the home page, click **Tools > Scheduled Processes > Schedule New Process** to create the schedule.

17 Application Toolkit Configuration

Set Watchlist Options

Disable or Enable Watchlist Categories and Items

To disable or enable predefined Watchlist categories and items for all users, use the following in the Setup and Maintenance work area:

- Functional Area: Application Extensions
- Task: Set Watchlist Options

Ultimately, what users see in their own Watchlist would be the categories and predefined items that you enable in the Set Watchlist Options page:

- Plus any saved searches that the user is using as Watchlist items
- Minus any categories or items that the user decides to hide using Watchlist preferences
- Minus any items with no results found, if the user decides to hide such items using Watchlist preferences

Any Category or Item

When you disable any category or item, you also disable the processes that calculate the Watchlist item counts. These processes include creating data caches, performing security checks, calling services across domains, running queries, and so on.

Predefined Watchlist Items

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item isn't available for users to display in their Watchlist.
- The item is removed from any Watchlist where it's currently displayed.

If you disable a Watchlist category, then the category isn't available for users to include in their Watchlist. All Watchlist items within the category are also disabled.

User-Created Saved Search Watchlist Items

A Watchlist item with the User-Created Saved Search type doesn't appear in the Watchlist. It controls the display of the **Manage Watchlist** button on pages with saved searches. If you disable this type of Watchlist item, then:

- The **Manage Watchlist** option isn't available on the corresponding page, so users can't use their own saved searches as Watchlist items.
- Any user-defined saved searches (from that page) already used as Watchlist items are removed from the users' Watchlist. The saved searches are still available for searching, but not for the Watchlist.

Watchlist Category

If you disable a Watchlist category, then:

- The category isn't available for users to include in their Watchlist.
- All Watchlist items within the category are also disabled.

Note: You can see the Watchlist icon in the global header only if your default home page layout is Panel or Banner.

Related Topics

- [Refresh Intervals for Watchlist Items](#)
- [How can I change predefined Watchlist category and item names](#)
- [Create Watchlist Items](#)
- [Show or Hide Watchlist Items](#)
- [Why can't I see some icons in the global header](#)

Refresh Intervals for Watchlist Items

All Watchlist items have a predefined refresh interval, which controls how often the query that calculates the count for a Watchlist item can run. You can use the Set Watchlist Options page to edit the interval values. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Set Watchlist Options

How the Refresh Works

The count for any Watchlist item gets refreshed as follows.

- When users open the Watchlist in the global header for the first time after signing in, the item is refreshed if five minutes have passed since its last refresh in an earlier session.
- When users open the Watchlist again, the item is refreshed only if the time since its last refresh is equal to or greater than the refresh interval.

User-Created Saved Search Watchlist Items

What you enter as the refresh interval for a Watchlist item of type User-Created Saved Search applies to all Watchlist items based on saved searches that users create for that item. For example, you set the refresh interval for the Corporate Card Transactions item to five minutes. Multiple users create saved searches for corporate card transactions and use those saved searches as Watchlist items in their own Watchlist. All of these Watchlist items would have a refresh interval of five minutes.

Related Topics

- [Disable or Enable Watchlist Categories and Items](#)
- [How can I change predefined Watchlist category and item names](#)
- [Create Watchlist Items](#)

FAQs for Set Watchlist Options

How can I change predefined Watchlist category and item names?

Edit the standard lookup type that stores the predefined Watchlist category and item names.

1. In the Setup and Maintenance work area, go to the **Manage Standard Lookups** task in the Application Extensions or a product-specific functional area.
2. On the Manage Standard Lookups page, find the lookup type for the Watchlist category you want to edit. The lookup types for predefined categories end with WATCHLIST, for example EXM_EXPENSES_WATCHLIST.
3. Edit the lookup type meaning to change the category name.
4. To change item names, edit lookup code meanings.
5. Save your work.

Related Topics

- [Overview of Lookups](#)
- [Update Existing Setup Data](#)

18 Help Configuration

Set Up Help

You don't have to set anything up for help to work. But you can do optional setup, for example to give people access to add help content. First enable help features, then do some tasks in the Application Extensions functional area.

Enable Features

In the Offerings work area, review these features at the offering level.

- **Local Installation of Help:** Make sure to leave this enabled.
- **Access to Internet-Based Help Features:** This feature isn't used, so it doesn't matter if you enable it or not.
- **Help Content Management:** Enable this feature if you want some people to be able to add company-specific help to help windows or the Getting Started work area.
- **Security for Added Help:** Enable this feature if you want certain help to be available only to a restricted set of user roles.

CAUTION: Enable this feature only if you have this requirement, because the feature can affect performance.

Related Topics

- [Show Help Icons by Default](#)
- [Give People Access to Create and Edit Help](#)
- [Configure Offerings](#)
- [How You Manage Different Types of Help](#)
- [Create Groups to Limit Access to Added Help](#)

Hide or Show Help Icons

By default, help icons that open help windows are visible. You can control whether users see the icons every time they sign in, on any page that has help icons. In other words, you can choose to disable or enable help icons by default across your site.

1. In the Setup and Maintenance work area, go to the **Set Help Options** task in the Application Extensions functional area.
2. On the Set Help Options page, deselect or select the **Show help icons by default** check box. You just need to do this for one offering, and the setting applies to everyone.
3. Sign out and sign back in to see your change take effect. The same goes for any user next time they sign in.

To show or hide the icons in a specific user session, people can still click their user image or name in the global header and select **Show Help Icons** or **Hide Help Icons**.

Note: What we are talking about here affects only help windows, not help text that appears when you hover over or click certain UI elements on the page. To edit or delete UI element help text, use Page Composer or other tools.

Related Topics

- [Update Existing Setup Data](#)
- [Manage Help for Fields and Other UI Elements](#)

Give People Access to Create and Edit Help

If you enabled the Help Content Management feature, check who has the Manage Help Content (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege. Here's what these users can do:

- Add help in any help window, and also edit and manage the help that anyone added.
- Edit existing pages in the Getting Started work area and also add new pages.

By default, the administrators for product families have this privilege. Your security administrator can assign job roles with this privilege to other users. The **Assign Help Text Administration Duty** task is a reminder for you to follow up with your security administrator. Make sure that people who want to create and edit help have the access to do so.

Related Topics

- [How You Manage Different Types of Help](#)

Create Groups to Limit Access to Added Help

In this example, you want to add company policies as help in a help window. But, at all times, only human resources (HR) specialists should be able to see those policies. Let's look at the steps to create a help security group that includes only the job role for HR specialists. You can then secure your company policies with this help security group so that only people with that job role can see the help.

Before You Start

In the Offerings work area, make sure that these features are enabled at the offering level:

- Local Installation of Help
- Help Content Management
- Security for Added Help

Create the Help Security Group

1. In the Setup and Maintenance work area, go to the **Manage Help Security Groups** task in the Application Extensions functional area.
2. On the Manage Help Security Groups page, add a new row.
3. Enter these values, but leave the start and end dates blank.

Field	Value
Help Security Group	HR
Display Name	HR Only
Description	Viewing by HR specialists only

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**.

Related Topics

- [Set Up Help](#)
- [Configure Offerings](#)
- [Update Existing Setup Data](#)
- [Add Your Content to Help Windows](#)
- [Create and Edit Added Help](#)

19 Common Reference Objects

Why can't I edit setup data?

The configuration of your setup data may be protected. Application developers mark some configurations as protected, indicating that you can't edit them.

Some examples of configurations that may be protected are:

- Descriptive flexfields
- Extensible flexfield contexts
- Extensible flexfield pages
- Value sets
- Tree structures

Set General Preferences for All Users

Use the Global Admin Preferences page to set general preferences, such as language, currency, and time zone for all users. Use the **Set User General Preferences** task only if you want to update preferences for all users. Your users can still set preferences for themselves using the settings in the General Preferences section on the Preferences page. Once you set the general preferences for all users, if specific users don't change their preferences, the choices you have set for all users will apply to them. You can also set the default value formats for date, time, and number in regional preferences for all users.

To set general preferences, do these steps:

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the **Set User General Preferences** task in the Application Extensions functional area.
3. Set the required general preferences for your users.

Note: You can also set the value formats for regional preferences, such as date, time, and number for your users using profile options.

4. If you only want to set the preferences for new users whose preferences haven't been set by them yet, select the **Reset preferences for new users only** check box. Selecting this option excludes all users whose preferences were set at some point in time.
5. Click **Save**.

Related Topics

- [Set Value Formats for Regional Preferences for All Users Using Profile Options](#)

Set Value Formats for Regional Preferences for All Users

Use profile options to set the default formats of values for regional preferences, such as date, time, number, currency, and time zone for all users. You can set the values of specific profile options at the site layer using the Manage Administrator Profile Values page. The formats you set here are displayed for all users in the fields for regional settings on the General Preferences: Regional page. Your users can still set the value formats for themselves using the settings in the General Preferences: Regional page. Once you set the value formats for all users, if specific users don't change their value formats, the choices you have set for all users will apply to them.

To set value formats for profile options, do these steps:

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task in the Application Extensions functional area.
3. Set the value formats for the profile options, as required:

Note: Check if the profile option already has a value set for the Site profile level. If so, just edit that value. Otherwise, create a new row and select a value for the Site profile level so that your settings apply to all users.

- o To set the date format:
 - i. Search for the **Default Date Format (FND_DATE_FORMAT)** profile option.
 - ii. In the FND_DATE_FORMAT: Profile Values section, click the **New** icon.
 - iii. From the **Profile Level** list, select **Site**.
 - iv. From the **Profile Value** list, select the required date format. For example, **31-1-1999**.
- o To set the time format:
 - i. Search for the **Default Time Format (FND_TIME_FORMAT)** profile option.
 - ii. In the FND_TIME_FORMAT: Profile Values section, click the **New** icon.
 - iii. From the **Profile Level** list, select **Site**.
 - iv. From the **Profile Value** list, select the required time format. For example, **1:30 PM**.
- o To set the number format:
 - i. Search for the **Default Number Format (FND_NUMBER_FORMAT)** profile option.
 - ii. In the FND_NUMBER_FORMAT: Profile Values section, click the **New** icon.
 - iii. From the **Profile Level** list, select **Site**.
 - iv. From the **Profile Value** list, select the required time format. For example, **-1,234.567**.
- o To set the default currency:
 - i. Search for the **Default Currency (FND_CURRENCY)** profile option.
 - ii. In the FND_CURRENCY: Profile Values section, click the **New** icon.
 - iii. From the **Profile Level** list, select **Site**.
 - iv. From the **Profile Value** list, select the required currency. For example, **US Dollar**.
- o To set the default time zone:
 - i. Search for the **Default User Time Zone (FND_TIMEZONE)** profile option.
 - ii. In the FND_TIMEZONE: Profile Values section, click the **New** icon.
 - iii. From the **Profile Level** list, select **Site**.

- iv. From the **Profile Value** list, select the required time zone. For example, **US Pacific Time**.
4. Click **Save and Close**.

Related Topics

- [Set General Preferences for All Users](#)
- [Update Existing Setup Data](#)

Set a Banner Message in the Global Header

Let's say you want to communicate some important information to your users. You can set a banner message to display such information in the global header. But here are a few things to keep in mind:

- The banner message doesn't support translation. It will be only in English.
- Oracle may override your banner message if required.

To set a banner message, do these tasks:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the **Banner Message (FND_BANNER_MESSAGE)** profile option.
3. In the FND_BANNER_MESSAGE: Profile Values section, click the **New** icon.
4. From the **Profile Level** list, select **Site**.
5. In the **Profile Value** field, enter the message that you want to show in the global header.

Note: The length of your message must not exceed 1000 characters. If your message has more than 77 characters, only the first 77 characters are displayed on the global header, and the complete message appears when you hover over the banner.

6. Click **Save and Close**.
7. Sign out and sign back in to see the banner message.

Related Topics

- [Set Profile Option Values](#)
- [Update Existing Setup Data](#)

How can I determine which languages appear in the Translation Editor?

Use the Translation Editor Languages profile option to specify the languages as the profile values, so that they're available as options for the user on the Translated Editor dialog box.

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. Search for the Translation Editor Languages profile option.
3. In the Profile Values section, specify the required languages as its profile values, separated by comma. You can either list the complete names of the languages or just the language codes specified on the Manage Languages page, for example, F for French, KO for Korean.

Note: You can specify only those languages that are available in the supported language pack. If you don't specify any value, all available language packs are supported.

4. Click **Save and Close**. The language entries will take effect for the user in the next sign in.

Related Topics

- [Enter or Edit Translated Text](#)

How do I define whether the user image, name, or initials display in the global header?

Set the User Image Display Enabled (FND_USER_PHOTO_ENABLED) profile option. If you select:

- Yes, then the user image is displayed in the global header only if the user uploaded a photo. Otherwise, the user's initials are displayed. By default, this profile option is set to Yes.
- No, then only the user name is displayed in the global header.

Related Topics

- [Change Your Photo](#)

Set CSV as the Default Option for Exporting Table Data

You can specify Comma Separated Values (CSV) as the default file format for exporting most table data to excel. Use the **File Format for Export to Excel** profile option to specify this setting so that your users can export table data to the CSV format by default.

Note: For tables that contain rows with detail facets, the table data doesn't get exported to the CSV format.

Follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the **File Format for Export to Excel (ORACLE.ADF.VIEW.EXPORT_DEFAULT_TYPE)** profile option.
3. In the ORACLE.ADF.VIEW.EXPORT_DEFAULT_TYPE: Profile Values section, click the **New** icon.
4. From the **Profile Level** list, select **Site**.
5. From the **Profile Value** field, select **Export to CSV**.
6. Click **Save and Close**.

Related Topics

- [Set Profile Option Values](#)
- [Update Existing Setup Data](#)
- [What's the difference between Export to Excel and desktop integration for Excel](#)

Define Application Taxonomy

Overview of Application Taxonomy

Oracle application components and functions are organized in a hierarchy, ranging from product lines to logical business areas. The hierarchy represents a breakdown of products into units based on how applications are installed and supported.

In the Application Extensions functional area within your offering, search for the Manage Taxonomy Hierarchy task and view the hierarchy on the Manage Taxonomy Hierarchy page.

Hierarchy

- The application taxonomy hierarchy contains various levels and types of nodes, or modules.

Usage

- Use application taxonomy to understand relationships among applications and between an application and its files. This information is helpful in managing various phases of the product life cycle.

Modules in Application Taxonomy

The highest level of the hierarchy is product line, followed by the product family, application, and logical business area. There can be multiple levels of logical business areas, with one or more nested within a parent logical business area. A module is a node at any of these levels. Each level is briefly described here.

- **Product Line:** A collection of products associated with a single brand name, for example, Oracle Fusion.
- **Product Family:** A collection of products associated with a functional area that may or may not be licensed together as a single unit, for example Oracle Fusion Financials.
- **Application:** A single product within a product family, containing closely related features for a specific business solution, for example General Ledger.
- **Logical Business Area:** A collection of business object definitions organized into a logical grouping. It contains the model objects, services, and UI components for those business objects. Logical business areas have their own hierarchy levels and in some cases can be up to two or three levels deep.

Related Topics

- [Guidelines for Managing Modules in Application Taxonomy](#)

Guidelines for Managing Modules in Application Taxonomy

In the application taxonomy hierarchy, when you create a module, it becomes a child of the currently selected node. Once created, you can't delete the module or move it elsewhere in the hierarchy.

From the Manage Taxonomy Hierarchy page, navigate to the Create Child Module or Edit Module page to manage the modules. As you create or edit modules, consider the following points regarding specific fields.

Identifiers

Module ID is the unique primary key for nodes in the taxonomy table. When you create a module, a unique read-only ID is automatically generated. The module contains two other identifiers: Module key and alternative ID. The module key is a string identifier, for example AP for the Oracle Fusion Payables application. The alternative ID is a numeric identifier, for example 1 for the Oracle Fusion product line. These additional identifiers are provided for the product line, product family, and application modules. However, you can optionally add them for logical business areas and new modules.

Note: Don't change the module key or alternative ID for predefined modules.

The product code is relevant only to application and logical business area modules. You can leave the field blank for other module types. The product code for applications is the short name that can be displayed in lists of application values. For example, FND for Oracle Fusion Middleware Extensions for Oracle Application.

Names

Module name is the logical name for the module. The name must be unique among nodes within the hierarchy level with the same parent, but Oracle recommends keeping it unique in the entire hierarchy. The user name and description can appear to users in other parts of Oracle Applications Cloud.

Usage Types

Though you can update the usage type to reflect the current state of the module, just doing so doesn't affect the actual state. For example, setting a module as installed doesn't mean the module is actually installed if the installation itself didn't take place. Installation refers to operations related to laying down all the components required to create an Oracle Applications Cloud environment. Deployment is the process that starts the managed servers and clusters and facilitates the actual use of product offerings. A licensed module is available for installation and deployment, and a deployed module is considered actively used when actually used by users.

Seed Data

If seed data is allowed, then data residing in flexfields and lookups can be extracted for the module using seed data loaders. By default, extract is allowed for all predefined modules of type application and logical business area.

Associations

You can associate a logical domain to modules of the type Product Family, as well as one or more enterprise applications to modules of type Application. This association represents the relationship between the taxonomy modules and the corresponding domain and enterprise applications stored in the Oracle Applications Cloud Functional Core (ASK) tables.

Related Topics

- [Modules in Application Taxonomy](#)

Define Reference Data Sharing

Reference Data Sharing

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 common data is shared or partitioned across business entities to avoid duplication and reduce maintenance effort. 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.

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 can't 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 different business units setting up and using the same grades, XYZ Corporation decides to create a set called Grades, which contains the grades. All business units in the organization have the Grades set so that the grades can be shared and used.

Note: For specific information about configuring reference data sharing for a particular object or product, refer to the relevant product documentation.

Related Topics

- [Reference Data Sets](#)
- [Reference Data Sets and Sharing Methods](#)
- [Assignment of Reference Data Sets to Reference Objects](#)

Reference Data Sets

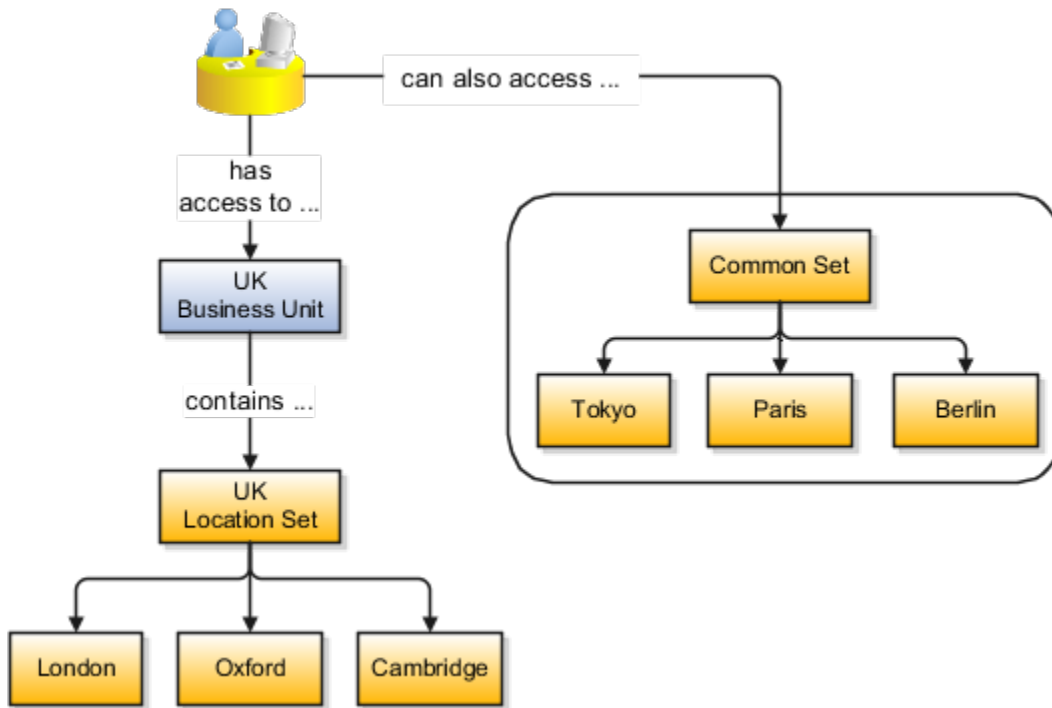
Reference data sets are logical groups of reference data that various transactional entities can use depending on the business context. You can get started using either the common reference data set or the enterprise set depending on your implementation requirement. You can also create and maintain additional reference data sets, while continuing to use the common reference data set.

Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This enables your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. Then, you can let managers define their own sales methods, but define payment terms centrally. As a result, each business unit has its own reference data set for sales methods and one central reference data set for payment terms assigned to all business units.

Partitioning

Partitioning reference data and creating data sets provide you the flexibility to handle the reference data to fulfill your business requirements. You can share modular information and data processing options among business units with ease. You can create separate sets and subsets for each business unit. Alternatively, you can create common sets or subsets to enable sharing reference data between several business units, without duplicating the reference data.

The following figure illustrates the reference data sharing method. The user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.



Related Topics

- [Reference Data Sets and Sharing Methods](#)
- [Assignment of Reference Data Sets to Reference Objects](#)

Reference Data Sets and Sharing Methods

Oracle Fusion Applications reference data sharing feature is also known as SetID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses. As a result, there is a reduction in the administrative burden and the time to implement new business units. For example, you can share sales methods, or transaction types across business units. You may also share certain other data across asset books, cost organizations, or project units.

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

Reference Data Sets

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

Your enterprise can determine that certain aspects of your corporate policy can affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This allows your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. In such a case, you can let managers define their own sales methods, but define payment terms centrally. In this example:

- Each business unit has its own reference data set for sales methods.
- One central reference data set for payment terms is assigned to all business units.

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

Reference Data Sharing Methods

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

- Assignment to one set only, no common values allowed. This method is the simplest form of sharing reference data that allows assigning a reference data object instance to one and only one set. For example, Asset Prorate Conventions are defined and assigned to only one reference data set. This set can be shared across multiple asset books, but all the values are contained only in this one set.
- Assignment to one set only, with common values. This method is the most commonly used method of sharing reference data that allows defining reference data object instance across all sets. For example, Receivables Transaction Types are assigned to a common set that's available to all the business units. You need not explicitly assign the transaction types to each business unit. In addition, you can assign a business unit-specific set of transaction types. At transaction entry, the list of values for transaction types includes the following:
 - Transaction types from the set assigned to the business unit.
 - Transaction types assigned to the common set that's shared across all business units.
- Assignment to multiple sets, no common values allowed. The method of sharing reference data that allows a reference data object instance to be assigned to multiple sets. For instance, Payables Payment Terms use this method. It means that each payment term can be assigned to one or more than one set. For example, you assign the payment term Net 30 to several sets, but assign Net 15 to a set specific only to your business unit. At transaction entry, the list of values for payment terms consists of only the set that's assigned to the transaction's business unit.

Note: Oracle Fusion Applications contains a reference data set called Enterprise. Define any reference data that affects your entire enterprise in this set. Also update the data set going forward as you create new reference data items.

Related Topics

- [What reference data objects can be shared across business units](#)
- [Items and Supplier Site Reference Data Sharing](#)
- [What reference data objects can be shared across cost organizations](#)
- [What reference data objects can be shared across project units](#)
- [What reference data objects can be shared across asset books](#)

Assignment of Reference Data Sets to Reference Objects

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

Determinant Types

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

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

Determinant

The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables

and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

Define ISO Reference Data

Considerations for Defining Currencies

Consider these points about entering the currency code, date range, or symbol for the currency, when you create or edit currencies.

Currency Codes

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

Date Ranges

You can enter transactions denominated in the currency only for the dates within the specified range. If you don't enter a start date, then the currency is valid immediately. If you don't enter an end date, then the currency is valid indefinitely.

Symbols

Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

Related Topics

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency](#)
- [What's a statistical unit currency type](#)
- [Euro Currency Derivation](#)

Euro Currency Derivation

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. If you have to use a different currency for Euro, you can disable the predefined 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 don't 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 must 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.

Language Packs on Your Application

A language pack contains artifacts that are translated to a specific language. Translated artifacts include UI text, predefined data, messages, BI catalog data, and so on. Here are the supported languages other than American English:

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Czech
- Danish
- Dutch
- Finnish
- French (Canadian)
- French (European)
- German
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazilian)
- Polish
- Romanian
- Russian
- Slovak
- Spanish
- Swedish
- Thai
- Turkish

How to Install Language Packs

To install language packs on all your environments, contact your help desk. For more information about language packs, see Oracle Applications Cloud Service Definition - Language Packs (2073202.1) on My Oracle Support at <https://>

support.oracle.com. There's no limit to the number of language packs you can ask for in one service request. But you must only install the language packs you need to conduct your day-to-day business because of these reasons:

- Once you request a language pack, the installation will be scheduled for all your environments, including production, staging, and test environments, so that they're all in sync.
- It takes time and resources to install language packs. So you might get extended outages during updates, especially if you have four or more language packs installed in your environments.
- Once you install any language, you can't uninstall it later.

You can view all available languages, whether they're already installed or available for installation and translation. In the Setup and Maintenance work area, use the **Manage Languages** task in the Application Extensions functional area. Each dialect is treated as a separate language. Generally, you don't need to edit any of the fields on the Manage Languages page, unless absolutely necessary.

Related Topics

- [Update Existing Setup Data](#)

Considerations for Natural Languages

Natural languages are all the languages that humans use, written and spoken. If a language is enabled, then users can associate it with entities, for example as languages spoken by sales representatives. When managing natural languages, consider tasks to perform and best practices for entering particular values.

Tasks

Once you add a language, it can't be deleted, but just disabled. You can optionally associate natural languages with International Organization for Standardization (ISO) languages and territories, just for reference.

Values

When you create a natural language, use the alpha-2 ISO code as the language code, or, if not available, then alpha-3. If the language isn't an ISO language, then use **x-** as a prefix for the code, for example **x-ja** for a Japanese dialect. Use the **sgn** code of ISO-639-2 for sign languages, followed by territory code, for example **sgn-US** for American Sign Language. You can also use Internet Assigned Numbers Authority (IANA) language tags.

The natural language description must be the language name with territory name in parenthesis where needed, for example **English (Australia)** and **English (Canada)**.

FAQs for Define ISO Reference Data

When do I create or edit territories?

The predefined territories are countries from the International Organization for Standardization (ISO) 3166 standard. Edit territory descriptions to determine how they're displayed in lists of country values in an application. You don't have to edit territory names or codes unless there is a specific requirement. Create territories if new countries emerge and the application isn't yet patched with the latest ISO country values.

Note: The National Language Support (NLS) territory codes are territory identifiers used in the application. Don't edit the codes unless you must change the association between ISO and the application territory.

When do I create or edit industries?

To meet a specific business need, you may edit industry names or descriptions of industries except for those belonging to the North American Industry Classification System (NAICS). Edit the industry descriptions also to determine how they appear in an application.

You may also create industries with specifications not included in the NAICS standards.

When do I associate industries with territories?

To meet specific business needs, you can associate industries with territories. For example, administrators can configure a page in different ways for different sets of users of the same industry, but residing in different countries.

When do I create or enable currencies?

Create or enable any currency for displaying monetary amounts, assigning currency to ledgers, entering transactions, recording balances, or for any reporting purpose. All currencies listed in the International Organization for Standardization (ISO) 4217 standard are supported.

The default currency is set to United States Dollar (USD).

Related Topics

- [Considerations for Defining Currencies](#)

What do I do if a currency code I am still using in my existing transactions is desupported?

Temporarily remove the end dates of these currencies and close the transactions or wait for the transaction life cycle to complete. You can then add the end dates for the currencies again so that you use new codes for any new transactions.

Note: In General Ledger, you can't change the currency for existing ledgers. So if you're using any desupported currency codes as ledger currencies in primary, secondary, or reporting currency ledgers, then remove the end dates of these currencies to continue using them.

Here's how you update the end date for a currency code:

1. In the Setup and Maintenance work area, go to the **Manage Currencies** task in the Application Extensions functional area.

Note: If you don't see this task, make sure the Maintain Common Reference Objects feature is enabled at the offering level in the Offerings work area.

2. Search for the obsolete currency code, for example STD.
3. Remove the end date of the currency code.
4. Save your changes.

Related Topics

- [Update Existing Setup Data](#)
- [Configure Offerings](#)

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

Precision refers to the number of digits placed after the decimal point used in regular currency transactions. For example, USD would have 2 as the precision value for transactional amounts, such as \$1.00.

Extended precision is the number of digits placed after the decimal point and must be greater than or equal to the precision value. For calculations requiring greater precision, you can enter an extended precision value such as 3 or 4. That would result in the currency appearing as \$1.279 or \$1.2793.

Minimum accountable unit is the smallest denomination for the currency. For example, for USD that would be .01 for a cent.

You can set these values for a currency using the **Manage Currencies** task in the Application Extensions functional area in the Setup and Maintenance work area.

What's a statistical unit currency type?

The statistical unit currency type denotes the Statistical (STAT) currency used to record financial statistics in the financial reports, allocation formulas, and other calculations.

When do I create or edit ISO languages?

Edit the names and descriptions of International Organization for Standardization (ISO) languages to determine how they appear in the application. The ISO languages are a part of the ISO 639 standard. If any change to the ISO standard doesn't reflect in the application, you can update the ISO alpha-2 code or add languages to provide up-to-date information.

Can I add or edit time zones?

You usually don't add or edit time zones because all standard time zones are provided. However, you may create time zones if new zones become standard and the application isn't yet updated with the latest values. You can rename existing time zones and enable them. Only the enabled time zones are available for all users to select while setting their regional general preferences.

To add or edit time zones, use the following in the Setup Maintenance work area:

- Functional Area: Application Extensions
- Task: Manage Time Zones

Manage Oracle Social Network Objects

Management of Oracle Social Network Objects

Use the Manage Oracle Social Network Objects task for managing the Oracle Social Network Objects. The integration of Oracle Social Network with applications and business processes brings key attributes from the applications to share, socialize, and update information. This helps in making better business decisions based on additional information that you obtain and analyze within your social network environment.

Use the Manage Oracle Social Network Objects page to set up and define:

- The business objects and attributes to enable
- The enablement method for social network integration with Oracle Applications Cloud

To open the Manage Oracle Social Network Objects page, use the following in the Set and Maintenance work area:

- Functional Area: Application Extensions
- Task: Manage Oracle Social Network Objects

Use Oracle Social Network to:

- Discuss projects and plans in public forums
- Maintain:
 - Membership groups
 - Activity feeds of the people you select
- Facilitate:
 - One-on-one Conversations
 - Reviews
 - Document sharing

An important aspect of managing Oracle Social Network objects is enabling business objects for integration.

Enabling Business Objects for Integration

A business object can't be shared within social network until a functional administrator or implementor:

- Accesses the Manage Oracle Social Network Objects page in Oracle Applications Cloud
- Enables the business object for social network integration

Related Topics

- [How can I update translations](#)
- [Synchronization of Business Objects](#)
- [What happens if I synchronize business objects](#)
- [What happens if I update translations](#)

Considerations for Enabling Social Networking on Objects

You can determine whether information about a business object, such as benefit plans or sales accounts, displays in Oracle Social Network. If you enable an object for sharing, you allow users to collaborate on the object through social networking. You can choose whether all instances of an object are shared, or only at the user's discretion. You can also choose which attributes are shared, such as names, details, and who made the last update.

In addition to a wide range of predefined objects, you can share:

- Objects and attributes that you created in Application Composer
- Fields that you created in descriptive flexfields

In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Manage Oracle Social Network Objects

After you click **Enable Object**, select one of the following enablement options:

- Manual
- Automatic
- No

Manual

If you select this option, which is recommended, you let users decide whether to share each instance of the object with the social network. Once shared, all updates to the enabled attributes of the instance appear on the social network. If the instance is deleted, that information is also shared.

Click **Enable All** to enable all objects for all applications. Enable All automatically applies the Manual option, which means that the user can choose whether to share an object instance.

Automatic

With this option, news about all instances of the object appears on the social network, including:

- Every newly created instance

- All subsequent updates to the enabled attributes
- Deletion of any instances

No

With this option, which is the default value, no news about the object appears on the social network.

Note: When you click **Disable Object**, the enabled setting of the selected business object is automatically changed to No.

After you enable a business object, you must enable one or more attributes of the object. Only the enabled attributes are shared. The Status column in the Business Objects table indicates which enabled business objects don't yet have an enabled attribute. For these objects, only the following information appear on the social network:

- Internal bookkeeping information, when creating or updating an instance of the object.
- News that an instance is deleted.

Related Topics

- [Management of Oracle Social Network Objects](#)
- [How can I update translations](#)
- [What happens if I update translations](#)
- [Synchronization of Business Objects](#)
- [What happens if I synchronize business objects](#)

Update Translations

The Update Translations process sends attribute labels and business object names to Oracle Social Network for use in the user interface.

In social network, attributes or business object labels appear in the language of your locale. If you change the locale in social network, then the attribute or business object labels appear in the updated language. However, the data appears in the language in which it was originally sent to social network. If you have previously sent an instance of the business object to social network, then the instance data isn't updated. Clicking **Update Translations** on the Manage Oracle Social Network Objects page sends translations for business objects with the option to enable as **Manual** or **Automatic**.

Related Topics

- [Management of Oracle Social Network Objects](#)
- [Considerations for Enabling Social Networking on Objects](#)
- [What happens if I update translations](#)
- [How can I update translations](#)
- [When do I update translations](#)

Synchronization of Business Objects

Use **Synchronize** on the Manage Oracle Social Network Objects page to synchronize business objects. This resends the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

Use the Synchronize button at the:

- **Business Objects table level:** To resend the definitions of a selected business object to social network. This button is enabled only when you select a row for a business object with the enablement option as **Manual** or **Automatic**.
- **Manage Oracle Social Network Objects page level:** To resend the definitions of all business objects with the enablement option as **Manual** or **Automatic** to social network.

Note: If you had modified any business object enabled for social network and not saved your changes, then on clicking **Synchronize**, a warning message appears. This message informs you that you haven't saved your changes, and you can select one of the following options:

- **Save and Synchronize:** To save the modified business objects, and synchronize the unmodified business objects.
- **Synchronize:** To ignore any unsaved business objects, and only synchronize the unmodified business objects.
- **Cancel:** To cancel the synchronization task.

FAQs for Manage Oracle Social Network Objects

What happens if I update translations?

When you update translations, you send translations for business objects with the enablement option as **Manual** or **Automatic** to Oracle Social Network.

On updating translations, you also:

- Synchronize the newly translated text from Oracle Applications Cloud so that it can be used within social network. This means you can:
 - Install and enable a new language.
 - Take a language patch at any time.
- Send attribute labels and business object names to social network for use in its user interface.

How can I update translations?

Use **Update Translations** on the Manage Oracle Social Network Objects page for subsequent updates to labels and attributes.

Use the **Update Translations** button at the:

- **Business Objects table level:** To send translations for a selected business object to Oracle Social Network. This button is enabled only when you select a row for a business object with the enablement option as Manual or Automatic.
- **Manage Oracle Social Network Objects page level:** To send translations for all business objects with the enablement option as **Manual** or **Automatic** to social network.

Note: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

When do I update translations?

Run the **Update Translations** process only after you install a new language pack of Oracle Applications Cloud.

Updating translations synchronizes the newly translated text to Oracle Social Network for integration with Oracle Applications Cloud.

Note: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

What happens if I synchronize business objects?

When you synchronize business objects, you resend the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

When do I synchronize business objects?

Run the Synchronize process after you use configuration sets to import the setup from the Manage Oracle Social Network Objects page in another environment.

You can also run the process whenever you want to synchronize the settings of business objects with social network without making changes in the Manage Oracle Social Network Objects page.

Related Topics

- [Contents of the Configuration Set](#)

Search Extension Framework

Overview of Search

Users can search for product-specific business objects, such as documents, records, and purchase orders. They can use highly responsive, index-based, and full-text search capabilities. The search platform has these components:

- The search engine, which provides primary search capabilities, such as indexing and querying, as well as supports search functions such as keyword and attribute search.
- The search extension framework, which serves as an integration layer between search engine and Oracle Applications Cloud.

Search Extension Framework

You can use the search extension framework to define product-specific searchable business objects and provide real time, index-based, and full-text search capabilities using REST and Java APIs.

This metadata-based framework supports search features, such as functional and data security and Natural Language Support. You can manage and configure the indexes after they're created, such as manage bulk uploads or provide production-to-test support.

Here are some of the things you can view in the search results using this framework.

- List of attributes and their associated set of available values. The attribute search results are based on the attributes of the business objects. After selecting a value for each attribute in the search result, you get more filtered results.
- Action links associated with the searchable objects. From the search results, you can either go straight to the related page or open a specific task.
- Recent searches for all the business objects enabled in the search.
- Basic search results based on the keywords used.
- Configured attachments related to transactional objects and record in your application.

Note: The search extension framework is available only for certain product families. Refer to the product-specific documentation to determine if your product uses this framework.

Enable Search Extension Framework

Enable the search extension framework to create indexes, ingest predefined indexes, and manage search capabilities.

- Make sure the **Enable/Disable Search Ext Framework (ORA_FND_SEARCH_EXT_ENABLED)** profile option is set to **Yes**.
- Make sure that you have the Manage Scheduled Job Definition (FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV) privilege to run scheduled processes.

- Submit the **ESS job to create index definition and perform initial ingest to OSCS** process for creating indexes and ingesting predefined indexes.

Note: If you don't specify any index names while submitting the process, the process will run for all predefined indexes. We recommend you to create indexes related to your product family only. Refer to the product-specific documentation to determine the index names for your product family.

Related Topics

- [Set Profile Option Values](#)
- [Submit Scheduled Processes and Process Sets](#)

FAQs for Search Extension Framework

What do I do if the process for creating indexes keeps failing?

It might be because of one or more of these reasons:

- You entered incorrect index names while submitting the process. Make sure that your ESS job parameters have the correct index names. If the problem persists, contact your help desk.
- You might not have enabled the search extension framework. Make sure you enable it.
- Your search cloud service isn't reachable. To check its availability, submit the **ESS process to check Search Cloud Service availability** process.

What do I do if I get errors about enabling the search extension framework?

Follow these steps:

1. Make sure the **Enable/Disable Search Ext Framework (ORA_FND_SEARCH_EXT_ENABLED)** profile option is set to **Yes**.
2. Create indexes and ingest predefined indexes. To do so, submit the **ESS job to create index definition and perform initial ingest to OSCS** process.

Related Topics

- [Set Profile Option Values](#)

What do I do if I get errors stating that the OSCS isn't reachable?

Follow these steps:

1. Check the availability of search cloud service. To do so, submit the **ESS process to check Search Cloud Service availability** process.
2. Create indexes and ingest predefined indexes. To do so, submit the **ESS job to create index definition and perform initial ingest to OSCS** process.

Related Topics

- [Submit Scheduled Processes and Process Sets](#)

Define Global Search

Overview of Global Search Setup

You have many options for setting up the global search, from enabling or disabling it completely to controlling what appears in the autosuggest. For most of the steps, use setup tasks in the Setup and Maintenance work area.

Enable Global Search

A predefined set of business objects, for example files related to purchase order, are available for global search. These objects are grouped into categories. The search gives you results from indexed data that matches your search term.

1. Check with your help desk to make sure that objects and categories are already set up.
2. Set the **Global Search Enabled (FUSION_APPS_SEARCH_ENABLED)** profile option to **Yes** at the Site level.
 - Otherwise, the **Search** field isn't available in the global header for any user.
 - After you set the profile option, users must sign out and sign back in to see the global search.

Note: Enabling global search is the only mandatory setup. You can skip the following setup steps, and just use the default configuration for the global search.

Define Global Search

Use the following tasks in the Application Extensions functional area to control how the global search works:

- **Manage Applications Core Global Search Configurations:** Define configurations that capture a collection of settings, and determine which configurations are enabled or used as default. Each configuration applies to the global search on all or specific applications or pages.
- **Manage Applications Core Global Search Suggestion Groups:** Define suggestion groups, which represent categories of suggestions in the autosuggest.

Retain Recent Items

You can set the Recent Items Retention (FND_PURGE_RECENT_ITEMS) profile option to determine how long to retain recent items for the global search autosuggest. A page that the user opened can appear in the user's autosuggest until the specified number of days passes. Aside from the autosuggest, this profile option also applies to the recent items tracked in **Favorites and Recent Items** in the global header. The **Favorites and Recent Items** icon is available in the global header only if your default home page layout is panel or banner.

Related Topics

- [Set Profile Option Values](#)
- [Examples of Global Search Configurations Set as Enabled or Default](#)
- [Create Global Search Configurations](#)
- [Suggestion Groups for Global Search](#)

20 Enterprise Scheduler Job Definitions and Job Sets

Overview of Managing Job Definitions and Job Sets

Users run scheduled processes based on jobs to process data and, in some cases, to provide report output. Each job has a job definition which, for example, determines the parameters that users can set. Jobs are based on Oracle Enterprise Scheduler Services. Using Enterprise Scheduler Jobs tasks, you can define job definitions, list of values sources, and job sets.

- **Job Definitions:** Contain the metadata about the job and the options available to users. A job definition is defined by a job type, such as Oracle Analytics Publisher or PL/SQL Job type or others.
- **List of Values Sources:** Determine where a list of values for the parameters in a job definition comes from and what the specific values are.
- **Job Sets:** Collections of several jobs in a single process set that the users submit instead of running separate jobs.

The various Enterprise Scheduler Jobs tasks are:

- Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications
- Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications
- Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications

In the Setup and Maintenance work area, you can find these tasks in the Application Extensions functional area, or, depending on your offering, another functional area. If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level in the Offerings work area.

Related Topics

- [Job Definitions](#)
- [Manage List of Values Sources](#)
- [Job Sets](#)
- [Overview of Scheduled Processes](#)
- [Configure Offerings](#)

Manage List of Values Sources

A list of values source for job definitions determines where a list of values comes from and what the specific values are. Users can select from the list when they set parameters. For example, the list of values for a Country parameter gives users a list of countries to choose from. You can create list of values sources to use in job definitions that you

or someone else created. Parameters in predefined job definitions can have lists of values too, but not from list of values sources that you can manage. But if you duplicate a predefined job definition, list of values sources might be automatically created for your new job definition. You can manage those sources as you would a source that you created yourself.

Here's how you get started to create, edit, or delete list of values sources:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.
Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.
2. Click the Manage List of Values Sources tab. If you don't see anything here, that just means you haven't created any sources or duplicated any predefined job definitions that would result in automatically creating list of values sources.
3. Go on to create or edit list of values sources.

Create List of Values Source

Create a source based on predefined view objects or your own SQL query. For predefined view objects, contact your help desk to find out if there are any that meet your needs. And to get the view object's full path, which you enter when creating the list of values source.

1. On the Manage List of Values Sources tab, click the **Create** icon.
2. In the Create List of Values Source dialog box, select something from the **Application Name** list that's related to your list of values. If you don't know what to select or can't find anything that applies, just select **Application Toolkit**.
3. In the **User List of Values Source Name** field, enter a name that helps you identify your list of values source.
4. From the **LOVType** list, select **Predefined** to use a view object or **User Defined** to use a SQL query.
5. If you selected Predefined, then in the **List of Values Source Definition Name** field, enter the full path of the view object that your help desk provided.

If you selected User Defined, enter your own SQL in the **Query** field.

- o Your query can't have any aggregate function like DISTINCT, SUM, MAX, or AVG in the direct select clause. It can't have UNION, UNION ALL, INTERSECT, or MINUS either.
- o If you absolutely need to use any of those functions, you need to wrap the query in another select clause. Here are a couple examples:

Don't Use This	Use This Instead
<pre>SELECT DISTINCT CHANNEL.MEANING MEANING FROM FND_LOOKUP_VALUES_TL</pre>	<pre>SELECT MEANING FROM (SELECT DISTINCT MEANING MEANING FROM FND_ LOOKUP_VALUES_TL) ;</pre>
<pre>select lookup_code as LookupCode from fnd_lookup_ values_b where lookup_ type='EXM_REPORT_STATUS' UNION select 'NULL' as LookupCode from dual</pre>	<pre>SELECT LOOKUPCODE FROM (select lookup_code as LookupCode from fnd_ lookup_values_b where lookup_type='EXM_REPORT_STATUS' UNION select 'NULL' as LookupCode from dual)</pre>

Don't Use This	Use This Instead

6. Make sure everything looks fine and then click **Save and Close**. You can't change most of the things about your source after you create it.

Edit or Delete List of Values Source

Here are some things to know about editing and deleting list of values sources, which you can do on the Manage List of Values Sources tab.

- You can edit only the application name and description.
- When you delete a list of values source, you can't find it and manage it any more, but it's not really gone. Any job definitions using that source can continue using it. So after you delete a source, you can't create another one later with the same name, even though you won't be able to find the deleted one. To avoid confusion, it's recommended that you don't ever delete any list of values source. Just create new ones as needed, with unique names.

Related Topics

- [Update Existing Setup Data](#)
- [Configure Offerings](#)

Manage Job Definitions

Job Definitions

Scheduled processes are based on jobs that process data and, in some cases, provide output. Each job requires a job definition. A job definition can also include parameters and user properties that the user defines while submitting the scheduled process.

You are encouraged to use predefined scheduled processes as is, so usually you don't need to do anything with job definitions. But if you do need something specific to your needs, you can create Oracle Analytics Publisher reports as the basis for custom jobs, and create job definitions for those custom jobs. You can also duplicate predefined job definitions and edit your copy, mainly to update the parameters. But, usually you wouldn't duplicate predefined job definitions. Some of them can't be duplicated anyway, and there are many limitations to consider with the duplicate.

To view, create, edit, or duplicate job definitions, use the Manage Job Definitions tab on the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, here's where you go to open that page:

- Functional Area: Application Extensions a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

Viewing Job Definitions

Use the table on the Manage Job Definitions tab to view the job definitions created for the application. An asterisk in the name column indicates a predefined job definition. Not all job definitions are shown. You always see only the ones you have access to, and only the first 100 are shown when you open the tab.

Tip: Use Query by Example to find the job definition you're looking for, even those not shown in the table by default.

This table describes the columns in the table on the Manage Job Definitions tab.

Column Name	Description
Name	Name of the job definition.
Display Name	Name of the job definition as available to users while submitting scheduled processes.
Description	Description for the job definition.
Path	The full directory path where the job definition is saved.
Execution Type	The type of job request for the given job definition, such as a Java, C, PL/SQL, Perl, or hosted script job.
Job Type	The name of the job type that the job definition is based on. • BIPJobType: Jobs that run as Oracle Analytics Publisher reports • CJobType: Jobs that are implemented in C and run in the container • HostJobType: Jobs that run as as host scripts executed from the command line • JavaJobType: Jobs that are implemented in Java and run in the container • PerlJobType: Jobs that are implemented in Perl and run in the container • PlsqlJobType: Jobs that run as PL/SQL procedures stored in a database server • SqlLdrJobType: Jobs that are implemented in SQL*Loader and run in the container • SqlPlusJobType: Jobs that are implemented in SQL*Plus and run in the container Note: If you create a brand new job definition (not by duplicating an existing one), the only job type you can use is BIPJobType.

Parameters

A parameter controls which records are included or how they are affected when the job runs. Parameters are available to users when they submit scheduled processes based on your job definitions. For example, a job updates only the records that are effective after the date that users enter in a Start Date parameter. You can create, edit and delete parameters for job definitions that are not predefined.

User Property

A user property is set in the job definition to attain some specific results.

Related Topics

- [Create Job Definitions](#)
- [Edit Job Definitions](#)
- [Overview of Scheduled Processes](#)
- [Use Query By Example](#)

Create Job Definitions to Run Reports as Scheduled Processes

Every job definition has a job type that reflects the executable for the job, such as Java or Oracle Analytics Publisher reports. You can only create job definitions that are based on Analytics Publisher reports. When there's a job definition for an Analytics Publisher report, users can run the report as a scheduled process in the Scheduled Processes work area. Otherwise, they can open reports (which are set up to be run online) elsewhere, for example in the Reports and Analytics work area.

Create Job Definitions

Here's how you create a job definition for an Analytics Publisher report:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. Click the **Create** icon.
4. Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.
Name	Enter a name with only alphanumeric characters, for example, AtkEssPrograms1 . It can't have spaces or any special characters.
Job Application Name	Select the application to associate the job definition with. What you select depends on the task you're using. ○ Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select CrmEss. ○ Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select FscmEss.

Field or Check Box	What You Do
	Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select EarHcmEss.
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select BIPJobType . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: Custom/<Family Name>/<Product Name>/<Report File Name>.xdo. Make sure to include the .xdo file extension for the report definition.
Enable submission from Scheduled Processes	Leave the check box selected.

- In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
- In the User Properties subtab, don't create or edit a user property unless you have the accurate information that's required to create or edit one. The **EXT_PortletContainerWebModule** user property is automatically created.
- Click **Save and Close**.

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

Related Topics

- [Define Parameters for Job Definitions](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)

Duplicate Job Definitions

You can duplicate predefined job definitions and edit your copy, mainly to update the parameters. But, usually you wouldn't duplicate predefined job definitions. Some of them can't be duplicated anyway, and there are many limitations

to consider with the duplicate. If you're duplicating a predefined job definition, make sure you test the duplicate carefully because it might not work exactly like the original.

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. On the Manage Job Definitions tab, select a job definition with any job type.
4. Click **Duplicate** to get another row in the table with the duplicate job definition.
5. Select the duplicate job definition and click **Edit**.
6. Enter the name and path.
7. Update the parameters if you need to.
8. Click **Save and Close**.

When you create a job definition by duplicating, a privilege with the same name as the duplicate job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

You also automatically create a view object with the same name in the list of values sources. Validations for the attributes in the parameters view object aren't copied over.

Related Topics

- [Define Parameters for Job Definitions](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)

Edit Job Definitions

You can only edit certain fields in predefined job definitions, as some of the fields are read only. However, you can edit all aspects of job definitions that are not predefined.

Editing Job Definitions

Follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, open the Manage Job Definitions tab.
3. Select the job definition you want to edit.
4. Click **Edit**.
5. Make the changes that you want, for example:

- You can edit the display name of the job definition to use terms that are more familiar to your users.
- You can use the **Prompt** field to edit parameter display names.

6. Click **Save and Close**.

Predefined Job Definitions

You cannot update parameters in predefined job definitions, but this table lists some of the other fields that you can edit.

Field	Description
Retries	The number of times to automatically run this job again if the scheduled process fails.
Job Category	Specific to the application of the job definition, it's used to group definitions according to your requirements.
Timeout Period	The amount of time before stopping a scheduled process that couldn't complete.
Priority	Priority of scheduled processes submitted, with 0 as lowest. If other processes, based on the same or another job, are scheduled to run at the same time, then priority determines the run order.

Related Topics

- [Job Definitions](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)

Define Parameters for Job Definitions

A parameter controls which records are included or how they are affected when a job runs. Job definitions can have one or more parameters or none at all. You define parameters while creating or editing job definitions using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

When users run the scheduled process for job definitions of type BIPJobType, the values they enter for the parameters determine the data to be included in the report. Also, the values are passed to the data model that the report is using.

The parameters that you define must be in the same order as parameters in the data model for the report. For example, the data model has parameters in this order:

- `P_START_DATE`
- `P_END_DATE`

- **P_CURRENCY**

You create parameters as follows:

- Start Date
- End Date
- Currency

Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.
3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	Select this if you want the parameter to be a check box. Select True or False to determine if the check box is selected or not.
Date or time	Select Date and time or Date only option. Select a value from the Default Date Format. Note: Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select yyyy-MM-dd, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.
Number	Select a Number Format. Select Left or Right for data alignment.
String	Select a Page Element. Select Text box if you want the user to provide a text. Select Choice list if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process. Select List of values if you want a list with unlimited options with a search facility.

5. Select the **Read Only** check box if you don't want to enable users to set this parameter. When a parameter is set as read only, the user is required to provide a default value to be passed to the job definition.

6. If you select list of values or choice list page element, select a **List of Values Source** and an **Attribute**. Use the list of values sources from the Manage List of Values Sources tab. Don't define lists of values in the data model that the report is using.
7. From the list of available attributes, select the attributes you want to appear in the list and move them to the selected attributes section. These attributes determine the values that the user can see.
8. Define a **Default Value** for the parameter.
9. In the **Tooltip Text** field, provide additional information for the user to follow.
10. Select the **Required** check box if users must set this parameter to submit the scheduled process.
11. Select the **Do not Display** check box if users should not see this parameter while submitting the process.
12. Click **Save and Create Another** or **Save and Close**.

Dependent Parameters

The attributes of some parameters depend on the attributes or values of certain other parameters. The attributes of a parameter would change if the value of its dependent parameter changes.

For example, you have three parameters, namely Country, State and, City. In this case, the value of the Country parameter would determine the values available in the State parameter. The values in the State parameter would determine the values available in the City parameter.

Related Topics

- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Define Dependent Parameters in Job Definitions](#)

Define Dependent Parameters in Job Definitions

This example demonstrates how to define dependent parameters.

This table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Which parameters do I want to make dependent?	Region, Country and City. Region list of values includes the names of the regions like North America, EMEA, JAPAC and so on. The Country list of values includes the names of countries like USA, Canada, France, England, India, Japan and so on. Similarly City list of values includes the names of different cities like New York, Washington, London, Paris, Mumbai, Tokyo and so on. The Country parameter list of values includes only the countries like USA, Canada and so on, if user selects North America. The City parameter list of values includes the names of the cities in the country that the user has selected.
What are view criteria?	The view criteria determine the values that appear in the dependent parameter list of values for the users to see. The view criteria are used to filter the list and pass the required bind variables based on the user's selection. To filter countries based on the selected region, you must select <code>getCountriesByRegion</code> and pass Region as a bind variable.

Prerequisites

Create the parameters **Region**, **Country** and **City**. The values available to the users in the Country parameter list of values depends on the value selected for the Region parameter. City parameter list of values depends on the value that the user selects for the Country parameter.

Defining Dependent Parameters

To define parameters with dependent lists of values:

1. On the Manage Job Definitions tab, open the Parameters sub tab.
2. Select the **Region** parameter.
3. Click the **Manage Dependencies** button located next to the **Delete** button.
4. From **Available View Criteria**, select `getCountriesByRegion` and move it to **Selected View Criteria** using the move icons.

The selected view criteria appears in the Bind Variables section.

5. In the Bind Variables section, for the `getCountriesByRegion` view criteria, select **Country** from the mapped parameters list of values.

The Country parameter list of values is now dependent on the value selected for the Region parameter.

6. Click **OK**.
7. Repeat the steps with **Country** parameter. Select `getCitiesByCountries` from the available view criteria and pass **City** as a bind variable.

Related Topics

- [Define Parameters for Job Definitions](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Create Job Sets](#)
- [Manage List of Values Sources](#)

Manage Job Sets

Job Sets

A job set is a collection of several jobs in a single process set that the users can submit instead of running individual jobs separately. The job set definition also determines if the jobs run in serial or parallel, or based on some other predetermined logic. In the Setup and Maintenance work area, go to the following:

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

Use the Manage Enterprise Scheduler Job Definitions and Job Sets page to open the Manage Job Sets tab.

- On this tab, you can view and define job sets, and use Query By Example to find a specific job set.
- You can't edit or delete the predefined job sets which are indicated by an asterisk. You can create job sets, and also edit and delete job sets that are not predefined.

Job Set Steps

A job set can contain any number of individual jobs as well as other job sets. There can also be multiple levels of nested job sets within a single job set. For example, a job set can include three jobs and two job sets, one of which contains another job set. Each individual job or job set that's included within a job set is called a job set step. A job set and each of its job set steps can have additional parameters. Users provide the values for these parameters when they submit the process set.

Application Defined Properties

Some Job Sets require the user to enter certain additional properties before submitting a job request. Application Defined Properties are the additional properties that the user has to enter during runtime. For example, when `enableDuplicateJobWithParamTaskflow` property is set to **True**, it can be used to run a single job multiple times with different parameter values, within a job set.

System Properties

System Properties are the additional settings that determine how a job set runs. For example, you can use a system property to determine the number of retries for a job set that fails to execute. On this tab, you can view and define job sets, and use Query By Example to find a specific job set.

Related Topics

- [Create Job Sets](#)
- [System Properties for Job Sets](#)
- [Overview of Managing Job Definitions and Job Sets](#)

Create Job Sets

Create a job set so that users can run multiple jobs with a single submission. Before you create the job set, plan the sequence and hierarchy of the job steps within the job set. You can create job sets using the Manage Job sets tab. You can also edit and delete job sets that are not predefined.

Steps to Create Job Sets

Follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, open the Manage Job Sets tab.
3. Click **Create**.

4. Complete the fields as shown in this table.

Field	Description
Name	Provide a name with only alphanumeric characters, for example, ExportMetadataTables1 . Note: A job set name can't have space or any special character.
Display Name	Provide a name that the users see while submitting the scheduled process.
Description	Provide more information about what the job set does.
Package	Specify the path where you want to save the job set.

5. In the Job Set Steps section, select **Serial** or **Parallel** to define the sequence of the job set.
6. Click **Add Job Set Step** to open the Add Step dialog box.
7. In the Step tab:
 - a. Enter a **Step ID** to easily identify the steps.
 - b. Search for and select a job or job set to include in your job set.
 - c. Select **Job definition** or **Job set**.
 - d. Type a valid name or package, or both of the Job or Job Set you are looking for and click search.
 - e. Select the required job definition or job set and click **OK**.
 - f. If you selected Parallel in step 4:
 - Select **Insert into main diagram** if you want the step to be executed independently.
 - Select **Add to list of available steps** if you want the step to be one of the outcomes in the available steps.
 - If you choose to add the step to the list of available steps, select an option for the possible job outcomes. For example, you can determine whether the process must stop or another step must be executed if the step fails to run successfully.
8. In the **Application Defined Properties** tab:
 - a. Click **Add Application Defined Property** icon and select a data type.
 - b. Enter a name and an initial value.
 - c. Select the **Read Only** check box if you don't want users to update this property when they submit the process set.
 - d. Click **OK**.

9. In the **System Properties** tab:
 - a. Click **Add System Property**.
 - b. From the name list, select a system property.
 - c. Enter a value in the **Initial Value** field.
 - d. Select **Read Only** check box if you don't want users to update this property when they submit the process set.
 - e. Click **OK**.

Note: You can also add and edit the Application Defined Properties and System Properties in the respective sections on the Create Job Set page.

10. Click **OK** to add the Job Set Step.
11. Add jobs and job sets as required. You can select job steps in the Job Set Steps section and edit, remove, or reorder (for Serial only). You can also switch between **Serial** and **Parallel**.
12. Click **Save and Close**.

Note: When you create a job set, a privilege with the same name as the job set is automatically created with a Run prefix. For example, for a job set named ExportAppsData, with display name Export Application Data, the privilege code is RUN_EXPORTAPPSDATA, with Run Export Application Data as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process set can do so.

Related Topics

- [Job Sets](#)
- [System Properties for Job Sets](#)
- [Overview of Managing Job Definitions and Job Sets](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)

System Properties for Job Sets

System Properties are the additional settings that determine how a job set runs. For example, you can use a system property to determine the number of retries for a job set that fails to execute. You can open the Manage Job Sets tab using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

System Properties

This table lists some system properties with description.

System Property Name	Description
<code>SYS_allowMultPending</code>	Specifies if the same job definition can have multiple pending requests.

System Property Name	Description
SYS_application	Specifies the logical name of the Scheduling Services folder application used for request processing. Oracle Enterprise Scheduler automatically sets this property during request submission.
SYS_effectiveApplication	Specifies the logical name of the Scheduling Services folder application that is the effective application used to process the request. You can associate a job definition, job type, or a job set step with a different application by defining the EFFECTIVE_APPLICATION system property. This property can only be specified through metadata and cannot be specified as a submission parameter.
SYS_priority	Specifies the request processing priority. The priority interval is 0 to 9, where 0 is the lowest priority and 9 is the highest. If this property is not specified, the default value used is 4.
SYS_product	Specifies the product used for submitting the request.
SYS_request_timeout	Enables the job request to time out.
SYS_requestExpiration	Specifies the expiration time for a request. This represents the time (in minutes) that a request will expire after its scheduled execution time. An expiration value of zero (0) means that the request never expires. If this property is not specified, the default value used is 0. Request expiration only applies to requests that are waiting to run. If a request waits longer than the specified expiration period, it does not run. After a request starts running, the request expiration no longer applies.
SYS_retries	Specifies the retry limit for a failed request. If request execution fails, the request is retried up to the number of times specified by this property until the request succeeds. If the retry limit is zero (0), a failed request is not retried. If this property is not specified, the default value used is 0.

Related Topics

- [Job Sets](#)
- [Create Job Sets](#)

Assign Roles for Access to Manage Scheduled Processes

Users can view and manage the scheduled processes that they submit, for example, to cancel the process or see the output. But, if they need to do that for processes other people submitted, they need certain roles. Here are the roles and what they let users do with scheduled processes that anyone submitted.

Role Name	Role Code	View	Update	Cancel	See Output	Republish Output
ESS Operator Role	ESSOperator	Yes	No	No	No	No
ESS Monitor Role	ESSMonitor	Yes	No	No	No	No

Role Name	Role Code	View	Update	Cancel	See Output	Republish Output
ESS Administrator Role	ESSAdmin	Yes	Yes	Yes	No	No
BI Administrator Role	BIAdministrator	No	No	No	Yes	Yes

You can use the Security Console to create a custom role that has the needed roles, and assign the custom role to the user. Usually it's best to give access just by giving users the needed roles.

- But, in some cases you might need to give additional access to specific tasks. For example, someone with ESS Monitor Role can see scheduled processes from others, but they also need to put processes on hold. And you don't want to give them the ESS Administrator Role because that would be too much access.
- Another case is that a user should not have access to all processes, but they still need to do certain tasks for some processes.

In these cases, the custom role you assign to users should have a data security policy, which gives users access to certain tasks. Here are the actions you should choose from for the policy, for the specific tasks you want to give users access to.

Action	Description
ESS_REQUEST_CANCEL	Cancel processes.
ESS_REQUEST_HOLD	Put processes on hold.
ESS_REQUEST_OUTPUT_READ	See the output from processes.
ESS_REQUEST_OUTPUT_UPDATE	Update the output from processes, for example to change what output you want if the process hasn't started running yet.
ESS_REQUEST_READ	Access processes and view details.
ESS_REQUEST_RELEASE	Release processes that were put on hold.

Access for All Scheduled Processes

Here's how you give someone access to manage all processes:

1. On the Roles page in the Security Console, click **Create Role**.

2. On the Create Role: Data Security Policies page, create a data security policy only if you need to give access to specific tasks.
 - a. For the **Database Resource** field, select **ESS_REQUEST_HISTORY**.
 - b. For the **Data Set** list, select **All Values**.
 - c. For the **Actions** list, select any of the tasks that you want to give access to.
3. On the Create Role: Role Hierarchy page, add any of the needed roles.
4. On the Create Role: Users page, enter the users you want to assign this custom role to.

Access to Do Certain Tasks for Specific Processes

Say you don't want to give users access to all scheduled processes. When you create the custom role, instead of selecting a role like ESS Monitor Role, you enter a condition that controls what processes are included. You first create the condition in a database resource:

1. On the Administration page in the Security Console, click **Manage Database Resources** on the General tab.
2. On the Manage Database Resources and Policies page, search with **ESS_REQUEST_HISTORY** in the **Object Name** field.
3. In the Search Results table, select the ESS_REQUEST_HISTORY database resource and click **Edit**.
4. On the Edit Data Security page, click the Condition tab.
5. On the Condition tab, click the **Create** icon.
6. In the Create Database Resource Condition dialog box, select **SQL predicate** for the **Condition Type** option.
7. In the **SQL Predicate** field, enter SQL that determines what processes to give access to, for example:

```
EXISTS
(select 1 from dual)
and DEFINITION in (
'JobDefinition://oracle/apps/ess/hcm/users/SyncRolesJob'
)
```

8. Save your work.

Now you're ready to create your custom role and assign it to users:

1. On the Roles page in the Security Console, click **Create Role**.
2. On the Create Role: Data Security Policies page, create a data security policy.
 - a. For the **Database Resource** field, select **ESS_REQUEST_HISTORY**.
 - b. For the **Data Set** list, select **Select by instance set**.
 - c. For the **Condition Name** list, select the condition you created.
 - d. For the **Actions** list, select **ESS_REQUEST_READ** so users can access the process in the first place. Include any other action that you want to give access to. For example, if the user needs to see output, select **ESS_REQUEST_OUTPUT_READ** too.
3. On the Create Role: Users page, enter the users you want to assign this custom role to.

Related Topics

- [Create Roles in the Security Console](#)

Allow Updates to Scheduled Process Priority

Every scheduled process has a default priority, from 0 to 9. When many scheduled processes are submitted, those with a lower number, for example 2, would usually run before those with a higher number, for example 7. You can set the **Scheduled process priority change allowed** (ESS_ALLOW_CHANGE_PROCESS_PRIORITY) profile option so that administrators can change the priority for specific submissions.

1. In the Setup and Maintenance work area, use the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set the **Scheduled process priority change allowed** profile option to **Yes** at the Site level.
2. In the Security Console, create a custom role that has the ESS Administrator Role (EssAdmin), and assign it to administrators who should have access to change priorities. Or, ask your security administrator to do this.

Related Topics

- [Set Profile Option Values](#)
- [Assign Roles for Access to Manage Scheduled Processes](#)

FAQs

Why can't I see certain job definitions, and how do I find them?

In the table on the Manage Job Definitions tab, not all job definitions are shown. You always see only the ones you have access to, and only the first 100 are shown when you open the tab. Use Query by Example to find what you're looking for, even the job definitions that aren't shown in the table by default.

Related Topics

- [Use Query By Example](#)

What do I select for job application name when I create a job definition?

What you select from the **Job Application Name** list depends on the setup task you're using.

- Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select **CrnEss**.
- Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select **FscmEss**.
- Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select **EarHcmEss**.

Can I use a table value set as the list of values for a parameter?

No, you should create a list of values source instead to provide the same values for the parameter.

How can I restrict user access so that they can run only custom scheduled processes?

You can try creating a custom role with the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege to give access to the Scheduled Processes work area, along with the privileges that are automatically created when you create a job definition or job set. But you need to test the role to make sure it doesn't have any roles or privileges that give access to predefined processes.

21 Audit Policies

Audit Policies

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects. All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at <https://support.oracle.com>.

If you don't want an application to be audited, you can stop the audit process by setting the Audit Level option to **None**. Also, note that there's no specified retention period for the audited data or the logs. Follow your company policy for retaining or removing such data.

Note: You won't be able to enable audit if you're working in a sandbox. If you try to set up audit while you're in a sandbox, you will see the message "Audit setup is disabled in a sandbox". You'll also notice that the buttons associated with the audit functionality are disabled.

Related Topics

- [Audit Configuration for Business Object Attributes](#)
- [Overview of Audit Configuration](#)

Audit Configuration for Business Object Attributes

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application. Your configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, use the **Manage Audit Policies** task in the Setup and Maintenance work area.

Selecting an Application

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

Selecting Attributes

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view, add, or remove flexfield attributes. The selected objects are audited.

Note: The auditing limit for an object is set to 20000 bytes. Each extension field that you add are predefined to consume 1500 bytes. When the total limit exceeds, the warning message "Attributes selected for audit exceeded the permitted limit. Deselect some attributes and proceed" appears.

Starting and Stopping Audit

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and aren't audited. To continue to audit the business object with select attributes, deselect those attributes that aren't to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn't get any audit results for that week, because during the entire month that object wasn't audited. Even if you enable audit for that object today, users can't get the wanted results because audit data until today isn't available.

Note: When users export the report summary to Microsoft Excel, there's a limit on displaying the number of rows. By default, this limit is set to 10000 but you can increase it to a maximum of 25000 using the profile option Audit Events Export Limit (FND_AUDIT_FMW_EVENT_LIMIT). Sometimes, the actual rows returned may be more than this limit, because a transaction may update multiple tables.

Overview of Audit Configuration

To set up auditing for Oracle Applications Cloud, select the **Manage Audit Policies** task from the Setup and Maintenance work area within your offering. To set up auditing for Oracle Fusion Middleware products, select the

level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the **config.xml** configuration file. To get a list of audit-specific assets, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at <https://support.oracle.com>.

Oracle Fusion Middleware Products

- Configure business objects to enable auditing in Oracle Fusion Middleware products. Refer to the Oracle Fusion Middleware Security and Administrator's Guide for Web Services.

See: Auditing Web Services

Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Fusion Middleware Application Security Guide.

See: Oracle Fusion Middleware Audit Framework Reference

Related Topics

Impersonation Audit

Users can temporarily designate other users to impersonate their profiles and perform application tasks on their behalf. Impersonation auditing is active even when auditing is disabled for an application. At run time, the audit setup tracks and stores information about attributes, even when auditing isn't enabled for the attributes. Impersonation auditing is enabled by default so that all actions performed by the impersonator are audited. Therefore, while viewing audit history, users can retrieve the audited information, filtered by an impersonated user.

However, impersonation auditing is limited in scope and applies only to the business objects in the Manage Audit Policies task. While impersonation auditing is enabled, updates are permitted only to the business objects in the Manage Audit Policies task. The impersonator can't update business objects in other tasks. If updates to business objects in other tasks are required, the impersonation auditing must be disabled.

CAUTION: If impersonation auditing is disabled, impersonation information won't be audited. The activities are audited as if the actual user performed them.

Impersonation auditing is controlled through the **Audit Impersonation Transaction Enabled** profile option. By default it's enabled. To disable it, set the profile value to **No**.

Related Topics

- [Designate Proxies](#)

How You Audit Talent Management Business Objects

Set up auditing policies to maintain a history of changes to your important data: what changed, who changed it, and when. The audit tracks changes to attributes of Oracle Fusion Talent Management business objects made using the application pages, web services, or talent management processes, which use Oracle Enterprise Scheduler.

You can view the audit history to determine how a business object obtained its current value and to compare old and new values. To set up auditing, you must have the Application Implementation Consultant job role to access the Manage Audit Policies task. To view audit data, you must have the Internal Auditor job role.

Talent Management Business Objects

When you set up auditing for business objects in talent management, you configure Oracle Fusion Applications business objects on the Manage Audit Policies page in the Setup and Maintenance work area:

1. Select the HCM Talent application on the Configure Business Object Attributes page.
2. Specify the attributes to audit for the objects. For example, you may audit the rating level and numeric rating attributes for rating levels.

The following table lists the talent management business objects to audit.

Talent Management Business Object	Audited Attributes
Talent content library, including rating models, rating levels, and content items	• From and to dates, code, name, distribution threshold, and description for rating models • From and to points, maximum and minimum distributions, numeric and star ratings, name, rating level, short description, review points, and description details for rating levels • Item code, from and to dates, item description, name, rating model details for content items
Talent pools	Status details of talent pool members
Talent profiles, including person and model profiles	Keywords and from and to dates for person and model profiles
Talent profiles setup, including content section properties	Label, column name, default value, display, source, required, searchable, value set name, and view attribute for profile type section properties (also called content section properties)
Performance evaluations, including evaluation sections, evaluation section ratings, evaluation items, evaluation item ratings, participant details, and performance task.	• Manager ID, status, start and end dates, performance document name, and evaluation context (descriptive flexfields for additional attributes) for performance evaluations • Comments and performance rating for evaluation section ratings • Item name, minimum weight, and weight for evaluation item • Comments, performance rating, and proficiency level for evaluation item ratings • Participant ID and role, status of the task, optional overall comments, and notified by data to indicate which person requested the participant to participate in the evaluation • Status of performance task, and action performed by data to indicate which person performed the task
Succession plans	Status details of succession plan candidates

Talent Management Business Object	Audited Attributes

Audit Reports

Talent management enables users with the Internal Auditor job role to view audit reports for audit-enabled talent management business objects. You can view the changes that the application data underwent. The report provides you with details of the talent management business objects that were created, updated, and deleted. You can select among several search parameters to decide the type of audit history report that you require. To access the Audit Reports work area, select **Navigator > Tools > Audit Reports**.

Related Topics

- [Managing Audit Policies: Explained](#)
- [Configuring Audit Business Object Attributes: Points to Consider](#)
- [Audit History: Explained](#)

Audit Payroll Business Objects

Set up auditing policies to maintain a history of changes to your important data: what changed, who changed it, and when. The audit tracks changes to attributes of payroll business objects made using the application pages, web services, or payroll processes, which use Oracle Enterprise Scheduler.

You can view the audit history to determine how a business object obtained its current value and to compare old and new values. To view the history or to create an audit report from the Audit History work area, you require appropriate duty roles and privileges. Enterprises typically assign the following two audit duty roles to the application implementation consultant and master data management application roles:

- Audit trail management, which determines the objects audited
- Audit trail report viewing to view the audit history

Payroll Business Objects

When you set up auditing for payroll, you configure Oracle Fusion Applications business objects on the Manage Audit Policies page in the Setup and Maintenance area:

1. Select the HCM Payroll application on the Configure Business Object Attributes page.
2. Specify the attributes to audit for the objects.

For example, you might audit the start and end date attributes for the calculation card component details.

This table lists the payroll business objects you can set up for auditing payroll. You track changes to attributes specified for these objects.

Payroll Business Object	Description
Assigned Payroll	Holds date-effective attributes about payrolls assigned to a worker.

Payroll Business Object	Description
Assigned Payroll More Details	Holds details that aren't date-effective about the payroll assigned to a worker.
Calculation Card	Holds values required for calculating payroll components.
Calculation Card Component	Holds the definition of a component that represents one or more logically related payroll components.
Calculation Card Component Detail	Holds the input values of a person's calculation card.
Calculation Reporting Card	Defines the tax reporting units that report the calculation.
Calculation Reporting Card Usage	Attaches a reporting card to a person record.
Element Entry	Holds earning and deductions details for a person.
Element Entry Value	Holds the values of the compensation and benefits granted to a person.
Payroll Calculation Range Value	Defines the values or sets of values used in the calculation of a value definition.
Payroll Calculation Value Definition	Defines how a value is calculated in payroll processing.
Personal Payment Method	Holds the payment method details for a person.

Related Topics

- [Audit Policies](#)
- [Audit Configuration for Business Object Attributes](#)
- [Audit History](#)

22 Applications Core Configuration

Import Flexfields, Lookups, or Profile Values Using Web Services

You can import lookups, profile option values, and extensible flexfields into an application using the import function on the application page. Alternatively, you can use the web service `FndManageImportExportFilesService` for the import task. The web service uses the following methods:

Loader Name	Asynchronous Method	Synchronous Methods	Supported methods for backward compatibility (without UUID)
Flex data uploader	<code>processFlexDataAsync(List<String> inputFileIdTypeList, String UUID)</code>	<code>processFlexData(List<String> inputFileIdTypeList, String UUID)</code>	<code>processFlexDataFiles(List<String> inputFileIdTypeList)</code>
Lookups data uploader	<code>processLookupsDataAsync(long lookupTypesFileID, long lookupCodesFileID, long viewApplicationID, String UUID)</code>	<code>processLookupsData(long lookupTypesFileID, long lookupCodesFileID, long viewApplicationID, String UUID)</code>	<code>processLookupsUploadFiles(long lookupTypesFileID, long lookupCodesFileID, long viewApplicationID)</code>
User profile values uploader	<code>processUserProfileValuesAsync(long userProfilesFileID, String UUID)</code>	<code>processUserProfileValues(long userProfilesFileID, String UUID)</code>	<code>processUserProfileValuesFile(long userProfilesFileID)</code>
Valueset Values data uploader	<code>processValueSetValuesAsync(Long fileIdAtRepository, String UUID)</code>	<code>processValueSetValues(Long fileIdAtRepository, String UUID)</code>	<code>valueSetValuesDataLoader(Long fileIdAtRepository)</code>
Generic method	NA	<code>downloadProcessLogFile(String UUID)</code>	NA

Example

The following example is about importing the profile values using the web service. To import lookups or extensible flexfields, initiate the web service in the same way as shown here, after replacing the methods and other relevant values in the code.

To import profile values:

1. Perform the following substeps to generate keystore for the security policy "oracle/wss11_saml_or_username_token_with_message_protection_service_policy":
 - a. Generate keystore using the command `keytool -genkeypair -keyalg RSA -alias mycompkey -keypass password -keystore mycompclient-keystore.jks -storepass password -validity 3600`.
 - b. Open the WSDL using the URL `http://<host>:<port>/fndAppCoreServices/FndManageImportExportFilesService?wsdl` through a web browser, and get the public key `<wsdl:service>/<wsdl:port>/<wsa:EndpointReference>/<wsid:Identity>/<dsig:keyInfo>/<dsig:X509Data>/<dsig:X509Certificate>`. Then, enclose it with `----- BEGIN CERTIFICATE -----` and `----- END CERTIFICATE -----` and save it to a file by name **cdmpk.cer**.
 - c. Store the key information in the truststore using the command `keytool -importcert -alias cdmpkey -file cdmpk.cer -keystore mycompclient-keystore.jks -storepass password`.
2. Open the WSDL page using the browser of your choice.
3. Export and save the associated security certificates **Verisign Class 3 Public Primary Certification Authority - G5** and **Verisign Secure Server CA - G3**.
4. Use the following command to import the saved certificates into the trust store of the client computer.

```
keytool -importcert -keystore <truststore> -storepass <truststorepassword> -file <file location where the mentioned certificate is stored> -alias <alias for certificate>
```

5. Run the following command to generate the JAX-WS proxy for the `FndManageImportExportFilesService` web service.

```
C:\Program Files\Java\jdk1.7.0_04\bin>wsimport -s "d:\wsimport\FndManageImportExport" -d "d:\wsimport\FndManageImportExport" http://<host>:<port>/fndAppCoreServices/FndManageImportExportFilesService?wsdl
```

6. Save the generated code as a JAR file and name it **FndManagelImportExportProxy.jar**.

7. Use the following code to create another JAR file to initiate the web service:

```
package com.oracle.xmlns.oracle.apps.fnd.applcore.webservices;

import com.sun.xml.ws.developer.WSBindingProvider;

import java.io.File;
import java.io.IOException;

import java.util.List;

import java.util.Map;

import javax.xml.ws.BindingProvider;
import javax.xml.ws.WebServiceRef;

import javax.xml.ws.handler.Handler;

import oracle.webservices.ClientConstants;

import weblogic.wsee.jws.jaxws.owsm.SecurityPoliciesFeature;
// !THE CHANGES MADE TO THIS FILE WILL BE DESTROYED IF REGENERATED!
// This source file is generated by Oracle tools
// Contents may be subject to change
// For reporting problems, use the following
// Version = Oracle WebServices (11.1.1.0.0, build 130224.1947.04102)

public class FndManageImportExportFilesServiceSoapHttpPortClient
{
    @WebServiceRef
    private static FndManageImportExportFilesService_Service fndManageImportExportFilesService_Service;
```

```

public static void main(String [] args)
{
    System.setProperty("javax.net.ssl.trustStore","<location of truststore which is used in II) to import
the certificates>");
    System.setProperty("javax.net.ssl.trustStorePassword", "<truststore password>");

    fndManageImportExportFilesService_Service = new FndManageImportExportFilesService_Service();
    SecurityPoliciesFeature securityFeatures =
    new SecurityPoliciesFeature(new String[] { "oracle/
wssl1_username_token_with_message_protection_client_policy",
});
    FndManageImportExportFilesService
    fndManageImportExportFilesService =
    fndManageImportExportFilesService_Service.getFndManageImportExportFilesServiceSoapHttpPort
    (securityFeatures);
    // Add your code to call the required methods.

    WSBindingProvider wsbp = (WSBindingProvider) fndManageImportExportFilesService;
    Map<String, Object> requestContext = wsbp.getRequestContext();

    requestContext.put(ClientConstants.WSSEC_KEYSTORE_TYPE,"jks");
    // Provide location of 'mycompclient-keystore.jks' which was created during Step I)
    requestContext.put(ClientConstants.WSSEC_KEYSTORE_LOCATION,"/home/user1/mycompclient-keystore.jks");
    requestContext.put(ClientConstants.WSSEC_KEYSTORE_PASSWORD,"password");
    requestContext.put(ClientConstants.WSSEC_RECIPIENT_KEY_ALIAS,"cdrmkey");

    //Provide user who is having permission to initiate the service
    requestContext.put(WSBindingProvider.USERNAME_PROPERTY,"<username>");
    requestContext.put(WSBindingProvider.PASSWORD_PROPERTY, "<password>");

    String id = invokeUploadFiletoUCMMethod(fndManageImportExportFilesService);

    if (id != null) {
        invokeUserProfileValuesDataLoader(fndManageImportExportFilesService, new Long(id));
    }
}

static String invokeUploadFiletoUCMMethod(FndManageImportExportFilesService
fndManageImportExportFilesService) {

    String response = null;
    DocumentDetails document = new DocumentDetails();
    ObjectFactory objfactory = new ObjectFactory();
    document.setFileName(objfactory.createDocumentDetailsFileName("import_data.txt"));
    // Provide UCM repository - if repository is fin/tax/import then suffix each value with $ as mentioned
    here
    document.setDocumentAccount(objfactory.createDocumentDetailsDocumentAccount("fin$/tax$/import$"));
    document.setDocumentTitle(objfactory.createDocumentDetailsDocumentTitle("VS"));
    document.setContentType(objfactory.createDocumentDetailsContentType("plain/text"));

    try {

        // Provide location of bulk import data file in prescribed format
        byte[] content =
        org.apache.commons.io.FileUtils.readFileToByteArray(new File("/home/user1/import_data.txt"));

        //System.out.println("File content:" + new String(content, "UTF-8"));
        document.setContent(objfactory.createDocumentDetailsContent(content));

    } catch (IOException e) {
        System.out.println(e.getMessage());
    }
}

```

```
}
catch(Exception e) {
    System.out.println("Exception: "+e.getMessage());
}

try {
    response = fndManageImportExportFilesService.uploadFiletoUCM(document);
    System.out.println("Response: " + response);

} catch (ServiceException e) {
    System.out.println(e.getMessage());
}

return response;
}

static void invokeUserProfileValuesDataLoader (FndManageImportExportFilesService
fndManageImportExportFilesService,
Long id) {
    String response;
    try {
        response = fndManageImportExportFilesService.processUserProfileValuesFile(id);
        System.out.println("Response: " + response);
    } catch (ServiceException e) {
        System.out.println(e.getMessage());
    }
}
}
```

Note: Wherever applicable, replace the values referring to the profile values with those of the lookups or flexfields value sets.

8. Save the generated output as a JAVA file and name it **FndManagelImportExportFilesServiceSoapHttpPortClient.java**.
9. Use the JAVA file to build a JAR file, and name it **FndManagelImportExportClient.jar**.
10. Use the following command to run the web service:

```
java -cp ./FndManageImportExportProxy.jar:./ws.api_1.1.0.0.jar:./FndManageImportExportClient.jar
FndManageImportExportFilesServiceSoapHttpPortClient
```

Here's a sample program that's a web service client for the asynchronous method `deployFlexAsync()`. This client program starts callback client and does the asynchronous call. The required callback web service starts at the line no 58.

```
Endpoint e = Endpoint.publish(callbackServiceAddress, new ApplicationsCoreSetupServiceResponseImpl());
```

The callback web service will still be in Running state after the client program execution completes and you need to close it manually. Alternatively, you can also comment the previous line here and run it in a separate client program.

```
package com.ws.client;

import com.sun.xml.ws.api.addressing.AddressingVersion;
import com.sun.xml.ws.api.addressing.WSEndpointReference;
import com.sun.xml.ws.developer.WSBindingProvider;
import com.sun.xml.ws.message.StringHeader;

import com.ws.client.callback.ApplicationsCoreSetupServiceResponseImpl;
import com.ws.client.types.DeployFlexAsyncResponse;

import java.util.Map;
import java.util.UUID;

import javax.xml.ws.Endpoint;
import javax.xml.ws.Response;
```

```
import javax.xml.ws.WebServiceRef;

import oracle.webservices.ClientConstants;

import weblogic.wsee.jws.jaxws.owsm.SecurityPolicyFeature;
// !THE CHANGES MADE TO THIS FILE WILL BE DESTROYED IF REGENERATED!
// This source file is generated by Oracle tools
// Contents may be subject to change
// For reporting problems, use the following
// Version = Oracle WebServices (11.1.1.0.0, build 150302.2135.1.30348)

public class ApplicationsCoreSetupServiceSoapHttpPortClient
{
    @WebServiceRef
    private static ApplicationsCoreSetupService_Service applicationsCoreSetupService_Service;

    private static final AddressingVersion WS_ADDR_VER = AddressingVersion.W3C;

    public static void main(String [] args) throws InterruptedException {
        applicationsCoreSetupService_Service = new ApplicationsCoreSetupService_Service();
        SecurityPolicyFeature[] features = new SecurityPolicyFeature[]
        { new SecurityPolicyFeature("policy:oracle/wss_username_token_client_policy") };

        ApplicationsCoreSetupService applicationsCoreSetupService =
        applicationsCoreSetupService_Service.getApplicationsCoreSetupServiceSoapHttpPort(features);

        // Get the request context to set the outgoing addressing properties

        WSBindingProvider wsbp = (WSBindingProvider)applicationsCoreSetupService;
        Map<String, Object> requestContext = wsbp.getRequestContext();

        requestContext.put(ClientConstants.WSSEC_KEYSTORE_TYPE, "jks");
        requestContext.put(ClientConstants.WSSEC_KEYSTORE_LOCATION,
        "/scratch/vgarikip/view_storage/work/keys/mycompclient-keystore.jks");
        requestContext.put(ClientConstants.WSSEC_KEYSTORE_PASSWORD,
        "mypassword1");
        requestContext.put(ClientConstants.WSSEC_RECIPIENT_KEY_ALIAS,
        "cdmkey");
        requestContext.put(WSBindingProvider.USERNAME_PROPERTY,
        "app_impl_consultant");
        requestContext.put(WSBindingProvider.PASSWORD_PROPERTY, "mypassword1");

        String callbackServiceAddress = "http://<server>:<port>/TestAsyncMani-Project1-context-root/
        ApplicationsCoreSetupServiceResponseImplPort";
        Endpoint e = Endpoint.publish(callbackServiceAddress, new ApplicationsCoreSetupServiceResponseImpl());

        WSEndpointReference replyTo = new WSEndpointReference(callbackServiceAddress, WS_ADDR_VER);
        String uuid = "uuid:" + UUID.randomUUID();

        wsbp.setOutboundHeaders( new StringHeader(WS_ADDR_VER.messageIDTag, uuid),
        replyTo.createHeader(WS_ADDR_VER.replyToTag));

        applicationsCoreSetupService.deployFlexAsync("PER_CITIZENSHIPS_DFF", "DFF",
        false); //.deployPatchedFlexAsync(mode, pCustomizationId, pCustomizationSetLoc);

        System.out.println("####END OF WS CALL");

        Thread.sleep(10000);

        // Add your code to call the desired methods.
    }
}
```

```
}
```

Example callback web service start utility if you comment line no 58 in the previous program:

```
package com.ws.client;

import com.ws.client.callback.ApplicationsCoreSetupServiceResponseImpl;
import javax.xml.ws.Endpoint;

public class RunCallbackServtest {
    public RunCallbackServtest() {
        super();
    }

    public static void main(String[] args) throws InterruptedException {
        RunCallbackServtest runCallbackServtest = new RunCallbackServtest();
        runCallbackServtest.runServ();
    }

    private void runServ() throws InterruptedException {

        System.out.println("$$$$$ BEFORE Server Start #####");
        String callbackServiceAddress = "http://<server>:<port>/TestAsyncMani-Project1-context-root/
ApplicationsCoreSetupServiceResponseImplPort";
        Endpoint e = Endpoint.publish(callbackServiceAddress, new ApplicationsCoreSetupServiceResponseImpl());

        System.out.println("$$$$$ AFTER Server Start #####");

    }
}
```

Define Lookups

Overview of Lookups

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.

The following table contains an example of a lookup type for marital status (MAR_STATUS) that has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Code	Meaning	Tag
M	Married	Not applicable

Lookup Code	Meaning	Tag
S	Single	Not applicable
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
- Configuration 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.

Configuration Level

The configuration 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 configuration 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 predefined lookup codes can't be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The configuration levels are user, extensible, and system. The following table shows the lookup management tasks permitted at each configuration level.

Permitted Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No

Permitted Task	User	Extensible	System
Updating start date, end date, and enabling the lookup code	Yes	Yes, only if the code isn't predefined data	No
Deleting codes	Yes	Yes, only if the code isn't 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 configuration level must be system or extensible to prevent deletion.

Once the configuration level is set for a lookup type, it can't be modified. The configuration level for newly created lookup types is by default set at the User level.

Access to the REST Resources

Users can retrieve information about lookups using the following REST resources:

- standardLookupsLOV
- commonLookupsLOV
- setEnabledLookupsLOV
- genericLookupsLOV

However, you can control whether a lookup is a part of the LOV or not. On the UI, for each lookup you can specify the **REST Access Secured** value that in turn determines whether it's included in the response or not. These values are:

- Anonymous: Lookup is available to a user having anonymous role or authenticated role.
- Authenticated: Lookup is available to a user having only the authenticated role.
- Secure: Lookup isn't available to users as part of the generic resource. To make it available securely, you must create a specific resource, assign it to a role, and assign that role to select users.

For all lookups, the default value is set to **Secure**. So, if you want to make the lookup available to users through any of those resources, you must change the value to Authenticated or Anonymous, depending on who needs to access that information.

Standard, Common, and Set-Enabled Lookups

The following table shows the available types of lookups.

Lookup Type	Description
Standard	Lists the available codes and translated meanings.
Set-enabled	Associates a reference data set with the lookup codes.

Lookup Type	Description
Common	Legacy lookups or lookups that have attributes.

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. These can also be lookups having attribute columns. 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 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 setdeterminant

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.

To view the predefined lookups and their lookup codes, use the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-Enabled Lookups

Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the permitted language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

Note: You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Related Topics

- [Example of a Set-Enabled Lookup](#)
- [What's the difference between a lookup type and a value set](#)
- [Example of a Standard Lookup](#)
- [How can I access predefined lookups](#)
- [Enter or Edit Translated Text](#)

Example of a Standard Lookup

Creating a new standard lookup involves creating or selecting a lookup type containing the lookup code. The task also involves determining appropriate values for the lookup codes and their meanings. You can only create or edit lookup codes for a particular lookup type if its configuration level supports it.

Creating a Lookup Type Called COLORS

Your enterprise needs a list of values to be used as different statuses on a process. Each status is indicated using a color. Therefore, you create a lookup type called COLORS. The following table lists a mapping between the lookup type parameters and the actual values assigned to those parameters to create the required list of values.

Lookup type parameters	Value
Lookup type name	COLORS
Meaning	Status
Description	Status by color
Module	Oracle Fusion Middleware Extensions for Oracle Application

After you define the lookup type, you need to define the lookup codes and their related details. The following table lists the lookup codes you define for the COLORS lookup type.

Lookup Code	Meaning	Enabled	Display Sequence
BLUE	Urgent	No	4
RED	Stop	Yes	1
GREEN	Proceed	Yes	3

Lookup Code	Meaning	Enabled	Display Sequence
YELLOW	Check	Yes	2

The Resulting Data Entry List of Values

Only the enabled lookup codes appear in the list of values for the COLORS lookup type. You must select one of them to complete the activity.

The following table lists the meanings and the codes that were enabled. They appear in the order of the defined display sequence.

Meaning	Lookup Code
Stop	RED
Check	YELLOW
Proceed	GREEN

The BLUE lookup code wasn't enabled and doesn't appear in the list of values. The display sequence of values in the list of values is alphabetic, unless you enter a number manually to determine the order of appearance. Number 1 indicates the first value that appears in the list. Only lookups that are enabled and active between start and end dates are visible.

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. The following table contains an example, where the lookup code is stored in the Status column of the transaction table.

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 doesn't affect transaction records in which that code is stored. Data querying and reporting have access to disabled lookup codes in transaction tables.

Related Topics

- [What's a lookup tag used for](#)
- [What's the difference between a lookup type and a value set](#)
- [Why can't I see my lookup types](#)
- [How can I edit lookups](#)

Example of a Set-Enabled Lookup

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. You can only create or edit lookup codes for a particular lookup type if its configuration 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. Use the Manage Set Assignments task to define and manage reference data set assignments.

Selecting a Reference Group for a Set-Enabled Lookup Type

Specify a reference group for a set-enabled lookup type to 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. For example, there are two references data sets - one for the US and the other for EU. If a COLORS lookup type contains RED, YELLOW, ORANGE, and GREEN lookup codes, you can enable one RED lookup code from the US reference data set and another RED lookup from the EU reference data, each lookup code having different meanings.

The following table elaborates the example, how these two reference data sets (US and EU) contain one lookup code that's common, but each differing in its lookup meaning.

Reference Data Set	Lookup Code	Lookup Meaning
US	RED	Red
US	YELLOW	Yellow
US	GREEN	Green
EU	RED	Rouge
EU	ORANGE	Orange

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 the example.

In another example in the following table, a lookup type called HOLD_REASON provides a list of reasons for putting a contract renewal on hold. 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

Referring to the example in the table, when end-users place a contract on hold in the US business unit, the three reason codes in the US set are available. When placing a contract on hold in the China business unit, the two codes in the China set are available.

Related Topics

- [Example of a Standard Lookup](#)

Import Lookups

On each page pertaining to the tasks of managing the Standard, Common, and Set Enabled lookups, use the Import option to import the lookup type and lookup code information.

Prerequisite

The separate files containing the lookup types and lookup codes are already available in the document repository of Oracle WebCenter Content.

Importing Lookups

To import lookups:

1. In the Setup and Maintenance work area, go to the Manage Standard Lookups task. Depending on the lookup you want to import, you may select the other lookup tasks.
2. In Search Results, from the Actions menu, select **Import**.

The Import Lookups dialog box appears.

3. Select the WebCenter Content account to which the files were uploaded.

4. Enter the names of the separate files containing the lookup type and lookup code information. The names here must match with the names of the files uploaded to the selected account.
5. Click **Upload**. The lookup details are imported.

Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics

- [File Format for Importing Lookups](#)
- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)

File Format for Importing Lookups

To import lookups into an application, you create separate text files containing the lookup types and lookup codes and upload them to the Oracle WebCenter Content document repository. The files must follow a specific format, as described here. After the files are in the document repository, you can then import the lookup types and lookup codes into the application following the instructions in the Importing Lookups: Procedure topic.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe (|) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.

The following sections contain details about the specific lookup types and codes.

Prerequisite

You must have worked with lookups in Oracle Cloud applications.

Standard and Common Lookups

The lookup types and codes are similar for standard and common lookups. To create a file containing the lookup types, include the following headers:

- **LookupType:** The lookup type.
- **Meaning:** The display name of the lookup type.
- **Description:** The description of the lookup type. This header is optional.
- **ModuleType:** The module with which the lookup type is associated.
- **ModuleKey:** The module code.

Here's a sample file that contains the header values at the beginning of the file, followed by line entries of the two lookup types that are to be imported. For importing several lookup types, add more line entries in a similar format.

```
LookupType|Meaning|Description|ModuleType|ModuleKey
AFLOG_22APR_1|Log1|AFLOG_desc_1|APPLICATION|FND
PROD_22APR_2|Product1|PROD_desc_2|APPLICATION|FND
```

To create a file containing the lookup codes, include the following headers.

- Required headers:

- **LookupType:** The lookup type.
- **LookupCode:** The lookup code associated with the lookup type.
- **DisplaySequence:** The sequence position at which the lookup code appears in the list of values.
- **EnabledFlag:** Indicates the status of the lookup code, whether it's enabled for display or not.
- **Meaning:** The display name of the lookup code.
- **Optional headers:**
 - **StartDateActive:** Beginning of the date range during which the lookup code is active and visible on the page. The format is dd/M/yyyy.
 - **EndDateActive:** End of the date range during which the lookup code is active and visible on the page. The format is dd/M/yyyy.
 - **Description:** Description of the lookup code.
 - **Tag:** Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.
 - **Seg:** The name of the API used for a global segment defined for the descriptive flexfield associated with the lookup.
 - **CONTEXT_ATTRIBUTE:** The context value specified in the CSV file for a particular descriptive flexfield.
 - **ctxSeg:** The name of the API for a context sensitive segment defined for a context attribute.

Here's a sample file that contains two lookup codes:

```
LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag|Seg|
CONTEXT_ATTRIBUTE|ctxSeg
TASK_22APR_1|Code1_1|1|Y|25/12/2014|25/5/2015|TASK_22apr_1|Task_desc_1|Tag1_1|testSeg1|TEST_CTX1|ctx1Seg1
TASK_22APR_1|Code1_2|2|N|25/1/2014|25/11/2015|TASK_22apr_2|Task_desc_2|Tag1_2|testSeg1|TEST_CTX1|ctx1Seg1
TASK_22APR_2|code2_1|3|N|25/12/2012|25/7/2015|TASK_22qpr_2_1|Task_desc_2|tag2_1|testSeg2|TEST_CTX2|ctx2Seg2
TASK_22APR_2|code2_2|3|Y|25/12/2012|25/7/2015|TASK_22qpr_2_2|Task_desc_2_2|tag2_2|testSeg2|TEST_CTX2|
ctx2Seg2
```

Set Enabled Lookups

To create a file containing the set enabled lookup types, include the following headers:

- **LookupType:** The lookup type.
- **Meaning:** The display name of the lookup type.
- **Description:** The description of the lookup type. This header is optional.
- **ModuleType:** The module with which the lookup type is associated.
- **ModuleKey:** The module code.
- **ReferenceGroupName:** Name of the reference group that contains the reference data set.

Here's a sample that contains two set enabled lookup types:

```
LookupType|Meaning|Description|ModuleType|ModuleKey|ReferenceGroupName
CODE_22APR_1|CODE_22apr_1|Code_desc_1|APPLICATION|FND|BU_APAC
CODE_22APR_2|CODE_22qpr_2|Code_desc_2|APPLICATION|FND|BU_APAC
```

To create a file containing the set enabled lookup codes, include the following headers.

- Required headers:
 - **LookupType**: The lookup type.
 - **LookupCode**: The lookup code associated with the lookup type.
 - **DisplaySequence**: The sequence position at which the lookup code appears in the list of values.
 - **EnabledFlag**: Indicates the status of the lookup code, whether it's enabled for display or not.
 - **Meaning**: The display name of the lookup code.
 - **SetName**: Name of the reference data set.
- Optional headers:
 - **StartDateActive**: Beginning of the date range during which the lookup code is active and visible on the page. The format is dd/M/yyyy.
 - **EndDateActive**: End of the date range during which the lookup code is active and visible on the page. The format is dd/M/yyyy.
 - **Description**: Description of the lookup code.
 - **Tag**: Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.

Here's a sample file that contains the header values at the beginning and lists four set enabled lookup codes to be imported. For importing several lookup codes, add more entries in the same format.

```
LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag|
SetName
DATA_22APR_1|Code1_1|1|Y|25/12/2014|25/5/2015|DATA_22apr_1|Data_desc_1|Tag1_1|TEST SET CODE 2
DATA_22APR_1|Code1_2|2|N|25/1/2014|25/11/2015|DATA_22apr_2|Data_desc_2|Tag1_2|TEST SET CODE 3
DATA_22APR_2|code2_1|3|N|25/12/2012|25/7/2015|DATA_22qpr_2_1|Data_desc_2|tag2_1|TEST SET CODE 2
DATA_22APR_2|code2_2|3|Y|25/12/2012|25/7/2015|DATA_22qpr_2_2|Data_desc_2_2|tag2_2|TEST SET_ERR_CODE_Z
```

Related Topics

- [Overview of Lookups](#)
- [Overview of Files for Import and Export](#)
- [Guidelines for File Import and Export](#)

FAQs for Define Lookups

How can I edit lookups?

On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookup types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they're central to an application. However, lookup types defined for a specific application are managed using the task for that application.

What's the difference between a lookup type and a value set?

A lookup type consists of lookups that are static values in a list of values. Lookup code validation is a one to one match.

A table-validated value set may consist of values that are validated through a SQL statement, which allows the list of values to be dynamic. The following table brings out the differences between a lookup type and a value set.

Tip: You can define a table-validated value set on any table, including the lookups table. Thus, you can change a lookup type 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 the list is table-validated
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	Validation 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	Both administrators and end-users manage these, except system lookups or predefined lookups at the system configuration level, which can't be modified.	Usually administrators maintain these, except some product flexfield codes, such as GL for Oracle Fusion General Ledger that the end-users maintain.

Both lookup types and value sets are used to create lists of values from which users select values.

A lookup type can't use a value from a value set. However, value sets can use standard, common, or set-enabled lookups.

What's a lookup tag used for?

A tag is an additional label attached to the lookup. Tags are user defined and can be grouped depending on the user's requirement to make search convenient and effective.

The same tag may be used across lookup categories. In such cases, tags are used as a refined search criterion to filter information across several groups and get the search result.

How can I search for a specific lookup code?

Use the Query By Example functionality to sort through hundreds of lookup codes for a lookup type, and display a specific lookup code. Enter the first few characters of the lookup code value in any of the relevant fields to filter the records.

Note: The search functionality is case sensitive.

Related Topics

- [Use Query By Example](#)

Manage Messages

Messages

Messages provide users with information about business or application errors or warnings.

Typically, messages inform the users about the following:

- Missing or incorrect data
- Status of an application, page, or a business object
- Status of an ongoing process
- Result of a user action

Besides notifying users about the problem, messages provide guidance to users on taking corrective action. Messages also warn users about the consequences of a certain action.

Oracle provides a set of predefined messages that are stored in a message dictionary. You can create additional messages or modify the existing ones using the Manage Messages task in the Setup and Maintenance work area.

Note: Don't delete predefined messages unless you're sure that they aren't used anywhere.

Message Dictionary

The message dictionary stores messages that the application requires at run time. Messages are predefined for specific applications and modules, but a few are common messages that can be used in any application or module.

When you create messages, use the message text and the following components to cover additional details addressing users and help desk personnel:

- **User Details:** A detailed explanation of the message short text meant for users.
- **Administrator Details:** Details of the identified problem meant for the help desk personnel. The end users don't see this text.
- **Cause:** An end-user version of the cause of error.
- **User Action:** Instructions to users for addressing the identified problem. Where there is no guidance for end users, they must approach the help desk.
- **Administrator Action:** Corrective action that help desk personnel must take to correct the problem. This information isn't available to the end users.

Related Topics

- [Message Types](#)
- [Create and Edit Messages](#)

Message Types

All messages must be associated with a message type. You can select the message type based on the message severity.

The available message types are:

- Error
- Warning
- Information
- UI String

Error Messages

Use the Error message to inform users about, for example, entering incorrect data or performing actions that trigger validation. Error messages also inform users how to correct the situation so that they can continue with their task.

For example: You can't specify a task without specifying the project.

Error messages also tell users about any serious problem with the application or process, and when they must seek assistance from the help desk. Some error messages trigger incidents or logs and have a mechanism to notify the help desk automatically.

Warning Messages

Use the Warning message type to inform users about an application condition or a situation that might require their decision before they can continue.

Warning messages:

- Describe the reason for the warning and potential consequence of the selected or intended user action.
- Can be either a question or a statement.

For example: You delete the primary user. Do you want to continue?

The message is usually followed by Yes and No buttons.

Information Messages

The Information message type tells users about changes in the application, a page, or a business object. These messages aren't triggered by users, and they don't have to take any immediate action in response.

For example: No events have been started or processed for this employee.

Use the Information message type to communicate information that's neither an error nor a warning.

UI String Messages

Use the UI string message type to store shorter messages such as UI prompts, titles, or translated text, in the message dictionary.

Related Topics

- [Message Groups](#)

Message Groups

You can group messages by severity to internally define logging and classifying incident policies. You can group by category based on the functionality or program.

Category and severity values don't appear in logging entries, incidents, or on the UI.

Note: The values in both options are predefined lookups but you can modify them. However, the maximum size of this field is 30 characters.

To group the messages, in the Setup and Maintenance work area, use the **Manage Messages** task.

Group by Category

Use this option to group messages that relate to one functionality, such as a scheduled process, together into one category. Select one of the predefined categories to enable automatic incident creation when the error message activates. By default, the following categories are available:

- **Product:** Issues related to product functionality, setup, and maintenance. Such messages are typically intended for functional administrators or product super users.
- **System:** Issues concerning the application, database, technology stack, and so on. Such messages are typically intended for technical users such as application administrators or database administrators.
- **Security:** Issues concerning permissions, access, compliance, passwords, and so on. Such messages are typically intended for security administrators.

Group by Severity

This grouping attribute is very specific and indicates the severity of the message. You must set the severity to High to enable automatic incident creation for the message. The following are predefined values, but you can add more if required.

- **High:** Used for serious messages that completely stop the progress of an important business process or affect a large user community, and require help desk's attention. Use this option to enable implicit incident creation for the message.
- **Medium:** Used for less severe and more isolated messages.
- **Low:** Used when you can't determine whether the message has a negative impact on end users or business processes.

Logging and Incidents

Select the **Logging Enabled** check box to include the UI message in the stored log file. To enable automatic incident creation when the error message appears on the UI, set the severity to High.

Incidents collect information about the application errors for which users may require assistance from help desk. An incident contains information about the state of the application at the time the problem occurred. Help desk can use the information in the incidents to resolve the problems.

Related Topics

- [Overview of Lookups](#)
- [What's an incident](#)
- [Run Diagnostic Tests](#)
- [Run Diagnostic Tests to Verify, Troubleshoot, and Analyze](#)

Create and Edit Messages

You can create messages or edit the predefined messages stored in the message dictionary.

Creating a Message

To create a message, perform the following steps:

1. In the Setup and Maintenance work area, go to the **Manage Messages** task.
2. On the Manage Messages page, click the **New** icon.
3. On the Create Message page, enter details in each section.

4. In the Message Properties section:

- a. Enter a unique message name that helps you find the messages you create and avoid name conflicts with predefined messages. Use underscore as a separator if the name contains multiple parts.
- b. Select the application and module to associate the message with.
- c. Enter a unique number that can be used as an identifier for the message. Users can quote this number when they contact the help desk for assistance.

Note: You can use any number between 10,000,000 and 10,999,999. This number range is allocated for the messages you create. At runtime, this number appears along with the application code after the message text, for example FND-2774.

- d. In the Translation Notes field, enter a description of the message indicating its use.
- e. Select the relevant message type, category, and severity.
- f. Select the **Logging Enabled** check box to create incidents or logs when messages appear on the UI.

5. In the Message Text section:

- a. In the Short Text field, provide the actual message text that appears on the page at runtime.
The short text can include tokens that are placeholders for displaying dynamic values at runtime. However, to support easy translation, keep the message length (including values of tokens) within 160 characters in American English.
- b. In the User Details field, enter information for the users to know why the message appeared. You can also include information for the users to resolve the issue themselves.
If your Short Text component has tokens that expand the text beyond the 160-character limit, move that portion of text here.
- c. In the Administrator Details field, provide a detailed technical explanation of the message. This field is only visible to the help desk.
- d. In the Cause field, provide a concise explanation of why the message appears. This text is visible to the users.
This information is optional and is only applicable to messages of type Error and Warning. However, if you mention the cause, you must mention in the User Action field the action that users must take.
- e. In the User Action field, enter the user action to guide the users with steps to respond to the message and complete the task.
- f. In the Administrator Action field, provide information that the help desk can use to resolve the problem.

6. In the Message Tokens section, define tokens that you want to use in this message.

7. Click **Save and Close**.

Editing a Message

You can edit a predefined message or a message that you created.

To edit a message, search for a message on the Manage Messages page and perform the following steps:

1. Select the existing message and click the **Edit** icon.
2. On the Edit Message page, modify the existing details according to the instructions provided in the Creating a Message procedure.

Note: Don't edit the message number for predefined messages.

3. Click **Save and Close**.

While creating and editing messages, you can translate the message details to the preferred languages without changing the language session of the application. To specify the translations in all the enabled language rows, use the Translation Editor option. Once the updates are made, users can view the translated text for the specific details.

Related Topics

- [Message Types](#)
- [Message Groups](#)
- [Use of Tokens in Messages](#)
- [How can I make message components visible only to specific users](#)
- [Enter or Edit Translated Text](#)

Use of Tokens in Messages

Certain messages must display variable information at run time to help users clearly relate to the actual data and perform the required action. You can use tokens to contain variable values at run time, instead of writing a unique message for every possible situation.

Tokens are programmatic parts of message text that are placed within curly brackets when creating the message. Tokens serve as placeholders for the actual data. At run time, tokens dynamically display the actual text or value in the message, making a message specific to the situation. For example, the message "Enter an effective date that's the same as or later than {MATURITY_DATE}" contains the token {MATURITY_DATE}. At run time, instead of the token, the represented value (the actual date) appears. Thus, users see the message "Enter an effective date that's the same as or later than 25-APR-2015".

Use the Manage Messages task in the Setup and Maintenance work area to create and manage tokens. You must edit a message to define tokens for it. You can create tokens for a message and also delete them. However, you can't edit or delete the predefined tokens.

Token Definition

To define a token, you must provide the following information:

- A unique name for the token.
- The type of data that the token replaces at run time. Available types are Date, Number, or Text.
- A description about what the token represents at run time.

Guidelines

Follow these general guidelines while defining tokens:

- Use curly brackets and all uppercase letters for the token names.
- Use underscore as a separator for a name containing two words or more.
- Don't use a space between words.

The following table contains specific guidelines for each token data type.

Data Type	Guideline
Text	Use tokens for substituting any variable text element that qualifies as a noun.
Number	Plan carefully while using tokens for numbers especially, where a token could refer to either a singular or a plural number. You can use tokens for numbers representing an order, customer, or any other business object bearing a numeric value.
Date	Clearly define the context of the date, such as the start date, or end date, or a date range.

Common Messages

Message names that begin with FND_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Applications Cloud. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

Creating and Editing Common Messages

You can create common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

Note: Don't use FND_CMN as the prefix for the messages you create because all the predefined common messages begin with it.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Applications Cloud implementation.

How can I make message components visible only to specific users?

Use the Manage Administrator Profile Values task to determine the visibility of the message components. For the **Message Mode** profile option, set the profile value to either User or Administrator. Based on the set value, the administrator or user actions and details appear for the intended audience.

However, the message components are visible to the audience based on their predefined access rights. Anyone having a user level access can't view the Administrator message components. If you set the profile value to the administrators of a specific product, the message components are visible only to that specific audience.

Note: If you don't set any value to the profile option, the visibility of the message component is determined by the default profile option settings.

Related Topics

- [Set Profile Option Values](#)

Define Document Sequences

Document Sequences

You can assign a document sequence number to each business document or business event to uniquely identify it. For example, you can assign a document sequence number to an invoice that gets generated in response to a purchase order. However, you must enable the document sequencing option for that business document or event to start assigning the number. A document sequence number is useful in tracking completed or failed transactions.

You can set up document sequencing in three different modes:

- Automatic
- Manual
- Gapless

Note: Plan your document sequencing carefully before you start applying sequence numbers. Avoid switching to a different mode after you saved your work on the Manage Document Sequences and Manage Document Sequence Categories pages.

Automatic Sequencing

Automatic document sequencing assigns a unique number to each document automatically when the document is generated. That unique number is stored in the database. You can set an initial value for the numbering sequence. Thereafter, the numbering is sequential by date and time of creation. If you don't provide an initial value, the application sets the default initial value as 1.

Manual Sequencing

Use the manual sequencing mode to assign a unique number to each document before the document is generated. In manual sequencing, the numeric ordering and completeness of a transaction isn't automatically enforced. As a result, users can skip or omit numbers when entering the sequence value. However, each time a user assigns a number, the application validates its uniqueness.

Gapless Sequencing

Gapless sequencing is similar to automatic sequencing. It automatically generates a unique number for each document, but does that only for successfully generated documents. Sequence numbers aren't assigned to incomplete or failed documents. As a result, the sequence is maintained for all the successfully generated documents.

Additionally, you can control the gapless document sequencing by enforcing the Transaction Date Validation option. When enabled, this option checks for the transaction date of a particular document and assigns the sequence number accordingly, to chronologically maintain the documents. The sequence numbers and the transaction dates are chronologically correlated to prevent any mismatch of a new document sequence assigned to an older document or an older document sequence assigned to a new document.

Note: Use this type of sequencing only if necessary because it may affect the performance of the application and slow down transaction processing.

Related Topics

- [Modules in Application Taxonomy](#)
- [Guidelines for Managing Document Sequences](#)

Document Sequence Categories

A document sequence category is a set of documents that share similar characteristics and that are formed into a logical group. Document sequence categories simplify the task of assigning number sequences to specific documents. Instead of assigning a number to each document, you assign a document sequence to one or more document sequence categories. The document sequence category automatically takes care of numbering the documents.

A document sequence category identifies the database table that stores documents resulting from transactions that your users enter. When you assign a sequence to a category, the sequence numbers the documents that are stored in a particular table. You must create document sequence categories to be able to manage the task of assigning document sequences.

Note: Once a document sequence category is created, you can't change the application, the category code, or the table name. Therefore, carefully consider these details and plan your document sequencing requirement before you begin working with the application.

Once you create a document sequence category, it's available for use in the **Document Sequences: Assignments** section on the Manage Document Sequences page. The **Category** field contains the name of the document sequence category. After you create a document sequence, you can assign it to a document sequence category.

Guidelines for Managing Document Sequences

Sequencing documents is an important business and legal requirement. Therefore, you must first decide the appropriate document sequence to use for a set of documents. Before you begin, here are a few prerequisites:

- Determine beforehand the mode of document sequencing, because you can't switch to other types once a sequence is in use.
- Note details such as the document sequence and document sequence category, for later reference.
- Identify if there are any restrictions or configuration prerequisites.

Note: Products that implement document sequencing have specifications about its usage. Refer to the corresponding product documentation for specific details and also to determine if there are any restrictions or configuration prerequisites.

Creating and Editing Document Sequences

You can create document sequences that are automatic, manual, or gapless, depending on the business or legal requirement. By default, the current date is considered as the start date. The sequence definition never expires if you

don't provide an end date. Among the several options used in creating and editing document sequences, the following options are functionally more important and therefore must be carefully determined:

- **Determinant Type:** Select to limit the document sequencing activity to certain documents that belong to a specific business entity, such as Ledger, Tax Registration, and so on.
- **Initial Value:** Enter a value for the first document in your sequence. This field applies only to sequences with automatic or gapless numbering types. Sequence numbers must not be more than 11 digits. If you leave this field blank, the first document is automatically assigned a value of 1. Once a document sequence is defined, you can't change this initial value.

Creating and Editing Document Sequence Categories

Document sequence categories are defined to make it easy to assign document sequence definitions to a group of documents instead of to individual documents. Each document sequence category is mapped to a specific table, where the documents belonging to that category are stored. When specifying the table, you must consider the following points:

- When the sequential numbering feature checks for completeness or generates a report, it locates the category's documents in the table.
- Select only those tables that belong to the application associated with the category.
- Once a category is defined, you can't switch to another table.

Assigning Document Sequences

Identify the documents to be numbered before assigning them a document sequence. For each document sequence, there can be only one active assignment to a document sequence category, and a determinant value (if applicable). As part of the assignment, specify whether the document is created automatically (for example, due to a batch process, or manually through a form). If you don't specify an end date, the assignment continues to remain active throughout the process cycle. If a determinant type was specified for the document sequence, then enter a specific determinant value related to the determinant type.

At run time, when users create documents, the document sequence to be assigned is determined based on the following:

- An active assignment that matches the correct combination of category
- The numbering method
- The date range containing the transaction date

Auditing Document Sequences

You can audit document sequences, if required, to provide an audit trail of the document sequences used in a specific product. However, before enabling the audit functionality for a document sequence, you must have created an audit table for the specific document sequence, using appropriate details. Enabling the audit functionality is permitted only for newly created document sequences. You can't audit document sequences that are already in use by a specific product.

For more information about defining a document sequence audit table, see the Oracle Fusion Applications Developer's Guide.

Related Topics

- [Guidelines for Managing Modules in Application Taxonomy](#)

Define Profile Options

Overview of Profile Options

Profile options are a set of preferences that you use to centrally manage the user interface settings and application behavior.

You can use the profile options to manage, for example:

- User preferences to specify language or currency.
- Configuration choices to change the user interface skin or appearance of fonts.
- Processing options to determine how much of an activity needs to be logged and at which level.

In the Setup and Maintenance work area, go to these tasks:

- Manage Profile Options
- Manage Profile Categories
- Manage Administrator Profile Values

This table explains what each task is used for.

Task	Purpose
Manage Profile Options	Create new profile options or modify existing profile options, except some which are predefined and restricted to prevent any modifications.
Manage Profile Categories	Group the profile options based on their functional similarities.
Manage Administrator Profile Values	Set the profile values for the enabled profile options to control application behavior.

Related Topics

- [Create and Edit Profile Options](#)
- [Set Profile Option Values](#)
- [Profile Categories](#)
- [How can I access predefined profile options](#)

Hierarchy in Profile Levels

The hierarchy in profile levels determines the context for making a profile option effective.

You can enable a profile option at the following levels:

- Site level (lowest): The entire site of deployment
- User level (highest): A specific user

After you create or edit a profile option on the Manage Profile Options page, you must enable it. You can enable it at multiple levels. The setting at the highest enabled level takes precedence over the lower levels. User level is the highest in the hierarchy and always takes precedence over the settings at the site level.

On the Manage Administrative Profile Values page, set the profile value at any of the enabled levels of the profile option.

Example of Profile Option Hierarchy

The following table shows an example of setting the currency profile option at different levels.

Profile Level	Hierarchy	Currency
Site	Lowest	Euro
User	Highest	US Dollar

For this example, there are two users, John and Lisa. For John, the user-level profile value currency is set to US Dollar. If the Currency profile option is enabled only at the site level, both John and Lisa would see Euro as the default currency. If the profile option is enabled at the user level, users having a different currency set as their currency profile value would see only that currency. In this case, John would see US Dollar as the default currency. If the Currency profile option is enabled at the user level and there is no user level currency defined, the site level setting takes effect. When both site and user levels are enabled, the value for the user level takes precedence over the site level value.

Set Profile Option Values

Each profile option contains specific values that determine how it affects the application. You can add or modify the values for each profile option. Select or enter the value for one or more of the available levels (site, product, and user) so that each setting takes effect at the intended level.

Setting the Profile Value

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. On the Manage Administrator Profile Values page, search for and select the profile option.

3. In the Profile Values section, click **Add**. A new row is added for you to specify the following conditions:
 - Profile Level: Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select **Site**.
 - Product Name: If you select **Product** as the profile level, select a product and specify the associated profile value.
 - User Name: If you select **User** as the profile level, select the user name and specify the associated profile value.
 - Profile Value: Select or enter the value corresponding to the selected profile level.

Note: For an existing entry, you can modify only the profile value.

4. Repeat step 3 to add more rows and set the profile values.
5. Click **Save and Close**.

Note: Changes in the profile values take effect for a user on the next sign in.

Import Profile Values

Use the Import option on the Manage Administrator Profile Values page to import profile values in bulk and associate them with a profile option.

Importing Profile Values

Before you begin, make sure that the file containing the profile values is available in the document repository of Oracle WebCenter Content.

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. In the Search: Profile Options section, search for the profile option for which you want to import the values.
3. In the Search Results: Profile Options section, select the profile option.
4. In the <Profile Option>: Profile Values section, click **Actions > Import**.
5. On the Import User Profile Values window, select the WebCenter Content account to which the file was uploaded.
6. Enter the name of the file containing the profile values. The name here must match with the name of the file uploaded to the selected account.
7. Click **Upload**. The profile values are imported.

Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics

- [File Format for Importing Profile Values](#)
- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)
- [How can I bulk update user preferences](#)

File Format for Importing Profile Values

To import profile option values into the application, you create a text file with the values and upload the file to the Oracle WebCenter Content document repository. The file must follow a specific format, as described here. After the file is in the document repository, you can then import the profile values into the application following the instructions in the Importing Profile Option Values: Procedure topic.

To create a file containing the profile values, include the following headers:

- **ProfileOptionCode:** The profile option code.
- **LevelName:** Must contain the value (Site, Product, or User).
- **UserName:** Must correspond to the registered user name in the application. Don't provide any other shortened or coded name of the user.
- **ProfileOptionValue:** The profile value to be imported.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe (|) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.

Here's a sample file that contains the header values at the beginning of the file, followed by line entries of the two profile values that are to be imported. For importing several profile values, add more line entries in a similar format.

```
ProfileOptionCode|LevelName|UserName|ProfileOptionValue
AFLOG_BUFFER_MODE|USER|APP_IMPL_CONSULTANT|TEST
AFLOG_LEVEL|USER|APPLICATION_DEVELOPER|FINEST
```

Related Topics

- [Overview of Profile Options](#)
- [Overview of Files for Import and Export](#)
- [Guidelines for File Import and Export](#)

Create and Edit Profile Options

Use profile options to manage user preferences and control the general function of applications. For example, you can control user preferences involving language, date, time, currency, and other similar general settings.

You can create a profile option and also determine the level at which that profile option takes effect. You can also define the profile values for the profile option. The profile values appear on the Manage Administrator Profile Values page when you select the profile option.

Creating a Profile Option

1. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
2. On the page, click **Actions > New**.
3. On the Create Profile Option page, fill all the fields with relevant details with specific attention to the following:

- o Use the SQL Validation field to provide an SQL statement that displays the permissible profile values to be used. Using an SQL statement, you can select the values from another table and display them as a list of values.

For example, to display the values **Yes** and **No** from a lookup table, you can use the following SQL statement:

```
select MEANING, LOOKUP_CODE from FND_LOOKUPS where LOOKUP_TYPE='YES_NO'
```

As a result, on the **Manage Administrator Profile Values** page, the profile values Yes and No are available for selection for that profile option.

- o You can specify a date range to keep the profile option active during that period. Beyond the specified duration, the profile option automatically becomes inactive. If you no longer require the profile option, you must manually delete it from the **Manage Profile Options** page.
4. Click **Save and Close**.
 5. On the Manage Profile Options page, search for the newly created profile option and from the results, select it.
 6. In the Profile Option Levels section, do the following:
 - a. In **Enabled**, select the levels at which you want to enable the profile option.

Note: You can enable a profile option at multiple levels, but a higher-level profile value overrides a lower-level value. Therefore, enable them only at the required levels.

 - b. In **Updatable**, select the profile level at which you want implementors to have update privileges. Leave the check box deselected if you don't want the implementors to modify the profile values (they appear in read-only mode).
 7. Click **Save and Close**.

To edit a profile option that you created, search for it and edit the necessary details.

Note: While creating and editing profile options and profile categories, you can translate the details to the preferred languages without changing the language session of the application. To specify the translations in all the enabled language rows, use the Translation Editor option. Once the updates are made, users can view the translated text for the specific details.

Related Topics

- [Hierarchy in Profile Levels](#)
- [Set Profile Option Values](#)
- [Enter or Edit Translated Text](#)

Profile Categories

You can create profile categories to group profile options based on their functional similarities and their use. In the Setup and Maintenance work area, use the **Manage Profile Categories** task.

Profile categories help administrators or implementors in retrieving profile options using a search criterion on the Manage Administrator Profile Values page.

Managing Profile Categories

Consider the following options while managing profile categories:

- Create profile categories and add existing profile options to them
- Add newly created profile options to existing user-defined profile categories

Note: While you can add a profile option to more than one category, some profile categories are predefined and restricted from any modifications. So, you can't edit them or add profile options to them.

Setting Display Sequence for the Profile Options

You must set the display sequence for each profile option that you add to a profile category. Display sequence determines the order in which the profile options appear in a search result, based on the profile category. You can set the sequence beginning with zero or one for the first profile option to display, and proceed sequentially to assign the values to the remaining profile options.

The following table demonstrates the effect of the display sequence on the profile options when they're retrieved as search results.

Profile Category	Included Profile Option - Assigned Display Sequence	Display Sequence of Profile Options in the Search Results
Attachments	• Attachment File Directory - 2 • Indicate Attachments - 1	1. Indicate Attachments 2. Attachment File Directory

Related Topics

- [Set Profile Option Values](#)

FAQs for Profile Options

How can I access predefined profile options?

Search for predefined profile options using the Manage Profile Options task.

1. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
2. On the page, enter any of the search parameters and click **Search**.

Tip: If you don't know the profile option code or the display name, use the **Application** or **Module** fields to filter search results.

3. Click a profile option to view its details.

How can I bulk update user preferences?

User preferences such as Language, Date Format, Time Zone are stored as profile options. You can use the import option on the Manage Administrator Profile Values task to bulk import these profile options and apply them to the user's profile.

Here are the profile options that affect user preferences, and can be imported using a text file:

- Default Currency (FND_CURRENCY)
- Default Date Format (FND_DATE_FORMAT)
- Default Decimal Separator (FND_DECIMAL_SEPARATOR)
- Display Name Language Preference (FND_DISPLAY_NAME_LANGUAGE)
- Default Language (FND_LANGUAGE)
- Default Number Format (FND_NUMBER_FORMAT)
- Default Time Format (FND_TIME_FORMAT)
- Default User Time Zone (FND_TIMEZONE)
- Default Territory (FND_TERRITORY)

Before you begin, you must prepare the text file in the prescribed format, where the top row is the header and the rest are values for the profile option. For example, if you're importing profile values for territories, create the text file in the format:

```
ProfileOptionCode|LevelName|UserName|ProfileOptionValue  
FND_TERRITORY|USER|john.doe@oracle.com|France
```

You must have uploaded the text file to Oracle WebCenter Content so that you can import it. For instructions on uploading the file, see [Overview of Files for Import and Export](#). For instructions on importing the file contents, see [Import Profile Values](#).

Related Topics

- [Import Profile Values](#)
- [Overview of Files for Import and Export](#)

Define Attachments

Attachments

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the [Oracle Fusion Applications Developer's Guide](#).

Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

All attachments are scanned for viruses before they're stored on the content management repository. If a virus is detected at the time of upload, the attachment request fails and the user is notified about it.

Security

Data security applicable to a specific business object also applies to its attachments. For example, if a user has no access to a specific expense report, then that user can't access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer's Guide.

Related Topics

- [Attachment Entities](#)
- [What's an attachment category](#)

Attachment Entities

An attachment entity is usually a database entity, for example a table or view, that represents a business object with which attachments can be associated. Each attachment UI must be defined with a corresponding attachment entity. Attachment entities are used only in the context of attachments and exist separately from the database entities that they're based on.

In the Setup and Maintenance work area, use the **Manage Attachment Entities** task to edit and create attachment entities. You can either use the predefined attachment entities with attachment UIs or create entities, for example when developing your own UIs.

The entity name should match the name of the table or view that represents the business object used for attachment. The name is also used in the repository folder that's automatically created to store attachments for the entity.

The data security policies associated with the database resource defined for the attachment entity apply to attachments for that entity. However, the security setting must be enabled for that entity. The database resource value must match the value in the OBJ_NAME column in the FND_OBJECTS table for the business object that the entity represents.

Related Topics

- [How Attachment Entities and Attachment Categories Work Together](#)
- [Modules in Application Taxonomy](#)
- [How Database Resources and Data Security Policies Work Together](#)

How Attachment Entities and Attachment Categories Work Together

The association between attachment entities and categories determines the use of categories for an entity. For example, categories associated with the expense report attachment entity are available in the attachment UIs for expense reports. You can configure the associations when managing either entities or categories. Between the Manage Attachment Entities and Manage Attachment Categories pages, any change in association on one page automatically reflects on the other page.

Managing Entities

In the Setup and Maintenance work area, go to the **Manage Attachment Entities** task. Determine the attachment categories that are relevant to a particular entity and assign it to those categories. Each entity must have at least one category. For a particular expense report page with attachments functionality, you can specify which category to use for the attachment. Accordingly, the data security defined for each category is applied to the attachments on that page if security is enabled.

Managing Categories

In the Setup and Maintenance work area, go to the **Manage Attachment Categories** task. If a category must be associated with multiple attachment entities, you can complete that association using this task. The association you define here reflects on the Manage Attachment Entities page for the respective entities.

Related Topics

- [What's an attachment category](#)
- [Attachment Entities](#)

Attachments Troubleshooting

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you don't have permission to add attachments.

Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.

Action	Privilege
View	Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)
Add or Update	Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)

Action	Privilege
Delete	Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users don't have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they can't create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.

Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user can't see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Related Topics

- [Attachment Entities](#)
- [How Attachment Entities and Attachment Categories Work Together](#)
- [What's an attachment category](#)

FAQs for Define Attachments

What's an attachment category?

You must use an attachment category to classify and secure an attachment. While adding attachments, you can view the available attachment categories and add the attachment to one of them. For example, attachments for an expense report can be categorized as receipts, scanned invoice images, and so on.

In the Setup and Maintenance work area, use the **Manage Attachment Categories** task. You can associate roles with categories to restrict user access and actions for an attachment entity. You can also create and manage categories for your own purpose, involving specific attachments with specific security requirements. For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Related Topics

- [How Attachment Entities and Attachment Categories Work Together](#)
- [Modules in Application Taxonomy](#)

23 Trees Setup

Overview of Trees

Trees are hierarchical data models that you can use to organize data, apply business rules, control data access, and improve performance while querying. For example, an application maintains data of an organization called Vision Corporation that has two departments: Marketing and Finance. The Finance department has two functional divisions: Receivables and Payables. You can define a tree for Vision Corporation to establish a hierarchy across its departments, and their respective functional divisions. You can use the hierarchy to manage data at various levels of the organization.

To work with trees, in the Setup and Maintenance work area, use any of the following tasks:

- **Manage Tree Structures:** To create and update tree structures. You must first define a tree structure to create a tree.
- **Manage Trees and Tree Versions:** To create and update trees and their versions.
- **Manage Tree Labels:** To create and update tree labels.

Tree Structures

As the name suggests, tree structures provide you the framework to organize data such that you can establish a hierarchy for use by the tree. So, similar to a template, a tree structure guides the creation of a tree.

Tree

A tree is an instance of the tree structure. The root node is the highest nodal point of a tree. Child nodes branch off from the root node. Child nodes at the same level, branching off from a common parent node, are called siblings. Leaves are details branching off from a node but not extending further down the tree hierarchy. You can create trees for multiple data sources and share them across applications.

Tree Versions

A tree by default has only one version. If required, you can create and maintain more than one editable tree version. At any point, only one tree version must be active. If you edit an existing version, it changes from active to draft. To use it again, you must set it to active. Similar to any other version control system, versions of trees are maintained to track all the changes that a tree undergoes in its life cycle.

Tree Labels

Tree labels are short names given to trees and tree structures. You can label the tree versions for better accessibility and information retrieval. When nodes are created in a tree, the existing tree labels are automatically assigned to the new tree nodes. You can use any table to store the labels and register the label data source with the tree structure.

Related Topics

- [Tree Structures](#)
- [Tree Labels](#)

Manage Tree Structures

Tree Structures

A tree structure defines the hierarchy for creating trees and prescribes rules based on which trees are created, versioned, and accessed. You can associate multiple data sources with a tree structure. A tree is an instance of this hierarchy. Every tree structure can contain one or more trees.

You can create tree structures specific to an application but you can share tree structures across applications. If you apply version control to the tree structure, it's carried over to the trees that are based on the tree structure. Each tree version contains at least one root node. Occasionally, a tree version may have more than one root node.

An administrator controls the access to tree structures through a set of rules that are periodically audited for validity.

Related Topics

- [Guidelines for Managing Tree Structures](#)
- [Tree Structure Audit Results](#)

Guidelines for Defining the Tree Structure

While creating a tree structure, you must specify important details on the Create Tree Structure: Specify Definition page. As the source of the tree structure, you may either select the predefined tree structures and proceed with the definition or create tree structures.

Tree Node Selection

The data in **Tree Node** table maps to the data in nodes of the tree structure. You must select the correct and most appropriate tree node table to define the tree structure, based on which you establish the tree hierarchy. This selection also affects the level of security that's set on a tree node and its child entities.

Tree Sharing Mode

Use the following options to determine the mode of sharing a tree structure across the applications.

- Open: Indicates that the tree is associated with all reference data sets.
- Set ID: Indicates that the tree is associated with a specific reference data set.

Modification

You can modify the predefined tree structures as well as those you create. However, modifying a predefined tree structure is restricted and permitted through additional privileges. Modification is limited to specific tree nodes and lower in the tree hierarchy.

Multiple Tree Versions

Although multiple tree versions can exist together, Oracle recommends only one version be active at any given time. However, if required, you can have more tree versions to be in the active state for the same date range. You can use this flexibility to select the tree version you want to implement.

Guidelines for Managing Tree Structures

You can create, edit, and delete tree structures. You can also change the status of a tree structure and audit the changes.

Creating and Editing Tree Structures

When you edit an active tree structure, the status of the tree structure and all associated trees and their versions changes to draft. To reuse a tree structure, create a copy of the tree without copying the associated trees and tree versions. After making changes, set the status again to active. If you delete a tree structure, all the associated trees and tree versions are automatically deleted.

For information about working with the offering-specific predefined tree structures, refer to the relevant product documentation.

Status

When you change the status of a tree structure, the status of the trees and tree versions associated with that tree structure also changes.

The following table lists the different statuses of a tree structure.

Status	Meaning
Draft	In a modified state, or not yet in use.
Active	In use, indicating that one or more trees or tree versions are created from the tree structure.
Inactive	Not in use.

Related Topics

- [Guidelines for Defining the Tree Structure](#)
- [How Trees and Data Sources Work Together](#)
- [Tree Structure Audit Results](#)

Tree Structure Audit Results

Use the tree structure audit results to verify the tree structure's correctness and data integrity. The audit results include the following details:

- The name of the validator, which is a specific validation check
- The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors

Running an Audit

Setting the status of a tree structure to active automatically triggers an audit of that tree structure. To manually trigger an audit, select Audit from the Actions menu on the Manage Tree Structures page. The Tree Structure Audit Result table shows a list of validations that ran against the selected tree structure.

Audit Validators

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.

Validator	Page	Description (what's validated)	Possible Cause for Validation Failure	Suggested Corrective Action
Restrict By Set ID	Manage Tree Structures: Specify Data Sources	If you select the Reference Data Set check box for the Restrict Tree Node List of Values Based on option, each of its data source view objects must have a reference data set attribute.	Even when the check box is selected, one or more data source view objects doesn't contain a reference data set attribute.	If reference data set restriction is required for this tree structure, include a reference data set attribute on all data sources. Otherwise, deselect the check box.
Available Label Data Sources	Manage Tree Structures: Specify Data Sources	If you select a list item from Labeling Scheme to specify a labeling scheme, the label data source view object specified for each data source must be accessible. Also, the primary keys must be valid. This restriction doesn't apply if you select None from the list.	• Any of the specified label data source view objects doesn't exist. • Any of the specified label data source view objects doesn't have primary keys. • When a label data source view object is initially defined, the database registers the primary keys for the view object. If the view object is later modified such that its primary keys no longer match the primary keys that were registered earlier, this validation fails.	• Correct the specified label data source view object. • Correct the primary keys of the specified label data source view object. • Do one of the following: ◦ Correct the primary keys in the label data source view object to match the primary keys that were earlier registered in FND_TS_DATA_SOURCE. ◦ Correct the primary keys registered in that table to match the new view object definition.

Validator	Page	Description (what's validated)	Possible Cause for Validation Failure	Suggested Corrective Action
Row Flattened Table Name	Manage Tree Structures: Specify Performance Options	You must specify a valid row flattened table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE_RF or another table.	- The specified table doesn't exist in the database. - The specified table doesn't contain the same columns as the FND_TREE_NODE_RF table.	Correct the row flattened table definition.
Available Data Sources	Add Data Source	Each data source view object specified for the tree structure must be accessible, and all its primary key attributes must be valid.	- Any of the specified data source view objects doesn't exist. - When you define a data source view object, keep the Use non-defined primary key columns check box deselected. The database automatically registers the primary keys for the view object. Select this check box if you want the database to register the primary keys you specify. However, if the registered primary keys contain any duplicates, this validation fails. - The Use non-defined primary key columns check box is selected in a data source, but the list of specified primary key columns doesn't match the primary keys defined in the corresponding data source view object. - Any common attribute that exists in both the data source view object and the tree node view object isn't of the same data type in both view objects.	- Correct the specified data source view object. - Correct the duplicate column in the registered primary keys. - Correct the primary keys of the specified data source view object. - Correct any mismatch in data types.
Column Flattened Table Name	Manage Tree Structures: Specify Performance Options	You must specify a valid column flattened table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE_CF or another table.	- The specified table doesn't exist in the database. - The specified table doesn't contain the same columns as the	Correct the column flattened table definition.

Validator	Page	Description (what's validated)	Possible Cause for Validation Failure	Suggested Corrective Action
			FND_TREE_NODE_CF table.	
Restrict by Date	Manage Tree Structures: Specify Data Sources	If you select the Date Range check box for the Restrict Tree Node List of Values Based on option for a tree structure, each of its data source view objects must have effective start date and end date attributes. This validation doesn't take place when the check box isn't selected.	Even when the check box is selected, one or more of its data source view objects doesn't contain effective start date and end date attributes.	If the date restriction is required for this tree structure, include the effective start date and effective end date attributes on all data sources. Otherwise, deselect the check box.
Tree Node Table Name	Manage Tree Structures: Specify Definition	You must specify a valid tree node table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE or another table.	- No table is specified in the Tree Node Table field. - The specified table doesn't exist in the database. - The specified table doesn't contain the same columns as the FND_TREE_NODE table.	Correct the tree node table definition.

Tree Nodes

Tree nodes are points of data convergence where a tree branches into levels. Nodes are the building blocks of a tree structure and are attached to tree versions. Whenever you create or edit a tree version, you need to specify its tree node. To manage tree nodes, in the Setup and Maintenance work area, go to the **Manage Trees and Tree Versions** task.

Managing Tree Nodes

You can create, modify, or delete tree nodes on the **Tree Version: Specify Nodes** page. To add a tree node, ensure that the tree structure with which the tree version is associated is mapped to a valid data source. You can also duplicate a tree node if the multiple root node feature is enabled.

Node Levels

Usually, the nodes at a particular level represent similar information. For example, in a tree that reflects the organizational hierarchy, all nodes representing divisions appear at one level and all the department nodes on another. Similarly, in a tree that organizes a user's product catalog, the nodes representing individual products might appear at one level and the nodes representing product lines on the immediate higher level.

The following node levels are in use:

- Root node: The highest node in the tree structure
- Parent node: The node that branches off into other nodes

- Child node: The node that's connected to a node higher in hierarchy (parent node)
- Sibling node: Nodes that are at the same level and belong to the same parent node
- Leaf node: Entities branching off from a node but not extending further down the tree hierarchy

Node Types

A tree node has the following node types.

- Single: Indicates that the node is a value by itself.
- Range: Indicates that the node represents a range of values and possibly could have many children. For example, a tree node representing account numbers 10000 to 99999.
- Referenced Tree: Indicates that the tree node is actually another version for the tree based on the same tree structure, which isn't physically stored in the same tree. For example, a geographic hierarchy for the United States can be referenced in a World geographic hierarchy.

How Trees and Data Sources Work Together

Data sources are the foundation of tree management. Tree structures, trees, and tree versions establish direct and real-time connectivity with the data sources. Changes to the data sources immediately reflect on the **Manage Trees and Tree Versions** page and wherever the trees are being used.

Metadata and Data Storage

Tree structures contain the metadata of the actual data and the core business rules that manifest in trees and tree versions. You can select and enable a subset of trees to fulfill a specific purpose in that application.

Access Control

Source data is mapped to tree nodes at different levels in the database. Therefore, the changes you make to the tree nodes affect the source data. Access control set on trees prevents unwanted data modifications in the database. Access control can be applied to the tree nodes or anywhere in the tree hierarchy.

Related Topics

- [Guidelines for Specifying Data Sources for Tree Structures](#)

Guidelines for Specifying Data Sources for Tree Structures

The data sources provide the items for establishing hierarchy in a tree structure. In the tree management infrastructure, these data sources are Oracle ADF business components view objects, which are defined by application development.

Labeling Schemes

Selecting a labeling scheme determines how the tree nodes are labeled. You may select a labeling scheme to assign at the data source level, at the parent node level, or keep it open for customers assignment. You may also choose not to

have any labeling scheme. However, if you decide to use any of the labeling schemes, select the following additional options, to restrict the list of values that appear in the selected tree node.

- **Allow Ragged Nodes:** To include nodes that have no child nodes, and are shorter than the remaining nodes in the entire hierarchy.
- **Allow Skip Level Nodes:** To include nodes that are at the same level but have parent nodes at different levels.

Restriction of Tree Node Values

You can decide the depth of the tree structure by selecting an appropriate value from the list. Keeping the depth limit open renders an infinite list of values.

Using the following options, you can restrict the list of values that appear for selection in a specific tree node.

- **Date Range:** Specifies whether a selection of nodes should be restricted to the same date range as the tree version.
- **Allow Multiple Root Nodes:** Allows you to add multiple root nodes when creating a tree version.
- **Reference Data Set:** Specifies whether a selection of nodes should be restricted to the same set as the tree.

Data Source Values and Parameters

Tree data sources have optional data source parameters with defined view criteria and associated bind variables. You can specify view criteria as a data source parameter when creating a tree structure, and edit the parameters when creating a tree. Multiple data sources can be associated with a tree structure and can have well-defined relationships among them.

Note: Parameter values modified at the tree level override the default values specified at the tree-structure level.

The data source parameters are applied to any tree version belonging to that data source, when performing node operations on the tree nodes. Data source parameters also provide an additional level of filtering for different tree structures. The tree structure definition supports three data source parameter types.

- **Bound Value:** Captures any fixed value, which is used as part of the view criteria condition.
- **Variable:** Captures and binds a dynamic value that's being used by the data source view object. This value is used by the WHERE condition of the data flow.
- **View Criteria:** Captures the view criteria name, which is applied to the data source view object.

You can also specify which of the data source parameters are mandatory while creating or editing the tree structure.

View objects from the Oracle ADF business components are used as data sources. To associate the view object with the tree structure, you can pick the code from Oracle ADF business component view objects and provide the fully qualified name of the view object, for example, **oracle.apps.fnd.applcore.trees.model.view.FndLabelVO**.

Guidelines for Improving the Performance of a Tree Structure

Tree structures are heavily loaded with data. As a tree management guideline, use the following settings to improve performance of data rendering and retrieval.

- Row Flattening

- Column Flattening
- Column Flattened Entity Objects
- BI View Objects

Row Flattening

Row flattening optimizes parent-child information for run-time performance by storing additional rows in a table for instantly finding all descendants of a parent without initiating a CONNECT BY query. Row flattening eliminates recursive queries, which allows operations to perform across an entire subtree more efficiently.

To store row flattened data for the specific tree structure, users can either use the central `FND_TREE_NODE_RF` table or they can register their own row flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales Division), and Sales Division is the parent of Region (Sales Division-Region), a row-flattened table contains an additional row with Corporation directly being the parent of Region (Corporation-Region).

Column Flattening

Column flattening optimizes parent-child information for runtime performance by storing an additional column in a table for all parents of a child.

To store column flattened data for the specific tree structure, users can either use the central `FND_TREE_NODE_CF` table or they can register their own column flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales Division), and Sales Division is the parent of Region (Sales Division-Region), a flattened table in addition to these columns, contains three new columns: Region, Sales Division, and Corporation. Although positioned next to each other, the column Region functions at the lower level and Corporation at the higher level, retaining the data hierarchy.

Column Flattened Entity Object

In the absence of a column-flattened table, if you need to generate the business component view objects for your tree structure for the flattened table, use the tree management infrastructure to correctly provide the fully qualified name of the entity object for the column flattened table.

BI View Object

View objects from Business Intelligence can be used as data sources, eliminating the need to create new types of data sources. This field is to store the fully qualified name for the BI view object generated by the tree management for business intelligence reporting and usage. The BI view object is a combination of the tree data source and column flattened entity. Using this option prevents data redundancy and promotes greater reuse of existing data, thereby improving the performance of the tree structure.

Search View Object

Specify the full name of the view object for the tree node to ensure that search operations performed on the tree node are efficient.

Manage Tree Labels

Tree Labels

Tree labels are tags that are stored on tree nodes. You can store labels in any table and register the label data source with the tree structure. When a labeling scheme is used for trees, the selected labels are stored in the tree label entity, and each tree node contains a reference to a tree label in the labeling scheme.

The following table lists the three ways in which tree labels are assigned to the tree nodes.

Labeling Scheme	Description
Level	Labels that are automatically assigned based on the data source to which the tree node belongs. A level label points to a specific data source. For example, in a tree that reflects the organizational hierarchy of an enterprise, all division nodes appear on one level and all department nodes on another.
Group	Labels that you can arbitrarily assign to tree nodes.
Depth	Labels that are automatically assigned based on the depth of the tree node within the tree. No manual assignment is performed. Note: In an unbalanced hierarchy, a level may not be equal to depth.

Manage Trees and Tree Versions

Guidelines for Managing Trees and Tree Versions

You can create and edit trees and tree versions depending upon the requirement. A tree can have one or more tree versions. When changes are made to an existing tree, a new version is created and published.

Creating and Editing Trees

Trees are created based on the structure defined in the tree structure. You can create trees, modify existing trees, and delete trees. If you want to copy an existing tree, you can duplicate it. You can also select and copy the associated tree versions.

Creating a tree involves specifying the tree definition and specifying the labels that are used on its nodes. If the selected tree structure has data sources and parameters defined for it, they appear on the page allowing you to edit the parameter values at the tree node level.

Note: Parameter values modified at the tree level will override the default values specified at the tree-structure level.

Creating and Editing Tree Versions

Tree versions are created at the time of creating trees. Each tree must contain a version.

Editing an existing tree provides you with the option of updating the existing version. You can also edit the existing version that lies nested in the tree in the search results.

When you edit a tree version bearing Active status, the status changes to Draft until the modifications are saved or canceled. To edit a tree version while keeping the status active select the **Update tree nodes while keeping the tree version active** check box.

Related Topics

- [Tree Nodes](#)
- [Tree Version Audit Results](#)

Tree Version Audit Results

Use the tree version audit results to verify the tree version's correctness and data integrity. The audit results include the following details:

- The name of the validator, which is a specific validation check
- The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors

Running an Audit

An audit automatically runs whenever a tree version is set to active. You can also manually trigger an audit on the Manage Trees and Tree Versions page, using **Actions > Audit**. If you run an audit on a tree version, which is in Draft status, and want to change the status to Active after the audit is complete then select the **Set tree version status to active after audit is successfully complete** Check Box.

The Tree Version Audit Result table shows a list of validations that ran against the selected tree version.

Validation Details

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.

Validator	Description (what's checked)	Possible Cause for Validation Failure	Suggested Corrective Action
Effective Date	The effective start and end dates of the tree version must be valid.	The effective end date is set to a value that isn't greater than the effective start date.	Modify the effective start and end dates such that the effective start date is earlier than the effective end date.

Validator	Description (what's checked)	Possible Cause for Validation Failure	Suggested Corrective Action
Root Node	On the Manage Tree Structures: Specify Data Sources page, if the Allow Multiple Root Nodes check box for the Restrict Tree Node List of Values Based on option isn't selected, and if the tree structure isn't empty, the tree version must contain exactly one root node. This validation doesn't take place if the check box is selected.	Even if the check box is deselected, the tree version has multiple root nodes.	Modify the tree version such that there is exactly one root node.
Data Source Maximum Depth	For each data source in the tree structure, on the Data Source dialog box, if the data source is depth-limited, the data in the tree version must adhere to the specified depth limit. This validation doesn't apply to data sources for which the Maximum Depth field is set to Unlimited .	The tree version has data at a depth greater than the specified depth limit on one or more data sources.	Modify the tree version such that all nodes are at a depth that complies with the data source depth limit.
Duplicate Node	On the Data Source dialog box, if the Allow Duplicates check box isn't selected, the tree version must not contain more than one node with the same primary key from the data source. If the check box is selected, duplicate nodes are permitted.	Even when the check box is deselected, the tree version contains duplicate nodes.	Remove any duplicate nodes from the tree version.
Available Node	All nodes in the tree version must be valid and available in the underlying data source.	- A node in the tree version doesn't exist in the data source. Deleting data items from the data source without removing the corresponding nodes from the tree version can result in orphaned nodes in the tree version. For example, if you added node A into your tree version, and subsequently deleted node A from the data source without removing it from the tree version, the validation fails. - The tree version contains a tree reference node, which references another tree version that doesn't exist.	Remove any orphaned nodes from the tree version. Update tree reference nodes so that they reference existing tree versions.
Node Relationship	All nodes must adhere to the relationships mandated by the data sources registered in the tree structure.	The tree structure has data sources arranged in a parent-child relationship, but the nodes in the tree don't adhere to the same parent-child relationship. For example, if the tree structure has a Project data source with a Task data source as its child,	Modify the tree version such that the nodes adhere to the same parent-child relationships as the data sources.

Validator	Description (what's checked)	Possible Cause for Validation Failure	Suggested Corrective Action
		Task nodes must always be within Project nodes in the tree version. This validation fails if there are instances where a Project node is added as the child of a Task node.	
SetID Restricted Node	On the Manage Tree Structures: Specify Data sources page, if the Set ID check box is selected to enable the Restrict Tree Node List of Values Based on option for each tree node, the underlying node in the data source must belong to the same reference data set as the tree itself. This restriction doesn't apply when the check box isn't selected.	Even when the check box is selected, the tree version has nodes whose data source values belong to a different reference data set than the tree.	Modify the tree version such that all nodes in the tree have data sources with reference data set matching that of the tree.
Label Enabled Node	On the Manage Tree Structures: Specify Data Sources page, if a labeling scheme is specified for the tree structure by selecting a list item from the Labeling Scheme list, all nodes must have labels. This restriction doesn't apply when you select None from the Labeling Scheme list.	The tree structure has a labeling scheme but the tree version has nodes without labels.	Assign a label to any node that doesn't have a label.
Date Restricted Node	On the Manage Tree Structures: Specify Data Sources page, if the Date Range check box is selected to enable the Restrict Tree Node List of Values Based on option for a tree structure, each node in the underlying data source must have an effective date range same as the effective date range of the tree version. This restriction doesn't apply if the check box isn't selected.	Even when the check box is selected, there are data source nodes that have a date range beyond the tree version's effective date range. For example, if the tree version is effective from Jan-01-2012 to Dec-31-2012, all nodes in the tree version must be effective from Jan-01-2012 to Dec-31-2012 at a minimum. It is acceptable for the nodes to be effective for a date range that extends partly beyond the tree version's effective date range (for example, the node data source value is effective from Dec-01-2011 to Mar-31-2013). It isn't acceptable if the nodes are effective for none or only a part of the tree version's effective date range (for example, the node data source value are effective only from Jan-01-2012 to June-30-2012).	Ensure that all nodes in the tree version have effective date range for the effective date range for the tree version.
Multiple Active Tree Version	On the Manage Tree Structures: Specify Definition page, if the Allow Multiple Active Tree Versions check box isn't selected for the tree structure, there must not be more than one active tree	Even when the check box isn't selected, there is more than one active tree version in the tree for the same date range.	Set no more than one tree version to Active within the same date range and set the others to inactive or draft status.

Validator	Description (what's checked)	Possible Cause for Validation Failure	Suggested Corrective Action
	version for a tree at any time. This restriction doesn't apply if the check box is selected.		
Range Based Node	On the Data Source dialog box, if the Allow Range Children check box isn't selected, range-based nodes aren't permitted from that data source. This restriction doesn't apply if the check box is selected.	Even when the check box isn't selected, there are range-based nodes from a data source.	Ensure that any range nodes in your tree version are from a data source that allows range children.
Terminal Node	On the Data Source dialog box, if the Allow Use as Leaves check box isn't selected, values from that data source can't be added as leaves (terminal nodes) to the tree version. This restriction doesn't apply if the check box is selected.	Even when the check box isn't selected, values from a data source are added as leaf nodes (terminal nodes).	Modify the tree version such that all terminal nodes are from data sources for which this check box is selected.
Usage Limit	On the Data Source dialog box, if the Use All Values option is selected to set the Usage Limit for the data source, every value in the data source must appear as a node in the tree. This restriction doesn't apply if None option is selected.	Even if the Use All Values option is selected, there are values in the data source that aren't in the tree version.	For each data source value that isn't yet available, add nodes to the tree version.

24 HCM Flexfields Setup

Overview of Flexfields

A flexfield is a set of placeholder fields associated with business objects and placed on the application pages to contain additional data. You can use flexfields to modify the business objects and meet enterprise data management requirements without changing the data model or performing any database programming. Using flexfields, you can capture different data on the same database table and modify the application features. For example, airline manufacturers may require specific attributes for the orders that aren't predefined. Using a flexfield for the order business object, they can create and configure the required attribute.

When you first define your flexfields, you choose how many segments you want to use and what order you want them to appear in. You also choose how you want to validate each of your segments. The decisions you make affect how you define your value sets. When your user enters a value, your value sets validate that value. The value sets can be one of these types:

- List of valid values that aren't stored in any application table.
- Table-validated value sets that use a predefined list of values stored in an application table.
- Format only value sets that use any value as long as it conforms to your specified formatting rules. For example, the value must not exceed the maximum length you define for your value set.

You can assign a value set to a flexfield segment to define the valid values in that segment. While defining valid values in a segment, either reuse an existing value set or define a new value set. You can reuse a value set as often as you want across multiple flexfields or different segments within the same flexfield.

Flexfield Types

Here are the types of flexfields:

- Descriptive flexfields
- Extensible Flexfields
- Key Flexfields

Both extensible and descriptive flexfields provide an expansion space that you can use to configure additional attributes without additional programming. Descriptive flexfields are stored in additional columns on the same table as that of the object, whereas extensible flexfields are stored in a separate extension table.

Key flexfields consist of one or more segments, where each segment can have a meaning. You can use key flexfields to enter multipart values, such as a part number, a job code, or an account code. Users see the flexfields as fields or attributes on UI pages. To manage the flexfields, use any of these tasks in the Setup and Maintenance work area:

- **Manage Descriptive Flexfields:** To configure descriptive flexfield segments if you have enabled descriptive flexfields on a page.
- **Manage Extensible Flexfields:** To configure extensible flexfield segments if you have enabled extensible flexfields on a page.
- **Manage Key Flexfields:** To configure key flexfields, which is a configurable multipart key.
- **Manage Value Sets:** To create reusable value sets to validate values in flexfield segments.

Note: You can manage value sets within the **Manage Descriptive Flexfields** or **Manage Extensible Flexfields** tasks.

Related Topics

- [How can I access predefined flexfields](#)
- [Overview of Descriptive Flexfields](#)
- [Overview of Extensible Flexfields](#)
- [Overview of Key Flexfields](#)
- [Overview of Value Sets](#)

Flexfield Components

A flexfield is made up of several data entities that store and render information pertaining to flexfield configuration.

Flexfields are made up of the following components:

- Segments
- Value Sets
- Contexts
- Structures

Segments

A segment is a field within a flexfield and represents a single table column of your database. When configuring a flexfield, define the appearance and meaning of individual segments. Segments represent attributes of information. Segments can appear globally wherever the flexfield is implemented, or based on a structure or context. Each segment captures a single atomic value and represents an attribute of information.

The characteristics of a segment vary based on the type of flexfield in which it's used.

- In key flexfields, a segment describes a characteristic of the entity. For example, a part number that contains details about the type, color, and size of an item.
- In a descriptive or extensible flexfield, a segment represents an information attribute on the application page. For example, details about a device containing components, some of which are global while the remaining are contextually dependent on the category of the device.

Value Sets

Users enter values into segments while using an application. A value set is a named group of values that validate the content of a flexfield segment. You configure a flexfield segment with a value set to enforce entries of only valid values for that segment.

The configuration involves the following tasks:

- Defining the values in a value set, including characteristics such as the length and format of the values.

- Specifying formatting rules or values from an application table or predefined list.

Multiple segments within a flexfield, or multiple flexfields, can share a single value set.

Contexts

Context-sensitive flexfield segments are available to an application based on a context value. You define contexts as part of configuring a flexfield. Users see global segments as well as any context-sensitive segments that apply to the selected context value.

In descriptive flexfields and extensible flexfields, you can reuse the context-sensitive segments that are based on the database columns, in multiple contexts.

Structures

Key flexfields have structures. Each key flexfield structure is a specific configuration of segments. Adding or removing segments, or rearranging their order, produces a different structure. You can reuse the segments that are based on the database columns, in multiple structures.

Note: You can translate all these flexfield components to the preferred languages without changing the language session of the application. To specify the translations in all the enabled language rows, use the Translation Editor option on the respective edit pages. Once the updates are made, users can view the translated text for the specific flexfield components.

Related Topics

- [How Flexfields Work with Oracle Application Cloud Architecture](#)
- [Overview of Value Sets](#)
- [Enter or Edit Translated Text](#)

Overview of Flexfield Configuration

Configuring a flexfield involves identifying the need for enhancing a business object with user-defined attributes and then integrating the attributes into deployment. In the case of key flexfields, configuring the flexfield involves identifying value set assignments and determining segment structures.

Overall Process for Configuring User-Defined Attributes

Before using flexfields to create attributes, familiarize yourself with the context layers and the configuration life cycle of the application. You can add attributes to a business object using a flexfield, if developers have registered that object to a flexfield. For descriptive and extensible flexfields, the overall configuration process involves the following:

1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
2. Plan the flexfield configuration.
3. Plan flexfield validation.

4. Define the attributes by configuring the flexfield segments.
 - a. Use the Manage Extensible Flexfields or Manage Descriptive Flexfields tasks, or use the **Configure Flexfield** icon button directly on the page where the flexfield is highlighted. For simple configurations, use the **Add Segment**, **Add Context Value**, and **Edit Segment** icon buttons directly on the page where the flexfield is highlighted.
 - b. Optionally, validate the flexfield configuration.
 - c. Optionally, deploy the flexfield to a sandbox for initial testing.
5. Deploy the extensible flexfields changes to the mainline metadata, to display the attributes on the application pages and to make them available for integration with other tools such as Oracle Business Intelligence. But for descriptive flexfields, you must deploy your changes to a unified sandbox and test the changes before publishing your sandbox. To deploy your descriptive flexfield to a sandbox:
 - a. Create or activate a sandbox, and select **Flexfields** from the list of tools.
 - b. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
 - c. Open the flexfield you want to edit, and make your changes.
 - d. On the **Actions** menu, select **Deploy Flexfield to Sandbox**.
 - e. Click **Yes** to continue with the deployment.
6. Perform the necessary steps to integrate the attributes into the technology stack.

A simple configuration is limited to such actions as adding a format-only field or adding a field with a basic list of values.

Overall Process for Configuring User-Defined Keys

Using key flexfields, you can configure intelligent key codes containing meaningful parts according to your business practices. You configure the key flexfield to have one segment for each part that makes up your key code.

For key flexfields, the overall configuration process involves the following:

1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
2. Plan the flexfield configuration.
3. Plan the flexfield validation.
4. Define the value sets before configuring the key flexfield segments by going to the Manage Value Sets task.
5. Define the key flexfield structures and their segments, and define structure instances for each structure.
 - a. Use the Manage Key Flexfields task or the **Configure Flexfield** icon button directly on the page where the flexfield is highlighted.
 - b. Optionally, validate the flexfield configuration.
 - c. Optionally, deploy the flexfield to a sandbox for initial testing.
6. Deploy the key flexfield changes to the mainline metadata to display it on the application pages and to make it available for integration with other tools such as Oracle Business Intelligence.

Note: You can't deploy your changes in value sets, key flexfields, and extensible flexfields to your unified sandbox. You must deploy them directly to the mainline environment. However, if you're making changes to any descriptive flexfields, you must deploy your flexfield to the sandbox and test your changes before publishing your sandbox.

7. Perform the necessary steps to integrate the flexfield into the technology stack.

Related Topics

- [Overview of Extensible Flexfields](#)
- [Considerations for Managing Flexfields](#)
- [Overview of Key Flexfields](#)
- [Overview of Context Layers](#)
- [Configuration Life Cycle](#)

Flexfields at Runtime

Business objects have an associated descriptive or extensible flexfield. Using these, you can create attributes for the business object at run time. Some business objects have an associated key flexfield for configuring flexible multiple part keys.

Finding Flexfields on a Page

At run time, the attributes you define as flexfield segments appear in the application page just like any other attribute. However, each type of flexfield appears in a different way.

The following characteristics help you determine the type of flexfield on the application page:

- Descriptive flexfield segments appear as label and field pairs or as a table of fields that correspond to the column headers. The fields represent the flexfield segments and accept values that derive from the segment's assigned value set.
- Extensible flexfield segments appear grouped within labeled regions, where each grouping is a context and the region labels are the context names.
- Key flexfields appear in the application page as a field with a key flexfield icon, where the field's value is a collection of segments.

To locate flexfields on a page, in the global header, select your user name and in the Settings and Actions menu, select **Highlight Flexfields**. The page renders in a special mode, displaying the location of flexfields, if any, on the page. Do the following:

- Hover over the **Basic Info** icon to view flexfield details.
- Click the **Configure Flexfield** icon to manage the flexfield using the Manage Flexfields task.
- Click the **Add Context Value**, **Add Segment**, or **Edit Segment** icons to add a context value or edit a global or context-sensitive flexfield segment. This applies to both descriptive and extensible flexfields.

Note: You can't create attributes on all flexfields. For example, some flexfields are protected, and you either can't edit their configurations at all, or can do only limited changes to them. Consult the product-specific documentation to verify whether there are any restrictions on using the flexfield.

All segments of a single flexfield are grouped together by default. The layout and positions of the flexfield segments depend on where the application developer places the flexfield on the page. Flexfields may also be presented in a separate section of the page, in a table, or on their own page or a dialog box. You can use Oracle Composer to edit the layout, position, or other display features of the flexfield segments.

When you no longer want to view the flexfields on a page, select **Unhighlight Flexfields** from the Administration menu.

Related Topics

- [Flexfield Modification Using Page Composer](#)

Flexfield Modification Using Page Composer

You can use Page Composer to modify flexfields specific to a page.

Extensible Flexfield Modification

In Page Composer, open the page with the flexfield you want to modify. Switch to Source view and look for a region that's bound to an `EffContextsPageContainer` task flow. You can find all attributes and contexts of the extensible flexfield in this task flow. To view the flexfield code and identifying information, open the properties panel for the region. To modify any component within the region, select the desired tag and click **Edit**.

Descriptive Flexfield Modification

In Page Composer, open the page with the flexfield you want to modify. Switch to Source view and look for the `<descriptiveFlexfield>` element of that flexfield. Open the properties panel for this element to view the flexfield code and to identify the information. Within the properties panel, you might modify properties for the global, context, and context-sensitive segments or re-order the global segments on the page.

Property	Description
Read-only	Indicates whether the flexfield is rendered as read-only. You can set the value to True or False or an EL expression .
Auto Submit	Indicates whether the component submits automatically when users change the segment's value. You can set the value to True or False or an EL expression .
Rendered	Indicates whether the flexfield is rendered on the page. You can set the value to True or False or an EL expression . If a value for this property is explicitly set within the descriptive flexfields metadata, it's shown as read-only. Users can't override the metadata settings using Page Composer.
Required	Indicates whether users must enter some data for the component before saving the page. You can set the value to True or False or EL expression . If a value for this property is explicitly set within the descriptive flexfields metadata, it's shown as read-only. Users can't override the metadata settings using Page Composer.
Inline Style	The inline style of the component. You can use the inline style property to set individual properties, such as background color, font style, or padding.
Style Class	The style class of the flexfield. You can use style class to group a set of inline styles.
Mode	The UI mode of the descriptive flexfield component. You can use this property to render all the segments or just some of them. You can select any one of these values:

Property	Description
	• No value: Renders all descriptive flexfield segments. By default, all descriptive flexfield segments are rendered. • global: Renders only the global segments of the flexfield. You can use this value for a descriptive flexfield inside a table column to generate sub-columns for the global segments. • contextSensitive: Renders only the context-sensitive segments of the flexfield (including the context segment). You can use this value for a descriptive flexfield inside a table detail region to render the context values.
ShortDesc	A text that appears when a user hovers over an element.
Label	The display text for the component. For example, the field prompt or the single prompt for a group of check boxes.
Columns	The width of the control in terms of the default font size of the browser. You can set this property with a literal value or an EL expression.

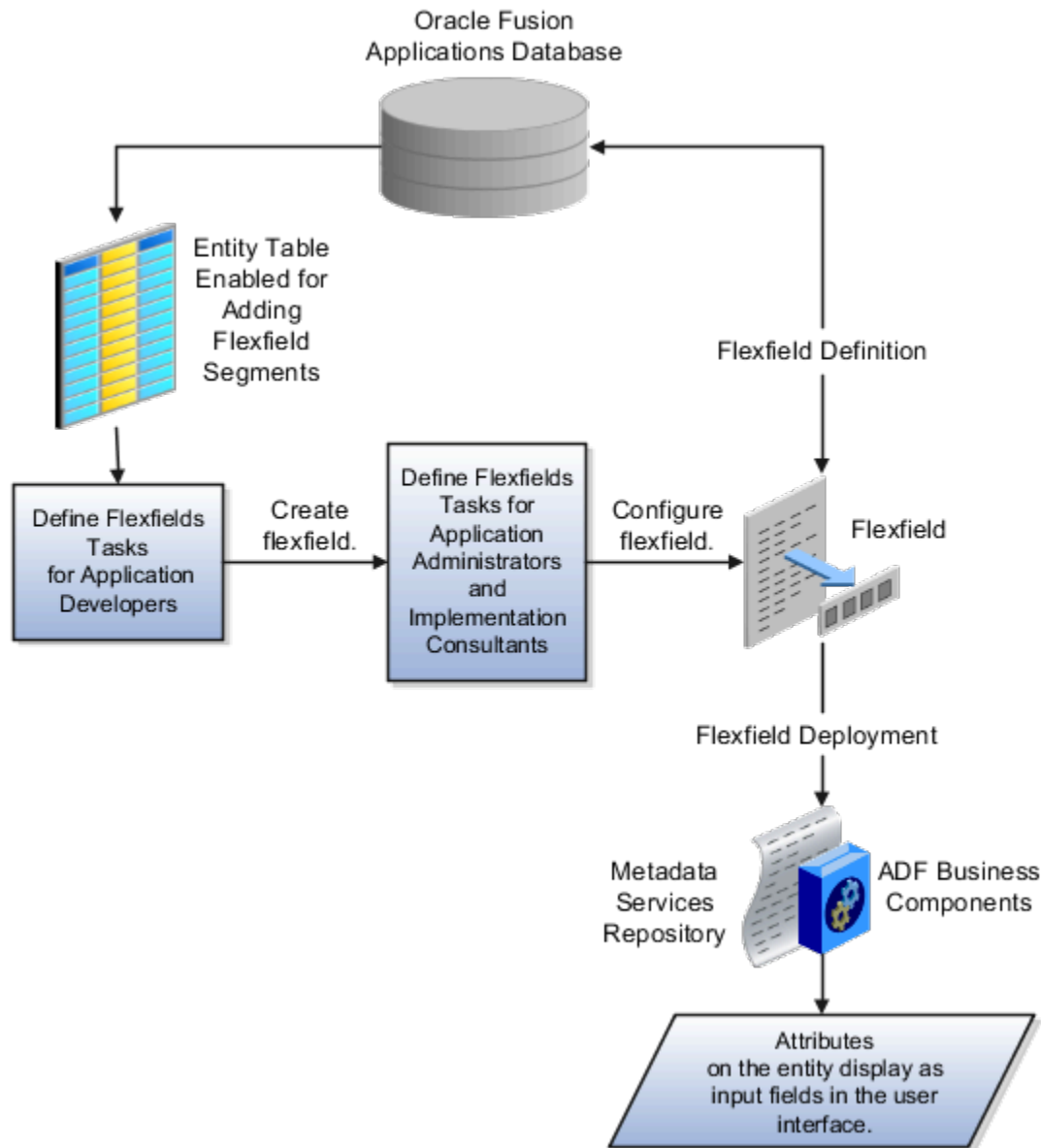
Note: Flexfield segments can't be edited using their individual component elements. They can only be edited from the properties panel of the `<descriptiveFlexfield>` element they belong to. To find these components, open the properties panel of the descriptive flexfield, switch to the relevant tab, and search using the unique identifying information. For example, to find a context sensitive segment, open the properties panel for the flexfield and go to the Flexfield Context Segments tab. Search for the segment using its Context Value and Segment Code.

Related Topics

- [Flexfields at Runtime](#)

How Flexfields Work with Oracle Application Cloud Architecture

To capture additional data, administrators or implementors configure flexfield segments that represent attributes of business objects. Business objects are enabled for both descriptive flexfields and extensible flexfields.



Application developers create a flexfield and register it so that it's available for configuration. Administrators and implementation consultants configure segments and other properties of the available flexfields. This information is stored as additional flexfield metadata in the database. Deploying the flexfield generates ADF business components based on the flexfield metadata in the database.

The following aspects are important in understanding how flexfields and Oracle Applications Cloud architecture work together:

- Integration
- Deployment
- Import and export
- Runtime
- Patching

Integration

The attributes that you add by configuring flexfields are available throughout the Oracle Fusion Middleware technology stack. You can use the flexfield segment's Application Programming Interface (API) to identify segments and integrate the flexfields in the following:

- User interface pages
- Service-oriented Architecture (SOA) infrastructure
- Oracle Business Intelligence
- Extended Spread Sheet Database (ESSbase)

Flexfield configurations are preserved across application updates.

Deployment

The metadata for the flexfield is stored in the application database as soon as you save your configuration changes. Deploying the flexfield generates the ADF business components so that the user interface reflects the latest flexfield definition in the metadata.

Importing and Exporting

Using the Setup and Maintenance work area, you can import and export flexfields across the implementation site. The deployment status must be either Deployed or Deployed to sandbox. Therefore, before you attempt migration, verify and ensure that a flexfield is successfully deployed.

Runtime

The latest definitions of a flexfield reflect on the user interface only if the flexfield is deployed. When the user interface accesses a business object, the deployed flexfield definition identifies the attributes associated with the captured values. On a page, if you add display configurations for a flexfield using Oracle Composer, the same flexfield segments can appear differently on different pages.

Patching

Flexfield configurations are preserved during patching and upgrading.

Related Topics

- [How Flexfield Deployment Status is Calculated](#)

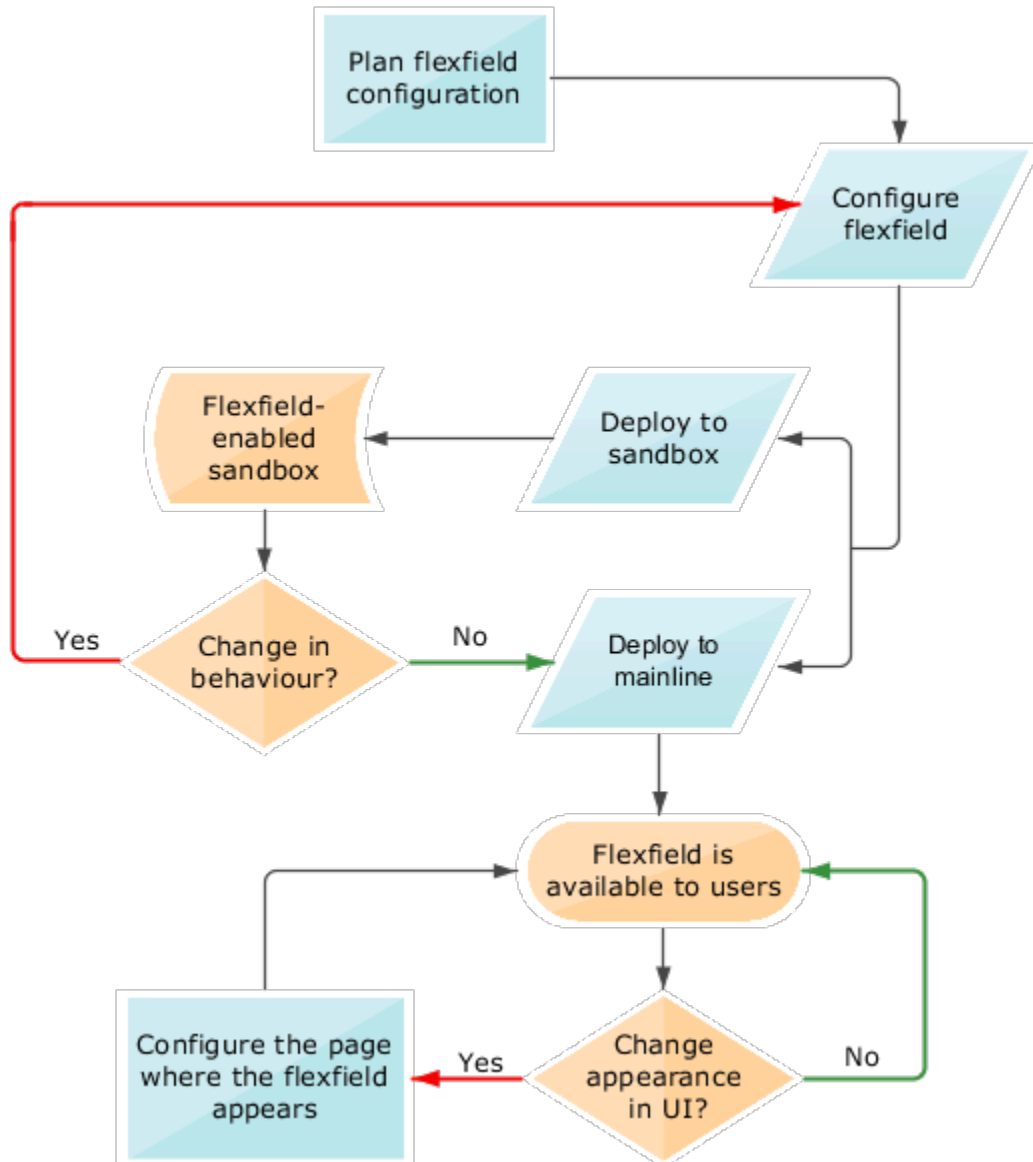
Flexfield Management

Considerations for Managing Flexfields

Managing flexfields involves planning and configuring flexfields.

You plan and configure the registered flexfields provided in your applications by applications developers. How you configure flexfield segments determines how the flexfield segments appear to users. Optionally, you can modify the UI page to change how the flexfield segments appear to users on that page.

The following figure shows the processes involved in making flexfields available to users. The tasks in the Define Flexfields activity let administrators configure and deploy flexfields. After you configure and deploy a flexfield to a sandbox, deploy it again to the mainline metadata so that it's available to the users.



Consider the following aspects of managing flexfields:

- Planning flexfields
- Configuring flexfields
- Enabling a flexfields segment for business intelligence
- Deploying flexfields
- Optionally changing a flexfield segment's appearance in a user interface page
- Identifying flexfields on a page and troubleshooting

Planning Flexfields

Before you begin planning flexfields, determine what type is appropriate to your needs, and which business objects are available for modifying flexfields. All flexfields consist of segments which represent attributes of an entity. The value a user enters for an attribute is stored in a column of the entity table. Carefully plan flexfields before configuring them. Before configuring new segments for your flexfields, be sure to plan their implementation carefully.

If you have determined that a business object supports flexfields, and those flexfields have been registered, you can begin planning their configuration. Note the code name of the flexfield you intend to configure so that you can find it easily in the Define Flexfield activity. In some cases you can determine and configure how the flexfield appears on the page. See Oracle Applications Cloud Help for specific products to determine any restrictions on using product-specific flexfields.

Configuring Flexfields

Administrators or implementors configure flexfields so they meet the needs of the enterprise. Some flexfields require configuration to make an application operate correctly. You can configure flexfields using the following methods:

- Use the manage flexfield tasks in the Setup and Maintenance work area.
- Use the Highlight Flexfields command in the Administration menu while viewing a page.
 - Use the **Configure Flexfield** icon button to manage all aspects of a flexfield, such as change a segment's sequence number or configure a flexfield segment's business intelligence label.
 - Use the **Add Segment** and **Edit Segment** icon buttons to add and edit descriptive or extensible flexfield segments with simple configurations.
 - Use the **Add Context** icon button to add descriptive or extensible flexfield context values.

Configuring a flexfield includes the following:

- Defining value sets against which the values entered by users are validated
- Defining the structure or context of the segments in the flexfield
- Specifying the identifying information for each segment
- Specifying the display properties such as prompt, length and data type of each flexfield segment
- Specifying valid values for each segment, and the meaning of each value within the application

Tip: You can create value sets while creating descriptive and extensible flexfield segments. However, define value sets before configuring key flexfield segments that use them, because you assign existing value sets while configuring key flexfield segments.

When creating table-validated, independent, dependent, or subset value sets while creating descriptive and extensible flexfield segments, you can optionally specify to display the description of the selected value next to the segment. You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order based on the segments' sequence numbers. You can't enter a number for one segment that is already in use for a different segment. Therefore, you may consider numbering the segments in multiples, such as 4, 5, or 10, to make it easy to insert new attributes.

A flexfield column is assigned to a new segment automatically, but you can change the assignment before saving the segment. If you must set a specific column assignment for a segment, create that segment first to ensure that the intended column isn't automatically assigned to a different segment.

Enabling a Flexfield Segment for Business Intelligence

You can enable flexfield segments for business intelligence if the flexfield is registered in the database as an Oracle Business Intelligence-enabled flexfield. For more information about enabling segments for business intelligence, see points to consider when enabling descriptive, extensible, and key flexfield segments for business intelligence. For extensible flexfield segments, you can't assign labels to equalize segments across contexts that are semantically equivalent.

Deploying Flexfields

Once you have configured a flexfield, you must deploy it to make the latest definition available to users. In the Define Flexfields tasks, you can deploy a flexfield using either of the following commands:

- The **Deploy Flexfield** command deploys a flexfield to the mainline metadata. This command is for general use in a test or production environment.
- The **Deploy to Sandbox** command deploys a flexfield to sandbox. This command is for confirming that the flexfield is correctly configured before deploying it to the mainline metadata.

Note: You can't deploy your changes in value sets, key flexfields, and extensible flexfields to your unified sandbox. You must deploy them directly to the mainline environment. However, if you're making changes to any descriptive flexfields, you must deploy your flexfield to the sandbox and test your changes before publishing your sandbox.

In Highlight Flexfields mode, when using the:

- **Add Context**, **Add Segment**, and **Edit Segment** tools for extensible flexfields, use the **Save** command to save your changes. Then use the **Deploy** command to deploy the flexfield to the mainline metadata
- **Add Segment** and **Edit Segment** tools for descriptive flexfields, use the **Save** and **Deploy** command to save your changes. Then deploy the flexfield to the mainline metadata

Once deployed, the deployment status indicates the state of the currently configured flexfield relative to the last deployed definition.

Optionally Changing a Flexfield Segment Appearance

The flexfield attributes that you define integrate with the user interface pages where users access the attributes' business object. Application development determines the UI pages where business objects appear and the display patterns used by default to render flexfield segments.

After a flexfield has been deployed to the mainline MDS repository so that it appears on application pages, you can modify it on a per-page basis using Page Composer. For example, you can hide a segment, change its prompt or other properties, or reorder the user-defined global attributes so that they're interspersed with the core attributes in the same parent layout. You can modify the appearance of descriptive and extensible flexfield segments in the UI page using Page Composer, once the flexfield is deployed to the mainline metadata.

If the applications are running in different locales, you can provide different translations for translatable text, such as prompts and descriptions. Enter translations using the locale that requires the translated text. In the global header, click your user name and from the **Settings and Actions** menu, select **Set Preferences**. Then change the text to the translated text for that locale.

Identifying Flexfields on a Page

The **Highlight Flexfields** command in the Administration menu of the Setup and Maintenance work area identifies the location of flexfields on the page by displaying an **Information** icon button for accessing details about each flexfield.

Even if a descriptive or extensible flexfield isn't yet deployed and no segments appear on the page in normal view, the flexfield appears in the Highlight Flexfield view for that page. For descriptive flexfields, the segments as of the last deployment appear. For extensible flexfields, any segments and contexts that have been saved but not yet deployed also appear as disabled.

Highlight Flexfields accesses the current flexfield metadata definition. Use the highlighted flexfield's **Configure Flexfield** icon button to manage flexfields directly. Alternatively, note a highlighted flexfield's name to search for it in the tasks for managing flexfields.

Related Topics

- [Flexfield Modification Using Page Composer](#)
- [Overview of Value Sets](#)
- [Considerations for Managing Descriptive Flexfields](#)
- [Considerations for Managing Extensible Flexfields](#)
- [Considerations for Managing Key Flexfields](#)

Flexfield Segment Properties

Independent of the value set assigned to a segment, segments may have properties that affect how they're displayed and how they function.

The following aspects are important in understanding

- Display properties
- Properties related to segment values
- Properties related to search
- Range validation segments
- Rule validation of segment values
- Naming conventions

Display Properties

The following table summarizes display properties.

Property	Description
Enabled	Whether the segment can be used.
Sequence	The order the segment appears in relation to the other configured segments.
Prompt	The string to be used for the segment's label in the user interface.

Property	Description
Display type	The type of field in which to display the segment.
Selected and deselected values	If the display type is check box, the actual values to save. For example, Y and N or 0 and 1.
Display size	The character width of the field.
Display height	The height of the field as measured in visible number of lines when the display type is a text area.
Read only	Whether the field should display as read-only, not editable text.
Description help text	The field-level description help text to display for the field. Use description help text to display a field-level description that expands on or clarifies the prompt provided for the field. If description help text is specified, a Help icon button is displayed next to the field in the application. The description help text is displayed when the user hovers over the Help icon button.
Instruction help text	The field-level instruction help text to display for the field. Use instruction help text to provide directions on using the field. If instruction help text is specified, it's appears in an in-field help note window when users move the cursor over the field.

Properties Related to Search

Extensible flexfield segments can be marked as selectively required in search using the indexed property. The indexed property requires users to enter a value before conducting a search on the attribute represented by the indexed segment. A database administrator must create an index on the segment column representing the indexed attribute.

Range Validation of Segments

Range validation enables you to enforce an arithmetic inequality between two segments of a flexfield. For example, a product must be ordered before it can be shipped. Therefore, the order date must be on or before the ship date. Also, the order date segment value must be less than or equal to the ship date segment value. You can use range validation to ensure this relationship.

The conditions for range validation are as follows:

- Segments must be configured for range validation in pairs, one with the low value and one with the high value.
- Both segments must be of the same data type.
- Both segments must be parts of the same structure in a key flexfield or parts of the same context in a descriptive flexfield or extensible flexfield.
- The low value segment must have a sequence number that's lesser than that of the high value segment.
- Non-range validated segments can exist between a range validated pair, but range validated pairs can't overlap or be nested.

You can configure as many range validated pairs as you want within the same flexfield. Your application automatically detects and applies range validation to the segment pairs that you define, in sequence order. It must detect a low value

segment first, and the next range validated segment that it detects must be a high value segment. These two segments are assumed to be a matching pair. The low value and the high value can be equal.

Rule Validation of Segment Values

Validation rules on descriptive and extensible flexfield segments determine how an attribute is validated. The value entered for an attribute on a business object must match a specified format or be restricted to a list of values. You can use a value set or a Groovy validator to specify the validation rules.

Value set validation is required for global segments and context-sensitive segments, and optional for context segments. In the case of context segments, the application may validate a value instead of the value set validating the value against the context segment. However the application entered values must match exactly the valid context segment values. If the context segment values are a superset or subset of the input values, you must assign a table-validated value set or independent value set to validate context values.

You can also use Groovy validation to set additional restrictions or requirements for what values are allowed for certain attributes of business objects. This is useful when you need to use the same value set to validate multiple segments, but the exact validation requirement changes with each case. These validators can be defined at the global segment level, or at the context level, based on your business needs. They have a validator code, validation expression, error message, and description. After adding a new validator, click the **Groovy Expression Builder** icon to open the expression builder window where you define your validation expression. Groovy validation is done when a user tries to save their values to an attribute that has a Groovy validator. If the value for this attribute fails validation against the Groovy expression, the text defined in the **Error Message** column is displayed as an error message.

When you configure a descriptive flexfield segment, you can specify a constant to use for setting the initial value. The initial value can be an available parameter. For every planned segment, list the constant value or parameter, if any, to use for the initial value.

Naming Conventions

Enter a unique code, name, and description for the segment. These properties are for internal use and not displayed to end users. You can't change the code after the segment is created.

The Application Programming Interface (API) name is a name for the segment that isn't exposed to users. The API name is used to identify the segment in various integration points including web services, rules, and business intelligence. Use alphanumeric characters only with a leading character. For example, enter a code consisting of the characters A-Z, a-z, 0-9 with a non-numeric leading character. The use of spaces, underscores, multi-byte characters, and leading numeric characters isn't permitted. You can't change the API name after the segment has been created.

Related Topics

- [Considerations for Managing Extensible Flexfields](#)

Naming Conventions for Flexfield APIs

Application Programming Interface (API) name is a name for your flexfield component, which isn't exposed to users. These names are used to identify flexfield components in various integration points, including web services, rules, and business intelligence.

How to Frame API Names

You must use only alphanumeric characters for API names. For example, enter a name with the characters A-Z, a-z, or 0-9, with a non-numeric leading character. Don't use spaces, underscores, multi-byte characters, or leading numeric characters in your API names.

CAUTION: Do not change API names after they're created. Doing so could break integration points.

Words You Can't Use for API Names

You can't use certain words for API names when configuring flexfields because they're reserved words in ADF, SQL, PL/SQL, Java, Groovy, and so on.

This table lists some of the reserved words that can't be used as API names. This list isn't exhaustive.

Letter	Reserved Words
A	ABORT, ABSTRACT, ACCEPT, ACCESS, ACTIONENABLED, ADD, ALL, ALLROWSINRANGE, ALTER, AND, ANY, ARRAY, ARRAYLEN, AS, ASC, ASSERT, ASSIGN, AT, ATTRIBUTEDDEF, ATTRIBUTEDEFS, ATTRIBUTEVALUE, ATTRIBUTEVALUES, AUDIT, AUTHORIZATION, AVG
B	BEGIN, BETWEEN, BINDINGS, BODY, BOOLEAN, BREAK, BY, BYTE, BYVALUE
C	CASCADE, CASE, CAST, CATCH, CATEGORY, CHAR, CHECK, CHILDREN, CLASS, CLONE, CLOSE, CLUSTER, CLUSTERS, COALESCE, COLAUTH, COLUMN, COLUMNS, COMMENT, COMMIT, COMPRESS, CONNECT, CONST, CONSTANT, CONSTRIANT, CONTAINS, CONTINUE, COUNT, CRASH, CREATE, CURRENT, CURRENTROW, CURRVAL, CURSOR
D	DATABASE, DATACONTROL, DATE, DBA, DEBUGOFF, DEBUGON, DECIMAL, DECLARE, DEFAULT, DEFINITION, DELAY, DELETE, DELTA, DESC, DESCRIPTION, DIGITS, DISPLAY, DISPLAYDATA, DISPLAYHINT, DISPLAYHINTS, DISPOSE, DISTINCT, DIV, DO, DOUBLE, DROP
E	ELSE, ELSIF, EMPTY, ENABLED, ENABLEDSTRING, END, ENTRY, EQ, EQUALS, ERROR, ESTIMATEDROWCOUNT, EXCEPTION, EXCLUSIVE, EXISTS, EXIT, EXTENDS
F	FALSE, FETCH, FILE, FINAL, FINALIZE, FINALLY, FINDMODE, FLOAT, FOR, FORM, FROM, FULLNAME, FUNCTION, FUTURE
G	GE, GENERIC, GETCLASS, GOTO, GRANT, GROUP, GROUPBY, GT
H	HASHCODE, HAVING, HINTS
I	IDENTIFIED, IF, IMMEDIATE, IMPLEMENTS, IMPORT, IN, INCREMENT, INDEX, INDEXES, INDICATOR, INITIAL, INNER, INPUTVALUE, INSERT, INSTANCEOF, INT, INTEGER, INTERFACE, INTERSECT, INTO, IS, ITERATORBINDING
J	JAVA
K	KEY

Letter	Reserved Words
L	LABEL, LABELS, LABELSET, LE, LEVEL, LIKE, LIMITED, LOCK, LONG, LOOP, LT
M	MANDATORY, MAX, MAXEXTENTS, MIN, MINUS, MLSLABEL, MOD, MODE, MODIFY
N	NAME, NATIVE, NATURAL, NE, NEW, NEXTVAL, NOAUDIT, NOCOMPRESS, NOT, NOTFOUND, NOTIFY, NOTIFYALL, NOWAIT, NULL, NULLIF, NUMBER
O	OF, OFFLINE, ON, ONLINE, OPEN, OPERATIONENABLED, OPERATOR, OPTION, OR, ORDER, ORDERBY, OTHERS, OUT, OUTER, OVERLAPS
P	PACKAGE, PARTITION, PCTFREE, POSITIVE, PRAGMA, PRIMARY, PRIOR, PRIVATE, PRIVILEGES, PROCEDURE, PROTECTED, PUBLIC
R	RAISE, RANGE, RANGESET, RANGESIZE, RANGESTART, RAW, REAL, RECORD, REFERENCES, RELEASE, REMR, RENAME, RESOURCE, REST, RESULT, RETURN, REVERSE, REVOKE, ROLLBACK, ROOTNODEBINDING, ROW, ROWID, ROWLABEL, ROWNUM, ROWS, ROWTYPE, RUN
S	SAVEPOINT, SCHEMA, SELECT, SELECTEDVALUE, SEPARATE, SESSION, SET, SHARE, SHORT, SIZE, SMALLINT, SPACE, SQL, SQLBUF, SQLCODE, SQLERRM, START, STATEMENT, STATIC, STDDEV, SUBTYPE, SUCCESSFUL, SUM, SUPER, SWITCH, SYNCHRONIZED, SYNONYM, SYSDATE
T	TABAUTH, TABLE, TABLES, TASK, TERMINATE, THEN, THIS, THROW, THROWS, TO, TOOLTIP, TOSTRING, TRANSIENT, TRIGGER, TRUE, TRY, TYPE
U	UID, UNION, UNIQUE, UPDATE, UPDATEABLE, USE, USER
V	VALIDATE, VALUES, VAR, VARCHAR, VARCHAR2, VARIANCE, VIEW, VIEWS, VOID, VOLATILE
W	WAIT, WHEN, WHENEVER, WHERE, WHILE, WITH, WORK
X	XOR

Related Topics

- [Flexfield Segment Properties](#)
- [Considerations for Managing Flexfields](#)

How Flexfield Segments are Rendered on Pages

Flexfield segments appear on pages as attributes of business objects. When you create or edit flexfield segments, the value you enter for the display type determines how the segment appears on a page.

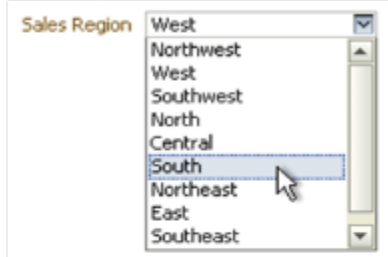
How Display Type Values Appear

The series of figures (A to L) represent how the display types render on the UI. Each display type screenshot is assigned an alphabetic character that maps to the display type and its description in the table.

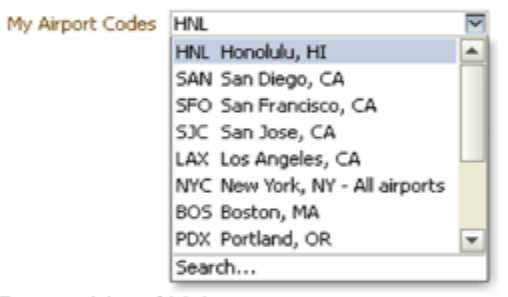
A. Check Box



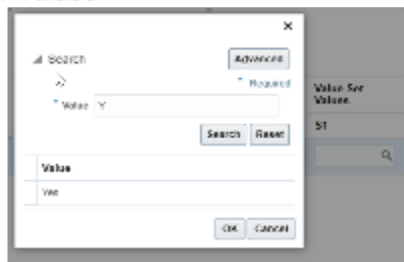
B. Drop-down List



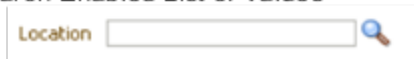
C. List of Values



D. Pop-up List of Values



E. Search Enabled List of Values



Group ☒ Item 1 ☐ Item 2 ☐ Item 3

Text area

Prompt

Select a date: 6/29/10 6:13:02 PM (UTC-08:00) US Pacific Time

Select Date and Time

June 2010

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

06 : 13 : 02 AM PM

(UTC-08:00) US Pacific Time

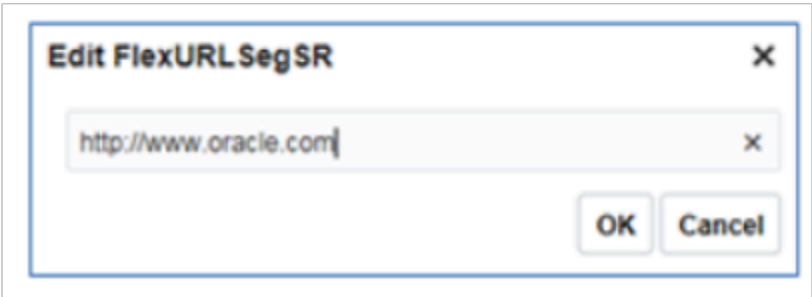
OK Cancel

Rich Text Editor

K. Color



L. Static URL



The table describes each display type:

Figure Reference	Display Type	Description
A	Check Box	The field appears as a check box. If you select the check box, the checked value is used. Otherwise, the deselected value is used.
B	Drop-down List	The field appears as a list of values from which you can select. It supports a smaller number of values.
C	List of Values	The field appears as a list of values from which you can select.

Figure Reference	Display Type	Description
D	Pop-up List of Values	The field appears as a list of values from which you can select. It supports large volumes of values.
E	Search Enabled List of Values	The field appears as a text field with a Search icon. You can type a value in the text field. You can also click the Search icon that opens another window for searching.
F	Radio Button Group	The field appears as a set of radio buttons. You can click a button to select an option. When you select an option, previously selected option is automatically deselected.
G	Text Area	The field appears as a text area where you can enter multiple lines of text. The display width and height specify the visible width and number of lines in the text area.
H	Text Box	The field appears as a text field where you can enter a single line of text. The display width controls the width of the text box.
I	Date Time	The field enables you to enter a date if the data type is Date. You can enter a date and time if the data type is Date Time. You can select the date in a calendar. If the data type is Date Time, you can also specify the hour, minutes, seconds, AM or PM, and the time zone.
J	Rich Text Editor	The field appears as a text area where you can enter and edit multiple lines of formatted text. The display width and height specify the visible width and number of lines in the rich text editor. Note: This display type is available for extensible flexfields only.
K	Color	The field displays a color palette. You can select a color and assign it to the segment. You can select the display type only if the value set for the segment is set to ORA_FND_COLOR_#RRGGBB.
L	Static URL	The field appears as a text field where you can enter a fixed URL that opens the web page when clicked.

Figure Reference	Display Type	Description
		Note: The length of the URL must not exceed 255 characters.

Note: If you select the display type as Hidden, the field isn't displayed.

How Flexfields and Value Sets Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise's value sets validate the values that your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

The following aspects are important in understanding how flexfields and value sets work together:

- Defining value sets
- Shared value sets
- Deployment

Defining Value Sets

As a key flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfields, you can define value sets when adding or editing a segment.

Note: Ensure that changes to a shared value set are compatible with all flexfield segments that use the value set.

Shared Value Sets

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared value set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

Value Set Values

To configure user-defined attributes to be captured on the value set values in the *Manage Value Sets* task, configure the Value Set Values descriptive flexfield. The object's code is FND_VS_VALUES_B. This flexfield expects the context code to correspond to the value set code. For each value set, you can define a context whose code is the value set code, and whose context-sensitive segments are shown for the values of that value set. By default, the context segment is hidden since it maps to the value set code and is not expected to be changed.

You can also define global segments that are shown for all value sets. However, this would be quite unusual since it would mean that you want to capture that attribute for all values for all value sets.

Deployment

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide users with the valid values for the attributes represented by the segments.

Related Topics

- [Overview of Flexfield Deployment](#)
- [How Flexfields Work with Oracle Application Cloud Architecture](#)
- [Validation Type Options for Value Sets](#)

Default Segment Values

To populate a flexfield segment with a default value when a row is created, specify a default type of constant, parameter, or Groovy, and a default value or expression.

To synchronize a segment's value with another field's value whenever it changes, specify the derivation value to be the flexfield parameter from which to derive the attribute's value. Whenever the parameter value changes, the attribute's value is changed to match. If you derive an attribute from a parameter, consider making the attribute read-only, as values entered by users are lost whenever the parameter value changes. When setting a default value or deriving a default value from a parameter, only those attributes designated by development as parameters are available for selection. Different combinations of making the segments read only or editable in combination with the default or derivation value or both, have different effects.

If your segment's default type is Groovy, you can set the Groovy expression you need using the expression builder. To open the expression builder, select **Groovy Expression** as your **Default Type** and click the **Groovy Expression Builder** icon. But you should know that Groovy defaulting doesn't support derivation when a dependent parameter changes. The expression is evaluated only at segment creation.

The following table maps these different combinations. Initial action corresponds to the row for the attribute value being created in the entity table. If the default value is read only, it can't subsequently be changed through the user interface. If the default value isn't read only, users can modify it. However, if the segment value is a derived value, a user-modified segment value is overwritten when the derivation value changes.

Default Type	Default value specified?	Derivation value specified?	Initial action	Action after parameter changes
None	No	Yes	No initial segment value	The changed parameter derivation value updates segment value
Constant	Yes	No	Default segment value	N/A
Constant	Yes	Yes	Default segment value	The changed parameter derivation value updates segment value
Parameter	Yes	No	The default segment value is the parameter's default value	N/A

Default Type	Default value specified?	Derivation value specified?	Initial action	Action after parameter changes
Parameter	Yes	Yes, and same as default value	The default segment value is the parameter's default and derivation value	The changed parameter derivation value updates segment value
Parameter	Yes	Yes, and different from default value	The default segment value is the parameter's default value	The changed parameter default value doesn't update segment value. Only the changed derivation value updates the segment value.
Groovy Expression	Yes	N/A	The default value of the segment is determined by evaluating the groovy expression.	Groovy expressions are evaluated only at segment creation. They're not evaluated when a dependent parameter is modified.
SQL	Yes	No	The default segment value is the value returned by executing SQL statement	N/A
SQL	Yes	Yes	The default segment value is the value returned by executing SQL statement	The changed parameter derivation value updates segment value

Note: For Descriptive Flexfield, only the `PARAMETER` bind variable is supported as the default type in a SQL statement in the specified format: `# {PARAMETER.<PARAMETER_NAME>}`. Other bind variables, such as `SEGMENT`, `CONTEXT`, and `VALUESSET` aren't supported in a SQL statement. Also, the default type in a SQL statement is evaluated only when you create a segment. They aren't evaluated when a dependent parameter is modified.

Related Topics

- [How can I set a default value for a flexfield segment](#)
- [Groovy Scripting Reference](#)

Flexfield Usages

The flexfield usage specifies the table with which the flexfield and its segments are associated. A flexfield can have multiple usages. However, the first table registered for a flexfield indicates the primary usage. Segments are based on the primary usage. Other usages of the same table for the same flexfield use the same segment setup, though the column names may have a differentiating prefix.

On the Manage Descriptive Flexfields and Manage Extensible Flexfields pages, click the **Show Entity Usages** icon for a specific flexfield to view its entity usage. On the Manage Value Sets page, you can view the flexfield usages for a selected value set.

Extensible Flexfields

For extensible flexfield contexts, you can configure a different usage. The use of an extensible flexfield context determines the scenarios or user interfaces in which the segments of a context appear to users. For example, the Supplier page displays an extensible flexfield's supplier usage and the Buyer page for the same flexfield displays the buyer usage. Then, a context that's associated only with the supplier usage appears only on the Supplier page and not on the Buyer page.

Value Sets

The use of value sets specifies the flexfields having segments where the identified value set is assigned.

FAQs for Flexfield Management

How can I access predefined flexfields?

Search for predefined flexfields using the manage flexfields tasks.

1. In the Setup and Maintenance work area, go to any of the following tasks:
 - Manage Descriptive Flexfields
 - Manage Extensible Flexfields
 - Manage Key Flexfields
2. On the page for the type of flexfield you're looking for, enter any of the search parameters and click **Search**.
Tip: If you don't know the flexfield name or the code, use the **Module** field to filter search results.
3. Click a flexfield to view its details.

For configuration that's not available through the manage flexfields tasks and the UI, ask your help desk to log a service request.

Related Topics

- [Update Existing Setup Data](#)

Why can't I edit my flexfield or value set configuration?

Your flexfield or value set configuration may be protected. Application developers mark some configurations as protected, indicating that you can't edit them.

Some examples of configurations that may be protected are:

- Descriptive flexfields

- Extensible flexfield contexts
- Extensible flexfield pages
- Value sets

Why did my page not display any flexfield?

For a flexfield to be available on the page, it must be registered by developers and also deployed. The segments appear on the page only after you have successfully deployed the flexfield.

A flexfield's deployment status indicates whether the flexfield segments are available to users. The flexfield segments that users see correspond to the flexfield definition last deployed successfully.

Note: Oracle CX Sales and Oracle B2B Service don't support flexfields.

To add attributes to these applications, you may use Application Composer. For more information, see the product-specific documentation.

Related Topics

- [How Flexfield Deployment Status is Calculated](#)

Why did my flexfield changes not appear in the UI?

The ADF business components or artifacts of a flexfield, which are generated into an Oracle Metadata Services (MDS) Repository when the flexfield is deployed, are cached within a user session. You must sign out and sign back in again to view flexfield definition changes reflected in the application user interface page.

Related Topics

- [How Flexfield Deployment Status is Calculated](#)

How can I enable flexfield segments for Oracle Social Network Cloud Service?

When you manage Oracle Social Network Objects during setup and maintenance, search for the business object that includes descriptive flexfields. Select the attributes that are defined as flexfield segments and enable them.

Flexfield Deployment

Overview of Flexfield Deployment

Deployment generates or refreshes the Application Development Framework (ADF) business component objects that render the flexfield in a user interface. The deployment process adds user-defined attributes to the Web Services Description Language (WSDL) schemas exposed by Oracle ADF services and used by SOA composites. Flexfields are deployed for the first time during the application provisioning process. After you configure or change a flexfield, you must deploy it to make the latest definition available to users.

If a descriptive flexfield is enabled for business intelligence, the deployment process redeploys the flexfield's business intelligence artifacts.

You can deploy a flexfield to a sandbox for testing or to the mainline metadata for use in a test or production environment. You can deploy extensible flexfields as a background process.

After deployment, the user-defined attributes are available for incorporating into the SOA infrastructure, such as business process and business rule integration. For example, you can now write business rules that depend on the user-defined attributes. You must sign out and sign back in to Oracle Applications Cloud to see the changes you deployed in the production environment.

The following aspects are important in understanding flexfield deployment:

- Deployment Status
- Initial Deployment Status
- Metadata Validations
- Metadata Synchronization
- Deployment as a Background Process
- Export of Artifacts from Flexfield MDS

Deployment Status

Every flexfield has a deployment status. Check the deployment status of your flexfield after patching. The following table lists the different deployment statuses a flexfield can have.

Deployment Status	Meaning
Edited	The flexfield metadata definition hasn't been deployed yet. Updates of the metadata definition aren't applied in the production environment yet.
Patched	The flexfield metadata definition has been modified through a patch or a data migration action, but the flexfield hasn't yet been deployed. So, the updated definition isn't reflected in the production environment.
Deployed to Sandbox	The current metadata for the flexfield is deployed in ADF artifacts and available as a flexfield-enabled sandbox. The status of the sandbox is managed by the Manage Sandboxes dialog box available in the Settings and Actions menu.

Deployment Status	Meaning
Deployed	The current metadata for the flexfield is deployed in ADF artifacts and available to users. No changes have been made to the flexfield after being deployed to the mainline metadata.
Error	The deployment attempt in the mainline metadata failed.

Note: Whenever a value set definition changes, the deployment status of a flexfield that uses that value set changes to edited. If the change results from a patch, the deployment status of the flexfield changes to patched.

Initial Deployment Status of Flexfields

The Oracle Applications Cloud implementation loads flexfield metadata into the database. This initial load sets the flexfield status to Edited. During installation, the application provisioning process deploys the flexfields of the provisioned applications, setting their status to Deployed if no errors occur.

In a provisioned application, deployed flexfields are ready to use. In some cases, flexfield availability at production environment requires setup, such as defining key flexfields.

Metadata Validation

Use the Validate Metadata command to view possible metadata errors before attempting to deploy the flexfield. Metadata validation is the initial phase of all flexfield deployment commands. By successfully validating metadata before running the deployment commands, you can avoid failures in the metadata validation phase of a deployment attempt. The deployment process ends if an error occurs during the metadata validation phase. Metadata validation results don't affect the deployment status of a flexfield.

Metadata Synchronization

When an extensible or descriptive flexfield is deployed, the deployment process regenerates the XML schema definition (XSD). As a result, the user-defined attributes are available to web services and the SOA infrastructure.

After deploying a flexfield configuration, you must synchronize the updated XML schema definition (XSD) files in the MDS repositories for each SOA application.

Note: To synchronize the updated XSD files in the MDS repositories in Oracle Cloud implementations, log a service request using My Oracle Support at <https://support.com/>

Deployment as a Background Process

You can deploy extensible flexfields offline as a background process and continue working in the session without having to wait for the deployment to complete. You can queue up several extensible flexfields and deploy as a background process. The flexfields are deployed, one at a time, in the order that you deploy them to the queue. You must deploy extensible flexfields with more than 30 categories as a background process.

You can remove an extensible flexfield from the deployment queue with the Cancel Background Deployment command. When an extensible flexfield is deployed in a background process, its offline status indicates that the flexfield is in a background deployment process. A flexfield's offline status is cleared and its deployment status updated when the background deployment process has completed.

Export of Artifacts from Flexfield MDS

You can export business components from MDS for descriptive, extensible, or key flexfields, mainly for use in troubleshooting issues with flexfields. Use **Download Flexfield Archive** on the Manage Flexfields page to export MDS artifacts of the selected flexfield, and import them to an archive on your local computer. You can use these archived business components of flexfields for troubleshooting purposes.

Alternatively, export the deployed artifacts using `exportMetadata WLST`.

Related Topics

- [How Flexfield Deployment Status is Calculated](#)
- [How Flexfields Work with Oracle Application Cloud Architecture](#)
- [Considerations for Deploying a Descriptive Flexfield to a Sandbox](#)
- [Why did my flexfield changes not appear in the UI](#)

How Flexfield Deployment Status is Calculated

Flexfield deployment status indicates how the flexfield metadata definition in the Oracle Applications Cloud database relates to the Application Development Framework (ADF) business components residing in an Oracle Metadata Services (MDS) Repository.

The following aspects are important in understanding how flexfield deployment status is calculated:

- Settings that affect flexfield deployment status
- How deployment status is calculated

Settings That Affect Flexfield Deployment Status

If you have made a change to a flexfield and expect a changed deployment status, ensure that you have saved your changes. No settings affect flexfield deployment status.

How Deployment Status Is Calculated

If the flexfield definition has been edited through the Define Flexfields activity task flows, the status is Edited. The latest flexfield metadata definition diverges from the latest deployed flexfield definition. Any change, including if a value set used in a flexfield changes, changes the deployment status to Edited. If a flexfield has never been deployed, its status is Edited.

Note: When an application is provisioned, the provisioning framework attempts to deploy all flexfields in that application.

If you deploy the flexfield to a sandbox successfully, the status is Deployed to Sandbox. The latest flexfield metadata definition in the application matches with the metadata definition that generated ADF business components in a sandbox MDS Repository. Whether the sandbox is active or not doesn't affect the deployment status. If the flexfield was deployed to a sandbox and hasn't been edited or redeployed to the mainline metadata since then, the status remains Deployed to Sandbox independent of whether the sandbox is active, or who's viewing the status.

If you deploy the flexfield successfully to the mainline metadata, the status is Deployed. The latest flexfield metadata definition in the application matches the metadata definition that generated ADF business components in a mainline MDS Repository. Change notifications are sent when a flexfield is deployed successfully to the mainline metadata.

If either type of deployment fails and that the current flexfield definition isn't deployed, the status is Error. The deployment error message gives details about the error. The latest flexfield metadata definition in the application likely diverges from the latest successfully deployed flexfield definition.

If the flexfield definition has been modified by a patch, the status is Patched. The latest flexfield metadata definition in the application diverges from the latest deployed flexfield definition. If the flexfield definition was Deployed before the patch and then a patch was applied, the status changes to Patched. If the flexfield definition was Edited before the patch and then a patch was applied, the status remains at Edited to reflect that there are still changes (outside of the patch) that aren't yet in effect.

When a deployment attempt fails, you can access the Deployment Error Message for details.

Related Topics

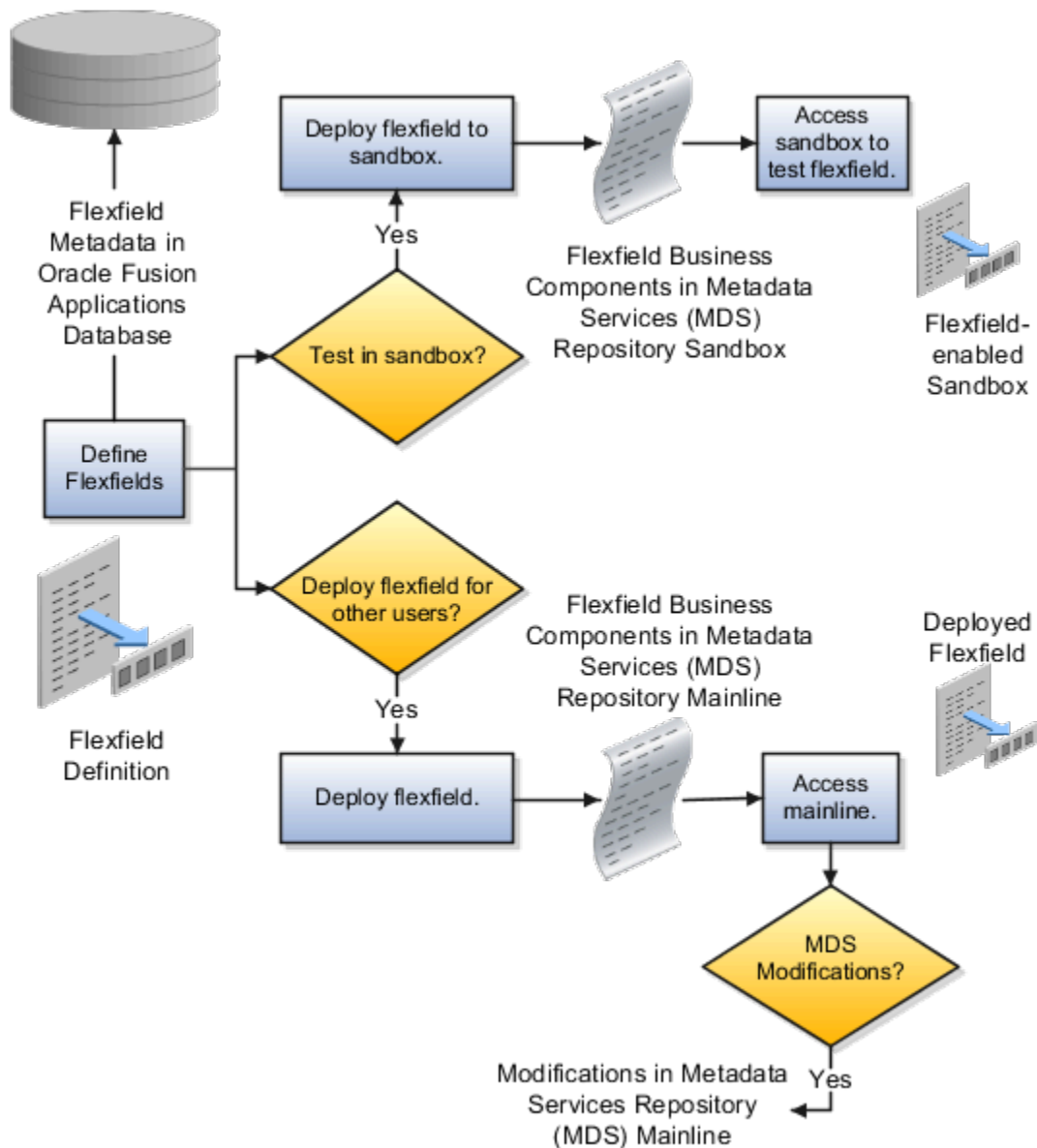
- [How Flexfields Work with Oracle Application Cloud Architecture](#)
- [Considerations for Managing Extensible Flexfields](#)

How Deploying a Flexfield-Enabled Sandbox Works with Mainline Metadata

The flexfield definition in a sandbox corresponds to the flexfield metadata definition in the Oracle Applications Cloud database at the time the flexfield was deployed to the sandbox. When the flexfield is ready for end users, the flexfield must be deployed to the mainline metadata.

A flexfield-enabled sandbox uses the following components.

- Flexfield metadata in the Oracle Applications Cloud database
- Flexfield business components in a sandbox Oracle Metadata Services (MDS) repository
- User interface modifications for the flexfield in the mainline MDS repository



Sandbox Metadata Services Repository Data

Deploying the flexfield to a sandbox generates the Application Development Framework (ADF) business components of a flexfield in a sandbox MDS Repository for testing in isolation.

CAUTION: Don't modify flexfield segment display properties using Page Composer in a flexfield sandbox as these changes are lost when you deploy your flexfield to the mainline metadata.

Mainline Metadata Services Repository Data

The Oracle Fusion Applications database stores the single source of truth about a flexfield. When the flexfield is deployed, the ADF business component objects that implement the flexfield in the run time user interface are generated in the mainline MDS Repository from this source.

Related Topics

- [How Flexfield Deployment Status is Calculated](#)

Considerations for Deploying a Descriptive Flexfield to a Sandbox

You can deploy and test the behavior of a descriptive flexfield in the flexfield-enabled sandbox. If changes are needed, you return to the **Manage Descriptive Flexfields** task to change the flexfield definition. When you deploy a descriptive flexfield to a sandbox, the process reads the metadata about the segments from the database. It generates ADF Business Components artifacts for flexfields based on the definition, and stores the generated artifacts in the sandbox.

You can't deploy your changes in value sets, key flexfields, and extensible flexfields to your unified sandbox. You must deploy them directly to the mainline environment. However, if you're making changes to any descriptive flexfield, you must deploy your flexfield to the sandbox and test your changes before publishing your sandbox. After you deploy a descriptive flexfield to a sandbox, you must sign out and sign back in to the application to see your changes.

Note: You can deploy a descriptive flexfield to a sandbox using the **Manage Descriptive Flexfields** task only.

Manage Value Sets

Overview of Value Sets

A value set is a group of valid values that you assign to a flexfield segment to control the values that are stored for business object attributes.

A user enters a value for an attribute of a business object while using the application. The flexfield validates the value against the set of valid values that you configured as a value set and assigned to the segment.

For example, you can define a required format, such as a five-digit number, or a list of valid values, such as green, red, and blue.

Flexfield segments are usually validated, and typically each segment in a given flexfield uses a different value set. You can assign a single value set to more than one segment, and you can share value sets among different flexfields.

Note: Ensure that changes to a shared value set are compatible with all flexfields segments using the value set.

The following aspects are important in understanding value sets:

- Managing value sets
- Validation
- Security
- Precision and scale
- Usage and deployment

- Protected value set data

Managing Value Sets

To open the Manage Value Sets page, use the Manage Value Sets task. You can also use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks for configuring a segment, including its value set. To open the Manage Values page, select the value set from the Manage Value Sets page, and click **Manage Values**. Alternatively, click **Manage Values** from the Edit Value Set page.

Validation

The following types of validation are available for value sets:

- Format only, where users enter data instead of selecting values from a list
- Independent, a list of values consisting of valid values you specify
- Dependent, a list of values where a valid value derives from the independent value of another segment
- Subset, where the list of values is a subset of the values in an existing independent value set
- Table, where the values derive from a column in an application table and the list of values is limited by a WHERE clause

A segment that uses a format only value set doesn't present a list of valid values to users. If required, you may add table validated value sets to the list of available value sets available for configuration.

Note: For the Accounting Key Flexfield value sets, you must use independent validation only. If you use other validations, you can't use the full chart of accounts functionality, such as data security, reporting, and account hierarchy integration.

Security

Value set security only works in conjunction with usage within flexfield segments. You can specify that data security be applied to the values in flexfield segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment users can view or modify.

The application of value set security has the following conditions:

- At the value set level: The value set is the resource secured by data security policies. If a value set is secured, every usage of it in any flexfield is secured. Disabling security for individual usages of the same value set isn't possible.
- Applies to independent, dependent, or table-validated value sets.
- Applies mainly when data is being created or updated, and to key flexfield combinations tables for query purposes. Value set security doesn't determine which descriptive flexfield data is shown upon querying.
- Security conditions defined on value sets always use table aliases. When filters are used, table aliases are always used by default. When predicates are defined for data security conditions, make sure that the predicates also use table aliases.

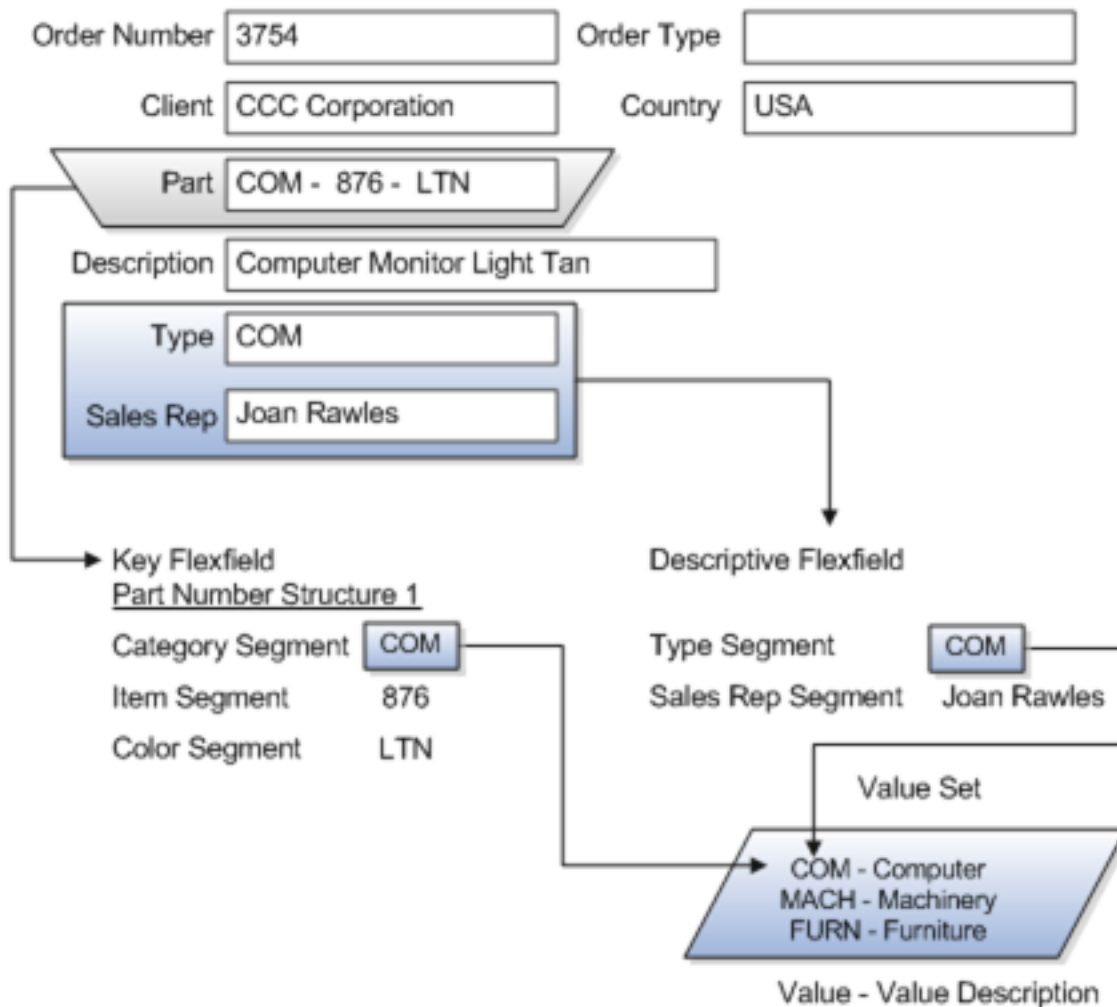
For key flexfields, the attributes in the view object corresponding to the account combination ID, structure instance number (SIN), and data set number (DSN) can't be transient. They must exist in the database table. For key flexfields, the SIN segment is the discriminator attribute, and the account combination segment is the common attribute.

Precision and Scale

If the data type of a value set is Number, you can specify the precision (maximum number of digits user can enter) or scale (maximum number of digits following the decimal point).

Usage and Deployment

The usage of a value set is the flexfields where that value set is used. The deployment status of flexfields in which the value set is used indicates the deployment status of the value set instance.



For most value sets, when you enter values into a flexfield segment, you can enter only values that already exist in the value set assigned to that segment.

Global and context-sensitive segment require a value set. You can assign a value set to a descriptive flexfield context segment. If you specify only context values, not value sets for contexts, the set of valid values is equal to the set of context values.

Protected Value Set Data

Application developers may mark some value sets as protected, indicating that you can't edit them.

You can edit only value sets that are not marked as protected. You can't edit or delete protected value sets. If the value set type supports values (such as independent, dependent or subset value sets), then you can't add, edit, or delete values.

Note: References to protected value sets aren't restricted. Value sets, protected or not, may be assigned to any flexfield segment. Likewise, other value sets may reference protected value sets; for example, an unprotected dependent value set may reference a protected independent value set.

Related Topics

- [How Flexfields and Value Sets Work Together](#)
- [Why can't I edit my flexfield or value set configuration](#)
- [What's the difference between a lookup type and a value set](#)
- [Default Segment Values](#)
- [Chart of Accounts Components](#)

Validation Type Options for Value Sets

Validation and usage of value sets determine where and how users access valid values for attributes represented by flexfield segments.

Tip: As a flexfield guideline, define value sets before configuring the flexfield, because you can assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfield segments, you can create value sets when adding or editing a segment on the run time page where the flexfield appears.

The following aspects are important in defining value sets:

- Value sets for context segments
- Format-only validation
- Interdependent value sets
- Table validation
- Range
- Security
- Testing and maintenance

Value Sets for Context Segments

When assigning a value set to a context segment, you can only use table-validated or independent value sets.

You can use only table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length. If you use a table value set, the value set can't reference flexfield segments in the value set's WHERE clause, other than the flexfield segment to which the value set is assigned.

Format Only Validation

The format only validation type enables users to enter any value, as long as it meets your specified formatting rules. The value must not exceed the maximum length you define for your value set, and it must meet any format requirements for that value set.

For example, if the value set permits only numeric characters, users can enter the value 456 (for a value set with maximum length of three or more), but can't enter the value ABC. A format only value set doesn't otherwise restrict the range of different values that users can enter. For numeric values, you can also specify if a numeric value should be zero filled or how many digits should follow the radix separator.

Interdependent Value Sets

Use an independent value set to validate data against a list that isn't stored in an application table, and not dependent on a subset of another independent value set. You can't specify a dependent value set for a given segment without having first defined an independent value set that you apply to another segment in the same flexfield. Use a dependent value set to limit the list of values for a given segment based on the value that the user has defined for a related independent segment. The available values in a dependent list and the meaning of a given value depend on which value was selected for the independently validated segment.

For example, you could define an independent value set of the states in the USA with values such as CA, NY, and so on. Then you define a dependent value set of cities in the USA with values such as San Francisco and Los Angeles that are valid for the independent value CA. Similarly, New York City and Albany are valid for the independent value NY. In the UI, only the valid cities can be selected for a given state.

Because you define a subset value set from an existing independent value set, you must define the independent value set first. Users don't have to select a value for another segment first to have access to the subset value set.

Independent, dependent, and subset value sets require a user-defined list of valid values. Use the Manage Values page to create and manage a value set's valid values and the order in which they appear.

Tip: You can configure the Manage Value Sets page to capture additional attributes for each valid value by adding context-sensitive segments in a new context for FND_VS_VALUES_B descriptive field.

Table Validation

Typically, you use a table-validated set when the values you want to use are already maintained in an application table, such as a table of supplier names. Specify the table column that contains the valid value. You can optionally specify the description and ID columns, a WHERE clause to limit the values to use for your set, and an ORDER BY clause.

If you specify an ID column, then the flexfield saves the ID value, instead of the value from the value column, in the associated flexfield segment. If the underlying table supports translations, you can enable the display of translated text by basing the value set's value column on a translated attribute of the underlying table. You should also define an ID column that's based on an attribute that isn't language-dependent so that the value's invariant ID (an ID that doesn't change) is saved in the transaction table. The run time displays the corresponding translated text from the value column for the run time session's locale.

Table validation lets you enable a segment to depend on multiple prior segments in the same context structure. You can't reference other flexfield segments in the table-validated value set's WHERE clause. Which means, the WHERE clause can't reference SEGMENT.segment_code or VALUESET.value_set_code.

Table-validated value sets have unique values across the table, irrespective of bind variables. The WHERE clause fragment of the value set is considered if it doesn't have bind variables. If it has bind variables, the assumption is that

the values are unique in the value set. If you use table validated value sets for key flexfields, then you can't use all integration options supported for key flexfields, such as:

- Data security
- Oracle Transactional Business Intelligence (OTBI)
- Extended Spread Sheet Database (ESSbase)
- Tree or hierarchy integration

To use these integration options for key flexfields, you must use independent value sets only.

Range

In the case of format, independent, or dependent value sets, you can specify a range to limit which values are valid. You can specify a range of values that are valid within a value set. You can also specify a range validated pair of segments where one segment represents the low end of the range and another segment represents the high end of the range.

For example, you might specify a range for a format-only value set with format type Number where the user can enter only values between 0 and 100.

Security

In the case of independent and dependent values, you can specify that data security be applied to the values in segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment users can view or modify.

To enable security on a value set, specify a database resource, typically the code value for the value set. Using the Manage Database Security Policies task, specify conditions, such as filters or SQL predicates, and policies that associate roles with conditions. You can use a filter for simple conditions. For more complex conditions, use a SQL predicate.

Value set data security policies and conditions differ from data security conditions and policies for business objects in the following ways:

- You can grant only read access to users. You can't specify any other action.
- When defining a condition that's based on a SQL predicate, use `VALUE`, `VALUE_NUMBER`, `VALUE_DATE`, `VALUE_TIMESTAMP`, or `VALUE_ID` to reference the value from a dependent, independent, or subset value set. For table value sets, use a table alias to define the table, such as `&TABLE_ALIAS category=70`.

When you enable security on table-validated value sets, the security rule that's defined is absolute and not contingent upon the bind variables (if any) that may be used by the `WHERE` clause of the value set. For example, suppose a table-validated value set has a bind variable to further filter the value list to x, y and z from a list of x, y, z, xx, yy, zz. The data security rule or filter written against the value set must not assume anything about the bind variables. Instead the whole list of values must be available and you write the rule, for example, to permit x, or to permit y and z. By default in data security, all values are denied and show only rows to which access has been provided.

Testing and Maintenance

You don't have to define or maintain values for a table-validated value set, as the values are managed as part of the referenced table or independent value set, respectively.

You can't manage value sets in a sandbox.

When you change an existing value set, the deployment status for all affected flexfields changes to Edited. You must redeploy all flexfields that use that value set to make the flexfields reflect the changes. In the UI pages for managing value sets, the value set's usages show which flexfields are affected by the value set changes.

If your application has more than one language installed, or there is any possibility that you might install one or more additional languages for your application in the future, select **Translatable**. This doesn't require you to provide translated values now, but you can't change this option if you decide to provide them later.

Related Topics

- [Considerations for Bind Variables in Table-Validated Value Sets](#)
- [What happens if a value set is security enabled](#)
- [Add Attributes to the Manage Value Sets Page](#)

Considerations for Planning Value Sets

The value sets you create and configure depend on the valid values on the business object attributes that will use the value set. When creating value sets, you first give the value set a name and description, and then define the valid values of the set.

The following aspects are important in planning value sets:

- List of values
- Plain text
- Value ranges
- Value format specification
- Security

List of Values

You can use one of the following types of lists to specify the valid values for a segment:

- Table column
- User-defined list. Also include a sub list.
- Dependent user-defined list

If the valid values exist in a table column, use a table value set to specify the list of values. To limit the valid values to a subset of the values in the table, use a SQL WHERE clause. Table value sets also provide some advanced features, such as enabling validation depending on other segments in the same structure.

Use an independent value set to specify a user-defined set of valid values. For example, you can use an independent value set of Mon, Tue, Wed, and so forth to validate the day of the week. You can also specify a subset of an existing independent value set as the valid values for a segment. For example, if you have an independent value set for the days of the week, then a weekend subset can comprise entries for Saturday and Sunday.

Use a dependent value set when the available values in the list and the meaning of a given value depend on which independent value was selected for a previously selected segment value. For example, the valid holidays depend on which country you're in. A dependent value set is a collection of value subsets, with one subset for each value in a corresponding independent value set.

For lists of values type value sets, you can additionally limit the valid values that an end user can select or enter by specifying format, minimum value, and maximum value. For list of values type value sets, you can optionally implement value set data security. If the applications are running in different locales, you might need to provide different translations for the values and descriptions.

Plain Text

Use a format-only value set when you want to allow users to enter any value, as long as that value conforms to formatting rules. For example, if you specify a maximum length of 3 and numeric-only, then end users can enter 456, but not 4567 or 45A. You can also specify the minimum and maximum values, whether to align the text to either side, and whether to zero-fill. With a format-only value set, no other types of validation are applied.

Value Ranges

You can use either a format-only, independent, or dependent value set to specify a range of values. For example, you might create a format-only value set with Number as the format type where the end user can enter only the values between 0 and 100. Or, you might create a format-only value set with Date as the format type where the end user can enter only dates for a specific year, such as a range of 01-JAN-93 to 31-DEC-93. Because the minimum and maximum values enforce these limits, you need not define a value set that contains each of these individual numbers or dates.

Value Format

Flexfield segments commonly require some kind of format specification, regardless of validation type. Before creating a value set, consider how you will specify the required format.

The following table shows options for validation type and value data type.

Option	Description
Value data type	Character, Number, Date, Date Time.
Value subtype	Text, Translated text, Numeric digits only, Time (20:08), Time (20:08:08). An additional data type specification for the Character data type for the Dependent, Independent, and Format validation types.
Maximum length	Maximum number of characters or digits for Character data type.
Precision	Maximum number of digits the user can enter.
Scale	Maximum number of digits that can follow the decimal point.
Uppercase only	Lowercase characters automatically changed to uppercase.
Zero fill	Automatic text alignment and zero-filling of entered numbers (affects values that include only the digits 0-9).

Note: You can't change the text value data type to a translated text value subtype after creating a value set. If there is any chance you may need to translate displayed values into other languages, choose Translated text. Selecting the Translated text subtype doesn't require you to provide translated values.

Value Sets for Context Segments

You can use only table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length. If you use a table value set, the value set can't reference flexfield segments in the value set's WHERE clause other than the flexfield segment to which the value set is assigned.

Security

When enabling security on a value set, the data security resource name is an existing value set or one that you want to create. The name typically matches the code value for the value set. You can't edit the data security resource name after you save your changes.

Related Topics

- [Overview of Value Sets](#)
- [How Flexfields and Value Sets Work Together](#)
- [Validation Type Options for Value Sets](#)
- [Default Segment Values](#)
- [What's the difference between a lookup type and a value set](#)

Considerations for Bind Variables in Table-Validated Value Sets

After you assign a value set to a flexfield, you can use bind variables in the WHERE clause.

These bind variables refer to flexfield elements:

- `:{SEGMENT.<segment_code>}`
- `:{CONTEXT.<context_code>;SEGMENT.<segment_code>}`
- `:{VALUESET.<value_set_code>}`
- `:{FLEXFIELD.<internal_code>}`
- `:{PARAMETER.<parameter_code>}`

Segment Code

`:{SEGMENT.<segment_code>}`

This bind variable refers to the ID or value of a segment where `<segment_code>` identifies the segment. Where referring to the ID, the value set is ID-validated. Where referring to the value, the value set isn't ID-validated. The data type of the bind value is the same as the data type of the segment's column.

For both descriptive and extensible flexfields, the segment must be in the same context as the source segment. The source segment contains the WHERE clause. For descriptive flexfields, if the segment is global, then the source segment must be global.

The segment must have a sequence number that's less than the sequence number of the target segment with this bind variable. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment. For example, the values to select from a CITIES table might depend upon the selected country. If SEGMENT1 contains the country value, then the WHERE clause for the CITIES table might be `<country_code> = :{SEGMENT.SEGMENT1}`.

Context Code

```
: {CONTEXT.<context_code>; SEGMENT.<segment_code>}
```

This bind variable, which is valid only for extensible flexfields, refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of a segment that's in a different context than the target segment (the segment with the WHERE clause).

- The `<context_code>` identifies the context and must be in the same category or in an ancestor category. It can't be a multiple-row context.
- The `<segment_code>` identifies the segment. The data type of the bind value is the same as the data type of the segment's column.

Note: The target segment should appear in the UI after the source segment to ensure the source segment has a value. If the target segment's context is a single-row context, the source and target segments must be on separate pages and the target page must follow the source page.

The framework of extensible flexfields doesn't perform any additional validation related to mismatched values for segments defined with cross context bind parameters. Administrators must populate the correct pair of segment values.

This bind variable is useful when the set of valid values depends on the value of a segment in another context. For example, the values to select from a CERTIFICATION table for a segment in the Compliance and Certification context might depend on the value of the country segment in the Manufacturing context.

Value Set Code

```
: {VALUESET.<value_set_code>}
```

This bind variable refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of the segment that's assigned to the value set that's identified by the `value_set_code`. The data type of the bind value is the same as the data type of the segment's column.

The segment must have a sequence number that's less than the sequence number of the segment with this bind variable. If more than one segment is assigned to the value set, the closest prior matching segment will be used to resolve the bind expression. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment and that segment code can vary, such as when the value set is used for more than one context or flexfield. For example, the values to select from a CITIES table might depend upon the selected country. If the value set for the segment that contains the country value is COUNTRIES, then the WHERE clause for the CITIES table might be `<country_code> = : {VALUESET.COUNTRIES}`.

Flexfield Internal Code

```
: {FLEXFIELD.<internal_code>}
```

This bind variable refers to an internal code of the flexfield in which the value set is used, or to a validation date. The `internal_code` must be one of the following:

- `APPLICATION_ID` - the application ID of the flexfield in which this value set is used. The data type of `APPLICATION_ID` and its resulting bind value is `NUMBER`.
- `DESCRIPTIVE_FLEXFIELD_CODE` - the identifying code of the flexfield in which this value set is used. The data type of `DESCRIPTIVE_FLEXFIELD_CODE` and its resulting bind value is `VARCHAR2`. Note that you use this string for both descriptive and extensible flexfields.
- `CONTEXT_CODE` - the context code of the flexfield context in which this value set is used. The data type of `CONTEXT_CODE` and its resulting bind value is `VARCHAR2`.
- `SEGMENT_CODE` - the identifying code of the flexfield segment in which this value set is used. The data type of `SEGMENT_CODE` and its resulting bind value is `VARCHAR2`.
- `VALIDATION_DATE` - the current database date. The data type of `VALIDATION_DATE` and its resulting bind value is `DATE`.

Flexfield Parameters

`:{PARAMETER.<parameter_code>}`

This bind variable refers to the value of a flexfield parameter where `parameter_code` identifies the parameter. The data type of the resulting bind value is the same as the parameter's data type.

Note: You can't assign a table value set to a context segment if the `WHERE` clause uses `VALUESET.value_set_code` or `SEGMENT.segment_code` bind variables.

Related Topics

- [Create Table-Validated Value Sets Based on Lookups](#)

Create and Edit Table-Validated Value Sets Based on Lookups

While creating and editing value sets, use a predefined list of values that are stored in an application table. You can specify which table you want to use, along with a `WHERE` clause to limit the values you want to use for your set. For example, let's use the `FND_LOOKUPS` view as the basis for a table-validated value set. The lookup meaning corresponds to the **Value Column Name** field and the lookup description corresponds to the **Description Column Name** field.

Create a Value Set Based on a Lookup

1. In the Setup and Maintenance work area, go to the **Manage Value Sets** task.
2. On the Manage Value Sets page, click the **Create** icon.
3. On the Create Value Set page, enter these values:

Field	Value
Value Set Code	SAMPLE_VALUE_SET_CODE
Description	Sample lookup-based table validated value set

Field	Value
Module	Oracle Middleware Extensions for Applications
Validation Type	Table
Value Data Type	Character

4. In the Definition section, enter these values:

Field	Value
FROM Clause	FND_LOOKUPS
Value Column Name	Meaning
Description Column Name	Description
Start Date Column Name	start_date_active
End Date Column Name	end_date_active
Enabled Flag Column Name	'Y'
ID Column Name	lookup_code
WHERE Clause	lookup_type = 'SAMPLE_LOOKUP_TYPE'
ORDER BY Clause	display_sequence, meaning

5. Click **Save and Close**.

Edit a Value Set Based on a Lookup

1. In the Setup and Maintenance work area, go to the **Manage Value Sets** task.
2. On the Manage Value Sets page, use the Search text field to search for a value set.
3. Select a value set and click the **Edit** icon.
4. On the Edit Value Set page, modify the existing values.
5. Click **Save and Close**.

Related Topics

- [Update Existing Setup Data](#)

Add Attributes to the Manage Value Sets Page

You can add attributes to independent, dependent, and subset value sets. The attributes appear on the Manage Value Sets page where you can store additional information about each valid value. To display attributes on an application page, you must programmatically modify the application.

To add attributes and subsequently view them on the Manage Value Sets page, perform the following steps:

1. Using the Manage Descriptive Flexfields task, find the FND_VS_VALUES_B flexfield and open it for editing.
2. Click **Manage Contexts**.
3. Create a new context and use the value set code for the context code.
4. Add new attributes as context-sensitive segments and save the changes.
5. Deploy FND_VS_VALUES_B to run time.
6. Sign out and sign back in.
7. Open the Manage Value Sets page to view the new attributes.

Import Value Set Values

You can import a file containing values that you want to edit or add to a given independent or dependent value set.

For example, uploading hundreds of values might be more efficient than creating them individually using the **Manage Value Sets** task. However, for just a few values, it might be quicker to perform the relevant tasks. Here are a few things you need to keep in mind while creating these files:

- Use a vertical bar or pipe (|) as a delimiter between fields for both the header and the value rows.
- As per the Oracle WebCenter Content specification, set the file encoding to UTF-8 without the Byte Order Mark (BOM).
- Make sure that the first line in the file is a header line, and the files look exactly the same as shown in the sample file.

Here's a sample file for value set value. You can see the header values at the beginning of the file, followed by the line entries of the two value set codes that are to be imported.

```
VALUE_SET_CODE|VALUE|ENABLED_FLAG
FLEX_KFF1_IND_CHR_L10_ZEROFILL|5000|Y
FLEX_KFF1_IND_CHR_L10_ZEROFILL1|5001|N
```

To import value set values, do these tasks:

1. Create a flat file containing the values in the value set that you want to add or update.
When creating the file, you must specify an existing value set code to which you want to add values or edit existing values. If the value set does not exist, add the value set using the appropriate **Manage Value Sets** task in the Setup and Maintenance work area.
2. Upload the flat file to the content repository using the File Import and Export page.
3. Import the file using the appropriate **Manage Value Sets** task in the Setup and Maintenance work area. To import the file, do these tasks:

- a. In the Manage Value Sets page, click **Actions > Import Related Values**.
- b. In the **File Name** field, enter the name of the flat file you uploaded using the File Import and Export page.
- c. In the **Account** field, select the user account containing the flat file.
- d. Click **Upload**.

Note: Alternatively, you can import the file using either of the following methods:

- Run the Upload Value Set Values scheduled process.
- Use the Applications Core Metadata Import web service. For more information on the Applications Core Metadata Import web service, see the SOAP Web Services guide for your cloud services.

Related Topics

- [Requirements for Flat Files to Upload Value Set Values](#)
- [Upload Value Set Values Process](#)
- [Overview of Files for Import and Export](#)

Import Value Set Values Using Web Services

As an alternative to using the import option on the Manage Value Sets page, you can use the `FndManageImportExportFilesService` web service to import value set values into an application. The web service uses the `valueSetValuesDataLoader` method.

Prerequisite

Ensure that the web service `FndManageImportExportFilesService` is added to the Manage Application Flexfield Value Set entitlement. Use the Security Console to perform this configuration on Oracle Entitlements Server. While configuring the web service, provide the following details:

- Resource type: `WebresourceResourceType`
- Display name: `ImportExport`
- Name: `http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/FndManageImportExportFilesService#*`
- Entitlement (In Default Policy Domain): `Manage Application Flexfield Value Set`
- Security policy: `oracle/wss11_saml_or_username_token_with_message_protection_service_policy`

Importing Value Set Values

To import value set values:

1. Perform the following substeps to generate keystore for the security policy "oracle/wss11_saml_or_username_token_with_message_protection_service_policy":
 - a. Generate keystore using the command `keytool -genkeypair -keyalg RSA -alias mycompkey -keypass <password> -keystore mycompclient-keystore.jks -storepass <password> -validity 3600`.

- b. Access the WSDL using the URL `http://<host>:<port>/fndAppCoreServices/FndManageImportExportFilesService?wsdl` through a web browser, and get the public key `<wsdl:service>/<wsdl:port>/<wsa:EndpointReference>/<wsid:Identity>/<dsig:keyInfo>/<dsig:X509Data>/<dsig:X509Certificate>`. Then, enclose it with `----- BEGIN CERTIFICATE -----` and `----- END CERTIFICATE -----` and save it to a file by name **cdrmprk.cer**.
 - c. Store the key information in the truststore using the command `keytool -importcert -alias cdrmkkey -file cdrmpk.cer -keystore mycompclient-keystore.jks -storepass <password>`.
2. Access the WSDL page using the browser of your choice.
3. Export and save the associated security certificates **Verisign Class 3 Public Primary Certification Authority - G5** and **Verisign Secure Server CA - G3**.
4. Use the following command to import the saved certificates into the trust store of the client computer.
`keytool -importcert -keystore <truststore> -storepass <truststorepassword> -file <file location where the mentioned certificate is stored> -alias <alias for certificate>`

5. Run the following command to generate the JAX-WS proxy for the `FndManageImportExportFilesService` web service.

```
C:\Program Files\Java\jdk1.7.0_04\bin>wsimport
-s "d:\wsimport\FndManageImportExport"
-d "d:\wsimport\FndManageImportExport" http://<host>:<port>/fndAppCoreServices/
FndManageImportExportFilesService?wsdl
```

parsing WSDL...

Generating code...

Compiling code...

6. Save the generated code as a JAR file and name it **FndManagelImportExportProxy.jar**.
7. Use the following code to create another JAR file to initiate the web service:

```
package com.oracle.xmlns.oracle.apps.fnd.applcore.webservices;

import com.sun.xml.ws.developer.WSBindingProvider;

import java.io.File;
import java.io.IOException;

import java.util.List;

import java.util.Map;

import javax.xml.ws.BindingProvider;
import javax.xml.ws.WebServiceRef;

import javax.xml.ws.handler.Handler;

import oracle.webservices.ClientConstants;

import weblogic.wsee.jws.jaxws.owsm.SecurityPoliciesFeature;
// !THE CHANGES MADE TO THIS FILE WILL BE DESTROYED IF REGENERATED!
// This source file is generated by Oracle tools
// Contents may be subject to change
// For reporting problems, use the following
// Version = Oracle WebServices (11.1.1.0.0, build 130224.1947.04102)

public class FndManageImportExportFilesServiceSoapHttpPortClient
{
    @WebServiceRef
    private static FndManageImportExportFilesService_Service fndManageImportExportFilesService_Service;
```

```

public static void main(String [] args)
{
    System.setProperty("javax.net.ssl.trustStore","<location of truststore which is used in II) to import
the certificates>");
    System.setProperty("javax.net.ssl.trustStorePassword", "<truststore password>");

    fndManageImportExportFilesService_Service = new FndManageImportExportFilesService_Service();
    SecurityPoliciesFeature securityFeatures =
    new SecurityPoliciesFeature(new String[] { "oracle/
wssll_username_token_with_message_protection_client_policy",
});
    FndManageImportExportFilesService
    fndManageImportExportFilesService =
    fndManageImportExportFilesService_Service.getFndManageImportExportFilesServiceSoapHttpPort
    (securityFeatures);
    // Add your code to call the desired methods.

    WSBindingProvider wsbp = (WSBindingProvider) fndManageImportExportFilesService;
    Map<String, Object> requestContext = wsbp.getRequestContext();

    requestContext.put(ClientConstants.WSSEC_KEYSTORE_TYPE,"jks");
    // Provide location of 'mycompclient-keystore.jks' which was created during Step I)
    requestContext.put(ClientConstants.WSSEC_KEYSTORE_LOCATION,"/home/user1/mycompclient-keystore.jks");
    requestContext.put(ClientConstants.WSSEC_KEYSTORE_PASSWORD,"<password>");
    requestContext.put(ClientConstants.WSSEC_RECIPIENT_KEY_ALIAS,"cdrmkey");

    //Provide user who is having permission to initiate the service
    requestContext.put(WSBindingProvider.USERNAME_PROPERTY,"<username>");
    requestContext.put(WSBindingProvider.PASSWORD_PROPERTY, "<password>");

    String id = invokeUploadFiletoUCMMethod(fndManageImportExportFilesService);

    if (id != null) {
        invokevalueSetValuesDataLoader(fndManageImportExportFilesService, new Long(id));
    }
}

static String invokeUploadFiletoUCMMethod(FndManageImportExportFilesService
fndManageImportExportFilesService) {

    String response = null;
    DocumentDetails document = new DocumentDetails();
    ObjectFactory objfactory = new ObjectFactory();
    document.setFileName(objfactory.createDocumentDetailsFileName("import_data.txt"));
    // Provide UCM repository - if repository is fin/tax/import then suffix each value with $ as mentioned
    here
    document.setDocumentAccount(objfactory.createDocumentDetailsDocumentAccount("fin$/tax$/import$"));
    document.setDocumentTitle(objfactory.createDocumentDetailsDocumentTitle("VS"));
    document.setContentType(objfactory.createDocumentDetailsContentType("plain/text"));

    try {

        // Provide location of 'VS.txt' which contains ValueSet values data in prescribed format
        byte[] content =
        org.apache.commons.io.FileUtils.readFileToByteArray(new File("/home/user1/VS.txt"));

        //System.out.println("File content:" + new String(content, "UTF-8"));
        document.setContent(objfactory.createDocumentDetailsContent(content));

    } catch (IOException e) {
        System.out.println(e.getMessage());
    }
}

```

```

catch(Exception e) {
    System.out.println("Exception: "+e.getMessage());
}

try {
    response = fndManageImportExportFilesService.uploadFiletoUCM(document);
    System.out.println("Response: " + response);

} catch (ServiceException e) {
    System.out.println(e.getMessage());
}

return response;
}

static void invokevalueSetValuesDataLoader(FndManageImportExportFilesService
fndManageImportExportFilesService,
Long id) {
    String response;
    try {
        response = fndManageImportExportFilesService.valueSetValuesDataLoader(id);
        System.out.println("Response: " + response);
    } catch (ServiceException e) {
        System.out.println(e.getMessage());
    }
}
}

```

8. Save the generated output as a JAVA file and name it **FndManageImportExportFilesServiceSoapHttpPortClient.java**.
9. Use the JAVA file to build a JAR file, and name it **FndManageImportExportClient.jar**.
10. Use the following command to run the web service:

```

java -cp ./FndManageImportExportProxy.jar:./ws.api_1.1.0.0.jar:./FndManageImportExportClient.jar
FndManageImportExportFilesServiceSoapHttpPortClient

```

Related Topics

- [Import Value Set Values](#)

Import Value Set Values Using Web Services

As an alternative to using the import option on the Manage Value Sets page, you can use the **FndManageImportExportFilesService** web service to import value set values into an application. The web service uses the **valueSetValuesDataLoader** method.

Prerequisite

Ensure that the web service **FndManageImportExportFilesService** is added to the Manage Application Flexfield Value Set entitlement. Use the Security Console to perform this configuration on Oracle Entitlements Server. While configuring the web service, provide the following details:

- Resource type: **WebresourceResourceType**
- Display name: **ImportExport**
- Name: **http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/FndManageImportExportFilesService#***

- Entitlement (In Default Policy Domain): Manage Application Flexfield Value Set
- Security policy: oracle/wss11_saml_or_username_token_with_message_protection_service_policy

Importing Value Set Values

To import value set values:

1. Perform the following substeps to generate keystore for the security policy "oracle/wss11_saml_or_username_token_with_message_protection_service_policy":
 - a. Generate keystore using the command `keytool -genkeypair -keyalg RSA -alias mycompkey -keypass <password> -keystore mycompclient-keystore.jks -storepass <password> -validity 3600`.
 - b. Access the WSDL using the URL `http://<host>:<port>/fndAppCoreServices/FndManageImportExportFilesService?wsdl` through a web browser, and get the public key `<wsdl:service>/<wsdl:port>/<wsa:EndpointReference>/<wsid:Identity>/<dsig:keyInfo>/<dsig:X509Data>/<dsig:X509Certificate>`. Then, enclose it with `----- BEGIN CERTIFICATE -----` and `----- END CERTIFICATE -----` and save it to a file by name **cdmpk.cer**.
 - c. Store the key information in the truststore using the command `keytool -importcert -alias cdrmkey -file cdrmpk.cer -keystore mycompclient-keystore.jks -storepass <password>`.
2. Access the WSDL page using the browser of your choice.
3. Export and save the associated security certificates **Verisign Class 3 Public Primary Certification Authority - G5** and **Verisign Secure Server CA - G3**.
4. Use the following command to import the saved certificates into the trust store of the client computer.

```
keytool -importcert -keystore <truststore> -storepass <truststorepassword> -file <file location where the mentioned certificate is stored> -alias <alias for certificate>
```

5. Run the following command to generate the JAX-WS proxy for the `FndManageImportExportFilesService` web service.

```
C:\Program Files\Java\jdk1.7.0_04\bin>wsimport
-s "d:\wsimport\FndManageImportExport"
-d "d:\wsimport\FndManageImportExport" http://<host>:<port>/fndAppCoreServices/
FndManageImportExportFilesService?wsdl
```

```
parsing WSDL...
```

```
Generating code...
```

```
Compiling code...
```

6. Save the generated code as a JAR file and name it **FndManagelImportExportProxy.jar**.
7. Use the following code to create another JAR file to initiate the web service:

```
package com.oracle.xmlns.oracle.apps.fnd.applcore.webservices;

import com.sun.xml.ws.developer.WSBindingProvider;

import java.io.File;
import java.io.IOException;

import java.util.List;

import java.util.Map;

import javax.xml.ws.BindingProvider;
import javax.xml.ws.WebServiceRef;

import javax.xml.ws.handler.Handler;
```

```
import oracle.webservices.ClientConstants;

import weblogic.wsee.jws.jaxws.owsm.SecurityPoliciesFeature;
// !THE CHANGES MADE TO THIS FILE WILL BE DESTROYED IF REGENERATED!
// This source file is generated by Oracle tools
// Contents may be subject to change
// For reporting problems, use the following
// Version = Oracle WebServices (11.1.1.0.0, build 130224.1947.04102)

public class FndManageImportExportFilesServiceSoapHttpPortClient
{
    @WebServiceRef
    private static FndManageImportExportFilesService_Service fndManageImportExportFilesService_Service;

    public static void main(String [] args)
    {
        System.setProperty("javax.net.ssl.trustStore","<location of truststore which is used in II) to import
the certificates>");
        System.setProperty("javax.net.ssl.trustStorePassword", "<truststore password>");

        fndManageImportExportFilesService_Service = new FndManageImportExportFilesService_Service();
        SecurityPoliciesFeature securityFeatures =
        new SecurityPoliciesFeature(new String[] { "oracle/
wss11_username_token_with_message_protection_client_policy",
    });
        FndManageImportExportFilesService
        fndManageImportExportFilesService =
        fndManageImportExportFilesService_Service.getFndManageImportExportFilesServiceSoapHttpPort
        (securityFeatures);
        // Add your code to call the desired methods.

        WSBindingProvider wsbp = (WSBindingProvider) fndManageImportExportFilesService;
        Map<String, Object> requestContext = wsbp.getRequestContext();

        requestContext.put(ClientConstants.WSSEC_KEYSTORE_TYPE,"jks");
        // Provide location of 'mycompclient-keystore.jks' which was created during Step I)
        requestContext.put(ClientConstants.WSSEC_KEYSTORE_LOCATION,"/home/user1/mycompclient-keystore.jks");
        requestContext.put(ClientConstants.WSSEC_KEYSTORE_PASSWORD,"<password>");
        requestContext.put(ClientConstants.WSSEC_RECIPIENT_KEY_ALIAS,"cdrmkey");

        //Provide user who is having permission to initiate the service
        requestContext.put(WSBindingProvider.USERNAME_PROPERTY,"<username>");
        requestContext.put(WSBindingProvider.PASSWORD_PROPERTY, "<password>");

        String id = invokeUploadFiletoUCMMMethod(fndManageImportExportFilesService);

        if (id != null) {
            invokevalueSetValuesDataLoader(fndManageImportExportFilesService, new Long(id));
        }
    }

    static String invokeUploadFiletoUCMMMethod(FndManageImportExportFilesService
fndManageImportExportFilesService) {

        String response = null;
        DocumentDetails document = new DocumentDetails();
        ObjectFactory objfactory = new ObjectFactory();
        document.setFileName(objfactory.createDocumentDetailsFileName("import_data.txt"));
        // Provide UCM repository - if repository is fin/tax/import then suffix each value with $ as mentioned
        here
        document.setDocumentAccount(objfactory.createDocumentDetailsDocumentAccount("fin$/tax$/import$"));
    }
}
```

```
document.setDocumentTitle(objfactory.createDocumentDetailsDocumentTitle("VS"));
document.setContentType(objfactory.createDocumentDetailsContentType("plain/text"));

try {

// Provide location of 'VS.txt' which contains ValueSet values data in prescribed format
byte[] content =
org.apache.commons.io.FileUtils.readFileToByteArray(new File("/home/user1/VS.txt"));

//System.out.println("File content:" + new String(content, "UTF-8"));
document.setContent(objfactory.createDocumentDetailsContent(content));

} catch (IOException e) {
System.out.println(e.getMessage());
}
catch(Exception e) {
System.out.println("Exception: "+e.getMessage());
}

try {
response = fndManageImportExportFilesService.uploadFiletoUCM(document);
System.out.println("Response: " + response);

} catch (ServiceException e) {
System.out.println(e.getMessage());
}

return response;
}

static void invokevalueSetValuesDataLoader(FndManageImportExportFilesService
fndManageImportExportFilesService,
Long id) {
String response;
try {
response = fndManageImportExportFilesService.valueSetValuesDataLoader(id);
System.out.println("Response: " + response);
} catch (ServiceException e) {
System.out.println(e.getMessage());
}
}
}
```

8. Save the generated output as a JAVA file and name it **FndManagelImportExportFilesServiceSoapHttpPortClient.java**.
9. Use the JAVA file to build a JAR file, and name it **FndManagelImportExportClient.jar**.
10. Use the following command to run the web service:

```
java -cp ./FndManageImportExportProxy.jar:./ws.api_1.1.0.0.jar:./FndManageImportExportClient.jar
FndManageImportExportFilesServiceSoapHttpPortClient
```

Related Topics

- [Import Value Set Values](#)

Requirements for Flat Files to Upload Value Set Values

You can import large volumes of value set value data from the content repository. To upload value set values to the content repository, create a flat file containing the values in the value set that you want to add or update. You upload these flat files to the content repository using the File Import and Export page.

General Requirements

The first line of the flat file must contain the column names for the value set value data, including all mandatory columns, and separated by the '|' (pipe) character. Each subsequent line should contain a row of data specified in the same order as the column names, also separated by the '|' character.

The requirements for creating flat files vary with the type of value sets:

- Independent value sets
- Dependent value sets

Independent Value Set

A flat file for uploading values for independent value sets must contain the mandatory columns. The following table lists the three mandatory columns and their data types.

Column Name	Data Type
ValueSetCode	VARCHAR2(60)
Value	VARCHAR2(150)
Enabled Flag	VARCHAR2(1), Y or N

Note: You can also specify optional columns.

Examples:

- To upload values to a COLORS independent value set with the minimum columns, you can use the following flat file:

```
ValueSetCode | Value | EnabledFlag
COLORS | Red | Y
COLORS | Orange | Y
COLORS | Yellow | Y
```

- To upload values to a STATES independent value set with more (optional) columns, you can use the following flat file:

```
ValueSetCode | Value | Description | EnabledFlag
STATES | AK | Alaska | Y
STATES | CA | California | Y
```


STATES | WA | Washington | Y

Dependent Value Sets

A flat file for uploading values for dependent value sets must contain the mandatory columns. The following table lists the four mandatory columns and their data types.

Column Name	Data Type
Value Set Code	VARCHAR2(60)
Independent Value	VARCHAR2(150)
Value	VARCHAR2(150)
Enabled Flag	VARCHAR2(1), Y or N

Note: You can also specify optional columns.

Example:

To upload values to a CITIES dependent value set (dependent on the STATES independent value set), you can use the following flat file:

```
ValueSetCode | IndependentValue | Value | EnabledFlag
CITIES | AK | Juneau | Y
CITIES | AK | Anchorage | Y
CITIES | CA | San Francisco | Y
CITIES | CA | Sacramento | Y
CITIES | CA | Los Angeles | Y
CITIES | CA | Oakland | Y
```

Additional Optional Columns

In addition to the mandatory columns, you can add optional columns. The following table lists the optional columns for both dependent and independent value sets.

Column Name	Type
Translated Value	VARCHAR2(150), for use in value sets that are translatable
Description	VARCHAR2(240)
Start Date Active	DATE, formatted as YYYY-MM-DD
End Date Active	DATE, formatted as YYYY-MM-DD
Sort Order	NUMBER(18)

Column Name	Type
Summary Flag	VARCHAR2(30)
Flex Value Attribute1 ... Flex Value Attribute20	VARCHAR2(30)
User-defined Value Attribute1 ... User-defined Value Attribute10	VARCHAR2(30)

Optional Columns to Support Descriptive Flexfields

You can also capture these additional columns on the value set values in the Manage Value Sets page. To capture these additional columns, you must configure the FND_VS_VALUES descriptive flexfield. This descriptive flexfield expects the context code to correspond to the value set code.

Column Name	Description
globalSegment1ApiName	This column corresponds to the API Name for a global segment defined in the FND_VS_VALUES descriptive flexfield.
contextSensitiveSegment1ApiName	This column corresponds to the API Name for a context sensitive segment defined in the FND_VS_VALUES descriptive flexfield.

Here's a sample file that contains the value set codes:

```
ValueSetCode|IndependentValue|IndependentValueNumber|IndependentValueDate|IndependentValueTimestamp|Value|
ValueNumber|ValueDate|ValueTimestamp|TranslatedValue|Description|EnabledFlag|StartDateActive|EndDateActive|
SortOrder|SummaryFlag| globalSegment1ApiName | contextSensitiveSegment1ApiName
VS1|||||DFF|||||Testing for WS updated|Y|2000-01-11|2000-01-2|1||seg1v1|ndseg1vs3
VS1|||||KFF|||||Testing for WS updated without segments|Y|2000-1-11|2000-01-22|1|seg1v2|nd1seg1vs4
```

Related Topics

- [Import Value Set Values](#)
- [Overview of Files for Import and Export](#)

Manage Values

Independent, dependent, and subset value sets require a user-defined list of valid values. Use the Manage Values page to create and manage values for a value set. You can also manage the order in which the value appears.

Create Values for a Value Set

1. In the Setup and Maintenance work area, go to the **Manage Value Sets** task.

2. Use the Search text field to search for a value set.
3. Select a value set and click **Manage Values**.
4. On the Manage Values page, click the **Create** icon and enter new values for the value set.
5. Click **Save and Close**.

Delete Values from a Value Set

1. In the Setup and Maintenance work area, go to the **Manage Value Sets** task.
2. Use the Search text field to search for a value set.
3. Select a value set and click **Manage Values**.
4. On the Manage Values page, click the **Delete** icon to delete a value from the value set.
5. Click **Save and Close**.

Upload Value Set Values Process

This process uploads a flat file containing value set values for flexfields. You can use the scheduled process to upload a file containing values you want to edit or add to an existing independent or dependent value set. This process is useful for adding or updating large volumes of value set value data in an automated or recurring fashion. For example, you can upload a hundred values on a recurring basis when scheduled as a recurring process. This method could be more efficient than using the Import action in the Manage Value Sets tasks in the Setup and Maintenance work area. However, for a task of uploading a hundred values, it may be quicker to use the Import action in the relevant tasks.

Run this process from the Scheduled Processes Overview page. You can run it on a recurring basis whenever the flat file in the content repository account is updated.

You must create the flat file containing the values data, and upload the flat file to the content repository using the File Import and Export page.

Parameters

Flat File Name

Enter the name of the flat file you uploaded using the File Import and Export page.

Account

Select the user account containing the flat file in the content repository to upload.

Related Topics

- [Import Value Set Values](#)
- [Overview of Files for Import and Export](#)
- [Overview of Scheduled Processes](#)

Translation of Flexfield and Value Set Configurations

When you first configure a flexfield or segment, the translatable text that you enter, such as prompts and descriptions, is stored as the text for all installed locales. You may then provide a translation for a particular locale. If you don't provide a translation for a given locale, then the value that was first entered is used for that locale.

To translate the text for a particular locale, sign in with that locale, or in the global header, select **Settings and Actions > Personalization > Set Preferences** and specify the locale. Then, update the translatable text in the flexfield using the Manage Descriptive Flexfields task, Manage Key Flexfields task, or Manage Extensible Flexfields task. Your modifications change the translated values only for the current session's locale.

After you complete the translations, deploy the flexfield.

You can define translations for a dependent value set or an independent value set, if the value set is of type Character with a subtype Translated text. You define the translations by setting the current session to the locale for which you want to define the translation. Then use the Manage Value Sets task to enter the translated values and descriptions for that locale.

For table-validated value sets, if the underlying table supports translations, use a translation view as the basis for a table-validated value set. You can set the **ID Column Name** field to the non-translated primary key and the **Value Column Name** field to the translated key.

Related Topics

- [Considerations for Planning Value Sets](#)
- [Create Table-Validated Value Sets Based on Lookups](#)

FAQs for Manage Value Sets

What happens if a value set is security enabled?

Value set security is a feature that enables you to secure access to value set values based on the role of the user in the application.

As an example, suppose you have a value set of US state names. When this value set is used to validate a flexfield segment, and users can select a value for the segment, you can use value set security to restrict them to selecting only a certain state or subset of states based on their assigned roles in the application.

For example, Western-region employees may choose only California, Nevada, Oregon, and so on as valid values. They can't select non-Western-region states. Eastern-region employees may choose only New York, New Jersey, Virginia, and so on as valid values, but can't select non-Eastern-region states. Value set security is implemented using Oracle Applications Cloud data security.

How can I set a default value for a flexfield segment?

When you define or edit a flexfield segment, you pick a value from the assigned value set and set it as default.

You can set the default value for a descriptive flexfield segment to be a parameter. The mapped entity object attribute provides the initial default value for the segment.

You can set the default value to be a constant, if appropriate to the data type of the value set assigned to the segment.

In addition to an initial default value, you can set a derivation value for updating the attribute's value every time the parameter value changes. The parameter you select identifies the entity object source attribute. Any changes in the value of the source attribute during run time are reflected in the value of the segment.

If the display type of the segment is a check box, you can set whether the default value of the segment is checked or unchecked.

Related Topics

- [Default Segment Values](#)

25 HCM Flexfields Maintenance

Manage Descriptive Flexfields

Overview of Descriptive Flexfields

Use descriptive flexfields to add attributes to business object entities, and define validation for them.

All the business object entities that you can use in the application are enabled for descriptive flexfields. However, configuring descriptive flexfields is an optional task.

Context

A descriptive flexfield can have only one context segment to provide context sensitivity. The same underlying database column can be used by different segments in different contexts.

For example, you can define a Dimensions context that uses the following attributes:

- ATTRIBUTE1 column for height
- ATTRIBUTE2 column for width
- ATTRIBUTE3 column for depth

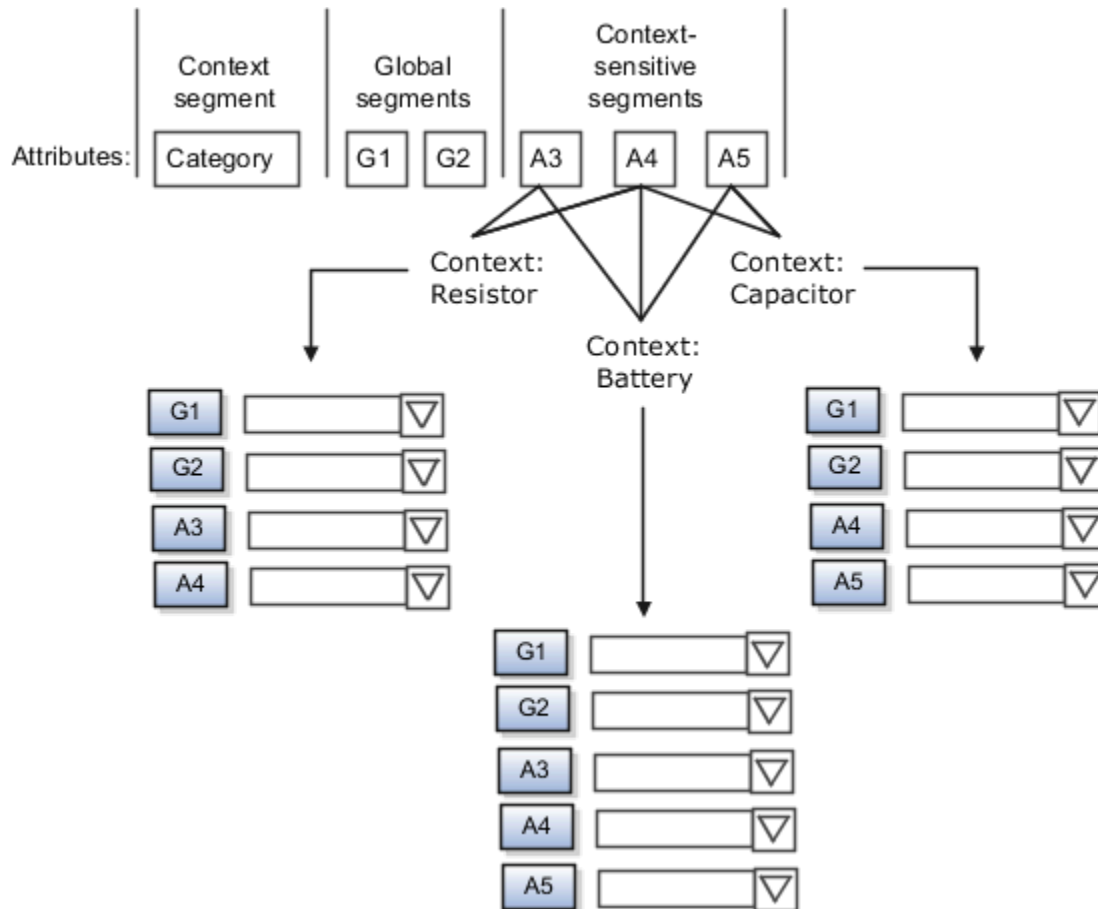
You can also define a Measurements context that uses the same columns for other attributes:

- ATTRIBUTE1 column for weight
- ATTRIBUTE2 column for volume
- ATTRIBUTE3 column for density

Segments and Contexts

The following table lists the different types of descriptive flexfield segments.

Segment Type	Run Time Appearance
Global segment	Always available
Context segment	Determines which context-sensitive segments are displayed
Context-sensitive segment	Displayed depending on the value of the context segment



Application development determines the number of segments available for configuring. During implementation, configure the flexfield by determining the following:

- Attributes to add using the available segments
- Context values
- The combination of attributes in each context

Value Sets

For each global and context-sensitive segment, you configure the values permitted for the segment. Based on it, the values that end users enter are validated, including interdependent validation among the segments.

Protected Descriptive Flexfield Data

Application developers may mark some data configurations in a descriptive flexfield as protected, indicating that you can't edit them.

Related Topics

- [Considerations for Managing Descriptive Flexfields](#)
- [Overview of Value Sets](#)
- [Considerations for Managing Flexfields](#)
- [How can I access predefined flexfields](#)

Considerations for Planning Descriptive Flexfields

Once you have identified a flexfield to configure, plan the configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you're provisioned with the roles needed to view and configure the flexfield. View the flexfield using the Highlight Flexfields command in the Administration menu while viewing the run time page where the flexfield appears. Plan how you will deploy the flexfield for test and production users. Review the tools and tasks available for managing flexfields for adding and editing flexfield segments.

Planning a descriptive flexfield can involve the following tasks:

1. Identify existing parameters.
2. Identify existing context values and whether the context value is derived.
3. Identify user-defined attributes and plan the descriptive flexfield segments, segment properties, and structure.
4. Plan validation rules.
5. Plan initial values.
6. Plan attribute mapping to Oracle Business Intelligence objects.

Identify Existing Descriptive Flexfield Parameters

Some descriptive flexfields provide parameters that can be used to specify the initial value of a descriptive flexfield segment. The parameter is external reference data, such as a column value or a session variable. For example, if a flexfield has a user email parameter, you can configure the initial value for a customer email attribute to be derived from that parameter.

Review the list of available parameters in the **Derivation Value** field in the Create Segment page for a descriptive flexfield. If you decide to use one of the parameters to set an initial value, select that parameter from the **Derivation Value** drop-down list when you add the descriptive flexfield segment.

Evaluate Whether the Context Value Is Derived

The context value for a descriptive flexfield might have been preconfigured to be derived from an external reference. For example, if the context is Marriage Status, then the value might be derived from an attribute in the employee business object. When the context value is derived, you might need to take the derived values and their source into consideration in your plan.

To determine whether the context value is derived, access the Edit Descriptive Flexfield task to view the list of configured context values for the flexfield. The Derivation Value field in the Context Segment region displays a list of available parameters. If context values have been preconfigured, see Oracle Applications Cloud Help for product-specific information about the use of those values.

Plan the Segments, Segment Properties, and Structure

Identify the user-defined attributes you need for a business object to determine the segments of the descriptive flexfield. Determine the segment properties such as the prompt, display type, or initial value.

The structure of the descriptive flexfield is determined by its global, context, and context-sensitive segments. Plan a global segment that captures an attribute for every instance of the business object. Plan a context for segments that depend on a condition of situation applying to a particular instance of the business object. Plan context-sensitive segments to capture attributes that are relevant in the context.

There's only one context segment available for descriptive flexfields. If you have more than one group of user-defined attributes where you could use the context segment, you will have to pick one group over the others, based on your company's needs and priorities, and add the other user-defined attributes as global segments.

Plan Validation Rules

Define each segment's validation rules and check if value sets exist for those rules or you must create new ones. If you must create a value set, you can create it either before configuring the flexfield or while creating or editing a segment.

When determining a segment's validation rules, consider the following questions:

- What is the data type - character, date, date and time, or number?
- Does the segment require any validation beyond data type and maximum length?
- Should a character type value be restricted to digits, or are alphabetic characters allowed?
- Should alphabetic characters automatically be changed to uppercase?
- Should numeric values be zero-filled?
- How many digits can follow the radix separator of a numeric value? In base ten numeric systems, the radix separator is decimal point.
- Does the value need to fall within a range?
- Should the value be selected from a list of valid values? If so, consider the following questions:
 - Can you use an existing application table from which to obtain the list of valid values, or do you need to create a list?
 - If you're using an existing table, do you need to limit the list of values using a WHERE clause?
 - Does the list of valid values depend on the value in another flexfield segment?
 - Is the list of valid values a subset of another flexfield segment's list of values?

Plan Initial Values

For every segment, list the constant value or SQL statement, if any, to use for the initial value of the user-defined attribute.

Plan How Segments Map to Oracle Business Intelligence Objects

You can extend descriptive flexfields into Oracle Transactional Business Intelligence (OTBI) for ad hoc reporting purposes. Determine the descriptive flexfield segments to be made available for reporting, and select the **BI Enabled** check box accordingly on the Manage Descriptive Flexfields page. You must run a process to extend the BI enabled segments into OTBI.

Depending on the reporting needs, you may map similar context-sensitive attributes from different contexts to the same attribute in OTBI. For example, there may be a segment tracking the Product Color attribute in different contexts of a context sensitive descriptive flexfield. You can use segment labels to map these context-sensitive attributes together by defining a segment label and updating the BI Label list accordingly.

Related Topics

- [Flexfield Segment Properties](#)
- [Overview of Value Sets](#)
- [Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence](#)
- [Default Segment Values](#)
- [Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields](#)

Considerations for Managing Descriptive Flexfields

Configuring descriptive flexfields involves managing the available flexfields registered with your Oracle Applications Cloud database and configuring their flexfield-level properties, defining and managing descriptive flexfield contexts, and configuring global and context-sensitive segments.

Every descriptive flexfield is registered to include a context segment, which you may choose to use or not.

In general, configuring descriptive flexfields involves:

1. Creating segment labels for business intelligence enabled flexfields.
2. Configuring global segments by providing identity information, the initial default value, and the display properties.
3. Configuring the context segment by specifying the prompt, whether the context segment should be displayed, and whether a value is required.
4. Configuring contexts by specifying a context code, description, and name for each context value, and adding its context-sensitive segments, each of which is configured to include identifying information, the column assignment, the initial default value, and the display properties.

The following aspects are important in understanding descriptive flexfield management:

- Segments
- Adding segments to highlighted descriptive flexfields
- Usages
- Parameters
- Delimiters
- Initial Values
- Business Intelligence

Segments

You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order. You can't enter a number for a segment if that number is already in use for a different segment.

Value sets are optional for context segments and follow specific guidelines:

- The value set that you specify for a context segment consists of a set of context codes.
- Each context code corresponds to a context that's appropriate for the descriptive flexfield.
- The value set must be independent or table-validated.

- If table-validated, the WHERE clause must not use the VALUESET.value_set_code or SEGMENT.segment_code bind variables.
- The value set must be of data type Character with the maximum length of values being stored no larger than the context's column length.
- If you don't specify a value set for a context segment, the valid values for that context segment are derived from the context codes. The definition of each context segment specifies the set of context-sensitive segments that can be presented when that context code is selected by the end user.
- For reasons of data integrity, you can't delete an existing context. Instead, you can disable the associated context value in its own value set by setting its end date to a date in the past.
- You can configure the individual global segments and context-sensitive segments in a descriptive flexfield. These segment types are differentiated by their usage, but they're configured on application pages that use most of the same properties.

Adding Segments to Highlighted Descriptive Flexfields

When you highlight flexfields on a run time page and use an **Add Segment** icon button to create a segment, the segment code, name, description, table column, and sequence number are set automatically. If you use an **Add Segment** icon button to configure descriptive flexfield segments, you can't use an existing value set. Value sets are created automatically when you add the segments. You can enter the valid values, their descriptions, and the default value or specify the formatting constraints for the value set, such as minimum and maximum values.

Depending on display type, the value set you create using the **Add Segment** icon button is either an independent value set or a format-only value set. The following table shows which type of value set is created depending on the segment display component you select.

Display Component	Value Set Created Using Add Segment
Check Box	Independent
Drop-down List	Independent
List of Values	Independent
Radio Button Group	Independent
Text Field With Search	Independent
Text box	Format Only
Text area	Format Only
Date/Time	Format Only

Tip: After you add a context value, refresh the page to see the new value.

Usages

Descriptive flexfield usages allow for the same definition to be applied to multiple entities or application tables, such as a USER table and a USER_HISTORY table. Descriptive flexfield tables define the placeholder entity where the flexfield segment values are stored once you have configured the descriptive flexfield. When you configure a flexfield, the configuration applies to all its usages.

Parameters

Some descriptive flexfields provide parameters, which are attributes of the same or related entity objects. Parameters are public arguments to a descriptive flexfield. Parameters provide outside values in descriptive flexfield validation. You use parameters to set the initial value or derivation value of an attribute from external reference data, such as a column value or a session variable, rather than from user input. Parameters can be referenced by the logic that derives the default segment value, and by table-validated value set WHERE clauses.

Delimiters

A segment delimiter or separator visually separates segment values when the flexfield is displayed as a string of concatenated segments.

Initial Values

The SQL statement defining an initial value must be a valid statement that returns only one row and a value of the correct type.

You can use two types of SQL statements:

- SQL statement with no binding. For example, select MIN(SALARY) from EMPLOYEES.
- SQL statement with bind variables. You can use the `PARAMETER` bind variable in the WHERE clause of the SQL statement.

- `{PARAMETER.<parameter_code>}`: Identifies a parameter.

Business Intelligence

Selecting a global, context, or context-sensitive segment's BI Enabled check box specifies that the segment is available for use in Oracle Business Intelligence.

When the flexfield is imported into Oracle Business Intelligence, the label you selected from the BI Label drop-down list equalizes the segment with segments in other contexts, and maps the segment to the logical object represented by the label.

Related Topics

- [Validation Type Options for Value Sets](#)
- [Default Segment Values](#)
- [Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence](#)
- [Flexfield Segment Properties](#)
- [Why can't I edit my flexfield or value set configuration](#)

Edit Descriptive Flexfields

You can edit your descriptive flexfield by changing its values. Here are the steps:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select a descriptive flexfield and click the **Edit** icon.
4. Edit the descriptive flexfield values and click **Save and Close**.

Related Topics

- [Update Existing Setup Data](#)

Validate Descriptive Flexfields

Before deploying your descriptive flexfields, you can validate their values to identify and fix errors in advance. Here are the steps:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click **Actions Validate Flexfield**.
4. In the confirmation dialog box, click **OK**.

Related Topics

- [Update Existing Setup Data](#)

Deploy Descriptive Flexfields

After editing the descriptive flexfield, you can deploy your changes. After you deploy the flexfield, you can view your changes in the UI. To deploy the descriptive flexfield, do these steps:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click **Actions Deploy Flexfield**.
4. In the confirmation dialog box, click **OK**.

Related Topics

- [Update Existing Setup Data](#)

Manage Global Segments

Global segments are those segments in a descriptive flexfield that are available throughout the enterprise. These segments always appear regardless of the context. You can create, edit, and delete global segments for a descriptive flexfield.

Note: Once you delete a segment, you can never recover it. So, you should delete only unwanted segments.

Create Global Segments

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, click the **Create** icon in the Global Segments section.
5. On the Create Segment page, enter the values for the segment.
6. Click **Save and Close**.

Edit Global Segments

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, select a segment and click the **Edit** icon in the Global Segments section.
5. On the Edit Segment page, edit the segment values.
6. Click **Save and Close**.

Delete Global Segments

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the Search text field to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, select a segment and click the **Delete** icon in the Global segments section.
5. In the confirmation dialog box, click **Yes**.

Related Topics

- [Update Existing Setup Data](#)

Manage Contexts

A descriptive flexfield may have a context segment to provide context sensitivity. You can create, edit, and delete context segments for a descriptive flexfield.

Create Context

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the Edit icon.
4. On the Edit Descriptive Flexfield page, click **Manage Contexts**.
5. On the Manage Contexts page, click the **Create** icon.
6. On the Create Context page, enter the values for the context.
7. Click **Save and Close**.

Edit Context

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, click **Manage Contexts**.
5. On the Manage Contexts page, use the Search text field to search for a context.
6. Select the context and click the **Edit** icon.
7. On the Edit Context page, edit the values for the context.
8. Click **Save and Close**.

Delete Context

You can delete unwanted contexts, but once you delete a context, you can never recover it. So, before you delete, be sure that you don't need it anymore.

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, click **Manage Contexts**.
5. On the Manage Contexts page, use the Search text field to search for a context.
6. Select the context and click the **Delete** icon.
7. In the confirmation dialog box, click **Yes**.

Related Topics

- [Update Existing Setup Data](#)

Manage Context-Sensitive Segments

A context-sensitive segment is available based on the context value. Once you define the context value, you can create a context-sensitive segment for the defined context value. You can also edit and delete a context-sensitive segment.

Create Context-Sensitive Segment

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. In the Context Sensitive Segments section, select the context from the **Context** list.
5. Click the **Create** icon.
6. On the Create Segment page, enter the values for the segment.
7. Click **Save and Close**.

Edit Context-Sensitive Segment

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfields page, use the text fields in the Search section to search for a descriptive flexfield.
3. Select a descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, select a segment and click the **Edit** icon under the Context-Sensitive Segments section.
5. On the Edit Segment page, edit the segment values.
6. Click **Save and Close**.

Related Topics

- [Update Existing Setup Data](#)

Configure Descriptive Flexfield Segments for a Lookup Type

Depending on the configuration level of a lookup type, you can configure the lookup codes or their meanings. To capture more information for the lookup type, you can also configure the descriptive flexfield segments for the lookup type. For example, let's configure the descriptive flexfield segments for the US_STATE lookup type. Here are the tasks we need to do:

- Create the US_STATE context code
- Create the context-sensitive segments
- Deploy the changes
- Add a context segment value for the lookup type

Create the US_STATE Context Code

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task in the Application Extensions functional area.
2. On the Manage Descriptive Flexfield page, use the Search text field to search for FND_LOOKUP_VALUES_B descriptive flexfield.
3. Select the descriptive flexfield and click the **Edit** icon.
4. On the Edit Descriptive Flexfield page, go to the Context Segment section and specify these values:

Field	Value
Default Type	Parameter
Default Value	LookupType
Derivation Value	LookupType
Display Type	List of Values

5. Click **Manage Contexts**.
6. On the Manage Contexts page, go to the Search Results section and click the **Create** icon.
7. On the Create Context page, enter the context code as **US_STATE**.
8. Click **Save and Close**.

Create the Context Sensitive Segments

1. On the Manage Contexts page, go to the Search Results section and select the **US_STATE** context code.
2. Click the **Edit** icon.
3. On the Edit Context page, go to the Context Sensitive Segments section and click the **Create** icon.
4. On the Create Segment page, specify these values:

Field	Value
Code	Capital
Data type	Character
Value Set	GL_100_CHARACTERS
Default Type	Parameter
Default Value	LookupType

Field	Value
Derivation Value	LookupType
Display Type	List of Values

5. Click **Save and Close**.
6. On the Manage Contexts page, click **Save and Close**.
7. On the Edit Descriptive Flexfield page, click **Save and Close**.

Deploy the Changes

1. On the Manage Descriptive Flexfield page, click **Deploy Flexfield** to deploy the changes made in the FND_LOOKUP_VALUES_B descriptive flexfield.
2. In the confirmation window, click **OK**.
3. Sign out and sign back in to see the changes.

Add a Context Segment Value for the Existing Lookup Type

After you add a new lookup code for the US_STATE lookup type, the context segment appears for the new lookup code. You can add value to the context segment.

1. In the Setup and Maintenance work area, go to the **Manage Common Lookups** task in the Application Extensions functional area.
2. On the Manage Common Lookups page, use the Search text field to search for the US_STATE lookup type.
3. Select the **US_STATE** lookup type.
4. Go to the Lookup Codes section and click the **New** icon.
5. In the **Lookup Code** field, enter **AZ**.
6. In the **Meaning** field, enter the meaning of the lookup code as **Arizona**.
7. Click **Save**.
8. Click the **Expand** icon to the left of the newly added lookup code.
9. In the **Capital** field, enter **Phoenix**.
10. Click **Save and Close**.

Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence

A descriptive flexfield that's registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI-enabled setting for each of its segments. When a global, context, or context-sensitive segment is BI-enabled, it's available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled flexfield segments:

- Flattening business components to use BI-enabled segments in Oracle BI
- Equalizing segments to prevent duplication and complexity in the flattened component
- Mapping attributes of flattened business components to logical objects in Oracle BI
- Managing the labels that map segments to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For example, a user can generate a report that includes attributes added by the descriptive flexfield. For information about logical objects and import, see the *Creating and Administering Analytics and Reports* guide for your products.

Flattening

When you deploy a BI-enabled descriptive flexfield, the deployment process generates an additional set of flattened Application Development Framework (ADF) business components. The ADF business component is generated in addition to the usual ADF business components and the ADF faces artifacts. The flattened business components include attributes for BI-enabled segments only. Flattening means each user-defined column in each context shows up as an attribute in the Oracle Business Intelligence folder.

Flattened components include one attribute for the BI-enabled context-segment, and one attribute for each business intelligence-enabled global segment. For BI-enabled context-sensitive segments, what's included as part of the flattened components depend on whether you assign a label to the segment or not:

- If you assigned a label to the segment, the flattened components include an additional single attribute representing segments with that label.
- If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled context-sensitive segment in each context.

Mapping to Logical Objects in Business Intelligence

You can simplify reporting by representing similar segments as a single logical object in Business Intelligence.

If you assign a label to any set of context-sensitive segments that serve the same purpose in different contexts, you can consolidate or equalize the segments into a single attribute. This prevents duplication and the extra workload and complexity that result from the flattening process. For example, a United States context might have a Passport segment and a Canada context might have Visa segment. If you assign the NationalID segment label to both the Passport and Visa segments, they're equalized into the same NationalID attribute in the flattened business component.

Non-labeled context-sensitive segments aren't equalized across context values, so the flattened components include a separate attribute for each context-sensitive segment for each context value. It may not be possible to equalize similarly labeled segments if they have incompatible data types or value set types.

Assign a label to a global segment, context segment, or context-sensitive segment to map the corresponding attribute in the flattened components to a logical object in Oracle Business Intelligence. Using labels to map segments to BI logical objects minimizes the steps for importing the flexfield into Oracle Business Intelligence.

Note: Assigning a label to a context-sensitive segment serves to equalize the attribute across contexts, as well as map the equalized attribute to business intelligence.

Managing Labels

You may assign a predefined label (if available) to segments or create new labels for assignment, as needed. Specify a code, name, and description to identify each label. In the BI Object Name field, enter the name of the logical object in Oracle Business Intelligence to which the segment label should map during import. Specifying the BI logical object minimizes the steps for importing the flexfield into Oracle Business Intelligence and helps to equalize context-sensitive segments across contexts.

If no labels are assigned to a BI-enabled segment, or the BI Object Name on the assigned label doesn't exist in business intelligence, you must manually map the segment to the desired logical object when importing into Oracle Business Intelligence.

In addition, context-sensitive segments without labels can't be equalized across context values. The flattened components include a separate attribute for each non-labeled context-sensitive segment in each context.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence and then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user.

To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For information about logical objects and import, see the Creating and Administering Analytics and Reports guide for your products.

Note: When you import a flexfield into the Oracle Business Intelligence repository, you see both `<name>_` and `<name>_c` attributes for each segment, along with some other optional attributes. The `<name>` attribute contains the value. The `<name>_c` attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Related Topics

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields](#)
- [Overview of Flexfield Change Import](#)

Manage Extensible Flexfields

Overview of Extensible Flexfields

Extensible flexfields are like descriptive flexfields, with some additional features.

- You can add as many context-sensitive segments to the flexfield as you need. You aren't restricted by the number of columns predefined and registered for the flexfield.
- You can configure a one-to-many relationship between the entity and its extended attribute rows.
 - A row of data can have multiple contexts associated with it.
 - A row of data can have multiple occurrences of the same context.
- You can configure attributes in groups to form a context so that the attributes in the context always appear together in the user interface.
- You can use existing hierarchical categories so that entities inherit the contexts that are configured for their parents. Contexts are reusable throughout categories.

- Application development has registered some extensible flexfields to support view and edit privileges. For such flexfields, you can specify view and edit privileges at the context level to control who sees the attributes and who can change the attributes' values.

When you configure a context for multiple rows per entity, the segments are displayed as a table.

Unlike descriptive flexfields, the extension columns corresponding to extensible flexfields segments are part of extension tables, separate from the base application table. Unlike descriptive flexfield contexts, the set of attributes in an extensible flexfield context remains constant and doesn't differ by context value. An extensible flexfield describes an application entity, with the run time ability to expand the database that implementation consultants can use to define the data structure that appears in the application. Extensible flexfields support one-to-many relationships between the entity and the extended attribute rows. To get a list of predefined extensible flexfields, use the Manage Extensible Flexfields task in the Setup and Maintenance work area.

The following aspects are important in understanding extensible flexfields:

- Usages
- Categories
- Pages
- Security
- Protected Extensible Flexfield Data

Usages

Similar to the descriptive flexfields, you can define multiple usages for an extensible flexfield, which enables several application tables to share the same flexfield.

For example, a flexfield for shipping options can be used by both a Supplier table and a Buyer table. In addition, you can associate a context with one, some, or all of the flexfield's usages. Thus, with the shipping information example, you can associate a warehouse context with the Supplier usage, a delivery location context with the Buyer usage, and a ship-via context with all usages.

Usages include security information for applying no security to user access or enforcing view and edit privileges. Some product-specific extensible flexfields have specialized usage fields beyond those for security.

Categories

You can configure multiple extensible flexfield contexts and group the contexts into categories. All extensible flexfields have at least one category. For some extensible flexfields, you can configure a hierarchy of categories. A child category in the hierarchy can inherit contexts from its parent category.

You can define categories for extensible flexfields, and you can associate any combination of contexts with a given category.

For example, the Electronics and Computers category hierarchy might include a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on. The Home Entertainment product might have contexts that specify voltage, dimensions, inputs and outputs. Contexts are reusable within a given extensible flexfield. For example, the dimensions context could be assigned to any category that needs to include dimensional information.

Pages

Extensible flexfields let you combine contexts into groups known as pages, which serve to connect the contexts so they will always be presented together in the application user interface.

Each application page corresponds to one extensible flexfield category, with a separate region of the page for each associated context.

Security

When you configure a flexfield, you set the privileges for a context at the usage level by selecting actions for the view and edit privileges of a context usage.

When an end user performs a search, the user interface displays only the attribute values of the contexts for which the user has view privileges. The user can perform a search using all attributes for all contexts, regardless of view privileges.

If end users access a context through a web service, an exception is thrown if they perform an action for which they don't have privileges.

All extensible flexfields have a base data security resource. Some data security resources for extensible flexfields are preconfigured with actions that you can use to specify access privileges. If no action is preconfigured, a security administrator can create actions and policies to support access control on the extensible flexfield attributes.

Some extensible flexfields have a translatable option; these flexfields also have a translation data security resource.

Protected Extensible Flexfield Data

Application developers may mark some data configurations in an extensible flexfield as protected, indicating that you can't edit them.

If an extensible flexfield is partially protected, then you can't edit the protected portions of the flexfield's configuration. For example:

- If an extensible flexfield context is protected, you can't edit its:
 - Context details
 - Context segments
 - Context usages
- If an extensible flexfield page is protected, you can't:
 - Edit the page details or delete the page
 - Edit the contexts associated with the page

Note:

- There's no restriction on page references to protected contexts. The pages you create may contain any context, whether protected or not.
- There's a restriction on category references to protected contexts. If a context is protected, you can't add it to or delete it from any category.

Related Topics

- [Overview of Flexfield Deployment](#)
- [Considerations for Managing Flexfields](#)
- [Considerations for Managing Extensible Flexfields](#)
- [How can I access predefined flexfields](#)
- [Update Existing Setup Data](#)

Considerations for Planning Extensible Flexfields

Once you have identified a flexfield, plan its configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you're provisioned with the roles required to view and configure the flexfield. View the flexfield using the Highlight Flexfields option in the Administration menu while viewing the run time page where the flexfield appears. Plan how to deploy the flexfield for test and production users. Review the tools and tasks available for managing flexfields for adding and editing flexfield segments.

Planning an extensible flexfield involves:

1. Identifying the following:
 - A hierarchical structure of categories
 - Existing context values
 - User-defined attributes, the relevant extensible flexfield segments, segment properties, and the structure
2. Planning the following:
 - Validation rules
 - Initial values
 - Security
 - Attribute mapping to Oracle Business Intelligence objects.

Category Hierarchy Structure

Existing category hierarchy structures provide the framework for planning what segments to add to an extensible flexfield as user-defined attributes of an entity. Some applications provide user interfaces to create and manage an extensible flexfield's category hierarchy.

Contexts and Existing Context Values

If related attributes can be grouped together, plan adding the attributes as a context of segments, and plan the order in which the attributes should appear. Some extensible flexfields have preconfigured context values. Region headers displayed in the user interface page or pages that contain the flexfield segments identify existing contexts. Using the Manage Extensible Flexfields task, find and open the flexfield for editing to view the list of configured context values.

See product-specific information for guidance in using preconfigured context values.

Plan the Segments and Segment Properties

List all the user-defined attributes that you want to add as extensible flexfield segments. For each segment, define properties, including the indexed property.

Plan Validation Rules

Define each segment's validation rules and check if value sets exist for those rules or you must create. If you must create a value set, you can create it either before you configure the flexfield or at the same time that you create or edit a segment.

When determining a segment's validation rules, consider the following questions:

- What is the data type: character, date, date and time, or number?
- Does the segment require any validation beyond data type and maximum length?
- Should a character type value be restricted to digits, or are alphabetic characters permitted?
- Should alphabetic characters automatically be changed to uppercase?
- Should numeric values be zero-filled?
- How many digits can follow the radix separator of a numeric value? In base ten numeric systems, the radix separator is a decimal point.
- Should the value be within a range?
- Should the value be selected from a list of valid values? If yes, consider the following questions:
 - Can you use an existing application table from which to obtain the list of valid values, or do you have to create a list?
 - If you're using an existing table, do you have to limit the list of values using a WHERE clause?
 - Does the list of valid values depend on the value in another flexfield segment?
 - Is the list of valid values a subset of another flexfield segment's list of values?

Plan Initial Values

For every segment, list the constant value or SQL statement, if any, to use for the initial value of the user-defined attribute.

Plan Security

Determine what privileges to set for view and edit access to context attributes, such as providing all users with view access but only managers with edit access.

If your security restrictions apply to several contexts, you can create generic actions. At a minimum, create the generic actions for the base data security resource. If the flexfield has a translatable option and you plan to use translatable contexts, then also create the generic actions for the translation data security resource. For example, the Item flexfield supports the translatable option and has a data security resource ITEM_EFF_VL in addition to the base data security resource ITEM_EFF_B. Then, create actions for both data security resources, such as EDIT_NONTRANS_ATTRS for ITEM_EFF_B and EDIT_TRANS_ATTRS for ITEM_EFF_VL.

If your security restrictions are more fine-grained, such as having to secure each context with a different privilege, then you can create more fine-grained actions.

Plan Which Segments Map to Oracle Business Intelligence Objects

If an extensible flexfield has been enabled for Oracle Business Intelligence, you can make the attributes available for use in Oracle Business Intelligence Applications.

Related Topics

- [Considerations for Managing Extensible Flexfields](#)
- [Flexfield Segment Properties](#)

Considerations for Managing Extensible Flexfields

Configuring extensible flexfields involves managing the available flexfields registered with your application database.

The following sequence describes how to configure extensible flexfields:

1. Configuring contexts by creating each context segment and the context-sensitive segments for each context segment, and providing the following for each segments:
 - a. Identifying information
 - b. Column assignment
 - c. Initial default value
 - d. Display properties
2. Configuring context usages and usage security by selecting actions to which users should have access:
 - View
 - Edit
 - None, if no special privileges should be enforced.
3. Configuring categories and category details.
4. Associating contexts with a category.
5. Creating logical pages for a category.

The following aspects are important in understanding extensible flexfield management:

- Contexts and pages
- Categories
- Initial values
- Adding segments to highlighted extensible flexfields
- Indexed segments
- Security
- Deployment

Contexts and Pages

Each context is displayed to end users as a region containing its context-sensitive segments. You can specify instruction help text to display instructions that explain how to use the region and its attributes to end users. Instruction help text is displayed at the beginning of the context region. A context can be defined as single row or multi-row. Single row contexts are the same as descriptive flexfields contexts. A single row context has only one set of context-sensitive segments. A multi-row context enables you to associate multiple sets of values with the same object instance.

For example, for a BOOK table, you could create a multi-row context named chapters that contains a segment for chapter and a segment for number of pages. Multiple chapters can then be associated with each book in the BOOK table.

For contexts that store multiple rows, you can uniquely identify each row by having the values in each row form a unique key.

If flexfield has a category hierarchy, then you can leverage the hierarchy to reuse contexts for similar entities, such as similar items in a product catalog.

Set the context to translatable so that free-form text entered by end users is stored in the language of the user's locale, and different translations of that text can be stored in other languages. Segments in the translated contexts should use format-only value sets for storing free-form, user-entered text.

Set the context security to give an end user view or edit access to a context. The context's task flow and region appear in the user interface only for users with view access. With edit access, an end user can edit the context's attribute values. With no action specified for a usage, no special privileges are enforced through the context's configuration.

Define logical pages to group contexts together in the user interface. For a given category, you may create one or more logical pages. You may add one or more of the category's associated contexts to each of the category's logical pages.

You can specify:

- The sequence of the contexts within each page.
- The sequence in which the logical pages appear.
- Instruction help text to display instructions that explain how to use the page to end users. Instruction help text is displayed at the beginning of the logical page, preceding all of its context regions.

Categories

A category is a grouping of related data items that can be considered to belong together. You can associate any combination of contexts with a given category. Extensible flexfields with more than 30 categories must be deployed as a background process.

A category hierarchy logically organizes a set of categories. For example, the Electronics and Computers category hierarchy might include a Computer category and a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on.

A category can be a child or sibling of an existing category. The hierarchy can be as simple or as complex as desired, with any combination of zero or more sibling categories and zero or more child categories. If no category is defined, the data items are grouped in a single predefined default category.

Each category has associated contexts that store relevant information about a data item in that category. For example, a Home Entertainment product has contexts that specify Voltage, Dimensions, Inputs and Outputs. Contexts are reusable within a given extensible flexfield. Then, the Dimensions context could be assigned to any category that needs to include dimensional information.

If a hierarchy includes child categories, each child category inherits the contexts from its parent category; for example, the Home Entertainment category inherits Voltage and Dimensions from the Electronics and Computers category.

Each extensible flexfield is associated with a particular category hierarchy. Consider category hierarchies to be defining framework for extensible flexfields and their contexts. A category hierarchy specifies which contexts are valid for each category.

An extensible flexfield can include multiple contexts which you define to support a given category. These contexts can be suitable for various purposes, but within a particular category, some contexts might be considered to be related to,

or dependent on, each other. You can combine these contexts into groups known as logical pages, and determine the sequence in which the pages appear. This serves to connect the contexts so they will always be presented together and in a particular order in the application user interface.

For example, the Home Entertainment category might have an Electrical Specifications page that contains the Voltage, Inputs and Outputs contexts, and a Physical Specifications page that contains the Dimensions and Form Factor contexts.

Initial Values

The SQL statement defining an initial value must be a valid statement that returns only one row and a value of the correct type.

You can use two types of SQL statements:

- SQL statement with no binding. For example, select MIN(SALARY) from EMPLOYEES.
- SQL statement with bind variables. You can use these bind variables in the WHERE clause of the SQL statement.
 - `: {SEGMENT.<segment_code>}`: Identifies a segment in the same context.
 - `: {PARAMETER.<parameter_code>}`: Identifies a parameter.
 - `: {CONTEXT.<context_code>;SEGMENT.<segment_code>}`: Identifies a segment in a different context. The context must be in the same category or in an ancestor category, and it can't be a multiple-row context.
 - `: {VALUESET.<value_set_code>}`: Identifies the closest prior segment in the same context that's assigned to the specified value set.
 - `: {FLEXFIELD.<internal_code>}`: Identifies a flexfield.

Adding Segments to Highlighted Extensible Flexfields

When you highlight flexfields on a run time page and use an **Add Segment** icon button to create a segment, the segment code, name, description, table column, and sequence number are set automatically. If you use an **Add Segment** icon button to configure extensible flexfield segments, you can't use an existing value set. Value sets are created automatically when you add segments. You can enter the valid values, their descriptions, and the default value or specify the formatting constraints for the value set, such as minimum and maximum values.

Depending on display type, the value set you create with the **Add Segment** icon button is either an independent value set or a format-only value set. The following table shows which type of value set is created depending on the segment display component you select.

Display Component	Value Set Created Using Add Segment
Check Box	Independent
Drop-down List	Independent
List of Values	Independent
Radio Button Group	Independent
Text Field With Search	Independent

Display Component	Value Set Created Using Add Segment
Text box	Format Only
Text area	Format Only
Rich Text Editor	Format Only
Date/Time	Format Only

Tip: After you add a context value, refresh the page to see the new value.

Indexed Segments

You can designate an extensible flexfield segment as indexed so that it's one of the selectively required attributes a user can use in an attribute search. If you indicate in the Manage Extensible Flexfield UI page that a segment should be indexed, the column representing the segment must be added to the database index. Commonly, a database administrator (DBA) adds columns to the database index.

When an extensible flexfield with indexed segments is deployed, search task flows are generated along with the other flexfield artifacts and specify the indexed attributes as selectively required. In the deployed extensible flexfield's search task flow, an end user must specify at least one of the indexed attributes in the search criteria. This prevents non-selective searches, which could cause performance issues.

For example, if you index the memory and processor attributes and ensure that the corresponding columns in the database are indexed, a user can search an item catalog for computers by entering processor or memory or both as a search criteria. No search is performed if an end user enters an attribute that isn't indexed as a search criterion.

Security

An extensible flexfield's base data security resource typically has a name with an `_B` suffix. The translation data security resource is a view of a translation table that typically has a name with an `_VL` suffix.

If a flexfield supports the translatable option and has a translation data security resource, make sure that you create the action for the appropriate data security resource.

- If you create a context-specific action for a nontranslatable context, add it to the base data security resource.
- If you create a context-specific action for a translatable context, add it to the translation data security resource.

Deployment

You can only deploy extensible flexfields using the Manage Extensible Flexfields task. You can deploy extensible flexfields offline as a background process and continue working in the session without having to wait for the deployment to complete. You can queue up several extensible flexfields and deploy as a background process. The flexfields are deployed, one at a time, in the order that you deploy them to the queue. You must deploy extensible flexfields with more than 30 categories as a background process.

You can remove an extensible flexfield from the deployment queue with the Cancel Background Deployment command. When an extensible flexfield is deployed in a background process, its offline status indicates that the flexfield is in a

background deployment process. A flexfield's offline status is cleared and its deployment status updated when the background deployment process has completed.

Note: The **Offline Status** column refreshes when you perform a new search in the Manage Extensible Flexfields task.

Related Topics

- [Why did my flexfield changes not appear in the runtime UI](#)
- [Flexfield Usages](#)
- [Why can't I edit my flexfield or value set configuration](#)

Considerations for Enabling Extensible Flexfield Segments for Business Intelligence

An extensible flexfield that's registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segment instances. When a segment instance is BI-enabled, it's available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled extensible flexfield segments.

- Flattening business components to use BI-enabled segments in Oracle BI
- Mapping attributes of flattened business components to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For information about logical objects and import, see the *Creating and Administering Analytics and Reports* guide for your products.

Flattening

When you deploy a business intelligence-enabled extensible flexfield, the deployment process generates an additional set of flattened business components for use in business intelligence. The flattened business components include attributes for business intelligence-enabled segment instances only.

If you assigned a label to a segment, the flattened components include a single attribute representing all segment instances with that label. If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled segment instance in each structure.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence and then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user. To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For information about logical objects and import, see the *Creating and Administering Analytics and Reports* guide for your products.

Tip: When you import a flexfield into the Oracle Business Intelligence repository, you see both `<name>_` and `<name>_c` attributes for each segment, along with some other optional attributes. The `<name>_` attribute contains the value. The `<name>_c` attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Related Topics

- [Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence](#)
- [Overview of Extensible Flexfields](#)
- [Set Extensible Flexfields as BI-Enabled](#)
- [Overview of Flexfield Change Import](#)

Considerations for Managing Extensible Flexfield Categories

Categories are a way of extending the number of context-sensitive segments for a flexfield beyond the columns reserved for flexfield segments.

For example, an Items extensible flexfield has a category for each item and each category can have one or more contexts. The laptop item belongs to the Computers category. Since extensible flexfields are mapped to separate extension tables, not just to columns as with descriptive flexfields, the thirty reserved columns on the extensible flexfield table let you define up to thirty context-sensitive segments for each context.

If you add a Dimensions context to the Computers category, thirty segments are available. But if you need to add more than thirty attributes, create another context and associate it to the same category. You could now add an Electronics Attributes context to the same Computers category in which you create another thirty segments. You can continue creating more contexts and adding them to the Computers category. In this way your laptop computer item can be extended with as many attributes as you need, because it's mapped to a category and you can keep adding contexts to that category.

A descriptive flexfield on an items table with thirty columns reserved for segments can only have a single context. Once you configure the columns for that one context, you can't create any more segments.

Predefined and Preconfigured Categories

How you structure the flexfield configuration depends on how categories are defined for the flexfield. If the extensible flexfield is preconfigured with one category, associate all your contexts and pages with that category. If a product-specific extensible flexfield is preconfigured with several categories, associate your contexts and pages with those categories. If the extensible flexfields provide user interfaces for configuring multiple categories, associate a context with more than one category using inheritance.

Some products provide an activity or task for creating and maintaining categories for an extensible flexfield. See product-specific information to determine if you can create categories for the flexfield.

You can view a flexfield's category hierarchies by using either the Highlight Flexfields feature or the Manage Extensible Flexfields task to find and open the flexfield for editing.

Disabling Categories

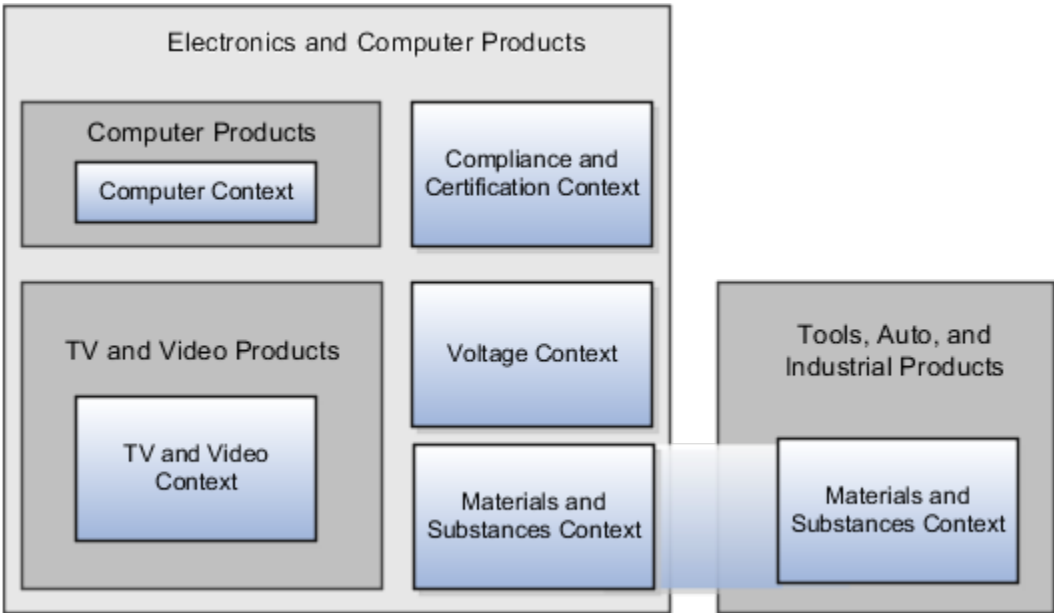
While configuring an extensible flexfield, you can disable a category. The Enabled column in the Category table of the Edit Extensible Flexfield page, indicates which categories are enabled.

Note: When you deploy an extensible flexfield that has a disabled category, that category and its descendant categories aren't deployed. Contexts and their segments are deployed only if they belong to at least one enabled category.

Contexts

Group similar attributes into contexts. The group is displayed together in a region. The region's header is the context value.

If a category hierarchy exists for the flexfield, then you can leverage the hierarchy to reuse contexts for similar entities, such as similar items in a product catalog.



The following table shows an example of category hierarchy for an extensible flexfield. To store voltage information for all electronic and computer items, associate a Voltage context with the Electronics and Computers category. Both the TV and Video subcategory and the Computers subcategory then inherit the Voltage context from the parent Electronics and Computers category.

Display Name	Code	Description
Electronics and Computers	PROD_ELECTRONICS	Electronics and Computers
TV and Video	PROD_TV_VIDEO	Television and Video
Computers	PROD_COMPUTERS	Computers
Office Products and Supplies	PROD_OFFICE_PRODUCTS_SUPPLIES	Office Products and Supplies
Tools, Auto, and Industrial	PROD_TOOLS_AUTO_INDUSTRIAL	Tools, Automotive, and Industrial
Sports and Outdoors	PROD_SPORTS_OUTDOORS	Sports and Outdoors

Display Name	Code	Description

Example of Configuring an Item Extended Attributes Flexfield

The Item Extended Attributes flexfield provides segments for extending the Item business object. In the Manage Extensible Flexfields task, configure your product business object to include a technical specifications logical page on the user interface for the Electronics and Computers category of items.

In this example, your configuration of this flexfield groups attributes into the following contexts:

- Materials and Substances
- Compliance and Certification
- Voltage

Scenario

The following list shows an example plan for computer attributes for the Item Extended Attributes flexfield. In this example, the Electronics Information page is inherited from the parent Electronics and Computers category.

- Page: Electronics Information
 - Context: Compliance and Certification, single row
 - ISO 14001 (International Organization for Standardization for an Environmental Management System)
 - ENERGY STAR (energy efficiency guidelines)
 - ROHS (Restriction of the use of certain hazardous substances in electrical and electronic equipment)
 - Context: Voltage, single row
 - Minimum voltage
 - Maximum voltage
 - Current type
 - Context: Materials and Substances, multiple rows
 - Material
 - Contain recycle
 - Percent unit mass
- Page: Computer Information
 - Context: Processor Specifications, single row
 - Manufacturer
 - CPU type
 - Processor interface
 - Processor class
 - Processor speed

- Cores

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which extensible flexfield is available for configuring a hierarchy of categories?	Item Extended Attributes flexfield

Collecting Technical Specifications

Your product inventory pages for electronics and computers require a technical specifications page. Your product inventory pages for furniture require a furniture specifications page and an assembly instructions page. Items in both the electronics and computer category, and in the furniture category, share attributes for specifying materials and substances.

Technical Specifications

Recovery and Recycling

Recovery Target(%)

70

Estimated Recovery Cost

1

Estimated Recycling Cost

1

Overall Part Reuse(%)

60

Overall Part Recovery(%)

75

Overall Material/Substance Reuse(%)

80

Compliance and Certification

ISO 14001

☐

Energy Star

☒

TCO

☐

RoHS

☒

Blue Angel

☐

Operating Conditions

Optimal Temp (Cel)

26

Wet Bulb Temp (Cel)

32

Humidity (%)

95

Min Dew Point

34

Materials and Substances

Actions

View

Detach

Material/Substance	Contained Recycle(%)	Percent of Unit Mass(%)	Mass(mg)
Lead/Lead Cor	3	2	4

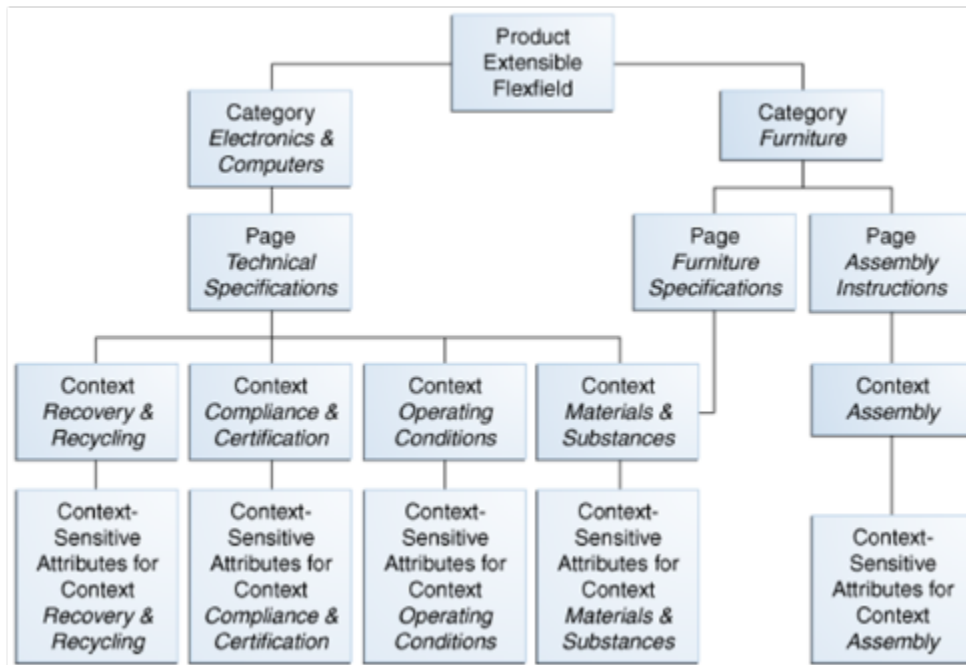
Use logical pages to determine how the contexts appear on the user interface. Use a context to store all the materials and substances required to make a single product. You can configure a context to store multiple rows per entity. The multiple rows are displayed in a table, like the Materials and Substances context.

The Technical Specifications logical page contains the attributes for the four contexts.

- Recovery and Recycling
- Compliance and Certification
- Operating Conditions
- Materials and Substances

The following figure is an example, where the Furniture category is configured to include a Furniture Specifications logical page and an Assembly Instructions logical page. The two

categories (Electronics and Computers and Furniture) share the Materials and Substances context.



Configure Security for the Item Flexfield Configuration

The following table shows an example of data security policies for the Item flexfield.

Data Security Resource	Policy	Role	Action	Condition
ITEM_EFF_B	A	VOLTAGE_SPEC	edit_nontrans_voltage_ctx	All values
ITEM_EFF_VL	B	COMPLIANCE_SPEC	edit_trans_compliance_ctx	All values
ITEM_EFF_VL	C	COMPUTER_SPEC	edit_trans_attrs	ComputerCategoryFilter
ITEM_EFF_VL	D	TELEVISION_SPEC	edit_trans_attrs	TVCATEGORYFilter

The following table shows the privileges for the three flexfield contexts.

Context	Edit Privilege	View Privilege
Voltage	edit_nontrans_voltage_ctx	NONE
Compliance and Certification	edit_trans_compliance_ctx	NONE
Materials and Substances	edit_trans_attrs	NONE

In this example, anyone can view the contexts' attributes, but the edit privileges are restricted as follows:

- Voltage: Only voltage specialists can edit this value.
- Compliance and Certification: Only compliance specialists can edit this value.
- Materials and Substances: Only computer specialists can edit these attributes for items in the computer category. Only television specialists can edit these attributes for items in the TV category.

To sum up, in this entire example, the Materials and Substances context is secured by a generic action with a condition applied to restrict access by category. Voltage and Compliance and Certification are secured by actions specific to each context.

Import Extensible Flexfields

Use the Import option on the Manage Extensible Flexfield page to bulk import the flexfield data that includes value set, context, and context segment details.

Prerequisite

The files containing the flexfield details are available in the document repository of Oracle WebCenter Content.

Importing Flexfields

To import flexfields:

1. Sign in to the application as an implementation consultant or an administrator.
2. In the Setup and Maintenance work area, open the **Manage Extensible Flexfield** task or a similar task for importing flexfields.
3. In Search Results, from the Actions menu, select **Import**.
4. On the Upload Flexfield Data dialog box, select the WebCenter Content account to which the files were uploaded.
5. Enter the names of the separate files containing the value set, context, and context segment information. The names here must match with the names of the files uploaded to the selected account.
6. Click **Upload**. The flexfield details are imported.

Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics

- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)
- [Import Value Set Values Using Web Services](#)
- [File Format for Importing Extensible Flexfields](#)

FAQs for Manage Extensible Flexfields

Why did the extensible flexfield context not appear at run time?

If a deployed extensible flexfield context doesn't appear in the user interface, verify that the context is associated with one of the category's pages defined for the extensible flexfield.

Related Topics

- [Why did my flexfield changes not appear in the run time UI?](#)

Manage Key Flexfields

Overview of Key Flexfields

Key flexfields provide a means to capture a key such as a part number, a job code, or an account code. A key flexfield consists of one or more segments, where each segment can have a meaning.

For example, a part number 10-PEN-BLA-450 might correspond to a black pen from supplier #450 sold by division #10 (office supplies). Behind the scenes, the application uses a unique number, 13452, for this part, but the user always sees the 10-PEN-BLA-450 part number.

The following aspects are important to understanding key flexfields:

- Architecture
- Segments and segment labels
- How to Identify Segments
- How the Override, Visible, and Rendered Properties Work
- Structures and segment instances
- Combinations
- Dynamic combination creation
- Security

Key flexfields aren't optional. You must configure key flexfields to ensure that your applications operate correctly. You configure and maintain key flexfield definitions with the Manage Key Flexfields task. To get a list of predefined key flexfields, use the Manage Key Flexfields task in the Setup and Maintenance work area. For information about specific key flexfields, see the help for the product where the associated business component is implemented.

Architecture

Flexfield metadata is stored in the flexfield metadata tables. When you configure a key flexfield, you define metadata about the key flexfield covering aspects such as:

- Segments are in a structure
- Structures in the flexfield
- Value sets in each segment

Based on the flexfield metadata, actual part numbers are captured as a combination of segment values and stored in a combinations table. A combinations table contains all the segment columns for a flexfield, a unique ID column, and a structure instance number column. The structure instance number column differentiates multiple arrangements of the segment columns. For example, a part number containing multiple segments can be represented by a key flexfield. A part number key flexfield has a corresponding combinations table. In that table, the flexfield stores a list of the complete codes, with each segment of the code in a column, with the corresponding unique ID and structure instance number for the code. When users define a new part number or maintain existing part numbers in the parts catalog, they directly maintain rows in the combinations table.

The foreign key table contains a different business entity than the combinations table. For example, the business entity in the foreign key table is order lines or invoice lines that contain foreign key references to parts for ordering. Any number of foreign key tables can reference a particular entity represented by a key flexfield.

Segments and Segment Labels

A key flexfield contains segments. Each segment contains these details:

- A prompt
- A short prompt
- Display width
- The sequential position of the segment within the key flexfield structure
- The range type
- Column name of the attribute being stored by the segment
- A default value set
- A label for the segment

How to Identify Segments

You can identify and control a segment within a key flexfield using a segment label. Segment labels act as tags for the segments, and these labels are defined by application developers. For example, say in the accounting flexfield, you want to identify which segment contains balancing information and which one contains natural account information. A segment label identifies the segment that contains natural account information. When you define your accounting flexfield, you must specify the segment labels for each segment. Some segment labels must be unique, and can't be applied to more than one segment in each structure. Other labels are required and must be applied to at least one segment in each structure.

You can also use a segment label to search for segments, such as the Cost Center label for all segments across key flexfields that store a value for the cost center. To identify and control a segment in key flexfield, you can set several segment properties in the flexfield XML with a literal value or an EL expression. These properties are attributes of the `<flexfieldLabeledSegmentHint>` element of the flexfield. These property settings apply to all segments that have the specified segment label assigned to them.

Property	Description
SegmentLabel	Indicates the segment label for the segment being configured.
Rendered	Indicates whether the segment is available on the page. You can set the value to True , False , or EL expression .
Required	Indicates whether users must enter some data for the component before they save. You can set the value to True , False , or EL expression .
Read-only	Indicates whether the users can modify the segment. You can set the value to True , False , or EL expression .
Visible	Indicates whether the segment is visible on the page. You can set the value to True , False , or EL expression .
Label	Indicates the display text for the segment.
ShortDesc	Indicates the text that appears when users hover over the component.
Columns	Indicates the width of the text control in terms of the number of characters shown. The number of columns is calculated based on the default font size of the browser. You can set this property with a literal value or EL expression .
Override	Indicates whether a certain child component inside a parent component is visible. You can set the value to True , False , or EL expression . When you use this property along with the visible property, it overrides the visible property of the parent component.

How the Override, Visible, and Rendered Properties Work

Let's look at a few scenarios:

- Here's a snippet of code without the override property:

```
<fnd:keyFlexfieldPartial value="#{bindings.Kff1PaInstanceIterator}" id="kfp1" visible="false">
  <fnd:flexfieldLabeledSegmentHint
    segmentLabel="SEGMENT_LABEL_R1" visible="true"/>
</fnd:keyFlexfieldPartial>
```

In this case, the `visible` property of the child component is set to **true** and the `visible` property of the parent component is set to **false**. So, segments with `SEGMENT_LABEL_R1` aren't visible because the `visible` property of the child component is used in conjunction with the `visible` property of the parent component.

- Here's a snippet of code with the override property:

```
<fnd:keyFlexfieldPartial value="#{bindings.Kff1PaInstanceIterator}" id="kfp1" visible="false">
  <fnd:flexfieldLabeledSegmentHint
    segmentLabel="SEGMENT_LABEL_R1" visible="true" override="true"/>
</fnd:keyFlexfieldPartial>
```

```
</fnd:keyFlexfieldPartial>
```

Here also, the `visible` property of the child component is set to **true** and the `visible` property of the parent component is set to **false**. But you're also setting the `override` property of the child component to **true**. So, segments with `SEGMENT_LABEL_R1` are visible because the `visible` property of the child component overrides the `visible` property of the parent component.

Remember, you must not use the `rendered` property along with the `override` property, because when you set the `rendered` property to **false** at the flexfield level, the ADF module ignores the rendered property at the segment level. For example, consider this snippet of code:

```
<fnd:keyFlexfieldPartial value="#{bindings.Kff1PaInstanceIterator}" id="kfp1" rendered="false">  
  <fnd:flexfieldLabeledSegmentHint  
    segmentLabel="SEGMENT_LABEL_R1" rendered="true" override="true"/>  
</fnd:keyFlexfieldPartial>
```

Though you set the `rendered` property to **true** at the segment level, this property is ignored. That's because the `rendered` property is set to **false** at the flexfield level. So, make sure that you use the `visible` property instead of the `rendered` property along with the `override` property.

Structures and Segment Instances

A key flexfield structure definition includes the number of segments and their order.

In some applications, different users like to see different segment structures for the same flexfield. A key flexfield can have multiple structures if registered to support more than one structure.

The flexfield can display different fields for different users based on a data condition in your application data, such as the value of another field entered by the user or the user's role. For example, the correctly formatted local postal address for customer service inquiries differs based on locale. A postal address key flexfield could display different segments and prompts for different users based on a location condition in your application data, such as the user's role or a value entered by the user.

Each structure can have one or more segments. Thus a segment is a child of a structure. To store a particular segment, such as Cost Center, in two different structures, you must define the segment separately in each structure. Each structure may have one or more structure instances. Each instance of a structure shares the same number and order of segments, but differs in the values or value sets used in validating the segments.

You can define multiple configurations of a key flexfield structure. These structure instances have the same segment structure, in the same sequence order. They differ primarily in how each segment is validated. You define a structure instance for each key flexfield and each key flexfield structure instance.

The segments in a key flexfield structure instance are segment instances. A segment instance is a segment with a specific value set assigned to it. If a key flexfield is registered with a tree structure, you can specify a tree code for a segment instance.

Combinations

A combination is a complete code, or combination of segment values that makes up the code, that uniquely identifies an object.

For example, each part number is a single combination, such as PAD-YEL-11x14 or 01-COM-876-7BG-LTN. In these combinations, the hyphen is the segment separator. If you have ten parts, define ten combinations. A valid combination is an existing or new combination that can be used because it's currently active and doesn't violate cross-validation or security rules. A combination has different segments depending on the flexfield structure being used for that combination. Any combination is associated with only one particular flexfield structure.

Many applications refer to a key flexfield combination by using the name of the entity or the key flexfield itself. For example, Assets uses the asset key flexfield and refers to one of its combinations as an asset key or asset key flexfield. In another example, Oracle Fusion General Ledger refers to combinations of the accounting flexfield as account or GL account.

Each key flexfield has one corresponding table, known as the combinations table, where the flexfield stores a list of the complete codes, with one column for each segment of the code, together with the corresponding unique ID number (an account combination ID) for that code. Then, other tables in the application have a column that stores just the unique ID for the code. For example, you may have a part number code, such as PAD-YEL-11x14. The Parts combinations table stores that code along with its ID, 57494. If your application lets you take orders for parts, you might then have an Orders table that stores orders for parts. That Orders table would contain a single column that contains the part ID, 57494, instead of several columns for the complete code PAD-YEL-11x14. Typically, one combinations page maintains the key flexfield, where the key flexfield is the representation of an entity in your application. Maintain individual combinations, such as part numbers in the combinations page.

Dynamic Combination Creation

Dynamic combination creation is the insertion of a new valid combination into a combinations table from a page other than the combinations page. The following table lists the levels at which dynamic combination creation may be enabled.

Level Of Dynamic Combination Creation	Controlled By
Flexfield	Application development
Each usage or reference to the key flexfield	Application development
Structure instance	Administrators and implementation consultants
Other	Administrators and implementation consultants

If your key flexfield or certain usages or references of the key flexfield don't permit dynamic combination creation, you may control whether dynamic combination creation is enabled for each structure instance. If enabled, a user can enter a new combination of segment values using the flexfield window from a foreign key page. For example, when entering a transaction, a GL user can enter a new expense account combination for an account that doesn't yet exist. Your application creates the new account by inserting the new combination into the combinations table behind the scenes. Assuming that the new combination satisfies any existing cross-validation rules, the flexfield inserts the new combination into the combinations table, even though the combinations table isn't the underlying table for the foreign key page.

Related Topics

- [Overview of Flexfield Deployment](#)
- [Considerations for Managing Flexfields](#)
- [Key Flexfield Structures](#)
- [How can I access predefined flexfields](#)
- [Update Existing Setup Data](#)

Considerations for Planning Key Flexfields

Your first step in planning your key flexfields is to determine which key flexfields your application requires. Your plan should include:

- The purpose of the key flexfield
- The number and length of its available segment columns
- Whether your key flexfield permits more than one structure
- Whether more than one structure must be defined
- The number, order and length of your segments for each structure

Before You Begin

Once you have identified a flexfield, plan its configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you're provisioned with the roles required to view and configure the flexfield. Use the Highlight Flexfields command in the Administration menu to view the run time page where the flexfield appears. Plan how you deploy the flexfield for test and production users and review the tools and tasks available for managing flexfields.

If you plan to use value sets, create them before configuring the key flexfield. You can't create value sets for key flexfields at the time that you add and configure key flexfield segments.

Access to Flexfield-Related Tasks

To configure flexfields and value sets, you must have access to the tasks for managing flexfields. Contact your security administrator for details. For information about product-specific flexfield tasks, such as Manage Fixed Assets Key Flexfields, refer to the product-specific documentation.

Restrictions

If you plan to use value sets, create them before configuring the flexfield. Plan your key flexfield configuration to scale to your enterprise needs. For example, if you expect to disable old cost centers and enable new ones frequently, plan a larger maximum size for your cost center value set so that you can have more available values. A 3-character value set with one thousand available values provides more room for changes than a 2-character value set with 100 available values.

Note the code name of the flexfield you intend to configure so that you find it easily in the tasks for managing key flexfields. In some cases you can configure how the flexfield appears on the page. See product-specific documentation to determine any restrictions on using product-specific key flexfields.

Reporting

To report on your data by certain criteria or sub-entities, such as account number or project or region, consider making that sub-entity a distinct segment, rather than combining it with another sub-entity. You can categorize and report on smaller discrete units of information.

Related Topics

- [Considerations for Planning Value Sets](#)

Considerations for Managing Key Flexfields

Consider the plans for a key flexfield, security, and resulting run time pages when configuring key flexfields.

Planning

Plan structures carefully and enable them for future needs. Don't change the number, order, and maximum length of segments once you have acquired flexfield data.

Structure Delimiters

A delimiter separates the segments when they appear to users. The delimiter value of a structure specifies the character used to visually separate segment values when the key flexfield is displayed as a string of concatenated segments in the UI.

Identify the delimiter value of your key flexfield carefully so that it doesn't conflict with the flexfield data. For example, if your data frequently contains periods, such as in monetary or numeric values, don't use a period as your segment separator. Any character you expect to appear frequently in your segment values or descriptions isn't a good choice for the delimiter. If you change the configuration of a key flexfield, such as the delimiter, the change affects the previously stored key flexfields with that structure.

Security

Oracle Fusion data security enforces value set security.

Within key flexfields, value set security applies to the selection of the individual segment values in the segment list of values. When selecting a key flexfield segment value from the combinations table, data security permits display of only the combinations whose segment values you have access to. Applications development controls whether or not value set security rules propagate to the foreign key table. By default they do.

Run Time Pages

Application development determines the user interface (UI) pages used to render flexfields. The types of key flexfield UI pages are as follows:

- Combinations pages where the underlying entity objects use the combinations table itself
- Foreign key pages where the underlying entity objects contain a foreign key reference to the combinations table
- Partial usage pages where some or all of the key flexfield's segment columns are in a product table

The same key flexfield can be used in different ways on different pages.

A page with a foreign key reference has a base table or view that contains a foreign key reference to a combinations table with the actual flexfield segment columns. This lets you manipulate rows containing account combination IDs (account combination).

A page with partial usage of a key flexfield presents segments that are defined on a product's transactional table in addition to being defined on a combinations table. In the case of a partial usage page, only a part of the configuration is likely to be visible. This enables the key flexfield to act more like a descriptive flexfield.

An account combination maintenance page or combinations page presents the combinations table. This enables directly creating and maintaining account combinations. The combinations table contains all key flexfield segment columns and a unique ID column.

A typical application has only one combinations page. An application might not have a combinations page if it doesn't support maintenance by administrators.

A page containing a search region enables users to select which attributes of the key flexfield view object to use as criteria to search for flexfield metadata.

For example, you can configure seven segments for the Account key flexfield. In a foreign key reference page, users see the typical key flexfield picker with all seven segments where they can search for combinations. In a partial usage page using the same key flexfield, users potentially could see only a single segment such as the Cost Center labeled segment, or they might see multiple segments but displayed as individual segments rather than options for selecting combinations.

Related Topics

- [Key Flexfield Structures](#)
- [Example of a Key Flexfields](#)
- [Key Flexfield Structure Instances and Segment Instances](#)
- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [Flexfield Usages](#)

Key Flexfield Structures

A key flexfield structure arranges the segments of a key so that you can reuse a single key flexfield in multiple combinations of the same segments or a subset of those segments. Multiple instances of a single structure can accommodate differences in the value sets assigned to the structure's segments.

The structure determines the following aspects of a key flexfield:

- The segments to include
- The order of the segments
- Segment labels on the included segments
- Properties for each segment applied to the instances of the segments in an instance of the structure

Managing Key Flexfield Structures

All the segments defined for a key flexfield are available to be included in a key flexfield structure.

You can define as many segments as there are defined segment columns in your key flexfield combinations table. Ensure that you add segments in the order that your key requires. Once deployed, the order can't be changed.

Enable segments to indicate that they are in use. A flexfield doesn't display disabled segments in run time. To protect the integrity of your data, disable a segment if you have already used it to enter data.

Related Topics

- [Key Flexfield Structure Instances and Segment Instances](#)

Key Flexfield Structure Instances and Segment Instances

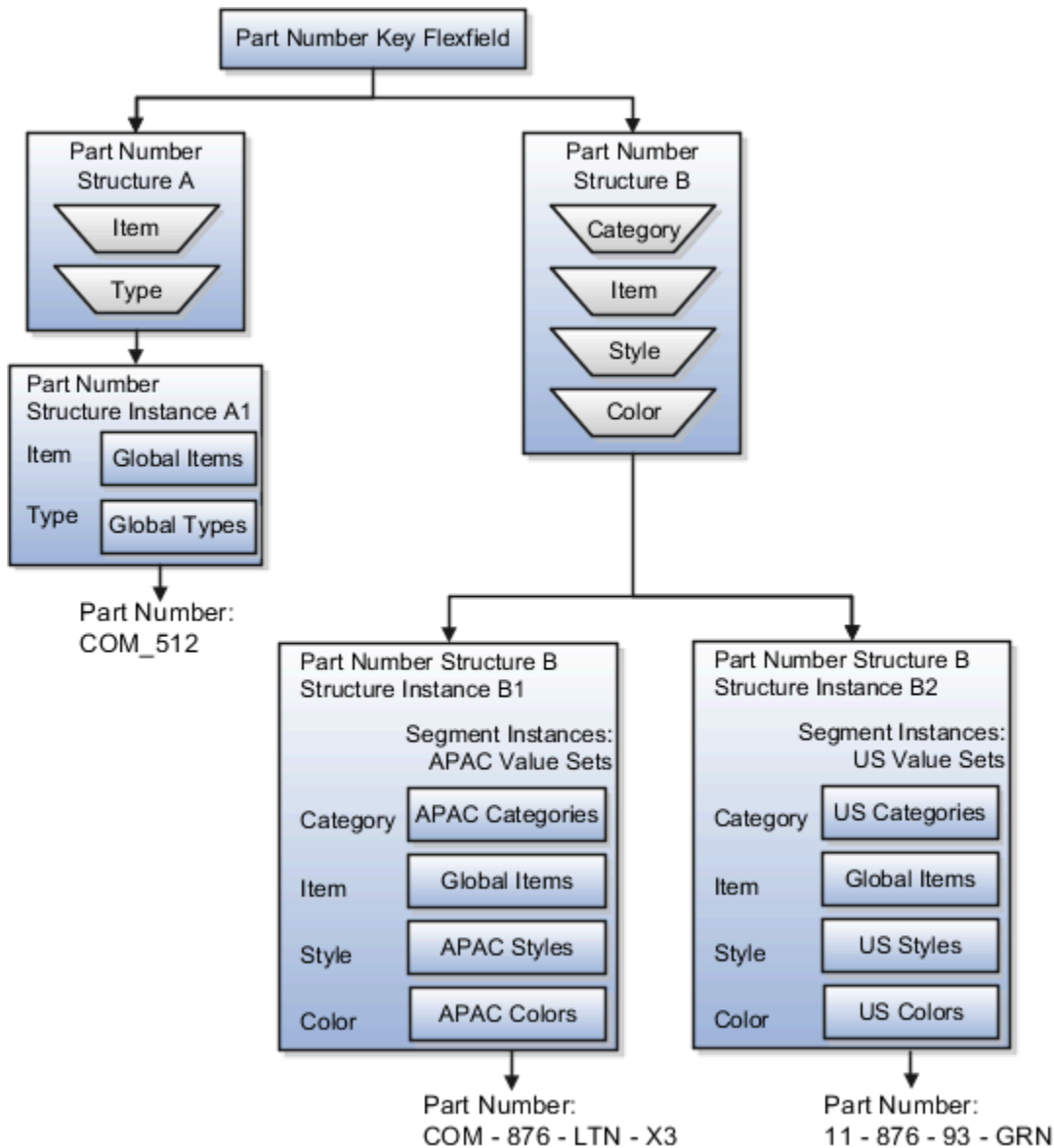
A key flexfield structure can have one or more alternate structure instances. The instances of a key flexfield structure share the following aspects of the structure:

- The same set of segments
- The same arrangement of segments
- The same properties at the segment and structure levels

The differences among structure instances include whether dynamic combination creation is permitted. Likewise, at the structure instance level, differences among segment instances are based on the following:

- Value set
- Default type and default value
- Tree code
- Whether the segment is any of the following:
 - Required
 - Displayed
 - Enabled for business intelligence
 - Optional or required as a query criterion

For example, you can use one group of value sets for the US and another for France.



The structures differ in the number of segments and the segment separators used. The structure instances share all the properties defined for that structure. However, the structure instances may vary if the properties are defined at the structure instance or segment instance level. For example, the value set assigned to the segment instances.

Query Required Segment Instances

You can designate a key flexfield segment instance as a query for making it a selectively required attribute. A user can use it as a key flexfield combination search. On the Manage Key Flexfields UI page, if you indicate that a segment instance requires indexing, add the column representing the segment to the database index. Commonly, a database administrator (DBA) adds columns to the database index.

Following deployment, the combination picker of the key flexfield displays the query required attributes as selectively required. A user must specify at least one of the query required attributes in the search criteria. This prevents unnecessary searches that could cause performance issues.

For example, you mark the cost center and account attributes as query required and ensure that the corresponding columns in the database are indexed. A user can search for combinations by entering cost center or account or both as search criteria. No search is performed if a user doesn't enter at least one query required attribute as search criteria.

Tip: Index the Structure Instance Number column on your combinations table to improve run time performance.

Dynamic Combinations

If a key flexfield supports dynamic combination creation, you can select to enable this feature by selecting **Dynamic Combination Creation Allowed**. As a result, users enter values at run time that produce new account combinations for the flexfield. If **Dynamic Combination Creation Allowed** isn't enabled, new valid combinations can only be entered using the combinations table for the flexfield.

Trees

You may define a tree code for the value set assigned to the segment instance. When you assign the tree code to the segment instance, tree hierarchy search operations are available on the segment values.

For a segment instance to be based on a tree, the following must be true.

- Application development registered the key flexfield with a tree structure. The tree structure may be fixed across all segments in the flexfield, or may vary across segments.
- A tree code for that tree structure exists.
- The tree code includes tree versions containing the values of the value set assigned to the segment instance.
- You assign the required tree code directly to the segment instance.

If these conditions are satisfied, you can assign the same or different tree codes to the different segment instances that use the same value set.

Related Topics

- [Flexfield Segment Properties](#)

Cross-Validation Rules

You can control the creation of new key flexfield code combinations by defining cross-validation rules. A cross-validation rule defines validation across segments and enforces whether a value of a particular segment can be combined with specific values of other segments to form a new combination.

The following table compares segment validation to cross-segment validation:

Type of validation	Type of control
Segment validation	Controls the values you can enter for a particular segment
Cross-segment validation	Controls the combinations of values that administrators and end users can create for key flexfields

Note: You can use cross-validation rules for any key flexfield that has cross-validation enabled. See the documentation for your key flexfield to determine if it supports cross validation.

Cross-validation rules prevent the creation of combinations with values that can't coexist in the same combination. For example, your company requires that all revenue accounts must have a specific department. Therefore, account combinations that have revenue account values, such as all values between 4000 and 5999, must have a corresponding department value other than 000, which indicates no department is specified. You can define cross-validation rules that disallow creation of combinations with incompatible segments, such as 4100-000 or 5000-000.

Alternatively, suppose your accounting key flexfield has an Organization segment with two possible values, 01 and 02. You also have a Natural Account segment with many possible values, but company policy requires that Organization 01 uses the natural account values 001 to 499 and Organization 02 uses the natural account values 500 to 999. You can create cross-validation rules to ensure that users can't create a general ledger account with combinations of values such as 02-342 or 01-750.

The following aspects are important to understanding cross-validation rules:

- Rule Definitions
- Enforcement
- Timing

Rule Definitions

The following table contains definitions used in cross-validation rules:

Rule Definition	Purpose
Name	Uniquely identifies cross-validation rules in a deployment.
Description	Helps administrators identify the purpose of the rule.
Error message	Explains why the attempted combination violates the rule.
Start Date, End Date	Indicates the period of time when the rule is in effect.
Enabled	Determines whether the rule is enforced.
Condition filter	Determines the conditions in which an enabled cross-validation rule should be evaluated.
Validation filter	Determines the validation that the rule enforces when that condition is met.

When the event specified in the condition filter is applicable, the validation filter condition must be satisfied before the combination can be created. If the event specified in the condition filter isn't applicable, then the combination is considered to pass the rule and the rule won't be evaluated even if it's enabled.

Note: If you don't specify any statement in the condition filter, then the condition is always true and the rule is always evaluated.

Enforcement

Cross-validation prevents creation of invalid combinations by administrators using maintenance pages and end users using dynamic insertion in foreign key pages.

Enabled rules are enforced when there is an attempt to create a new combination of segment values. Disabled rules are ignored. Deleting the rule has the same effect, but you can re-enable a disabled rule.

Timing

When users attempt to create a new combination, the key flexfield evaluates any cross-validation rules that are enabled and in effect.

Note: Cross-validation rules have no effect on combinations that already exist. The flexfield treats any existing invalid combinations that pre-date the rule as valid.

If you want to prevent users from using previously existing combinations that are no longer valid according to your cross-validation rules, manually disable those combinations using the combinations page for that key flexfield.

When defining a cross-validation rule, specify a start and end date to limit the time when the rule is in effect. The rule is valid for the time including the From and To dates.

Related Topics

- [Considerations for Cross-Validation Rules](#)

Considerations for Cross-Validation Rules

To validate the key flexfield combinations of segment values across segments, optimize your cross-validation rules to improve the experience of administrators and users.

Consider the following when defining cross-validation rules:

- Filters
- Rule Complexity
- Maintenance

Filters

A cross-validation rule includes a condition filter and a validation filter. The rule is evaluated using the following logical order: If the condition filter is satisfied, then apply the validation filter.

The condition filter describes the event when the rule is evaluated. If the event specified in the condition filter isn't applicable, then the rule isn't evaluated, even if enabled. When the event specified in the condition filter is applicable, the validation filter condition must be satisfied before the combination can be created.

For example, your organization has determined that a certain company value called Operations can't use a specific cost center called Marketing. You can define a cross-validation rule to validate your combinations.

1. The rule evaluates the company condition filter.
2. When company is equal to Operations, the rule evaluates the cost center validation filter.
3. When cost center is equal to Marketing, the rule prevents a combination from being created.

4. The error message you defined for the rule displays to inform the user that the attempted combination violates the rule.

Such a rule doesn't affect the creation of combinations with Marketing cost center and company values other than Operations.

Rule Complexity

For optimal performance and ease of understanding, define several simple validation rules instead of using one complex rule. Simple validation rules let you provide a more specific error message and are easier to maintain over time.

Avoid rules that control validation across more than two segments, where possible. While you can define cross-validation rules that span two or more segments, it becomes difficult to interpret cross-validation error messages and rectify invalid key flexfield combinations.

Maintenance

To maintain consistent validation, review existing key flexfields when you update your cross-validation rules. Regardless of your current validation rules, you can use an existing key flexfield combination if it's enabled. Therefore, to ensure accurate validation, you must review your existing combinations and disable any combinations that don't match the criteria of your new rules.

Tip: To keep this type of key flexfield maintenance to a minimum, decide upon your cross-validation rules when you first set up your key flexfield structure. Define cross-validation rules before creating combinations and before combinations are used in transactions.

To prevent users from using existing combinations that are no longer valid according to your cross-validation rules, disable them using the combinations page.

Related Topics

- [Cross-Validation Rules](#)

Edit a Cross-Validation Rule

Cross-validation rules prevent specific combinations of segment values in account combinations. You can use the Manage Cross-Validation Rules task to edit existing rules or to create one-off rules.

Scenario

Your organization has a cross-validation rule named **Companies 131 and 151**, which restricts account combinations for those companies to department 40 and product 211. Account combinations for both companies should now include department 30. To edit the cross-validation rule, perform these steps.

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Financials
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Cross-Validation Rules
2. Select the chart of accounts for your organization and select the **Companies 131 and 151** cross-validation rule.

Companies 131 and 151: Details

Condition Filter 2 Filter Conditions Defined		Validation Filter 2 Filter Conditions Defined	
Condition Details	Company Equals to 131 OR Company Equals to 151	Validation Details	Department Equals to 40 Product Equals to 211
Error Message Name	GL_CVR_1000021_COMPANIES 131 A	Error Message	Companies 131 and 151 can be used with department 40 and product 211.

3. Click the **Validation Filter** icon.
4. Click **Add Fields** and select the **Department** segment.
5. Accept the default operator, which is Equals, and select department **30**.

Validation Filter

Department Equals 40

Department Equals 30

Product Equals 211

Search Reset Add Fields Reorder

OK Cancel

6. Click **OK**.
7. Click **Save**.

Validation Filter 3 Filter Conditions Defined

Validate (Department Equal to 30
OR Department Equal to 40)
AND Product Equal to 211

Error used with department 40 and product 211.

8. To update the error message, search for and select the Manage Messages for General Ledger task. Query the error message name for the cross-validation rule and edit the message to include department 30.

Related Topics

- [Update Existing Setup Data](#)

Considerations for Enabling Key Flexfield Segments for Business Intelligence

A key flexfield registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segment instances. When a segment instance is BI-enabled, it's available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled key flexfield segments.

- Flattening business components to use BI-enabled segments in Oracle BI
- Equalizing segments to prevent duplication and complexity in the flattened component
- Mapping attributes of flattened business components to logical objects in Oracle BI
- Managing the labels that map segments to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For information about logical objects and import, see the *Creating and Administering Analytics and Reports* guide for your products.

Flattening

When you deploy a business intelligence-enabled key flexfield, the deployment process generates an additional set of flattened business components for use in business intelligence. The flattened business components include attributes for business intelligence-enabled segment instances only.

If you assigned a label to a segment, the flattened components include a single attribute representing all segment instances with that label. If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled segment instance in each structure.

Mapping to Logical Objects in Business Intelligence

You can simplify reporting by representing similar segments as a single logical object in Business Intelligence. If you assign a label to segments that serve the same purpose in different structures, you can consolidate the segments into a single attribute. This prevents duplication and the extra workload and complexity that result from the flattening process. For example, an organization may have more than one definition of its key accounting flexfield to support different requirements for accounting reporting. A US Accounting Flexfield structure may have a segment called Subaccount to track project expenditures. The same type of information may be tracked in a UK accounting flexfield structure with a segment called Project. Equalize these two segments to create a single list of values for reporting.

Non-labeled segments aren't equalized across context values, so the flattened components include a separate attribute for each segment for each structure. It may not be possible to equalize similarly labeled segments if they have incompatible data types or value set types.

Assign a label to a segment to map the corresponding attribute in the flattened components to a logical object in Oracle Business Intelligence. Using labels to map segments to BI logical objects minimizes the steps for importing the flexfield into Oracle Business Intelligence. Assigning a label to a segment serves to equalize the attribute across structures, as well as map the equalized attribute to business intelligence.

Managing Labels

You may assign a predefined label (if available) to segments or create labels for assignment, as needed. Specify a code, name, and description to identify each label. In the BI Object Name field, enter the name of the logical object in Oracle Business Intelligence to which the segment label should map during import. Specifying the BI logical object minimizes the steps for importing the flexfield into Oracle Business Intelligence and helps to equalize context-sensitive segments across structures.

If no labels are assigned to a BI-enabled segment, or the BI Object Name on the assigned label doesn't exist in business intelligence, you must manually map the segment to the required logical object when importing into Oracle Business Intelligence. In addition, segments without labels can't be equalized across structures. The flattened components include a separate attribute for each non-labeled segment in each structure.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence. Then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user.

To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For information about logical objects and import, see the Creating and Administering Analytics and Reports guide for your products.

Note: When you import a flexfield into the Oracle Business Intelligence repository, you see both `<name>_` and `<name>_c` attributes for each segment, along with some other optional attributes. The `<name>_` attribute contains the value. The `<name>_c` attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Related Topics

- [Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence](#)
- [Overview of Key Flexfields](#)
- [Enable Key Flexfields for Business Intelligence Reporting](#)
- [Overview of Flexfield Change Import](#)

Example of a Key Flexfields

A key flexfield can capture expense account information.

Scenario

When entering details for each expense, the user specifies an account to which the expense is charged.

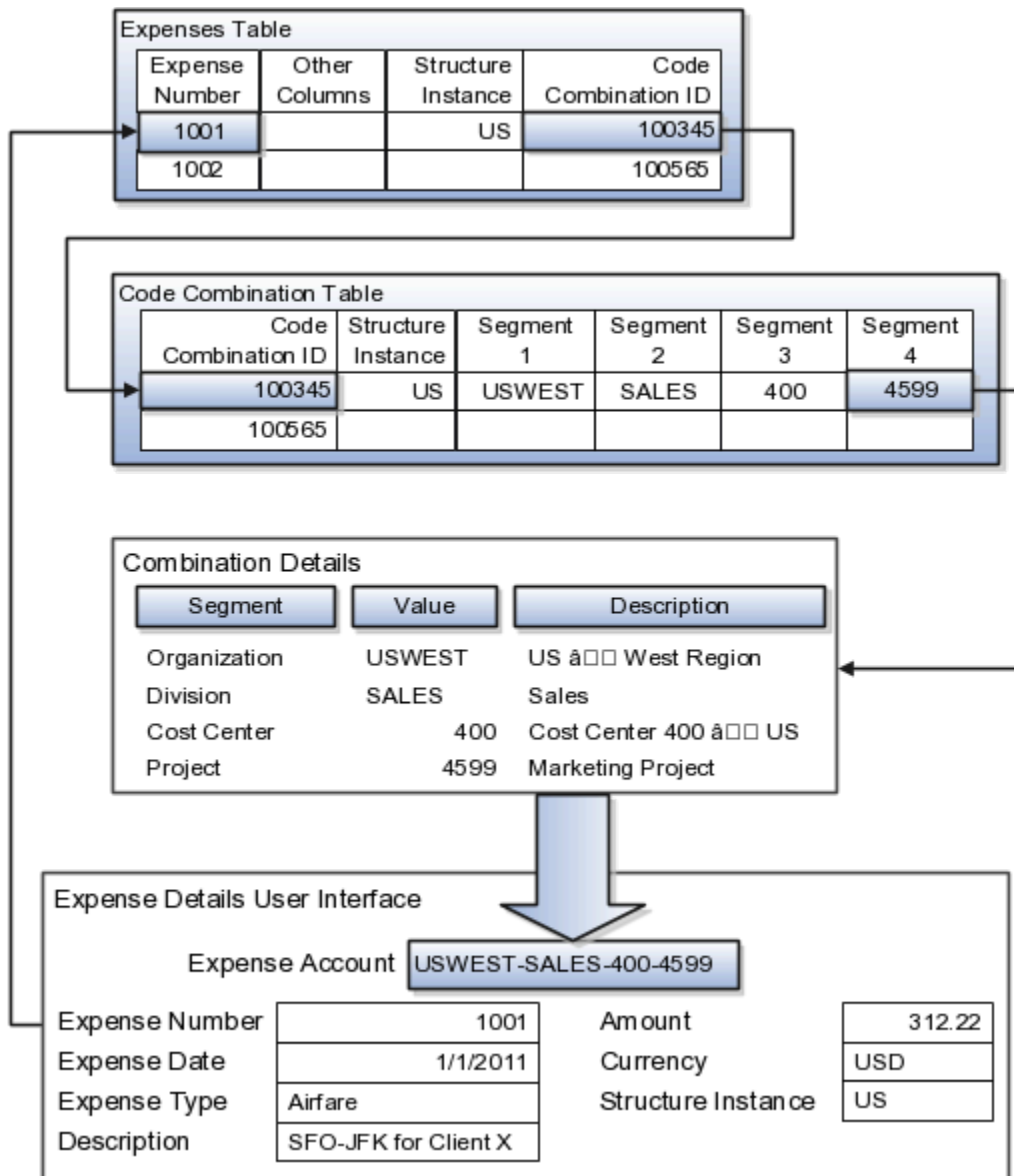
Entering Expense Accounts

A user interface for entering expenses helps the user select an expense account that identifies the cost center and other details needed for processing the expense.

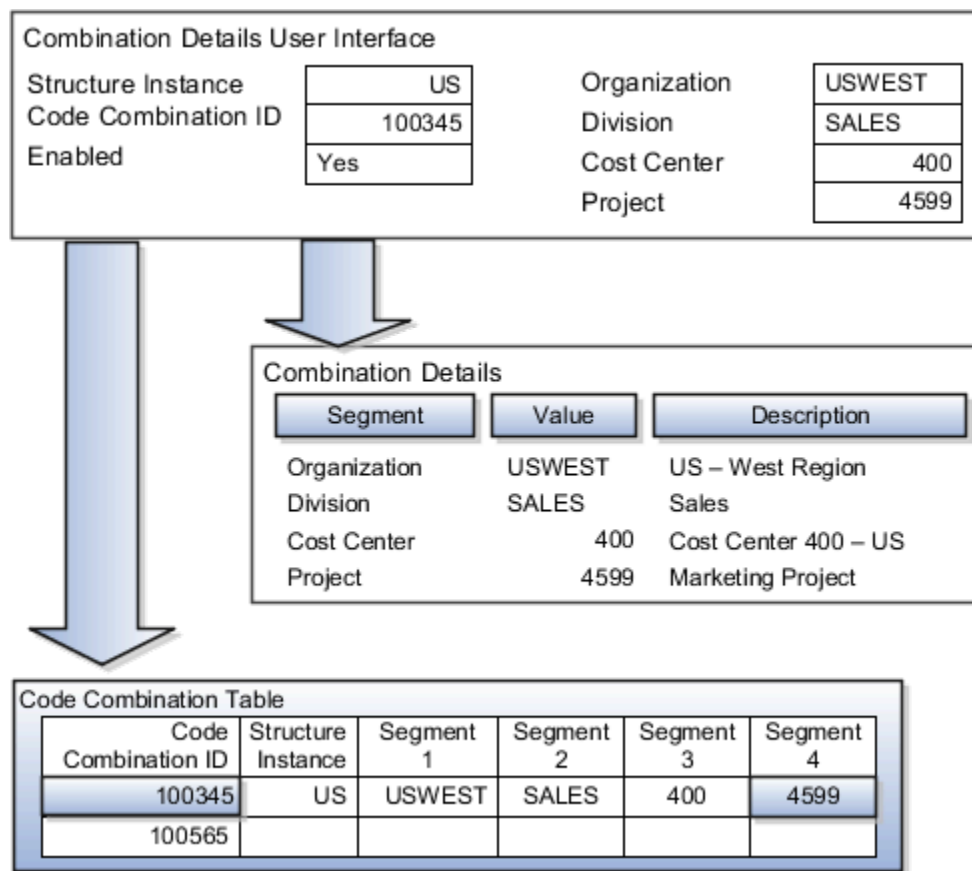
The expense account field is a foreign key reference to a account combination (EXPENSE_LINES.EXPENSE_ACCOUNT = ACCOUNT.COMBINATION).

Account combinations Table for Entering Accounts and Employees

The account combinations table supports entering account information, such as for expense accounts.



The combinations page, which is the maintenance page for the key flexfield, is for managing rows in the combinations table. In this example, managing the combinations means adding or editing account numbers that adhere to the key flexfield metadata rules.



If dynamic combination creation isn't enabled, then when entering an expense line, the user can only select an account that already exists in the ACCOUNTS (combinations) table. If they require an account that doesn't exist, they must consult with the appropriate application administrator who can add the account to the combinations table.

If dynamic combination creation is enabled, then when entering an expense line, the user can either select a preexisting account, or type in a new account that's created dynamically on the fly in the ACCOUNTS (combinations) table. Once the new combination is created, the same user can refer to it on the expense line.

When managing employee information, the user specifies the cost center that the employee belongs to. The cost center field corresponds to a single, labeled segment of the Account Key Flexfield and has metadata defined such as the allowable value set for that segment.

Combination Details

Segment	Value	Description
Cost Center	400	Cost Center 400 ââ US

Employee Details User Interface

Employee Number	10000	Structure	US
Employee ID	gbrown	Cost Center	400
Hire Data	1/1/2011		

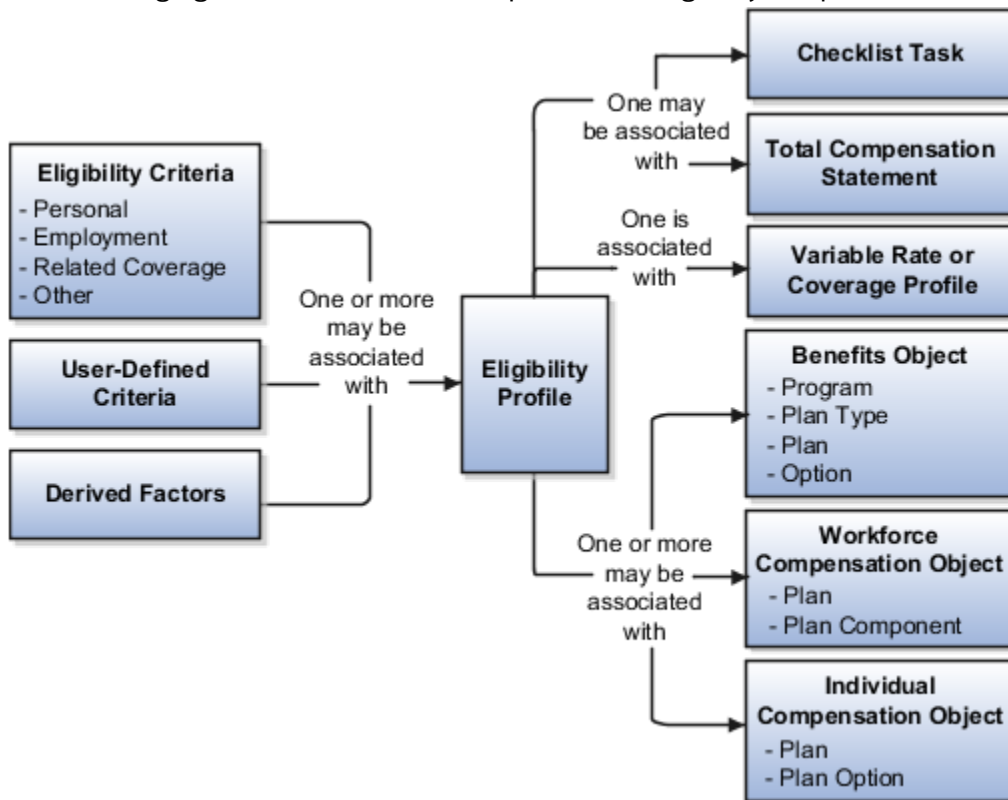
Related Topics

- [Example of One Chart of Accounts Structure with Many Instances](#)

26 Eligibility Profiles

How Eligibility Works With Other Objects

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility. The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

Object that Uses an Eligibility Profile	Purpose	Whether You Can Attach More Than One Profile?
Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage	No
Checklist task	Control whether that task appears in an allocated checklist	No
Total compensation statement	Apply additional eligibility criteria after statement generation population parameters	No
Benefits object	Establish the eligibility criteria for specific programs, plans, and options	Yes
Compensation object	Establish the eligibility for specific plans and options	Yes
Performance documents	Establish the eligibility for performance documents	Yes
Goal plans or goal mass assignments	Establish eligibility for the goal	Yes
Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan	Yes

Related Topics

- [User-Defined Criteria](#)
- [Derived Factors](#)
- [Eligibility Profiles](#)

Derived Factors

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

Using the **Manage Derived Factors** task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation
- Hours worked
- Full-time equivalent

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility. Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.
Full-time equivalent	Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

Related Topics

- [Examples of Derived Factors](#)
- [Eligibility Profiles](#)

Examples of Derived Factors

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band can use the same values, as shown in the following table:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

You use the length of service derived factor to determine eligibility based on an employee's length of service. For example, you can create a derived factor to determine if an employee has completed 10 years of service. You can specify the start date of the length of service period using any rule in the Period Start Date Rule list:

- Adjusted service date

- Date of hire
- Original hire date
- Seniority date

If you select Seniority Date, you use the Seniority Date list to select the specific configuration rule, such as the grade seniority date, to determine the date. If you have other special requirements to calculate the length of service, you can use a formula. You indicate the end of the length of service period by using a determination rule, such as end of month, first of month, as of event date, or end of pay period. The following table shows an example of a set of length-of-service bands.

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire This sets the beginning of the period being measured.
Determination Rule	End of year This sets the end of the period being measured.
Age to Use	Person's

Field	Value
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Related Topics

- [Eligibility Profiles](#)
- [Derived Factors](#)

Options for Using Age to Determine Eligibility

The **Age to Use** value that you select for an age derived factor determines whose birth date is used to calculate the derived age. The most common value is **Person's**.

Use the **Manage Derived Factors** task to configure age derived factors.

Person's Age

You usually use **Person's** as the **Age to Use** setting. With this setting, each person's own birth date is used to calculate age for eligibility evaluation, as shown in the following table.

Scenario	Result
You select Person's as the Age to Use value, and associate the age derived factor with a dependent eligibility profile.	Each dependent's eligibility is evaluated based on the age calculated from his or her own birth date.

Other Age to Use

To evaluate participant or dependent eligibility or rates based on another person's age, such as a spouse or child, select a value other than **Person's**.

The following table provides examples.

Scenario	Result
You select Person's oldest child as the Age to Use value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the age of the participant's oldest child. For example, all dependents become ineligible when the oldest child reaches the maximum age of eligibility.
You select Inherited Age as the Age to Use value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the date of birth as defined in the person extra information flexfield.

Related Topics

- [Derived Factors](#)
- [Examples of Derived Factors](#)

User-Defined Criteria

You can define your own eligibility criteria that meet any special requirements of your organization. Associate your criteria with eligibility profiles.

This topic provides an example and discusses creating and using a user-defined criteria.

Example

Your organization wants to use work-at-home assignment as the eligibility criteria for a monthly telecommunications allowance. The table and column already exist, but the data is not available from existing eligibility criteria tabs on the Create Eligibility Profile page. Therefore, you must first create the work-at-home criteria so that you can then use it with an eligibility profile.

Creating the Criteria

Use the **Manage User-Defined Criteria** task in the Plan Configuration work area. The data for the eligibility criterion that you create must be stored in a table that is accessible to the application. The procedure varies depending on the table.

Data Table	Procedure
Person Attributes or Assignments table	1. Select the table and table column from lists. You must understand the basic structure of these tables. 2. Select the lookup type to use to validate input values, including user-defined lookup types that you created for either table. For details, see the Setting Up Lookup-Based User-Defined Criteria: Worked Example topic. 3. If the field stores a numeric value or a date, specify a range of valid values.
Other tables	1. Use the Manage Fast Formulas task in the Setup and Maintenance work area. 2. Select your formula on the Create User-Defined Criteria page.

Using the Criteria

You can define one or two sets of criteria on the Create User-Defined Criteria page. The participant must meet the criteria defined in either set to be considered eligible or ineligible.

After you create your user-defined criteria, you can add it to an eligibility profile on the User-Defined Criteria tab in the **Other** category.

Related Topics

- [User-Defined Criteria: Examples](#)
- [Eligibility Profiles: Explained](#)
- [Setting Up Lookup-Based User-Defined Criteria : Worked Example](#)

Examples of User-Defined Criteria

The following scenarios illustrate how you can create different types of user-defined criteria for use in eligibility profiles associated with benefits and compensation objects. In each example, you must:

1. Create the user-defined criteria using the Manage User-Defined Criteria task in the Plan Configuration work area.
2. Add the user-defined criteria to an eligibility profile using the Manage Eligibility Profile task.
3. Set the criteria values to use in the eligibility profile.
4. Associate the eligibility profile with the relevant benefits or compensation object.

Base Eligibility on a User-Defined Attribute

Your commercial diving company wants to offer different benefit rates to employees who dive to depths greater than 330 feet.

1. On either the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Person Attributes
Column	BEN_DIVE_DEPTH
Lookup	BEN_DIVE_DEPTH
Enable range validation one	Selected

2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
3. On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	330
Set 1 To Meaning	9999
Exclude	Clear

4. Associate the eligibility profile with a benefit variable rate profile.

Base Eligibility on a Formula

Your company wants to offer a spot incentive bonus to hourly employees who worked 100 percent of their scheduled shift hours in a three-month period. In the Setup and Maintenance work area, you used the Manage Fast Formula task to create the formula that calculates Scheduled Hours minus Worked Hours for each week in the previous three months. If the result of successive calculations is less than or equal to zero, then the formula returns a result of Yes.

1. On the create or edit page for user-defined criteria, enter the following values.

Field	Value
Access One Formula	Worked_Sched_Hours_Percent
Enable range validation one	Clear

2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
3. On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Clear

4. Associate the eligibility profile with the bonus compensation object.

Tip: For very complex scenarios, your organization or implementation team can write a company-defined program to evaluate eligibility.

Use Eligibility to Exclude

Your organization wants to exclude workers with a work-at-home assignment from a transportation allowance.

1. On the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Assignment
Column	Work_at_home

Field	Value
Lookup	YES_NO
Enable range validation one	Clear

- On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
- On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Selected

- Associate the eligibility profile with the transportation allowance compensation object.

Related Topics

- [User-Defined Criteria](#)
- [Configure Your Own Criteria Based on Lookups](#)

Example of Using Range of Scheduled Hours

This example illustrates how to define eligibility criteria based on the number of hours a worker is scheduled to work within a specified period.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to workers who were scheduled to work either of the following ranges. Both ranges are as of the end of the previous quarter:

- Between 30 and 40 hours each week
- Between 130 and 160 hours each month

To do this, add two different ranges on the Range of Scheduled Hours subtab under the Employment tab of the create or edit eligibility profile pages. Set the values for the weekly range as shown in the following table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the monthly range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Related Topics

- [Eligibility Profiles](#)
- [Create a Participant Eligibility Profile](#)

Eligibility Profiles

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility

- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
 - Derived factors
 - User-defined formulas
 - User-defined criteria
- Consider whether to combine criteria into one profile or create separate profiles depending on:
 - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
 - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description
Profile Type	Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents. All other profiles are participant profiles.
Usage	Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents. Selecting Global makes the profile available to multiple business process usages.
Assignment to Use	Determines the assignment that the eligibility process evaluates for the person • Select Specific assignment when the usage is Compensation or Performance. • Select a value that includes benefit relationship when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments.

Setting	Description
	- Select one of the following values for all other usages, such as total compensation statements: - Any assignment - enterprise - Employee assignment only - enterprise - Primary employee assignment only - enterprise

Defining Eligibility Criteria

Here's the list of eligibility criteria that you can use to configure benefit offerings:

Category	Description
Personal	- Gender - Person Type - Disabled - Uses Tobacco - Service Areas - Home Location - Postal Code Ranges - Leave of Absence - Termination Reason - Qualification - Competency - Marital Status - Religion
Employment	- Assignment Status - Hourly or Salaried - Assignment Category - Grade - Job - Position - Payroll - Salary Basis - Department - Legal Entities - Performance Rating - Quartile in Range - Work Location - Range of Scheduled Hours

Category	Description
	• People Manager • Job Function • Job Family • Hire Date • Probation Period • Business Unit
Derived factors	• Age • Length of Service • Compensation • Hours Worked • Full-Time Equivalent • Combined Age and Length of Service • Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Other	• Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Related coverage	• Covered by Another Plan • Covered by Another Plan in Program • Covered by Another Plan Type in Program • Covered by Another Program • Dependent Eligible for Another Plan Type in Program • Eligible for Another Plan • Eligible for Another Plan Type in Program • Enrolled in Another Option in Plan • Enrolled in Another Plan • Enrolled in Another Plan in Program • Enrolled in Another Plan Type in Program • Enrolled in Another Program • Other Coverage
Labor Relations	• Bargaining Unit • Labor Union Member

Category	Description
	- Union - Collective Agreement

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Related Topics

- [Examples of Eligibility Profiles](#)
- [Derived Factors](#)
- [User-Defined Criteria](#)
- [Single or Multiple Eligibility Profiles](#)
- [Create a Participant Eligibility Profile](#)

Single or Multiple Eligibility Profiles

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
• Checklist tasks • Variable rate profiles • Variable coverage profiles • Total compensation statements • Absence types	• Benefits offerings • Individual and workforce compensation plans • Performance documents • Goal plans or mass goal assignments • Absence plans

Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Level	Eligibility Profile Criteria
Program	Exclude employees who do not have an active assignment.

Level	Eligibility Profile Criteria
Plan type in program	Exclude employees who do not have a full-time assignment.
Plan	Exclude employees whose primary address is not within a defined service area.

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

Related Topics

- [How Eligibility Works With Other Objects](#)
- [What happens if I include multiple criteria in an eligibility profile](#)
- [Best Practices for Setting Up Eligibility in a Benefits Hierarchy](#)

Examples of Eligibility Profiles

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including the Setup and Maintenance work area and the Plan Configuration work area.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Benefits
Profile Type	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No

Criteria Type	Name	Values	Select Exclude Check Box
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes

Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Checklist
Profile Type	Participant

The following table provides the values for the eligibility criteria.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

Related Topics

- [Eligibility Profiles](#)
- [Derived Factors](#)
- [How can I restrict benefits enrollment opportunities based on provider location](#)
- [How to Configure Grandfathered Benefits](#)

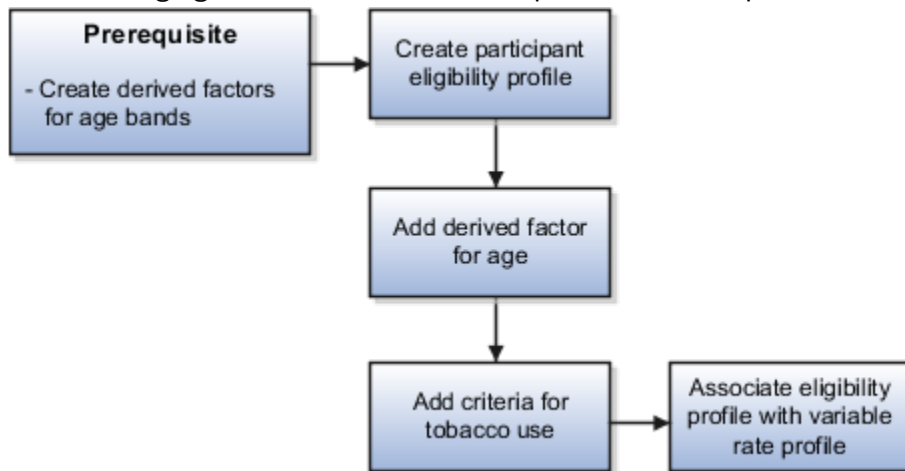
Create a Participant Eligibility Profile

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included

The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
2. On the Create menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	Any assignment - benefit relationship

Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	Make sure that it's not selected

Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Tobacco Use	None
Exclude	Make sure that it's not selected

4. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Related Topics

- [Examples of Eligibility Profiles](#)
- [Derived Factors](#)
- [Create a Benefit Variable Rate](#)

27 Predictive Models for HCM

Guidelines for Managing Predictive Models

Oracle Fusion Workforce Predictions provides predefined models for the prediction of worker performance and voluntary termination. Each predictive model is based on multiple attributes.

You can:

- Run predictive models to provide up-to-date predictions.
- Remove individual predictive models from the predictions process.
- Remove individual attributes from the predictive models or what-if analyses.
- Create predictive attributes to include in the predefined predictive models or what-if analyses.

Running Predictive Models

When you run a predictive model, the process Collect Data and Perform Data Mining for Predictive Analytics is invoked immediately to:

- Rebuild the selected predictive models.
- Make predictions based on scores derived during the build process.

If the volume of relevant transactions (such as transfers, hires, terminations, and promotions) is high in your enterprise, then you can schedule the process to run weekly. At a minimum, you're recommended to run the process monthly to take account of latest data trends. When scheduled, the process rebuilds and runs all predictive models.

If you add attributes to or remove attributes from a predictive model, and you want to include those changes in predictions immediately, then you need to run the predictive model immediately. Don't wait for the next scheduled run of Collect Data and Perform Data Mining for Predictive Analytics.

Removing Predictive Models

To remove a predictive model from the predictions process, you deselect the **Include in Predictions** option for the model. In this case, the model is excluded when you run Collect Data and Perform Data Mining for Predictive Analytics, whether you run it immediately or as a scheduled process. Consequently, related analytics in transactional flows, such as Promote Worker, are empty.

Creating and Editing Predictive Attributes

You can create predictive attributes to include in the predefined predictive models. To derive the value of the new attribute, you create a fast formula database item (DBI) group and select it in the **Formula Function** field. You can also control which predefined and locally created predictive attributes appear in what-if analyses.

In Oracle Cloud environments, you can't create formula functions. Therefore, you may not be able to create predictive attributes.

You can edit or delete any predictive attribute that you create. You can't edit or delete predefined predictive attributes. For any attribute, you can edit how the attribute appears in what-if analyses. For example, you can change the minimum and maximum values on a slider scale.

Related Topics

- [Voluntary Termination : How It Is Predicted](#)
- [High Performance : How It Is Predicted](#)

28 Other Setup and Maintenance Tasks

Set Up the Mapping Service for Contextual Addresses

A contextual address is marked with an orange triangle, the **More** icon. When users hover over the triangle, an icon appears, which they can click to display the address on a map.

Set Up Mapping Service

You can specify the mapping service to be used to display the map.

1. In the Setup and Maintenance work area, go to the **Manage Application Toolkit Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the Mapping Service for Contextual Addresses (ATK_CONTEXT_ADDRESS_MAP_OPTION) profile option.
3. In the Profile Values section, enter a full URL of a mapping service in the **Profile Value** field.

CAUTION: By default, the **Profile Value** field is blank. Until you enter a valid value for this profile option, users continue to get an error when they try to open a map for any contextual address.

Here are a few examples of mapping service URLs:

- o `http://maps.google.com/maps?output=embed&q=`
- o `http://maps.live.com/default.aspx?where1=`
- o `http://bing.com/maps/?v=2&encType=1&where1=`

Tip: You can include parameters in the URL. For example, to avoid a locator box in Google Maps, you can add `&iwloc=&` to the URL. So, the mapping service URL you would enter in the **Profile Value** field is: `http://maps.google.com/maps?iwloc=&&output=embed&q=`

Related Topics

- [Set Profile Option Values](#)
- [Why can't I see the map for contextual addresses](#)

Home Page Setup

Configure Infolet Display

Use the Home Configuration page in the Structure work area (**Navigator > Configuration > Structure**) to configure the display settings of infolet pages in the Analytics section of the home page. If you're using a panel or banner layout, the home page displays the page control containing icons that you use to go to infolet pages.

Define Settings

You can rename infolet pages, change their visibility settings, and reorder them. But before you start, activate a sandbox that has the Structure tool in it.

On the Home Configuration page, you can do these tasks:

- Click the infolet page name to rename it.
- Click the **Visible** field for an infolet page to change its visibility setting. You can show or hide specific infolet pages on the home page. To do so, select any of these options:
 - Yes: The infolet page appears on the home page.
 - No: The infolet page doesn't appear on the home page.
 - EL expression: The evaluation of the EL expression decides the visibility of the infolet page on the home page for specific user roles.
- Use the **Move Up** and **Move Down** icons to adjust the relative positions of the infolet pages on the home page.

If you're using a panel or banner layout, you can use profile options to define settings for the filmstrip, which appears between the global header and the page title:

- To enable users to use the filmstrip, set the **Springboard Strip Enabled** profile option (**FND_USE_FILMSTRIP**) to **Yes**.
- If the **FND_USE_FILMSTRIP** profile option is set to **Yes**, then you can display the filmstrip as expanded by default. To do so, set the **Springboard Strip Expanded** profile option (**FND_EXPAND_FILMSTRIP**) to **Yes**. A user can still collapse or expand the strip on any page, and when done, this profile option is set by default for subsequent sessions of that user.

Related Topics

- [Set Profile Option Values](#)
- [Define Home Page Appearance](#)
- [Examples of EL Expressions for Configuring Navigation](#)
- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)

Define Home Page Appearance

Use the Themes tab in the Appearance work area to first select your home page layout and then define its display settings. And then use the Home Page Display tab to define the display settings of your home page. Based on the home page layout you're using, the options available on the Home Page Display page may vary.

Let's see how to define the home page appearance.

1. Activate a sandbox that has the Appearance tool in it.
2. Click **Navigator > Configuration > Appearance**.
3. Click the Home Page Display tab.
4. In the **Name** column of the table, click any section name to rename it.
5. Click the **Visible** field for a section to change its visibility setting. You can show or hide the section on the home page.

- Yes: The section appears on the home page.
 - No: The section doesn't appear on the home page.
 - EL expression: The evaluation of the EL expression decides whether the section appears on the home page for specific user roles.
6. In the **Order** column, use the **Move Up** and **Move Down** icons to adjust the relative positions of the sections on the home page.
 7. Click **Apply**.

If you're using a panel or banner layout, do these tasks:

1. Activate a sandbox that has the Appearance tool in it.
2. Click **Navigator > Configuration > Appearance**.
3. Click the Home Page Display tab.
4. Select one of these options to display on the home page:
 - **Social**: Displays social networking content, such as the number of followers.
 - **Announcements**: Displays employee announcements.
 - **Cover image**: Displays the image for the main panel or banner, which you specify on the Themes page.
 - **None**
5. Specify whether to display the photo in the main panel or banner of the home page from the social network profile or from HCM.
6. Click **Apply**.

Related Topics

- [Configure Infolet Display](#)
- [Manage Themes](#)
- [Overview of Configuring Themes and Home Page Settings](#)
- [Configure Classic Themes](#)
- [Overview of Sandboxes](#)

Create and Enable Announcements

Use the Announcements page to create, edit, or delete company announcements. After you create announcements, you can enable them to display on the home page, and also specify which user roles can see specific announcements on the home page. You can also use the Announcements REST resource to create, edit, view, or delete announcements. Your application users can also create or edit announcements on their own, but they must have the Manage Help Content (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege.

Create Announcements

1. Click **Navigator > Tools > Announcements**.
2. Click **Create**.
3. Specify the details, such as subject, start date, and end date.
4. Select a category. If you select **User-Defined**, a text box appears, where you can provide additional details.
5. Select any of these options to upload an image. Make sure your image size is 776x437 px or larger to avoid image distortion.

- **Predefined:** Select an image from the list.
- **File:** Browse and select a file from your local computer.
- **URL:** Enter a full URL for the image.

Note: You can't delete announcement images or resize them.

6. From the **Visible** list, select any of these options:

- **Yes:** The announcement appears on the home page.
- **No:** The announcement doesn't appear on the home page.
- **EL Expression:** The evaluation of the EL expression decides whether the announcement will appear on the home page for a specific user role.

7. If you have selected **EL Expression** from the **Visibility** list, click the **Edit** icon next to the **Visibility** list. Then enter a value or expression, and click **Validate** to make sure that the validation result is **True**. For example, you can enter the EL expression in the `{securityContext.userInRole['<role-name>']}` format.
8. Add the content in the text box. You can format your text using the formatting options.
9. Click **Save and Close**.

Your changes on the Announcements page apply immediately to all users, even if you saved your changes while a sandbox is active and not yet published.

Edit or Delete Announcements

1. Click **Navigator > Tools > Announcements**.
2. Select the announcement that you want to edit or delete.
3. Edit the announcement details or click **Delete**.

Enable News and Announcements Section on the Home Page

You can use the Appearance work area to determine whether to display the News and Announcements section on the home page. The News and Announcements section on the home page displays the entire announcement along with the subject and image. But if you're using a panel or banner layout, you will see only the announcement content, not the subject or image in the panel or banner.

1. Click **Navigator > Configuration > Appearance**.
2. Click the Home Page Display tab.
3. Select **Yes** for News and Announcements, and click **Apply**.

Note: If you're using a panel or banner layout, select **Announcements** from the home panel options, and then click **Apply**.

Related Topics

- [Overview of Configuring Themes and Home Page Settings](#)
- [Why can't I see announcements on my home page](#)
- [Announcements REST Endpoints](#)

FAQs for Home Page Setup

How can I rename an icon for an infolet page in the page control on the home page?

You can rename an icon for an infolet page using the Home Configuration page of the Structure work area. To open this page, select **Configuration** > **Structure** from the Navigator menu, and then click the **Home Configuration** tab.

Related Topics

- [Configure Infolet Display](#)

Set Privacy Statement URL

A privacy statement is legal content that tells you how a company collects and manages user data. You can add a link to your company's statement in the About This Application dialog box.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the Privacy Statement URL (PRIVACY_PAGE) profile option.
3. In the Profile Values section, update the **Profile Value** field with the full URL of the web page that has the privacy content. By default, this profile value is **N**.

CAUTION: Don't enter any other value, such as **Y**, because that causes a broken link.

4. Click **Save and Close**.

And that's it! Your users can now view the **Privacy Statement** link by clicking their user image or name in the global header and selecting **About This Application**.

Set Up Sender Policy Framework

If you send an email from Oracle Applications Cloud and want the email to use your domain, you must set up Sender Policy Framework (SPF). Setting up the framework ensures that your domain is protected and your messages are delivered correctly. By updating the SPF record, you authorize the Oracle email servers to send emails on behalf of your domain. When the recipient receives your email, the SPF record of your domain is validated to determine if it's a valid email. Only after validation, your message is delivered.

To set up SPF, do these tasks:

- Have your IT Administrator update your SPF record with this statement:
`include:spf_c.oraclecloud.com`
- Validate your SPF record by using an SPF record checker tool. For example, you can use the SPF Surveyor tool to authenticate your domain.

To use the SPF Surveyor tool, do these tasks:

- a. Go to <https://dmarcian.com/spf-survey/>.
- b. Enter the domain you are using for the email, such as `oracle.com`.
- c. Click **Survey domain**.

A message is displayed indicating the validation results.

Guidelines for Setting Up General Troubleshooting

To help the help desk troubleshoot issues that users encounter in the application, users can record the issue while they reproduce it. Some advanced users might also need detailed information in the About This Page dialog box. Setting up for troubleshooting involves making sure that users have the appropriate access, and determining how many users can record at the same time.

Access

Check with your security administrator that the appropriate users are assigned roles that inherit the following privileges:

- **Record and View Issue (FND_RECORD_AND_VIEW_ISSUE_PRIV):** To create a basic recording
- **Set Issue Recording Advanced Options (FND_SET_ISSUE_RECORDING_ADVANCED_OPTIONS_PRIV):** To set advanced options before starting the recording
- **View Version Information (FND_VIEW_VERSION_INFORMATION_PRIV):** To see the versions that technical components of the application are on

Number of Users

Recordings are stored on servers, and by default, up to five users can record at the same time on each server. For performance reasons, you can set the Maximum Number of Users Allowed to Record Issues (ORA_FND_RECORD_ISSUE_MAX_USERS) profile option to a number lower than five.

Related Topics

- [Set Profile Option Values](#)
- [Record Issues to Troubleshoot](#)
- [How can I view the version information of an application?](#)

Set Up the Worklist Region on My Dashboard

You can add the Worklist: Notifications and Approvals region to My Dashboard, which is a blank dashboard by default. This region displays the workflow tasks assigned to the person using My Dashboard. After you add the Worklist region, select a value for the Welcome Dashboard Worklist Timeout Interval (ATK_HOME_PAGE_WORKLIST_TIMEOUT) profile option.

Adding the Region

To add the Worklist: Notifications and Approvals region to My Dashboard:

1. Click **Navigator > Others > My Dashboard**.
2. Click your user image or name in the global header, and select **Edit Pages** in the Administration menu group.
3. Click the **Add Content** button where you want to place the region.
4. Open the Application Content folder in the Add Content dialog box.
5. Click **Add** for the Worklist: Notifications and Approvals item.
6. Click **Close**.
7. Save your work, and then click the **Close** button.

Defining the Timeout Interval

When users open My Dashboard and it contains the Worklist: Notifications and Approvals region, data for the region is retrieved. The Welcome Dashboard Worklist Timeout Interval profile option determines how long to continue retrieving before timing out and displaying no data. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions
- Task: Manage Application Toolkit Administrator Profile Values

Note: If you don't see this task, then make sure that the Application Toolkit Component Maintenance feature is enabled at the offering level in the Offerings work area.

On the Manage Application Toolkit Administrator Profile Values page, set the Welcome Dashboard Worklist Timeout Interval profile option.

- If you don't set a value for this profile option, which is blank by default, then the region doesn't time out.
- Retrieving data for the Worklist region affects the performance of My Dashboard as a whole. So, select a value for this profile option if your users have the Worklist region on My Dashboard and notice performance issues.

After the timeout, users can refresh the region to try retrieving the data again.

Related Topics

- [Set Profile Option Values](#)
- [Configure Offerings](#)
- [Update Existing Setup Data](#)

Deep Links

You can use deep links to open pages without using menus or navigating through pages. Deep links come in handy if you want users to go directly from various locations to Oracle Applications Cloud. You can add deep links to a business intelligence report, an email notification, or a company website hosted on Oracle Cloud. For example, you can enable direct navigation to the My Team page. If users click your deep link URL from the company website, but aren't yet signed in to Oracle Applications Cloud, they're automatically redirected to the Sign In page. To see a complete list of the available deep links, use the Deep Links work area (**Navigator > Tools > Deep Links**). For access to this work area, you need to have the View Administration Link (FND_VIEW_ADMIN_LINK_PRIV) privilege.

How It Works

You can copy a URL from the Deep Links page and use it to create a link, for example on your company website. You can use deep links as is, to take users to a high level page, for example an overview or search page. Or, you can edit the URL so that it opens a page where the user can take action, for example to create something. For more information, refer to your product-specific documents.

URL Pattern of Deep Links

Here's a typical URL pattern of a deep link.

`https://<pod-name>/fndSetup/faces/deeplink?`

`objType=<objID>&objKey=<name1=value1;name2=value2>&action=<action>&returnApp=<returnappURL>&returnAppParams=<returnAppPa`

To direct users to a product-specific action page, you need to add specific parameters to the deep link URL. This table describes the parameters and gives you some examples of parameter values.

Parameter	Description	Example of Parameter Values
pod-name	The host name.	pod.oraclecloud.com
objType	The object type, such as work areas.	Supplier
objKey	The object identifier.	Supplier Number
action	The action that users can do on the page that the URL opens up, for example to edit something. Here are a few things to know: - If you don't add any value for the action parameter, this value is considered as NONE by default. So users will be taken to a high-level page, such as an overview page or a search page. - If the value you added for the action parameter doesn't match with any action on the UI, or the user doesn't have the privileges to access that action, they will be taken to a high-level page.	NONE VIEW CREATE EDIT
returnAppURL	The application URL where users will be automatically redirected to when they try to return to the previous page, or after they complete their task. If you're using a third party URL, make sure the application name is registered using the Manage Integration of Additional Applications page in the Setup and Maintenance work area.	MyOracle
returnAppParams	Parameters for the return application URL.	type=photo

Related Topics

- [Manage Integration of Additional Applications](#)

29 Moving Common Reference Objects

Overview of Moving Common Reference Objects

The common reference objects are used by several setup tasks in the Setup and Maintenance work area. The common reference objects become a part of the configuration package that's created for an implementation project. While moving the application content, for example, moving from test to the production phase of an implementation, attend to the nuances of these common reference objects.

Parameters

The common reference objects are represented as business objects. A single object can be referenced in multiple setup tasks with different parameters. In the configuration package created for the implementation project, parameters passed to a setup task are also passed to the business objects being moved. As a result, the scope of the setup tasks is maintained intact during the movement.

Dependencies

Common reference objects may have internal references or dependencies among other common reference objects. Therefore, you must note all the dependencies before moving the objects so that there are no broken references among them.

Related Topics

- [Guidelines for Moving Related Common Reference Objects](#)
- [Business Objects for Moving Common Reference Objects](#)
- [Overview of Setup Data Export and Import](#)
- [Setup Data Export and Import Using an Offering or a Functional Area](#)

Business Objects for Moving Common Reference Objects

Common reference objects in Oracle Fusion Functional Setup Manager are used to move application setup content from one environment to another. For example, from a test environment to a production environment.

Choice of Parameters

The following table lists the business objects, the movement details, and the effect of the setup task parameter on the scope of the movement.

Note:

- You can move only the translations in the current user language.
- You can move the Oracle Social Network business objects and the changes to the Navigator using the configuration sets on the Configuration Set Migration page.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Message	Messages and associated tokens	No parameters: All messages are moved. Parameter moduleType/moduleKey: Only messages belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter messageName/applicationId: Only the specified message is moved.
Application Taxonomy	Application taxonomy modules and components	No parameters: All taxonomy modules and components are moved.
Application Attachment Entity	Attachment entities	No parameters: All attachment entities are moved. Parameter moduleType/moduleKey: Only attachment entities belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.
Application Attachment Category	Attachment categories and category-to-entity mappings	No parameters: All attachment categories and category-to-entity mappings are moved. Parameter moduleType/moduleKey: Only attachment categories belonging to the specified module and its descendant modules in the taxonomy hierarchy along with the respective category-to-entity mappings are moved.
Application Document Sequence Category	Document sequence categories	No parameters: All categories are moved. Parameter moduleType/moduleKey: Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter code/applicationId: Only the specified document sequence category code is moved.
Application Document Sequence	Document sequences and their assignments	No parameters: All sequences are moved. Parameter moduleType/moduleKey: Only document sequences belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		Parameter name : Only the specified document sequence is moved.
Application Descriptive Flexfield	Descriptive flexfield registration data and setup data	No parameters: All descriptive flexfields are moved. Parameter moduleType/moduleKey: Only descriptive flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter descriptiveFlexfieldCode/applicationId: Only the specified descriptive flexfield is moved. Importing the metadata of a flexfield can change its deployment status. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment. Also, only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Extensible Flexfield	Extensible flexfield registration data and setup data, including categories	No parameters: All extensible flexfields are moved Parameter moduleType/moduleKey: Only extensible flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter extensibleFlexfieldCode/applicationId: Only the specified extensible flexfield is moved. Importing the metadata of a flexfield can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment. Also, only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Key Flexfield	Key flexfield registration data and setup data	No parameters: All key flexfields are moved. Parameter moduleType/moduleKey: Only key flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter keyFlexfieldCode/applicationId: Only the specified key flexfield is moved. Importing the metadata of a flexfield can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment. Only flexfields with

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Flexfield Value Set	Value set setup data	No parameters: All value sets are moved. Parameter moduleType/moduleKey: Only value sets belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter valueSetCode: Only the specified value set is moved. Importing the metadata of a value set can change the deployment status of flexfields that use the value set. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment.
Application Reference Currency	Currency data	No parameters: All currencies are moved.
Application Reference ISO Language	ISO language data	No parameters: All ISO languages are moved.
Application Reference Industry	Industry data including industries in territories data	No parameters: All industries are moved.
Application Reference Language	Language data	No parameters: All languages are moved.
Application Reference Natural Language	Natural language data	No parameters: All natural languages are moved.
Application Reference Territory	Territory data	No parameters: All territories are moved.
Application Reference Time zone	Time zone data	No parameters: All time zones are moved.
Application Standard Lookup	Standard lookup types and their lookup codes	No parameters: All standard lookups are moved. Parameter moduleType/moduleKey: Only standard lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified common lookup is moved.
Application Common Lookup	Common lookup types and their lookup codes	No parameters: All common lookups are moved. Parameter moduleType/moduleKey: Only common lookups belonging to the specified

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified common lookup is moved.
Application Set-Enabled Lookup	Set-enabled lookup types and their lookup codes	No parameters: All set-enabled lookups are moved. Parameter moduleType/moduleKey: Only set-enabled lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified set-enabled lookup is moved.
Application Profile Category	Profile categories	No parameters: All profile categories are moved. Parameter moduleType/moduleKey: Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. name/applicationId: Only the specified category is moved.
Application Profile Option	Profile options and their values	No parameters: All profile options and their values are moved. Parameter moduleType/moduleKey: Only profile options and their values belonging to the specified module are moved. Parameter profileOptionName: Only the specified profile option and its values are moved.
Application Profile Value	Profile options and their values	No parameters: All profiles and their values are moved. Parameter moduleType/moduleKey: Only profiles and their values belonging to the specified module are moved. Parameter categoryName/categoryApplicationId: Only profiles and their values belonging to the specified category are moved. Parameter profileOptionName: Only the specified profile and its values are moved.
Application Reference Data Set	Reference data sets	No parameters: All sets are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Reference Data Set Assignment	Reference data set assignments	Parameter determinantType: Only assignments for the specified determinant type are moved. Parameter determinantType/referenceGroupName: Only assignments for the specified determinant type and reference group are moved.
Application Tree Structure	Tree structures and any labels assigned to the tree structure	No parameters: All tree structures (and their labels) are moved. Parameter moduleType/moduleKey: Only tree structures (and their labels) belonging to the specified module are moved. Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.
Application Tree	Tree codes and versions	No parameters: All trees are moved. Parameter moduleType/moduleKey: Only trees belonging to the specified module are moved. Parameter treeStructureCode: Only trees belonging to the specified tree structure are moved. Parameter TreeStructureCode/TreeCode: Only trees belonging to the specified tree structure and tree code are moved.
Application Tree Label	Tree structures and any labels assigned to the tree structure	No parameters: All tree structures (and their labels) are moved. Parameter moduleType/moduleKey: Only tree structures (and their labels) belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.
Application Data Security Policy	Database resources, actions, conditions, and data security policies	No parameters: All database resources/actions/conditions/policies are moved. Parameter moduleType/moduleKey: Only database resources/actions/conditions/policies belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter objName: Only the specified database resource along with its actions/conditions/policies is moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		If the policies being moved contain reference to newly created roles, move the roles before moving the policies. If the source and target systems use different LDAPs, manually perform the GUID reconciliation after moving the data security policies.

Related Topics

- [Guidelines for Moving Related Common Reference Objects](#)

Guidelines for Moving Related Common Reference Objects

Certain common reference objects may use other common reference objects creating dependencies among the objects. During the movement of common reference objects, ensure that these dependencies or references aren't broken or lost.

Dependencies

The dependencies among the common reference objects may be caused by any of the following conditions.

- Flexfield segments use value sets
- Value sets may make use of standard, common, or set-enabled lookups
- Key flexfields may have an associated tree structure and key flexfield segments may have an associated tree code
- Tree codes and versions may be defined over values of a value set
- Data security policies may be defined for value sets that have been enabled for data security

You may decide to move one, some, or all of the business objects by including the ones you want to move in your configuration package. For example, you may decide to move only value sets, or move both value sets and their lookups as part of the same package. Whatever be the combination, Oracle recommends that during the movement of objects, you follow an order that maintains the dependencies among the objects.

While moving the business objects, adhere to the following order:

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, messages, and so on.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.

7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.

Note: In scenarios where there may be dependencies on other objects, you must move the dependencies before moving the referencing object. For example, if data security policies have dependencies on newly created security roles, you must move the security roles before moving the security policies.

Related Topics

- [Business Objects for Moving Common Reference Objects](#)

Guidelines for Moving Common Reference Objects Using the Seed Data Framework

To move the common reference objects, you can use the Seed Data Framework. You can also use the command line interface of the Seed Data Framework to move the object setup data. For more information about seed data loaders including common reference object loaders, see Oracle Fusion Applications Developer's Guide.

Movement Dependencies

The seed data interface moves only the setup metadata. For example, if you use Seed Data Framework to import flexfield metadata, the flexfield setup metadata is imported into your database. However, you must initiate the flexfield deployment process separately after seed data import to regenerate the runtime flexfield artifacts in the target environment. Similarly, if you use Seed Data Framework to import data security metadata, you must first move any new referenced roles and then manually run the GUID reconciliation where required.

To ensure that the reference data isn't lost during the movement, certain guidelines are prescribed. It's recommended that you perform the movement of object data exactly in the following order:

Note: Only the translation in the current user language is moved.

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, attachments, reference data sets, document sequences, messages, and data security.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.
8. Move created reference data sets before moving any objects that reference them, such as reference data set assignments and set-enabled lookups.
9. Move created document sequence categories before moving any objects that reference them, such as document sequences.

10. Move created tree labels before moving any objects that reference them, such as trees.
11. Move created data security objects and policies before moving any objects that reference them, such as value sets.
12. Move created value sets before moving any objects that reference them, such as flexfields.
13. Move created trees before moving any objects that reference them, such as key flexfields.

