Oracle Human Capital Management Cloud Configurations

for

Oracle Human Capital Management Cloud Integration to Oracle Utilities Work and Asset Cloud Service

Setup Guide

20C

Disclaimer

Oracle Human Capital Management Cloud Configurations for Oracle Human Capital Management Cloud Integration to Oracle Utilities Work and Asset Cloud Service, Release 20C

December 2020

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Preface

Welcome to the Oracle Human Capital Management Cloud Configurations for Oracle HCM Cloud Integration to Oracle Utilities Work and Asset Cloud Service Setup Guide. This document focuses on the Oracle Human Capital Management Cloud configurations.

The preface includes the following:

- Audience
- Documentation and Accessibility
- Abbreviations

Audience

This document is intended for anyone implementing the integration between Oracle Human Capital Management Cloud and Oracle Utilities Work and Asset Cloud Service.

Documentation and Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support for the hearing impaired. Visit:

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs

Abbreviations

Terms	Expanded Form
HCM	Oracle Human Capital Management
WACS	Oracle Utilities Work and Asset Cloud Service
OIC	Oracle Integration Cloud

Chapter 1: Configuration Overview

To configure Oracle Human Capital Management Cloud in the integration, perform the following steps in the order mentioned:

This chapter focuses on the Employee integration and configuration details of employees in Oracle Human Capital Management Cloud. It includes the following:

1. Create a profile. Refer to Chapter 2: Employee Integration for more details.
2. Create a value set. Refer to Chapter 2: Employee Integration for more information.
3. Create manage workforce structures extensible flex fields. Refer to Chapter 3: Craft Integration for details.
4. Create fast formulae. For more details, refer to Chapter 3: Craft Integration.
5. Create a Business Intelligence report template for job. Refer to Chapter 3: Craft Integration for more information.
6. Extract the upload for Employee/Jobs/Absence. Refer to Chapter 4: Employee Unavailability Integration for more details.

Chapter 2: Employee Integration

This chapter focuses on the Employee integration and configuration details of employees in Oracle Human Capital Management Cloud. It includes the following:

- Integration Overview
- Oracle HCM Cloud Configuration for Employee

Integration Overview

This section covers basic integration overview for employee integration. Oracle Human Capital Management Cloud (Employee) is the central repository of Employee records.

Key attributes will be captured from Oracle HCM Cloud and synced with Oracle Utilities Work and Asset Cloud Service in two modes:

- Bulk (Initial Upload)
- Incremental Upload

This seamless integration between Oracle Human Capital Management Cloud and Oracle Utilities Work and Asset Cloud Service helps to maintain the same Employee definition across both platforms.

For information about implementing Oracle Human Capital Management Cloud, see: https://docs.oracle.com/en/cloud/saas/human-resources/20d/fahcm/oracle-hcm-cloud-introduction.html#FAHCM898690

Design

Bulk Upload

Bulk Upload is an initial upload from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud Service where all Employee definitions are exported to UCM in XML format through Data Exchange that is inbuilt functionality of ERP. Use the filter to select an employee in the Oracle Human Capital Management Cloud module. The business may choose to import records based on filter as per business requirement. Only Active employees in the system are part of the integration.

A few examples of attributes that will be passed to Oracle Utilities Work and Asset Cloud Service in this integration are Personal Number, Legal Entity, Address, email ID, Employee type, rate, assignment, job role. Oracle Human Capital Management Cloud schema will need a

mapping with Oracle Utilities Work and Asset Cloud Service and each field attribute will be mapped to the corresponding value in Oracle Integration Cloud. These values will have a DVM for mapping between Oracle Utilities Work and Asset Cloud Service and Oracle Human Capital Management Cloud.

Incremental Update

The incremental upload will be a specific scenario, where Atom Feeds handle sync for a set of changes made within employee definition. Filter Criterion for Increment will be similar to bulk, where it will only send data Applied in the bulk filter.

For more information about Atom Feeds, see https://docs.oracle.com/en/cloud/saas/human-resources/22a/farws/index.html.

Events for Employee:

- Empassignment
- EmpUpdate
- Newhire
- termination

Functions that are part of the Atom feed update:

- Add/update the employee record from the tabs in Oracle Human Capital Management Cloud
- Definition change through Person Management
- Assign Position/Jobs/Grade based on Assignment

Oracle HCM Cloud Configuration for Employee

This section focuses on importing the files that are part of the package and configuring them in the Oracle Human Capital Management Cloud environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration.

Importing the extract definition includes the following:

- Creating a Profile
- Value Sets
- Extract Upload

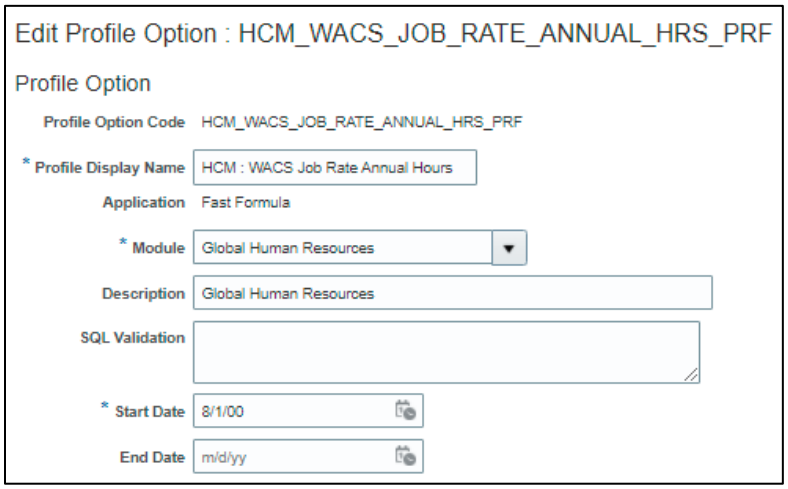
Creating a Profile

A user profile is a set of changeable options that affect the way Oracle applications appear and how they function. Oracle applications use a set of user profile options that are common to all the applications. In addition, each module has its own unique set of user profile options.

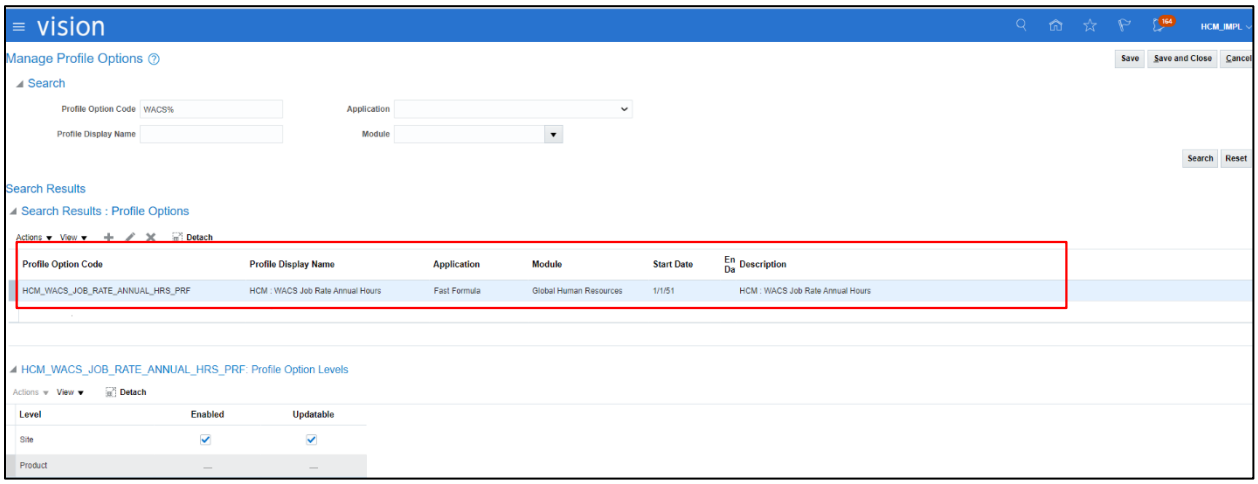
For Employee Integration extract definition, create the following profile:

Step 1

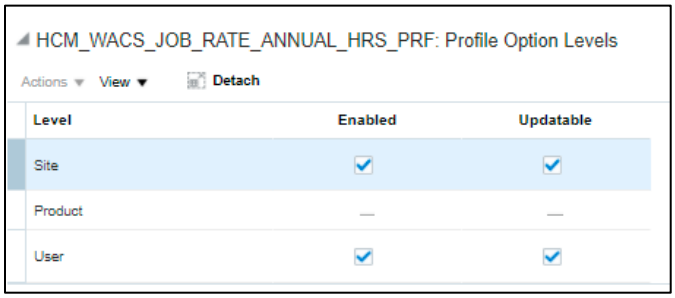
1. Navigate to **Setup and Maintenance** > **Search** > **Manage Profile Options**.
2. Click **+** to create a profile.
   (HCM_WACS_JOB_RATE_ANNUAL_HRS_PRF)
   Profile Option Code: HCM_WACS_JOB_RATE_ANNUAL_HRS_PRF
   Profile Display Name:: "HCM : WACS Job Rate Annual Hours"
   Application: Fast Formula
   Module: Global Human Resources
   Description: Global Human Resources
   *Start Date: 1/1/51



3. Click **Save**.
4. Select the Record under “Search Results : Profile Options”



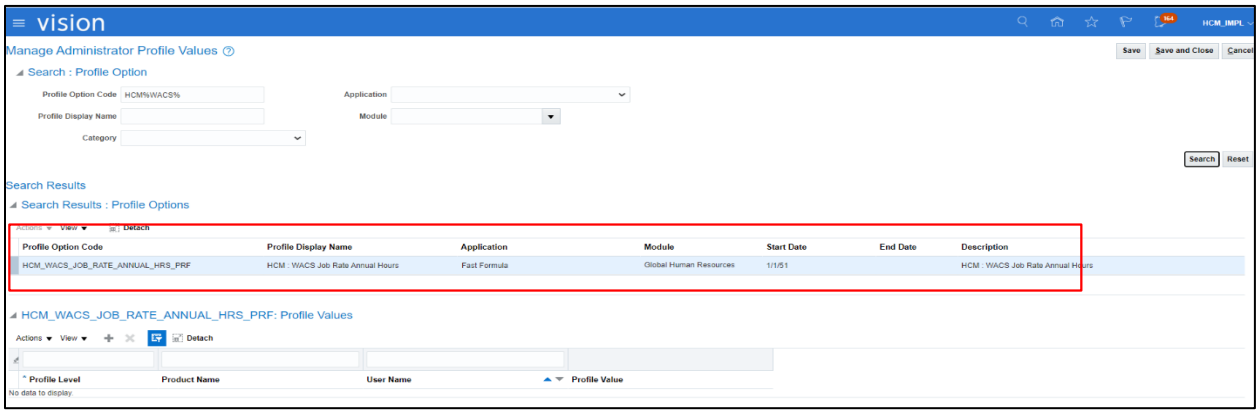
5. Enable the levels as shown in the figure below.



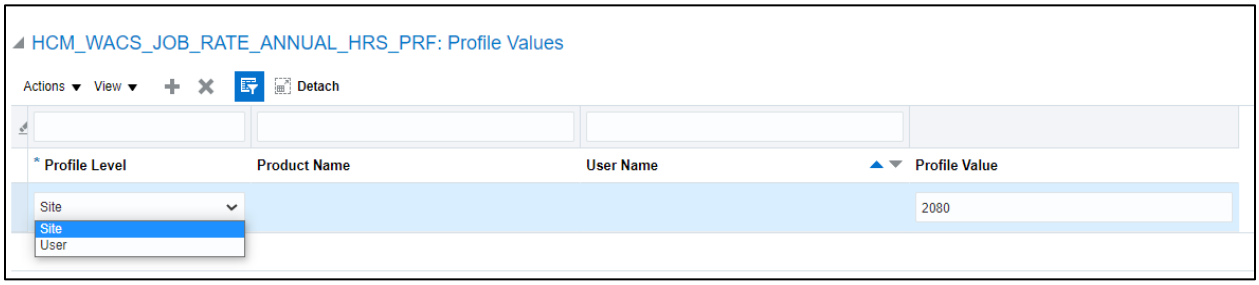
6. Click **Save and Close**.

Step 2

1. Navigate to **Setup and Maintenance** > **Search** > **Manage Administrator Profile Values** and search for the “HCM_WACS_JOB_RATE_ANNUAL_HRS_PRF” profile.
2. Select the record under “Search Results : Profile Options”
3. Click **+** in the **Profile Values** section. Add the annual hours value.



4. Select **Site** in the **Profile Level** drop-down list. **Profile Value** indicates the number of working hours in an Organization Year.

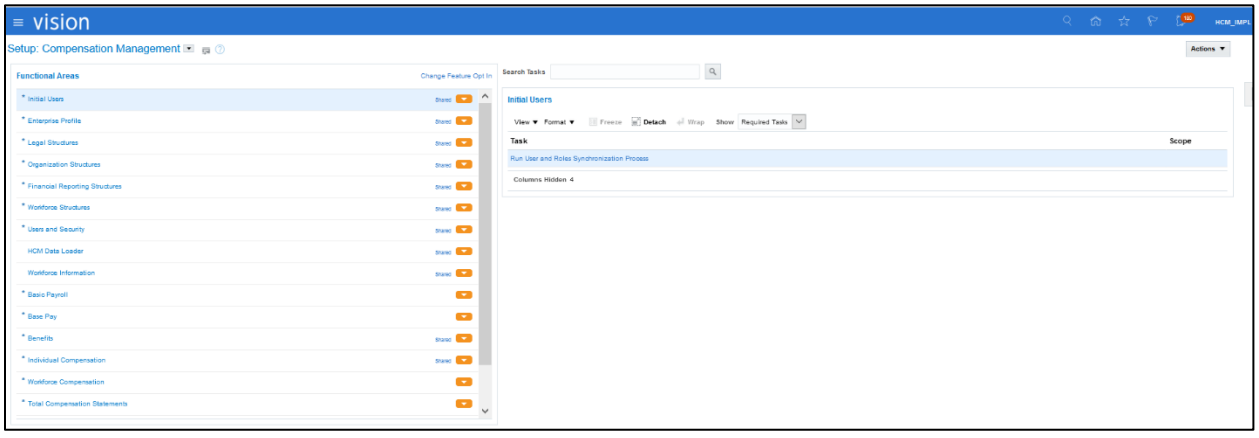


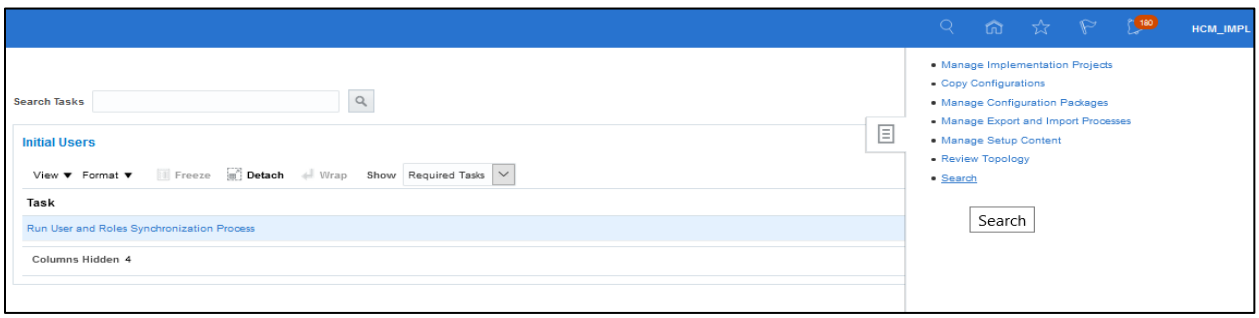
This profile value is used for the salary annual rate calculation. The above figure shows the default value 2080; it is the number of working hours in a year. Note that the hours vary based on the working days in an organization (to be used as per business case).

Value Sets

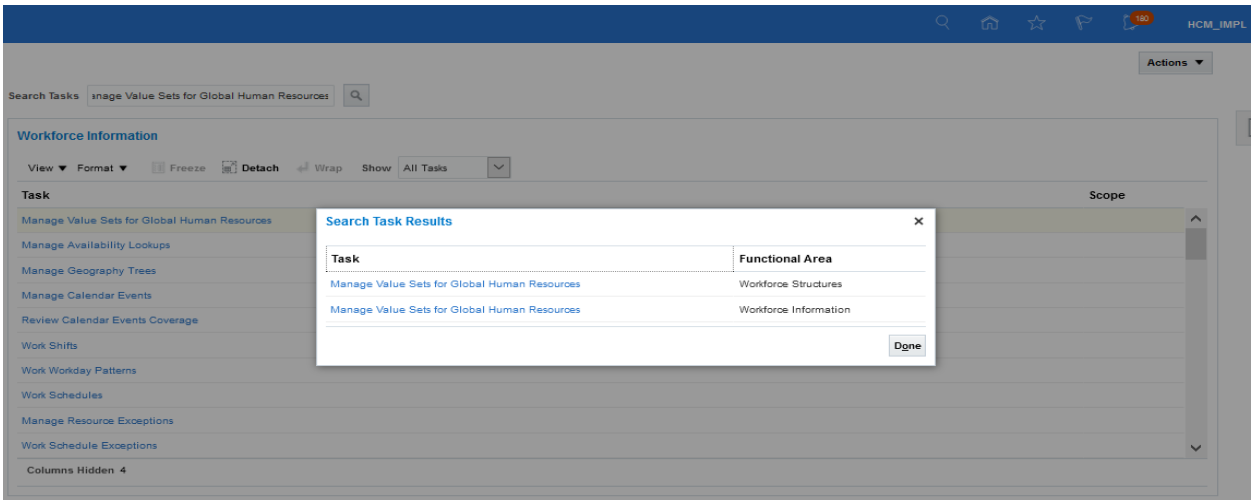
Step 3

1. Login to the system with appropriate user/role.
2. Navigate to **Setup and Maintenance** > **Search** > Manage Value Sets for Global Human Resources.





3. Search on Manage Value Sets for Global Human Resources (Workforce Structures).

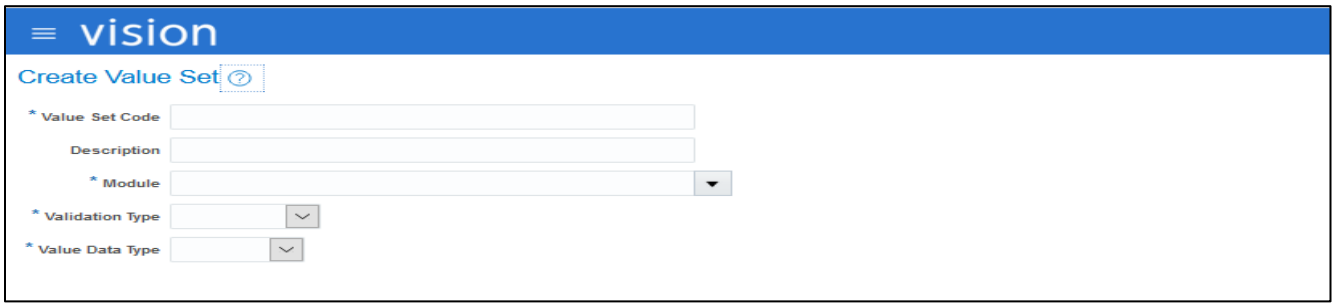


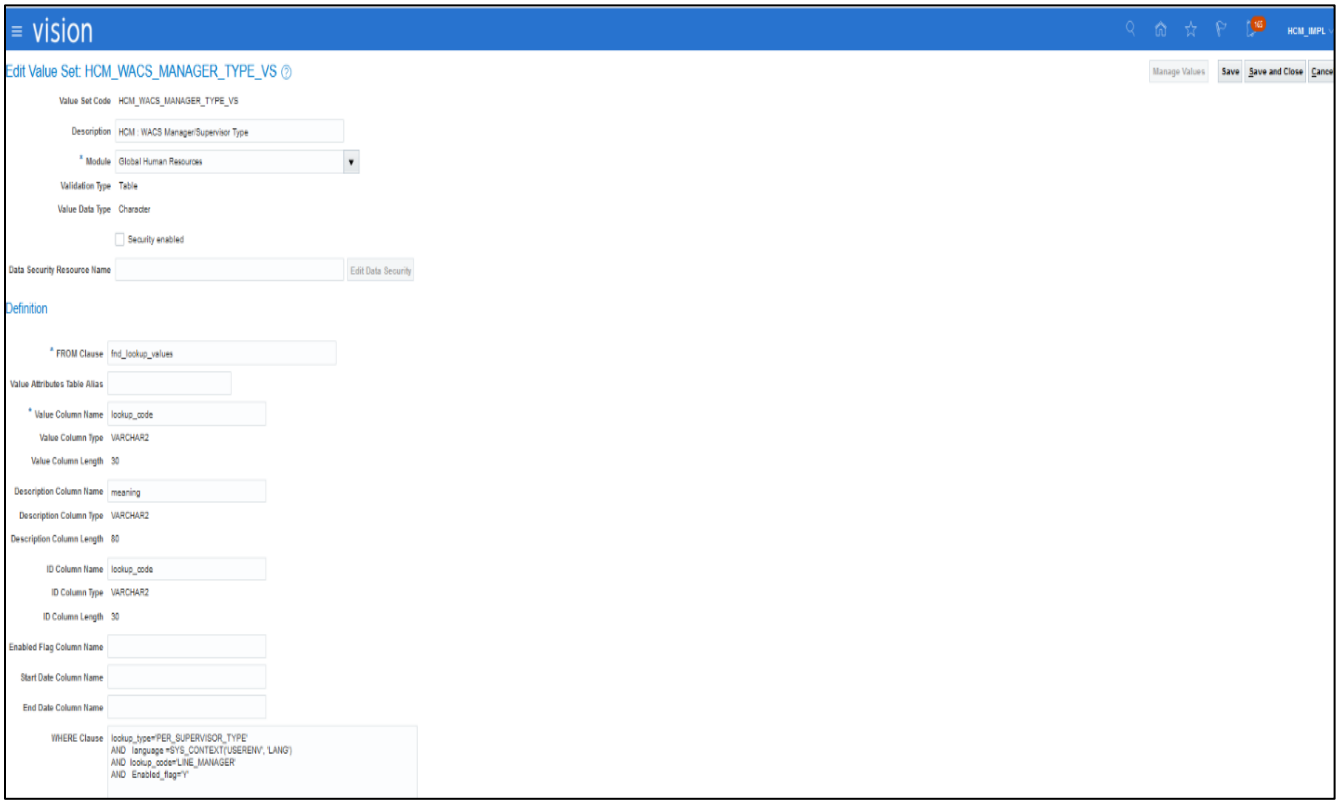
4. Enter the details as in the table below.
   a. To create a Manager Type with the following values:

      HCM_WACS_MANAGER_TYPE_VS

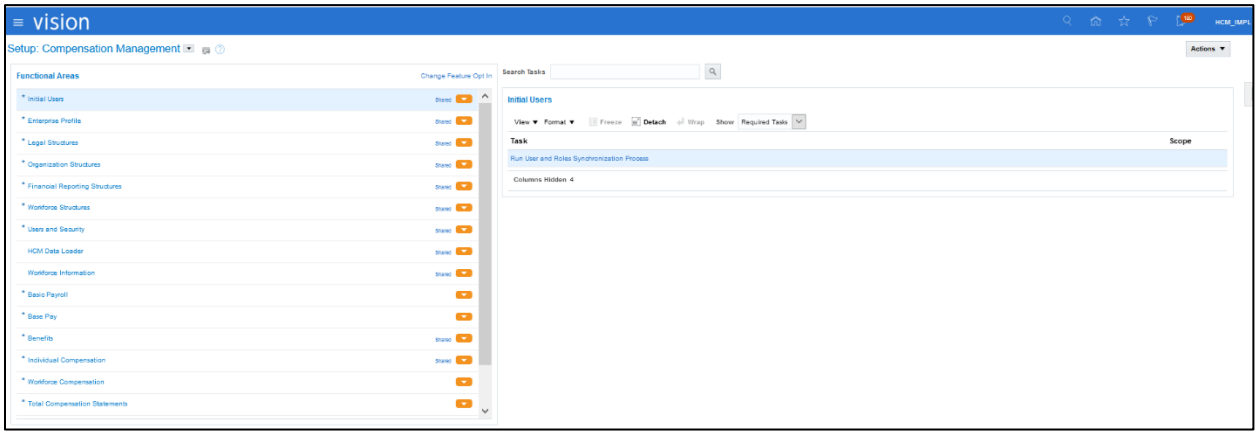
      HCM: WACS Manager/Supervisor Type

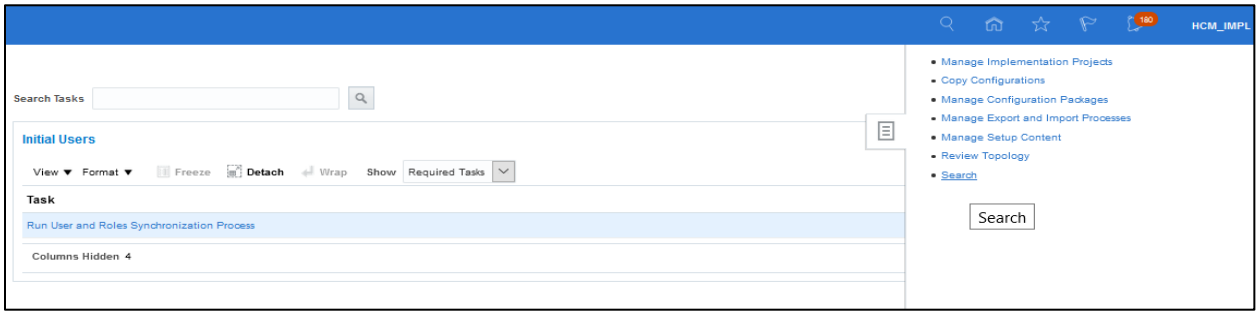
*Value Set Name	HCM_WACS_MANAGER_TYPE_VS
Description	HCM : WACS Manager/Supervisor Type
* Module	Global Human Resources
Validation Type	Table
Value Data Type	Character
*FROM Clause	fnd_lookup_values
*Value Column Name	lookup_code
Description Column Name	Meaning
ID Column Name	lookup_code
WHERE Clause	lookup_type='PER_SUPERVISOR_TYPE' AND language =SYS_CONTEXT('USERENV', 'LANG') AND lookup_code='LINE_MANAGER' AND Enabled_flag='Y'



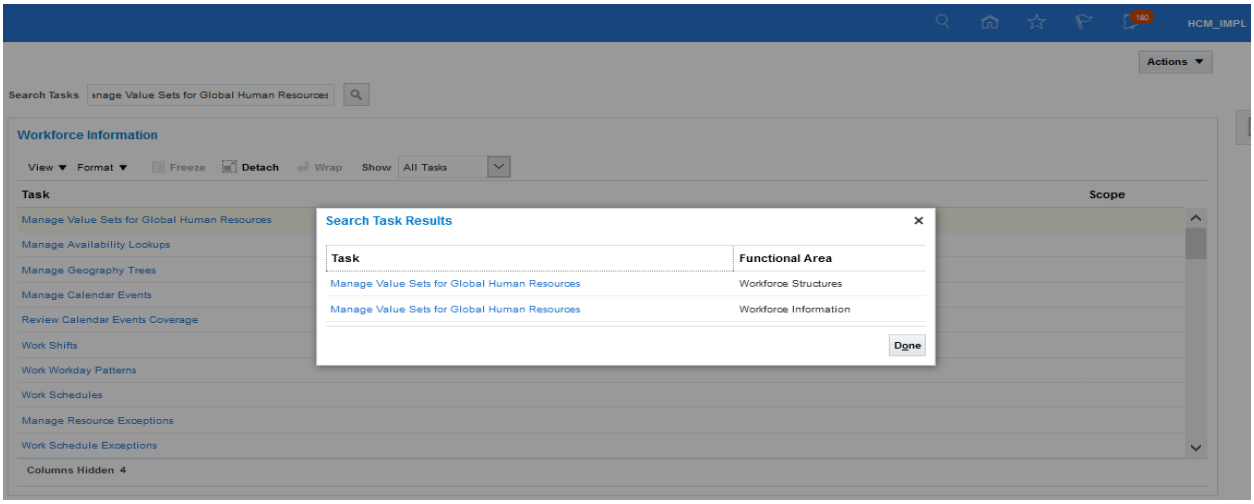


b. To create the Annual Rate Value Sets:
    i. Log into the system with appropriate user/role.
    ii. Navigate to **Setup and Maintenance** > **Search**.



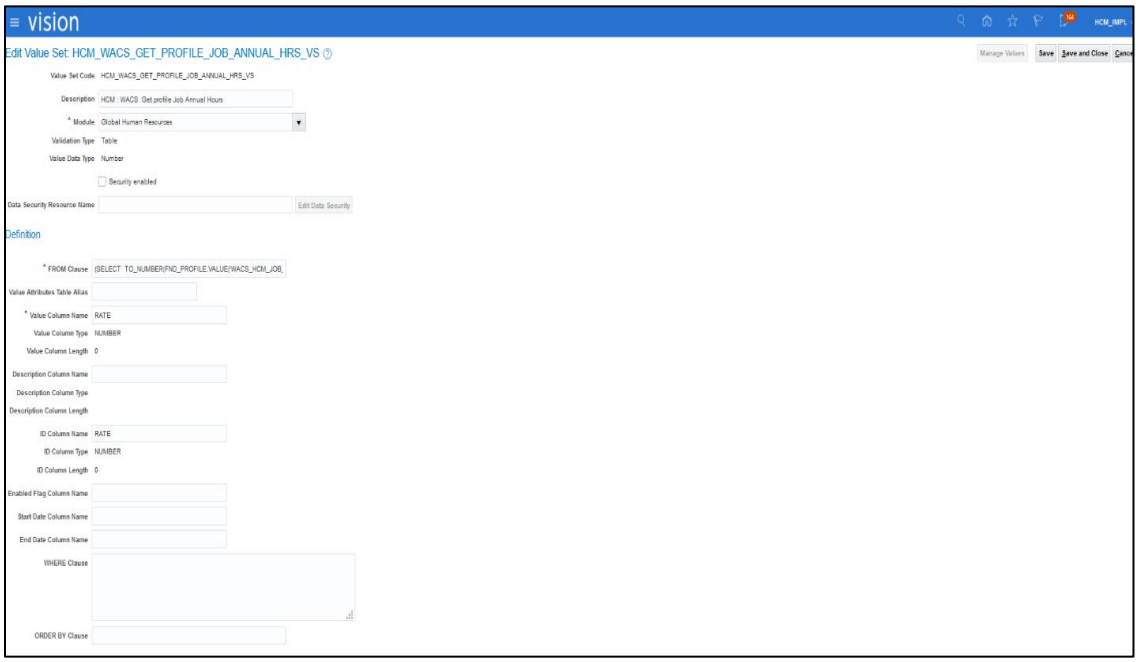


iii. Search for "Manage Value Sets for Global Human Resources" (Workforce Structures).



c. Enter the following details for the value set.
HCM_WACS_GET_PROFILE_JOB_ANNUAL_HRS_VS
Note that Annual Rate Value Set is based on "HCM_WACS_JOB_RATE_ANNUAL_HRS_PRF".

*Value Set Name	HCM_WACS_GET_PROFILE_JOB_ANNUAL_HRS_VS
Description	HCM : WACS Get profile Job Annual Hours
* Module	Global Human Resources
Validation Type	Table
Value Data Type	Number
*FROM Clause	(SELECT TO_NUMBER(FND_PROFILE.VALUE('HCM_WACS_JOB_RATE_ANNUAL_HRS_PRF')) RATE FROM DUAL)
*Value Column Name	RATE
Description Column Name	
ID Column Name	RATE
WHERE Clause	



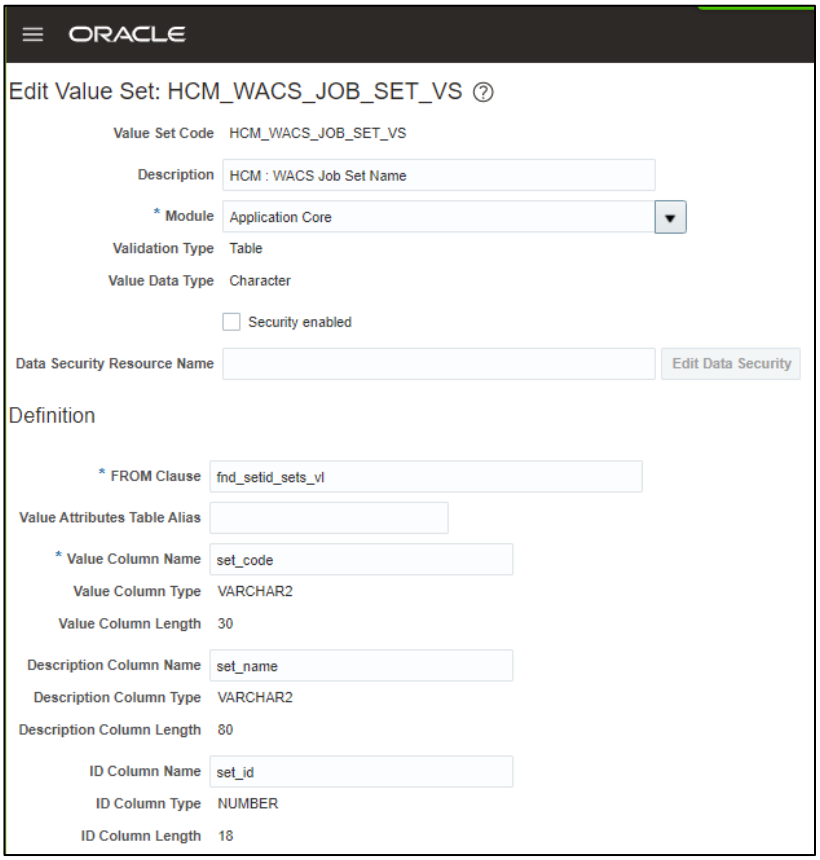
d. Click **Save and Close**.

HCM_WACS_JOB_SET_VS

1. Create a new value set.
2. Enter the following details for the value set.
3. Search for **Setup and maintenance** > **Search** > Manage Value Sets for Global Human Resources" (Workforce Structures).

4. Navigate to the “HCM_WACS_MANAGER_TYPE_VS” **Value Set** page.
5. Create a new value set and provide the details as below.

*Value Set Name	HCM_WACS_JOB_SET_VS
Description	HCM : WACS Job Set Name
* Module	Application Core
Validation Type	Table
Value Data Type	Character
*FROM Clause	fnd_setid_sets_vl
*Value Column Name	set_code
Description Column Name	set_name
ID Column Name	set_id
WHERE Clause	

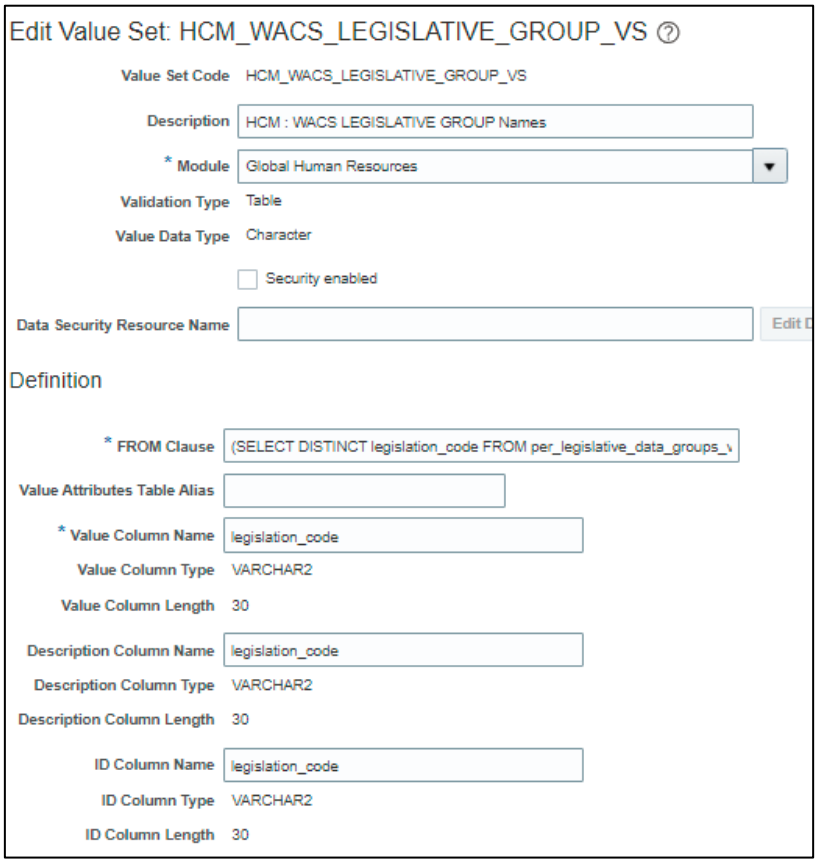


HCM_WACS_LEGISLATIVE_GROUP_VS

1. Create a new value set
2. Enter the following details for the value set.

3. Search for **Setup and maintenance** > **Search** > Manage Value Sets for Global Human Resources" (Workforce Structures).
4. Create new value set and provide the details as below.

*Value Set Name	HCM_WACS_LEGISLATIVE_GROUP_VS
Description	HCM : WACS LEGISLATIVE GROUP Names
* Module	Global Human Resources
Validation Type	Table
Value Data Type	Character
*FROM Clause	(SELECT DISTINCT legislation_code FROM per_legislative_data_groups_vl)
*Value Column Name	legislation_code
Description Column Name	Name
ID Column Name	legislation_code
WHERE Clause	



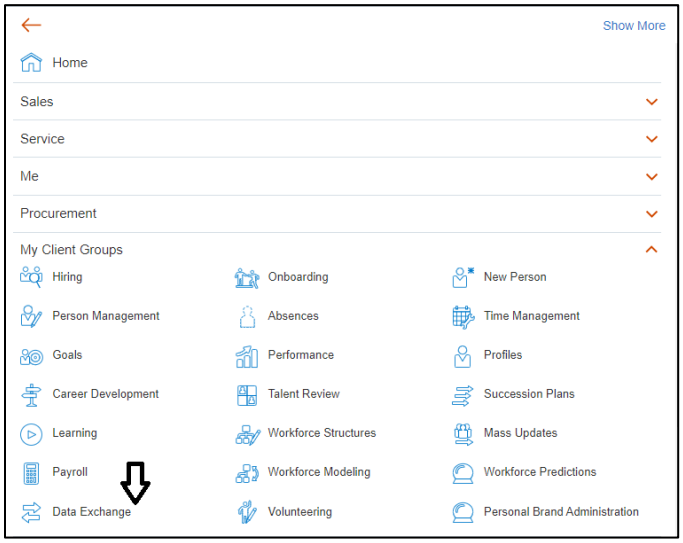
Extract Upload

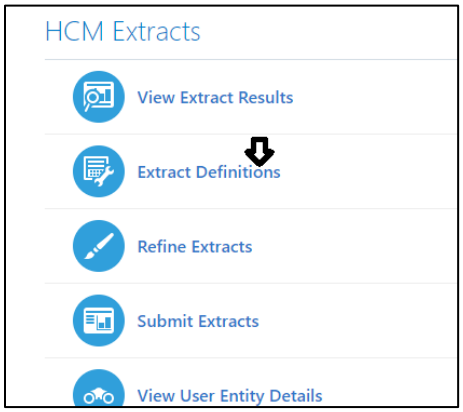
Make sure to upload the extract after all the configuration are done for all the Employee/Craft/Absence sections.

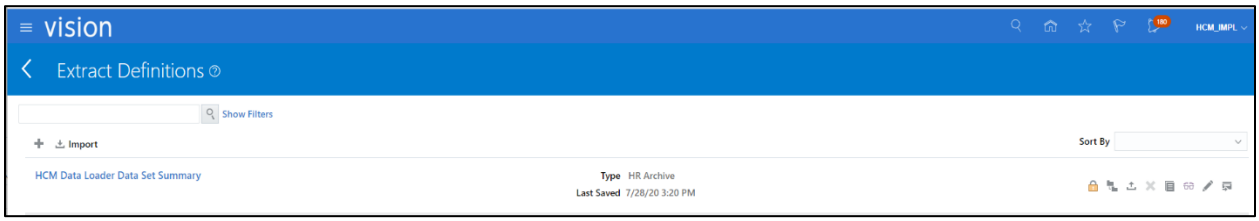
Important! Verify that Profile, Value sets and Fast formula are uploaded before running the extract upload process.

To extract upload:

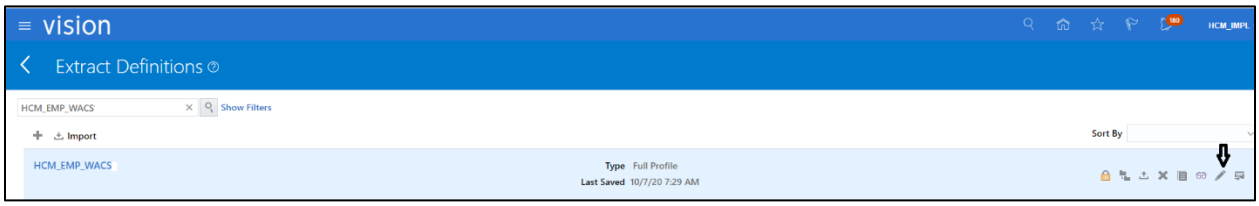
1. Login with the HCM/Data Exchange user role.
2. Navigate to **My Client Group** > **Data Exchange**.
3. Select **Upload** and click **Browse**.
4. Upload the extract file “HCM_EMP_WACS”. The file is available in the package.

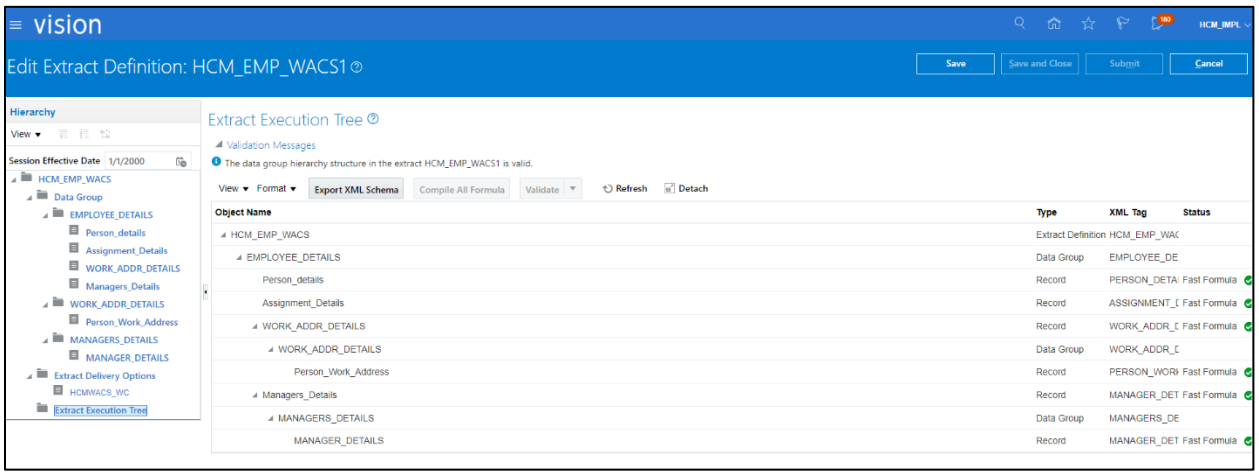




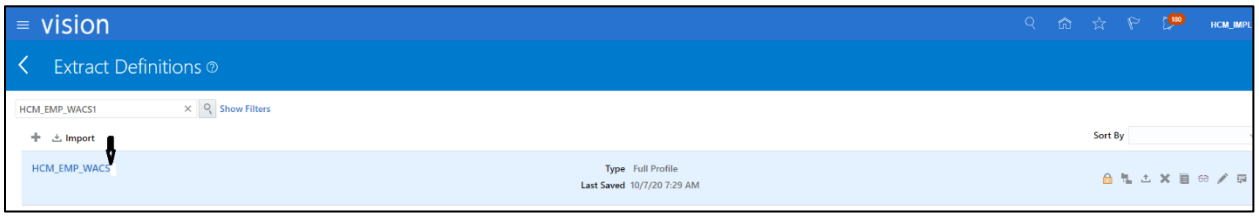


5. Compile the extract. After successful compilation, click **Validate**.
6. Save the extract.
7. Query the extract. Navigate to **Advanced** and click **Extract execution Tree**. When the status is green, validate it. Save and close.

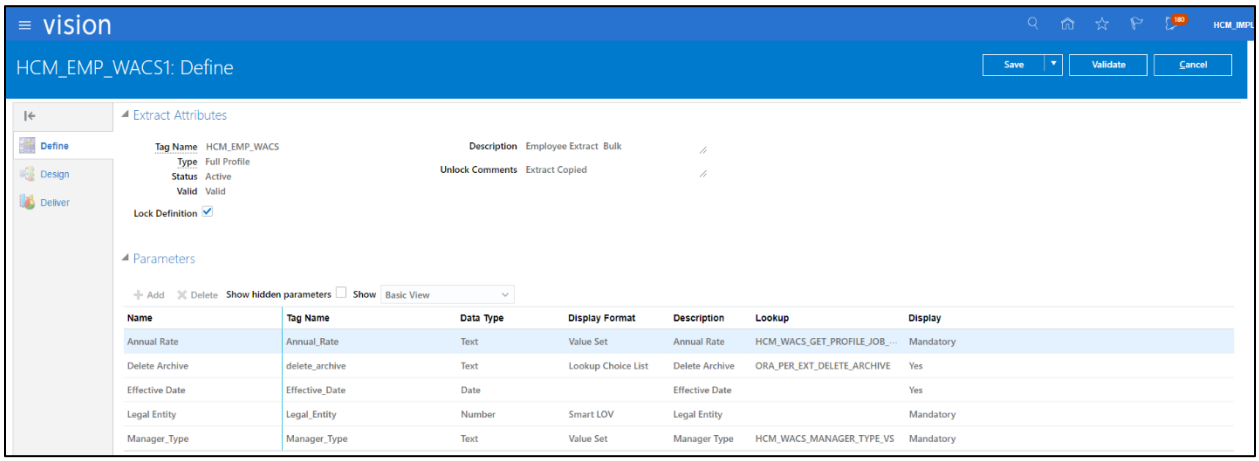




8. Click the extract definition.

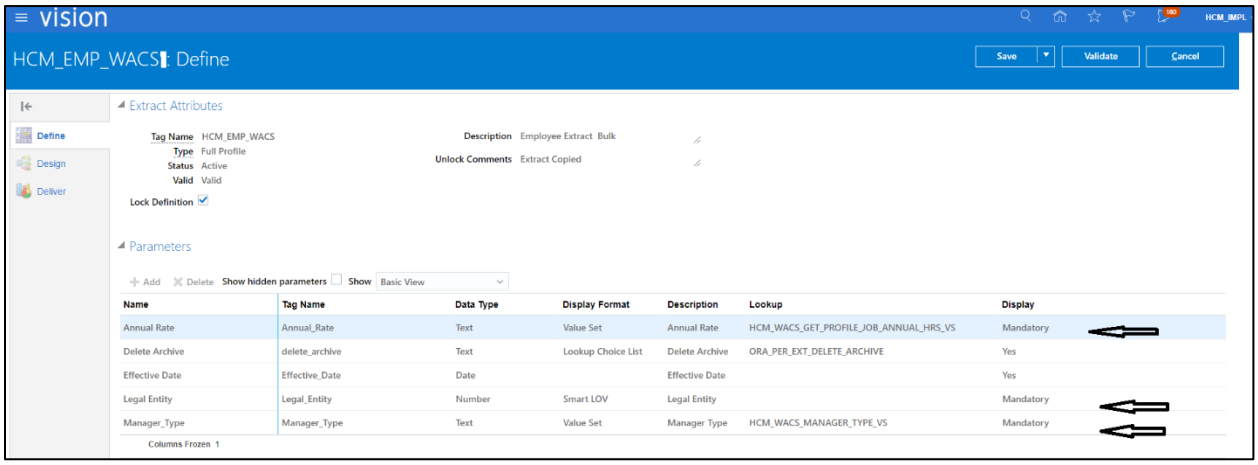


9. Enter a definition to lock the extract. After successful lock, save and close.



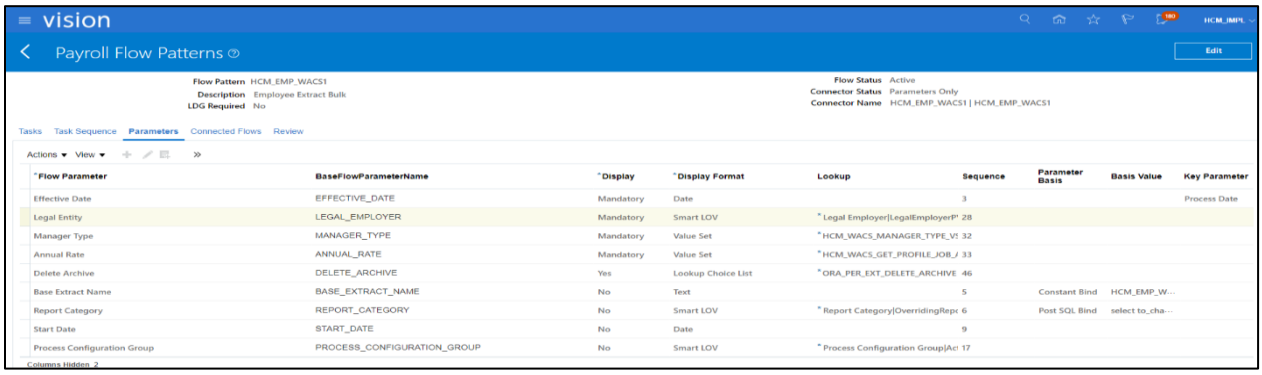
To verify the Run page:

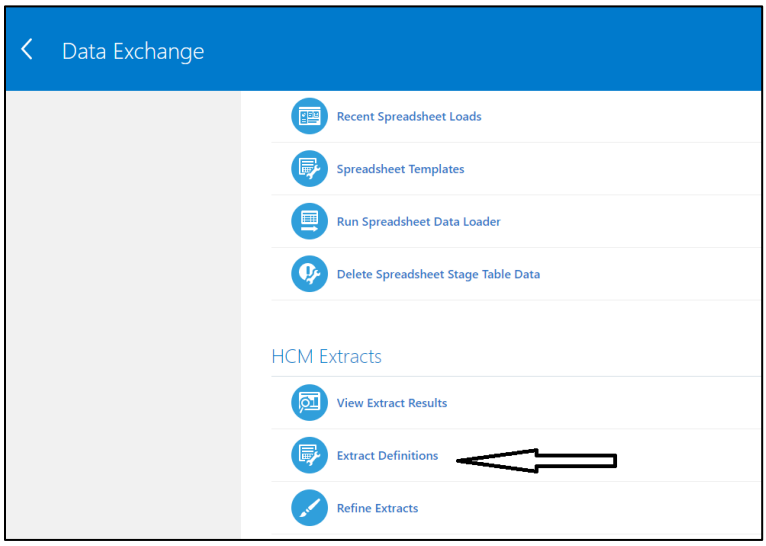
1. Check all the value sets and mandatory fields set. The Lookup values also are reflected in the window.

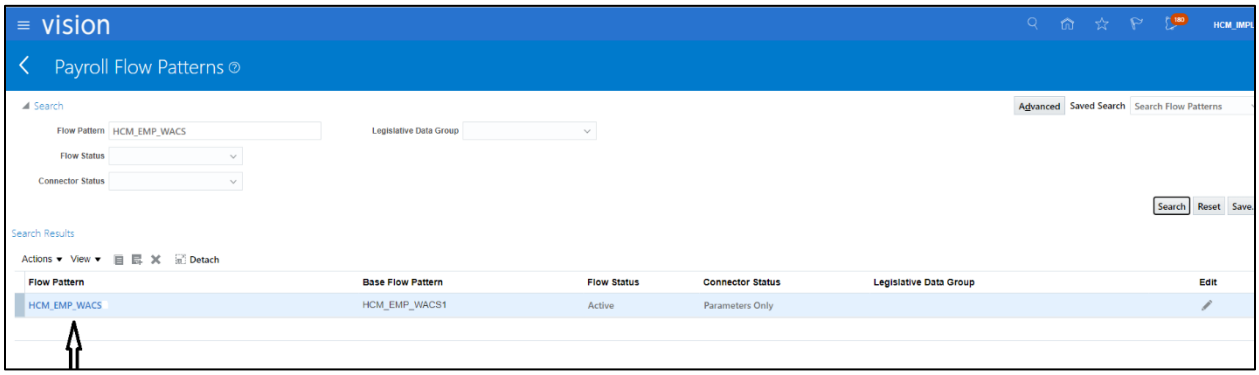


Note that the Legal Entity is not attached to smart LOV.

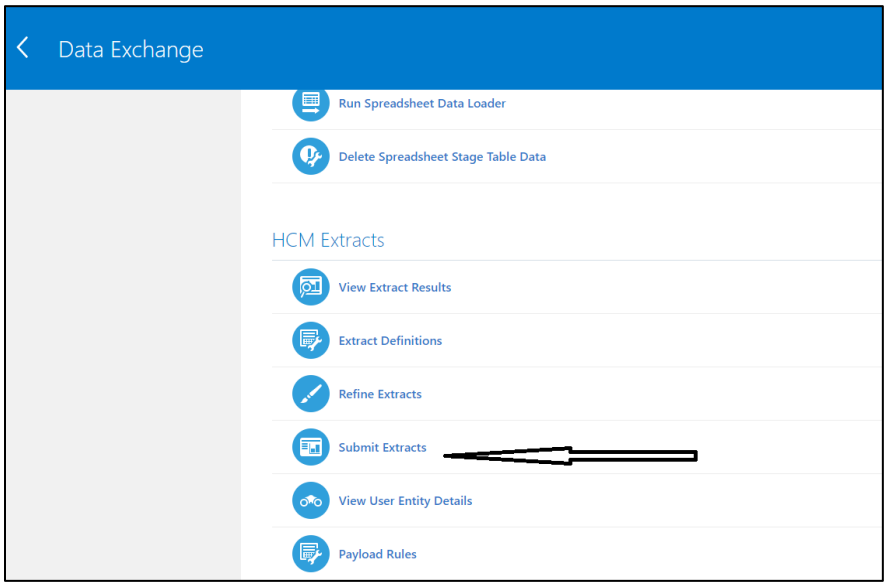
2. To refine the extract, search for extract and navigate to **Parameters** > **Edit**.
3. Click **Legal Entity**. Search and add the Legal Entity “LegalEmployerPVO” Smart LOV.



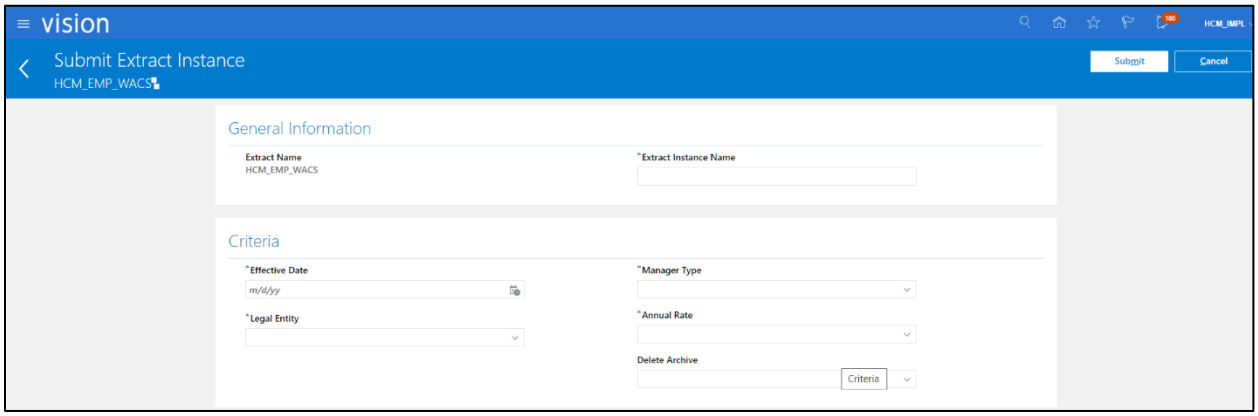




4. Verify if the **Submit Extract** page is populated with the values in the respective fields.



5. Verify if the **Manager Type**, **Legal Entity** and **Annual Rate** fields are populated with values as per the configuration.



Note that after the report is submitted, the report extract is available in UCM for the Oracle Integration Cloud process.

Chapter 3: Craft Integration

This chapter focuses on the overview and configuration for Craft/Jobs integration. It includes the following:

- Integration Overview
- Oracle HCM Cloud Configuration for Craft

Integration Overview

This section covers basic integration overview for Craft/Jobs integration. Oracle Human Capital Management Cloud (Jobs) is the central repository for the Jobs records.

The key attributes are captured from Oracle Human Capital Management Cloud and synced with Oracle Utilities Work and Asset Cloud Service using two modes:

- Bulk (Initial Upload)
- Incremental Upload

This seamless integration between Oracle Human Capital Management Cloud and Oracle Utilities Work and Asset Cloud Service helps to have the same Jobs and Grades rates (summarized) defined across both platforms.

For details about implementation, see:
https://docs.oracle.com/en/cloud/saas/human-resources/20d/fahcm/oracle-hcm-cloud-introduction.html#FAHCM898690

The goal of this integration is to create a central depository of Jobs in Oracle Human Capital Management Cloud which is primarily mapped to Principle Craft in Oracle Utilities Work and Asset Cloud Service. The integration has the ability to synchronize crafts and related craft rates from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud Service.

Design

Bulk Upload

Bulk Upload will be an initial upload from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud Service, where all Job/Craft information is extracted in UCM using XML format through Data Exchange that is the inbuilt functionality of ERP. The selection of the craft/jobs in the Oracle Human Capital Management Cloud module is done using an extensible flexfeild that stores a value if it is Oracle Utilities Work and Asset Cloud Service job or not. Only Active Jobs in the system are part of the integration.

Incremental Update

The incremental upload will handle sync for a set of changes made within job information.

The following functions are part of Jobs integration:

- Add/update the Job record from the tabs in Oracle Human Capital Management Cloud
- Information or rate change in Job
- Active/Inactive of Job

Jobs extract report has the listed mandatory parameters (Job Set, Annual Rate and Effective Date).

This report extract will have both Crafts and corresponding rates, which will be handled in Oracle Integration Cloud using one service. (This is one-way integration from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud Service.)

- The integration timeline needs to be decided by a business that can be scheduled in the BI report setup. (Incremental report will take only the changes from last run date - delta and new records).
- Filter criteria in Job extract:
    - Job-status is ACTIVE (Bulk), INACTIVE/INACTIVE (Incremental)
    - Initial load , only active jobs are interfaced and incremental load both Active and Inactive jobs are interfaced.
    - WACS JOB (Flexfield is set to YES)
    - Job Set (Based on Legislative Unit - can be global or specific to one legislative unit): Mandatory
    - Effective Date: Mandatory
      JOB HCM Extract extracts the data based on the effective date and need to be decided before executing /scheduling the report.

Business Rules

- Craft rate is derived from the grades linked to Job.
- If multiple rates (Hourly, weekly, yearly, etc.) are attached to the single grade then maximum annual factor (hourly) grade is considered for the average calculation.
- After the initial run, for all next report run:
    - Check if there is a change in Craft rate (If X=X go to step2, X !=X- Go to Step3).
    - If no change = Effective date should be the same
    - If the rate is changed, update the rate with an effective date of the assignment.

Sample Craft Rate

The craft rate will be average from all the average grades of the Job. (In the following example, the average rate will be 15 that will be sync to craft rate in Oracle Utilities Work and Asset Cloud Service.

Job1		Min	Max	Average
	Grade1	10	14	12
	Grade2	12	16	14
	Grade3	14	18	16
	Grade4	16	20	18
	Craft Rate for WACS			15

- Manual addition of expense account for Craft and attach at the craft level. This is a prerequisite to the integration.

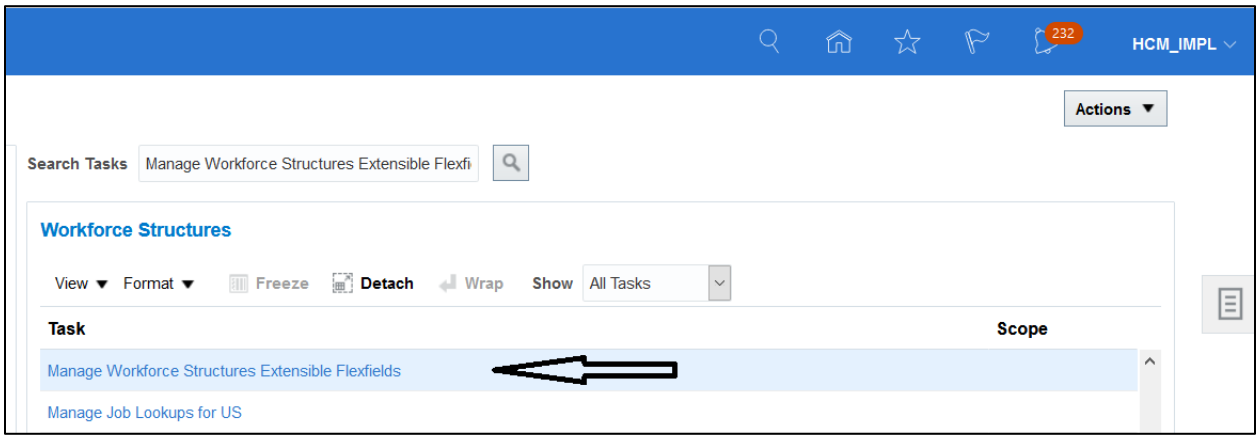
Oracle Human Capital Management Cloud Configuration for Craft

This section focuses on importing the files that come as a part of the package and configuring them in the Oracle Human Capital Management Cloud environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration.

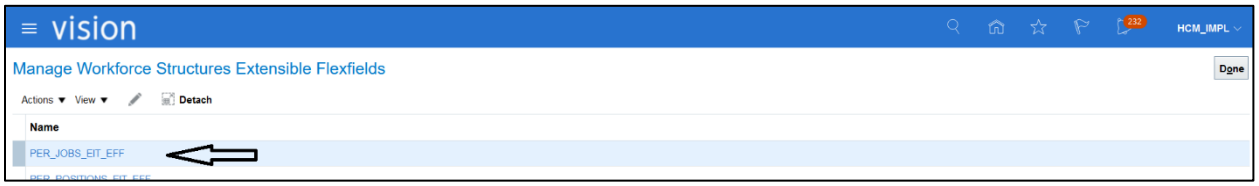
Defining Extensible Flexfield

To define an extensible flexfield:

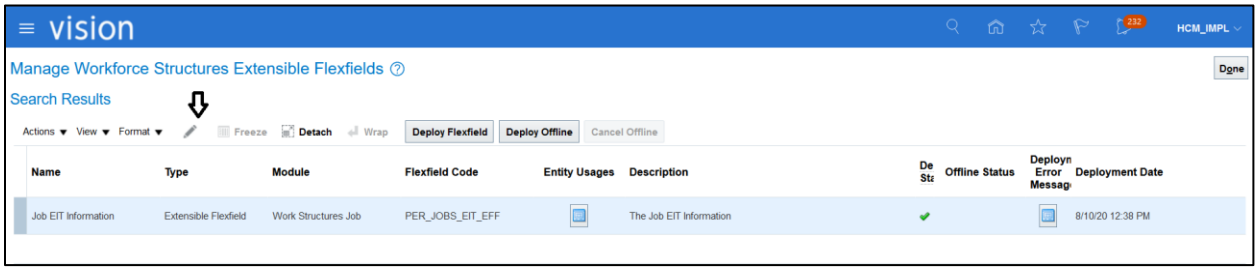
1. Navigate to **Setup and Maintenance** > **Search**.
2. Click **Manage Workforce Structures Extensible Flexfields**.



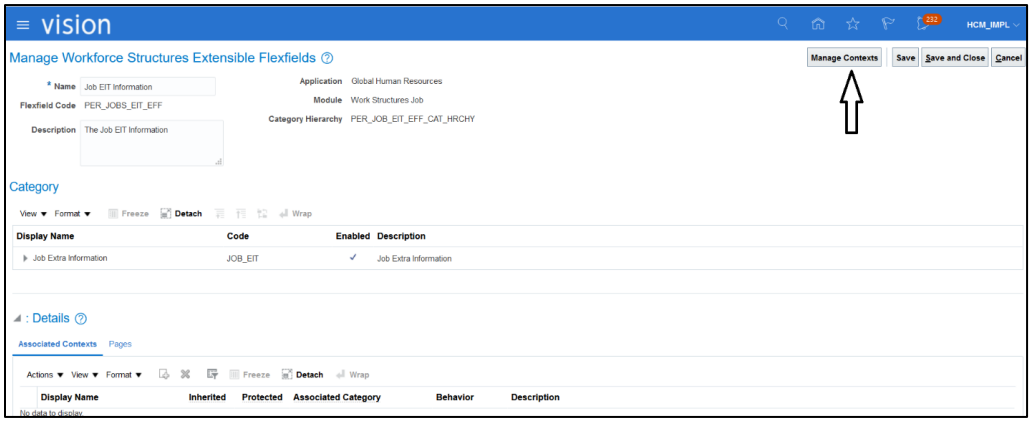
3. Click **PER_JOBS_EIT_EFF**.



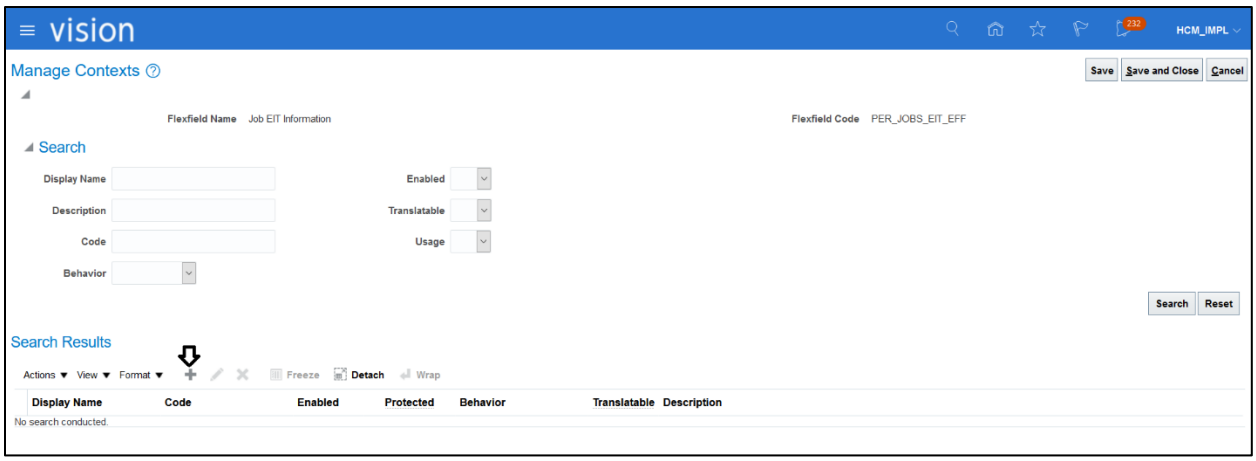
4. Click **Edit**.



5. After you click Pencil, below page will open.
6. Click **Manage Contexts**.



7. Click **Add (+)**.



8. Add **Context Usage** and **Add Context Sensitive Segments**.

   Flexfield Name: Job EIT Information

   Flexfield Code: PER_JOBS_EIT_EFF

   Display Name: WACS_JOB

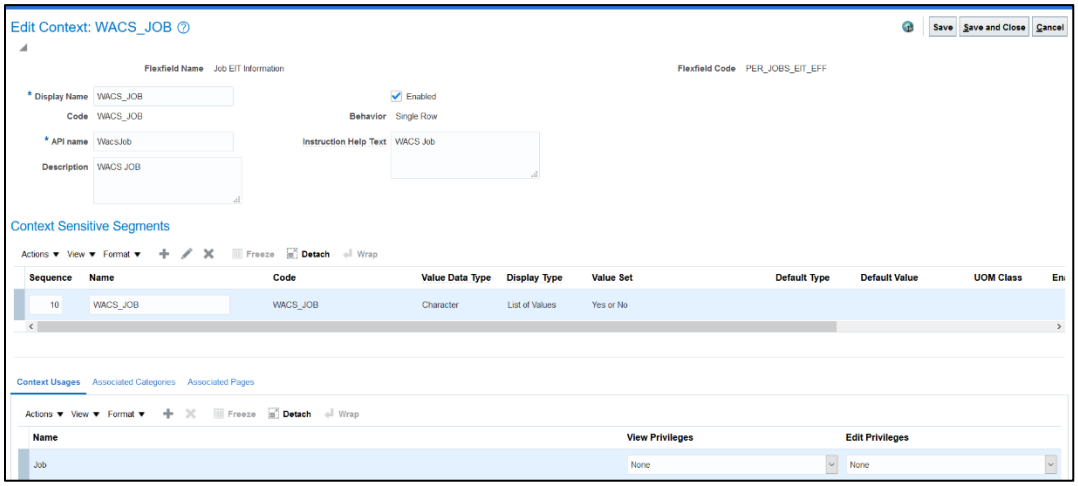
   Code: WACS_JOB

   API name: WacsJob

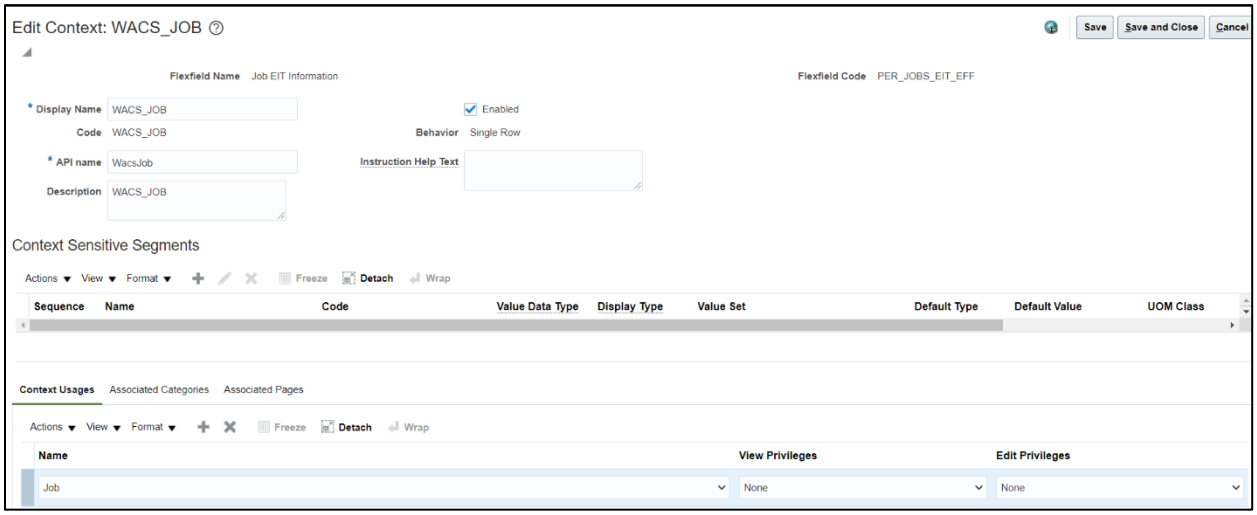
   Description: WACS JOB

   Enabled: YES

   Instruction Help Text: WACS Job



9. Click **Save**.



10. Navigate to **Context Sensitive Segments** and click **+** to add a segment. Fill the data as shown in the figure below.

    Name: WACS_JOB

    Code: WACS_JOB

    API Name: wacsJob

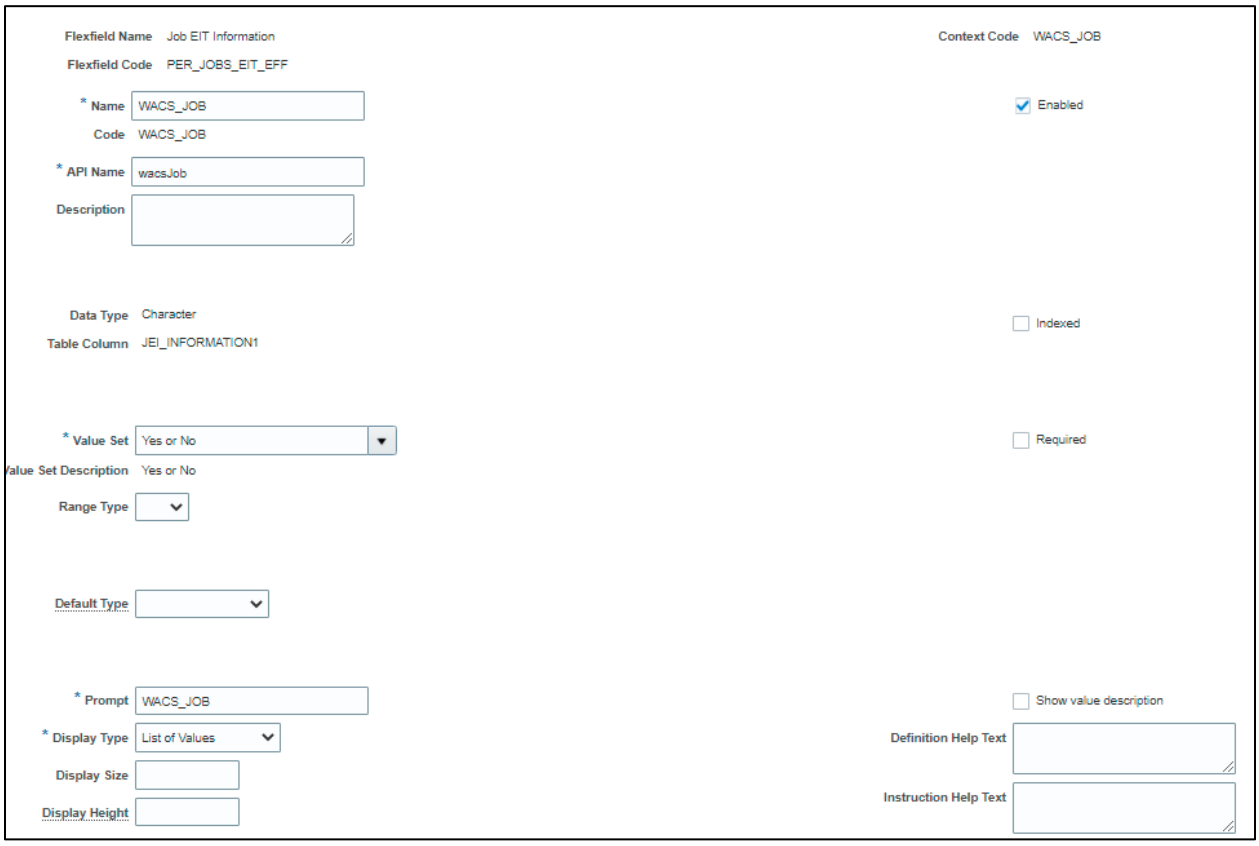
    Data Type: Character

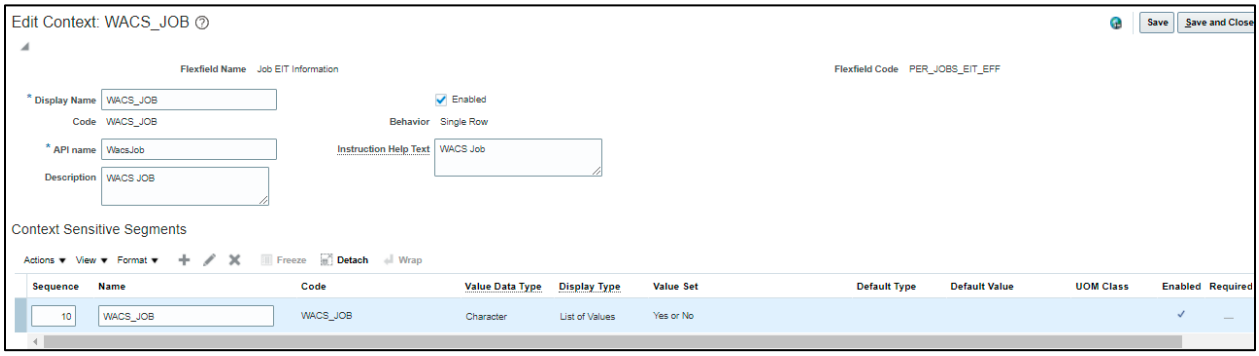
    Value Set: Yes or No

    Prompt: WACS_JOB

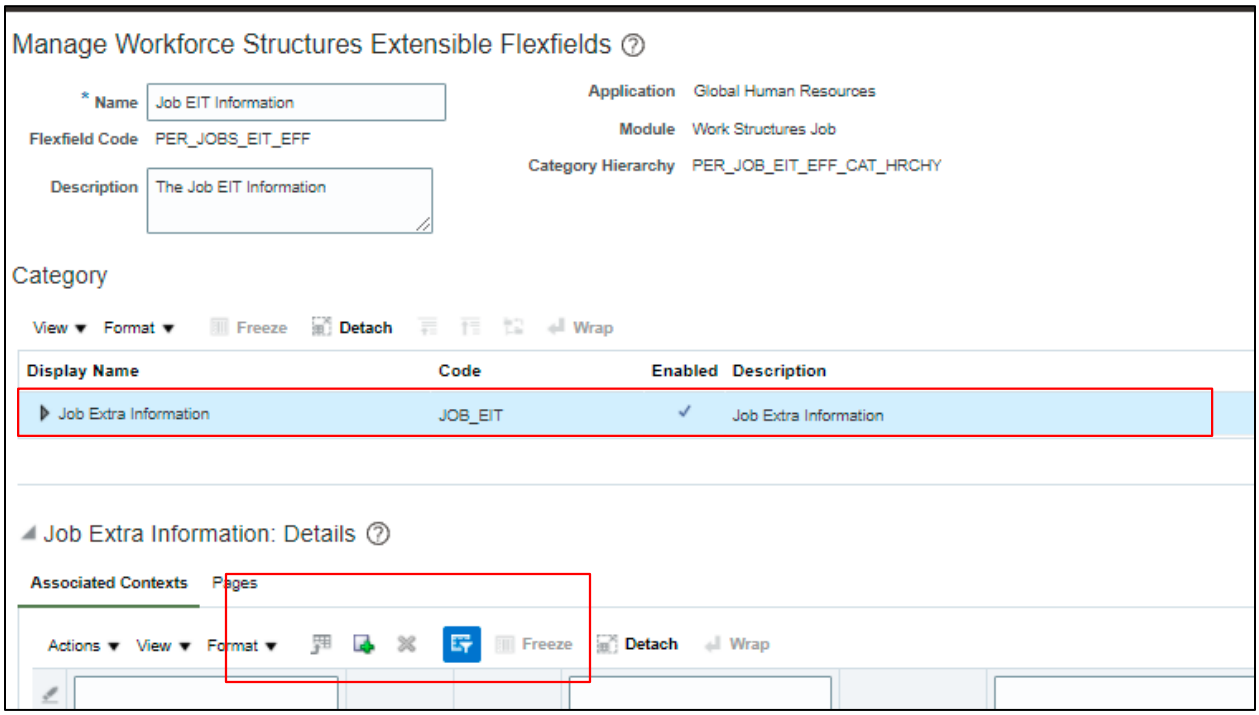
    Display Type: List of Values

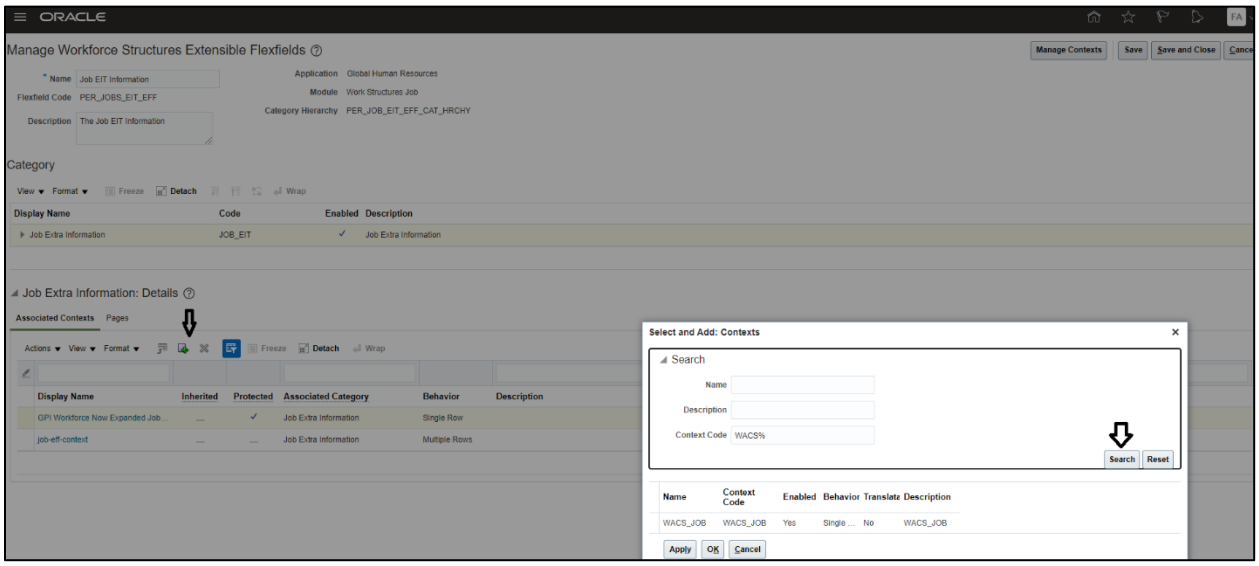
    BI Enabled: Yes





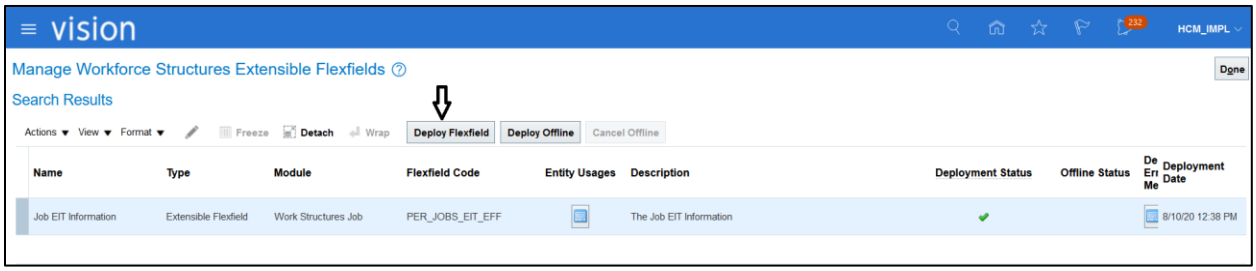
11. Click **Save and Close**.
12. Select the search result and click **Add**.





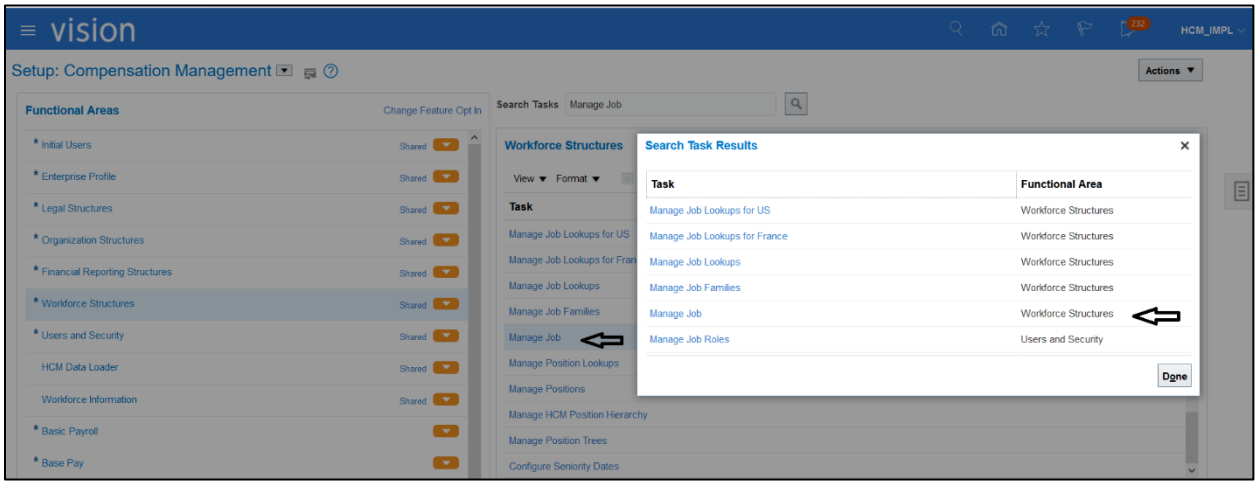
13. Search for “WACS_JOB”. Click **Apply** and then click **OK**. The **Associate** page is shown as below after the **Associated** context is attached.

14. Click **Save and Close**.
15. Deploy Flexfield as shown below and make sure that the deployment status is highlighted in green.

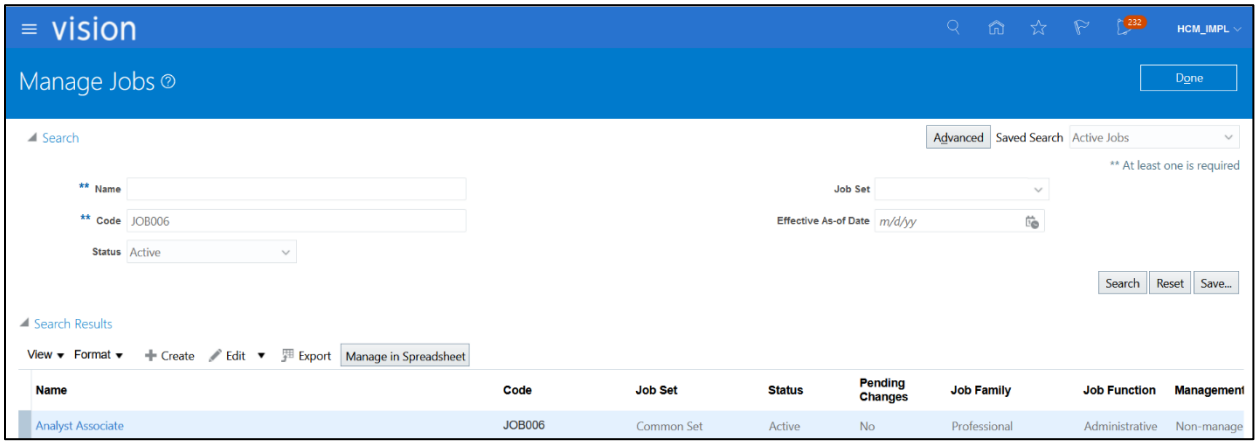


To attach EFF to JOB in ERP:

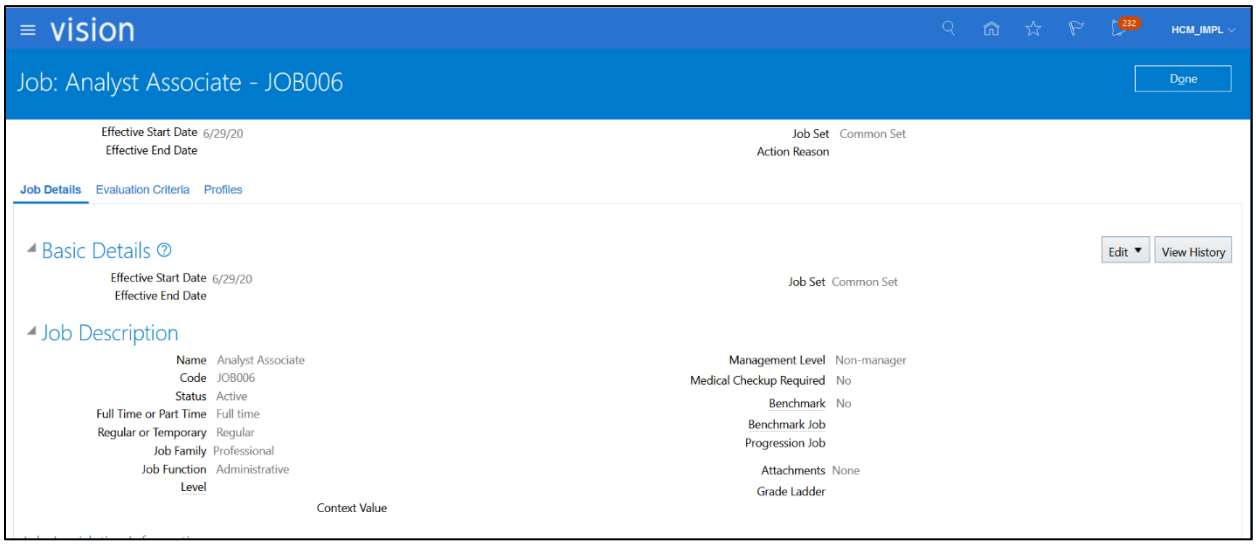
1. Query any job that needs to be attached. Filter WACS JOB and attach EFF.
2. Navigate to **Setup and Maintenance**> **Search** > **Manage Jobs**.

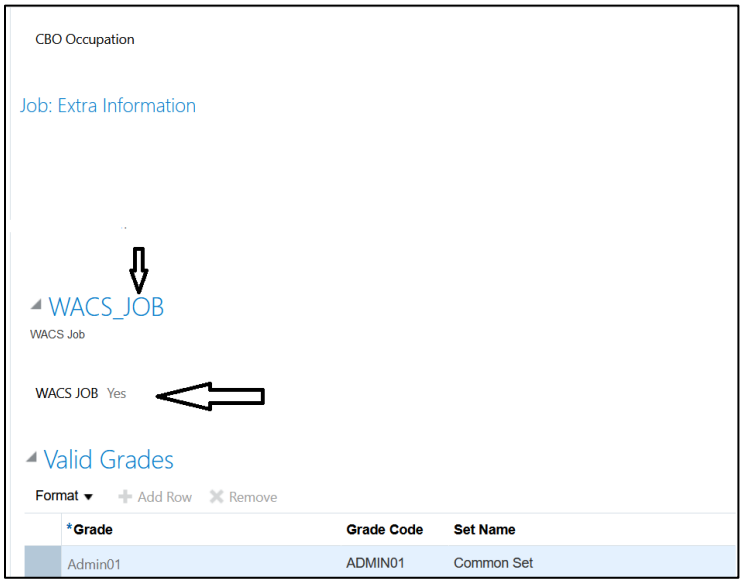


3. Query the Required JOBS.



4. Click the job name and edit it.





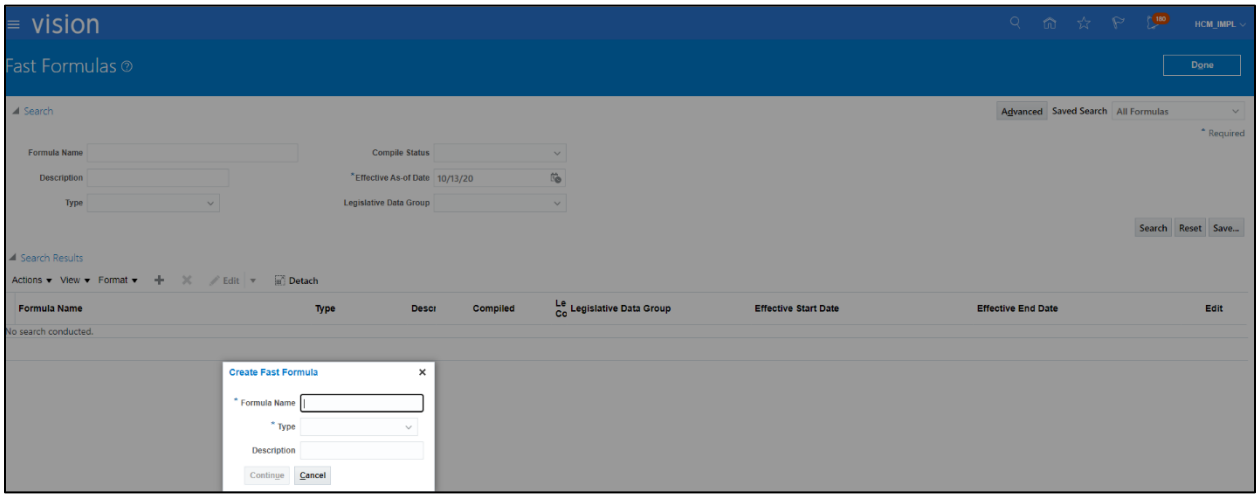
5. Click **WACS Job** and select **Yes** from the LOV.
6. Click **Done**.

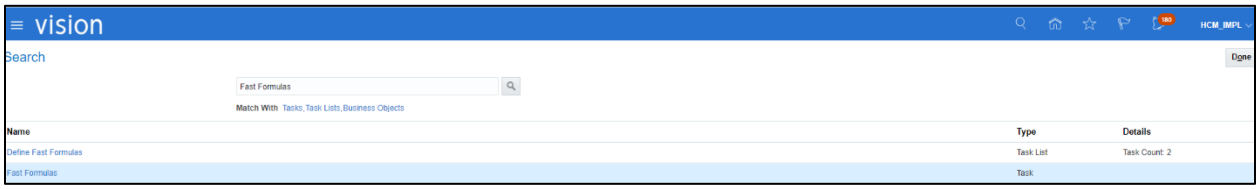
   JOB006 is displayed in the Bulk extract or Incremental (if any changes).

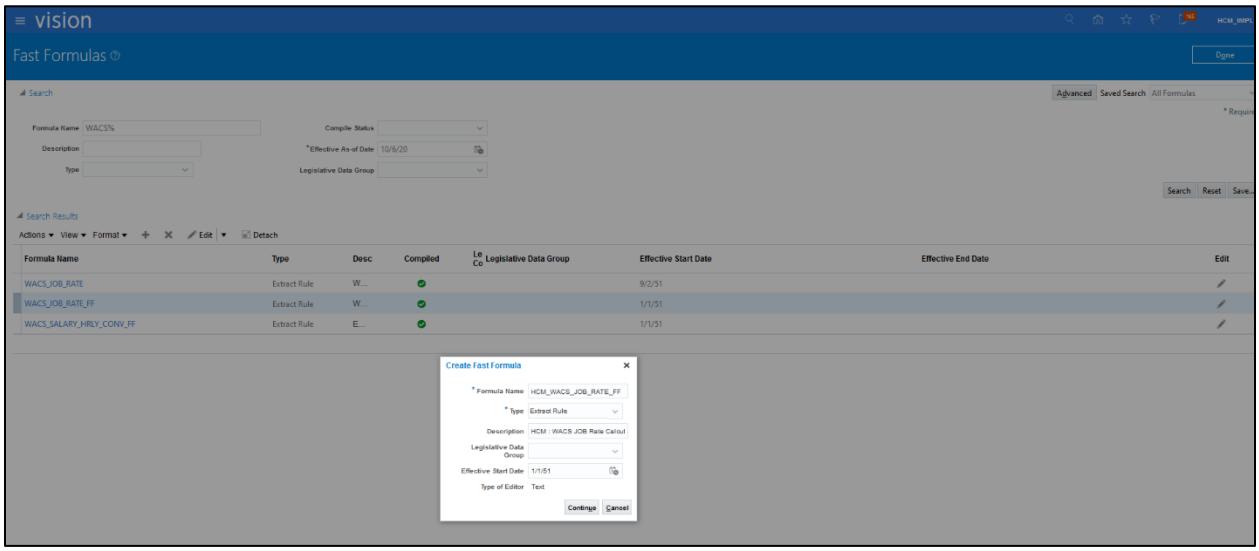
Fast formula

To use the Fast Formula file from the package available for Job extract:

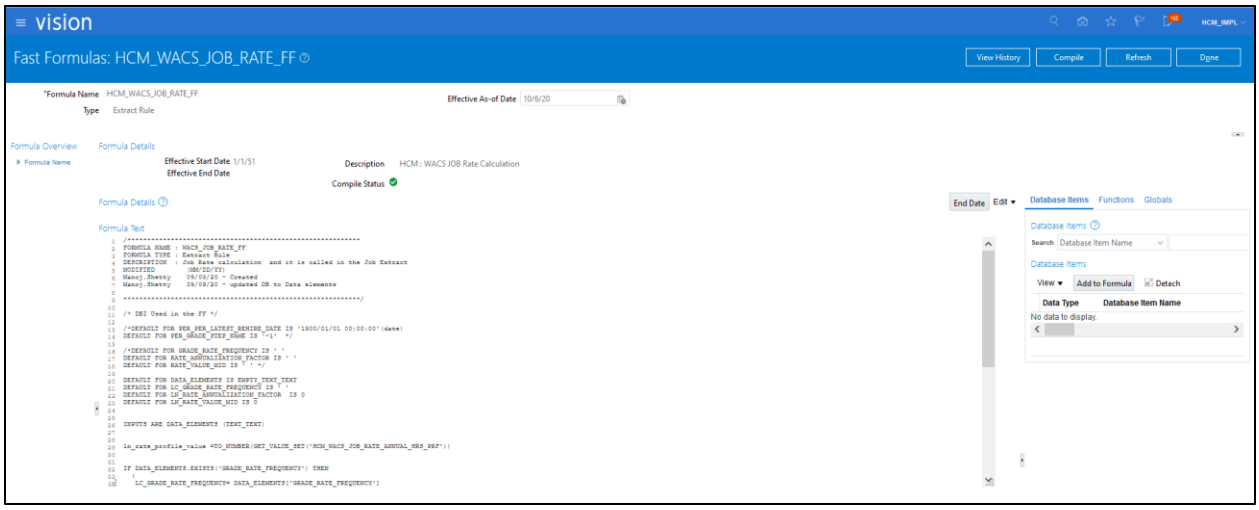
1. Navigate to **Setup and Maintenance** > **Search** > **Fast Formulas**.
2. Enter **Formula Name**, **Type** and **Description** from the package. (Refer to the accelerator package on Market Place.)







3. Take the text file (HCM_WACS_JOB_RATE_FF.txt) from the accelerator package and paste the code to **Fast Formulas**.
   Formula Name: HCM_WACS_JOB_RATE_FF
   Type: Extract Rule
   Effective Start Date: 1/1/51
   Description: HCM : WACS JOB Rate Calculation
4. Save it and click **Compile**.



5. Make sure the Compile Status is green.

Business Intelligence Report Template for Job (Used in Data Exchange)

This template is used in data exchange to calculate the average rate of the job using the midpoint of multiple grades attached to it. For more information, refer to the Business Rules section.

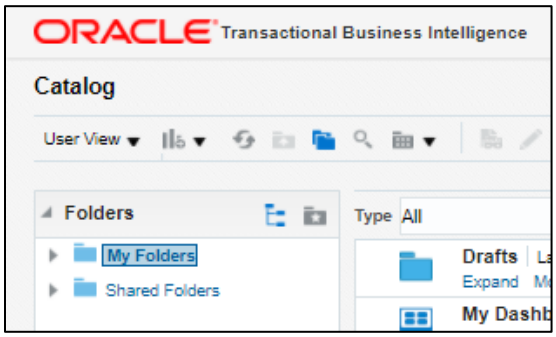
Use the ".xdo.calatalog" file from package to a specified folder: **Shared** > **Custom** > **HCMJOBWACS**

Migrating Reports in Oracle Cloud Instance

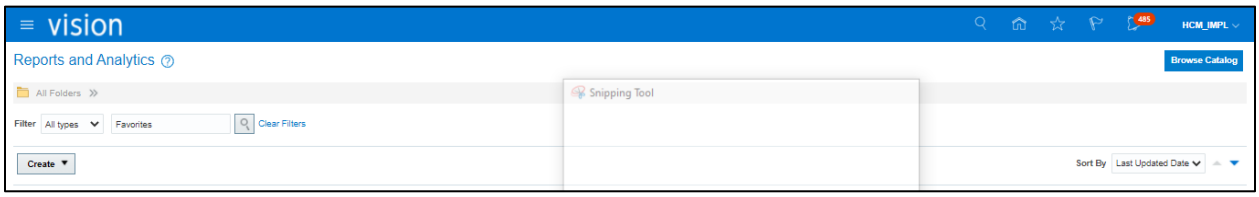
The migration process involves un-archiving the report and data model.

To migrate reports in Oracle Cloud Instance:

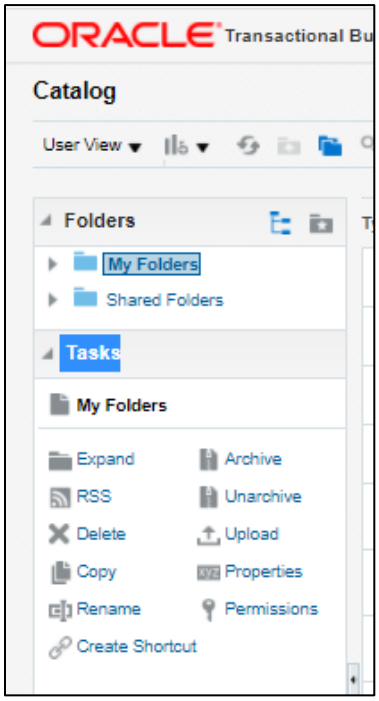
1. Navigate to **Tools** > **Report and Analytics**.
2. Browse to the folder where the report and data model is placed.
3. Create a folder "HCMWACSJOB" in **Shared Folder** > **Custom Folder**. (Name cannot change)



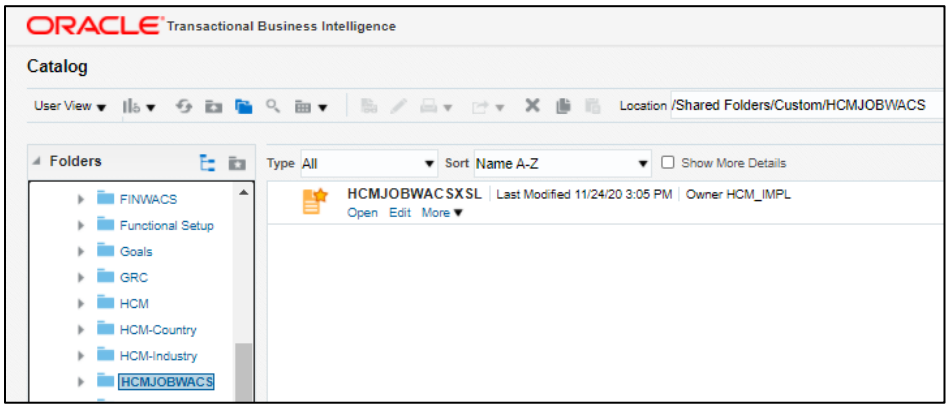
4. Use the files in the package with an extension of “xdo.catalog”.



5. Un-archive the report and data model.



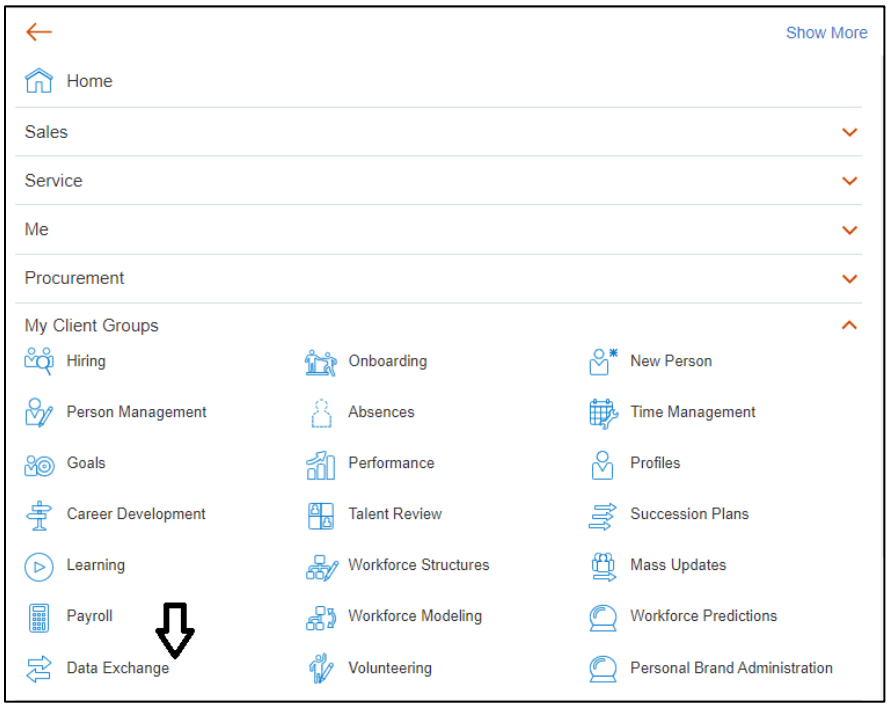
6. Un-archive files in the new instance.
    a. Navigate to the folder where the report should be uploaded.
    b. Click **Unarchive** in the **Tasks** pane.
    c. The system prompts to browse and upload the file from your desktop. Make sure to select the “.xdo.catalog” file for the report.

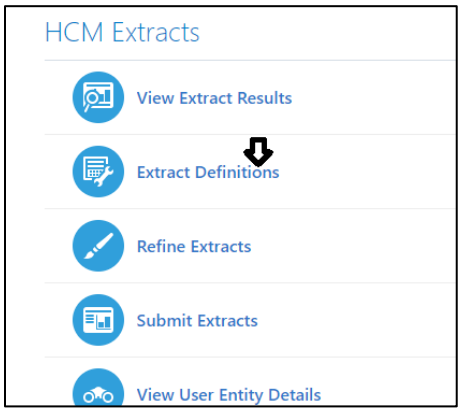


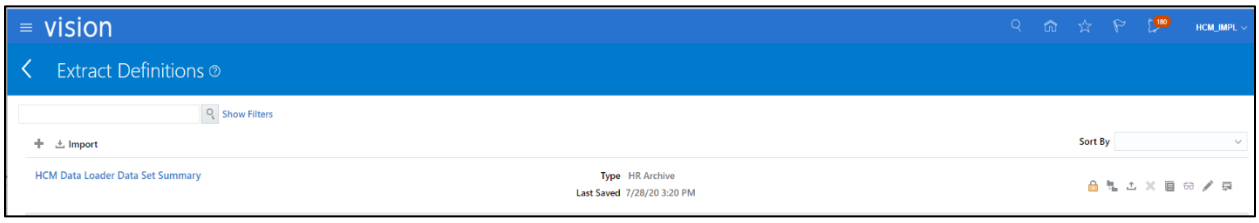
Extract Upload

To extract an upload:

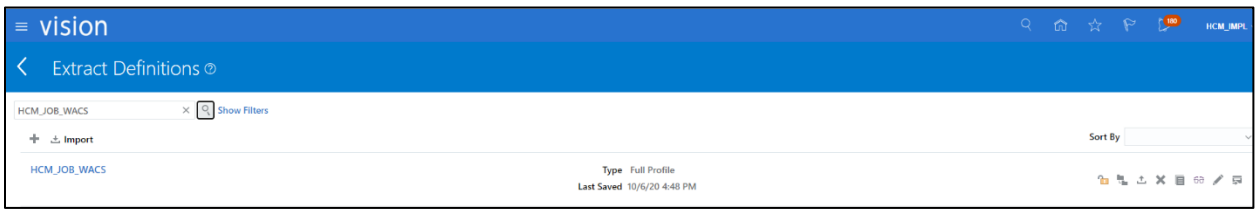
1. Navigate to **Tools** > **Report and Analytics** > **Data Exchange** > **HCM Extract**.
2. Click **Upload** and **Browse**.
3. Upload the extract file “HCM_JOB_WACS”.



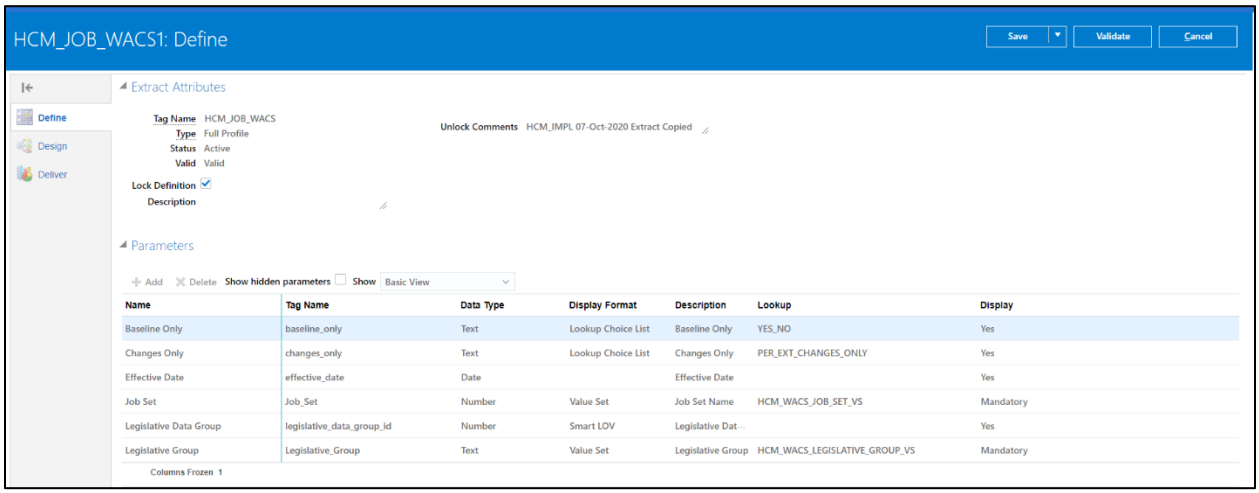




4. Click **Compile** and **Validate**.
5. Query the extract. Navigate to **Advanced** and click **Extract Execution Tree**.
6. After the **Compile Status** is green, click **Save and Close**.
7. Click the extract definition. Lock and save it.
8. Check all the value sets and mandatory fields are set.

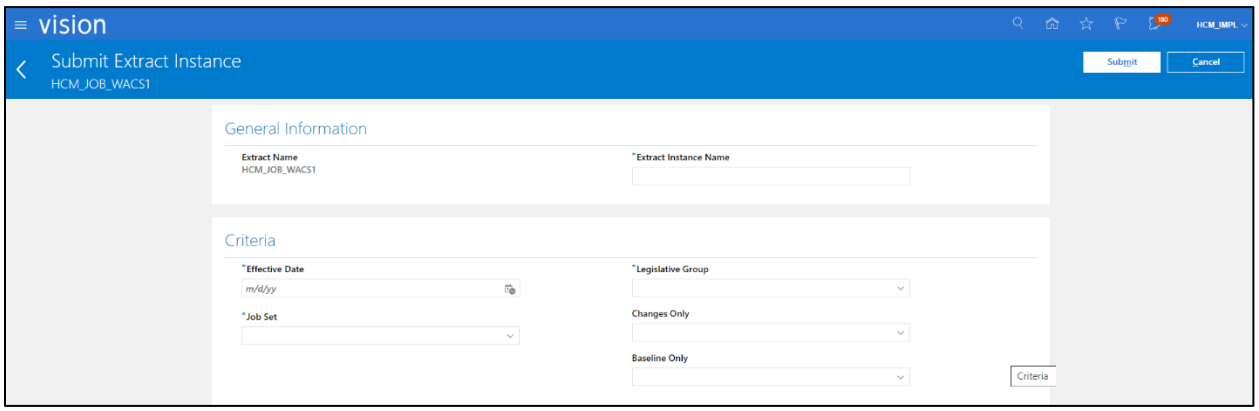


9. Click the **Extract Name**.
10. Check if the **Run** screen populates proper values in the respective fields.



11. On the **Submit Extracts** page, search for the job extract.

12. Click the **Extract Name** and verify the **Legislative Group** and **Job Set** values.



Chapter 4: Employee Unavailability Integration

This chapter focuses on the overview and Oracle HCM Employee Unavailability integration. It includes the following:

- Integration Overview
- Oracle HCM Cloud Employee Unavailability

Integration Overview

This section provides an overview of Oracle Human Capital Management Cloud absence integration to Oracle Utilities Work and Asset Cloud Service (Employee Unavailability). It focuses on integration requirements and the business standpoint of the functionality.

- Sync absence from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud system for employees

Oracle Cloud Absences Integration to Oracle Utilities Work and Asset Cloud provides the features to satisfy the following basic business needs.

This seamless integration between Oracle Human Capital Management Cloud and Oracle Utilities Work and Asset Cloud helps to have the same Employee absence across both platforms.

The integration will support Bulk upload and incremental updates to Oracle Utilities Work and Asset Cloud Service.

Design

The scope of the absence integration is bulk data (initial) and incrementally based on the following approach. Bulk data is part of initial run and changes are synchronized using the incremental flow (changes/new/updated).

- External Leave Details (Sick, Vacation, etc.) are integrated to Oracle Utilities Work and Asset Cloud system. This type of leave would mean the employee is not available to assign an activity in Oracle Utilities Work and Asset Cloud Service.

Internal Absence details are handled in Oracle Utilities Work and Asset Cloud Service: Training, Meeting, etc.

Oracle Human Capital Management Cloud passes the completed leaves in case an employee applies in the system after taking leave. Example: An employee returning after a sick day can also apply for leave which will be sent to Oracle Utilities Work and Asset Cloud Service.

Filter selection while data extract:

- Level 1: Filter for Employee and Employee Unavailability extract will be the same, based on Legal Entity.
- For Bulk and Incremental "Approved (Scheduled & In progress)" absence status would be filtered.
- The status will need to be mapped in DVM with the Oracle Utilities Work and Asset Cloud corresponding status.

When an employee applies for leave in Oracle Human Capital Management Cloud, the system generates a Unique Absence ID for the record. Incremental will capture new Absence and also record changed for existing approved absence data.

Bulk Upload

Oracle HCM Absence Data (Bulk)

Bulk Absence data will be interfaced from Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud so that the Oracle Utilities Work and Asset Cloud Service team can plan and assign the tasks accordingly to the employee/workers.

Incremental Update

Oracle HCM Incremental (Delta)/Changes

Incremental Absence data is be interfaced form Oracle Human Capital Management Cloud to Oracle Utilities Work and Asset Cloud so that the Oracle Utilities Work and Asset Cloud Service team can plan and assign the tasks accordingly to the employee/workers.

The incremental update will use same extract used for bulk but with different parameter to interface the delta data based on the last run date and time. Any change from that will be captured in the new Extract.

Business Rules

- Oracle Human Capital Management Cloud (Data Exchange) should be available for the absence design/extract/schedule.
- Oracle Integration Cloud should be available for the integration activities.

- Oracle Utilities Work and Asset Cloud Service system should be up and running for the interface and validate the absence data.
- Oracle Utilities Work and Asset Cloud Service team should have other tools/reports to validate the interfaced data.

Oracle HCM Cloud Employee Unavailability

This section focuses on importing the files that come as a part of the package and configuring them in the Oracle Human Capital Management Cloud environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration.

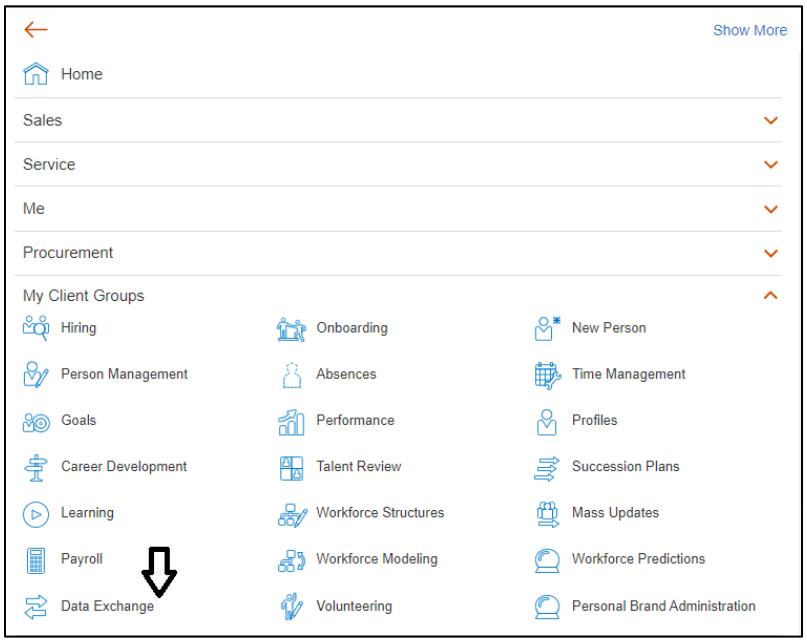
Extract Name: HCM_ABS_WACS

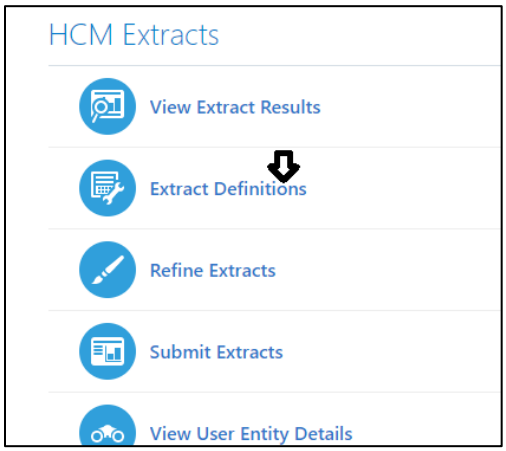
Integration Name: HCMABSWACS

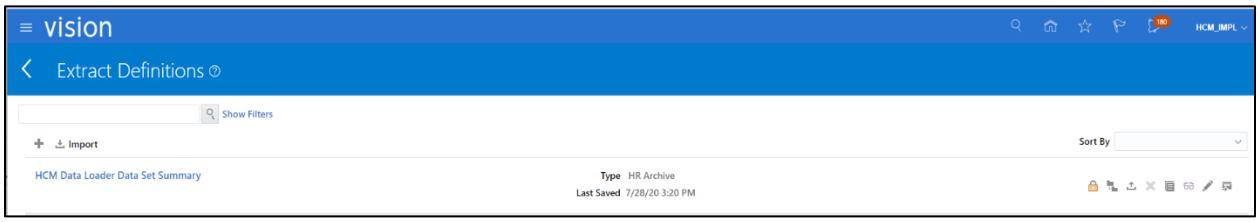
Extract Upload

To extract an upload:

1. Navigate to the **Oracle Human Capital Management Cloud Extract** page.
2. Click **Upload** and browse to the folder.
3. Upload the extract file “HCM_ABS_WACS”.





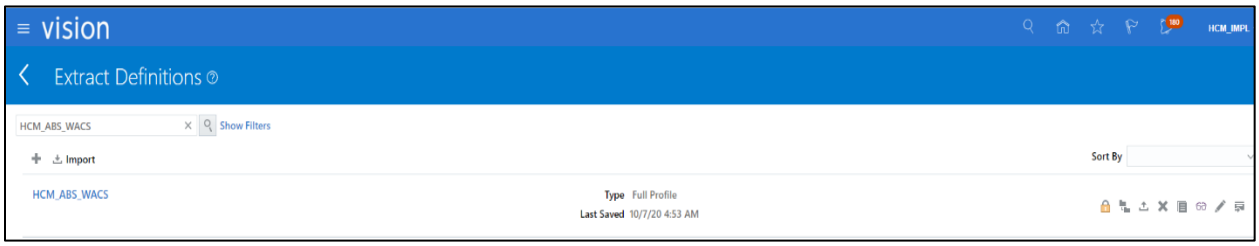


4. Query the extract. Navigate to **Advanced** > **Extract Execution Tree** > **Compile**.
5. Verify if the **Compile Status** is green. Save and close.
6. Lock the extract definition.

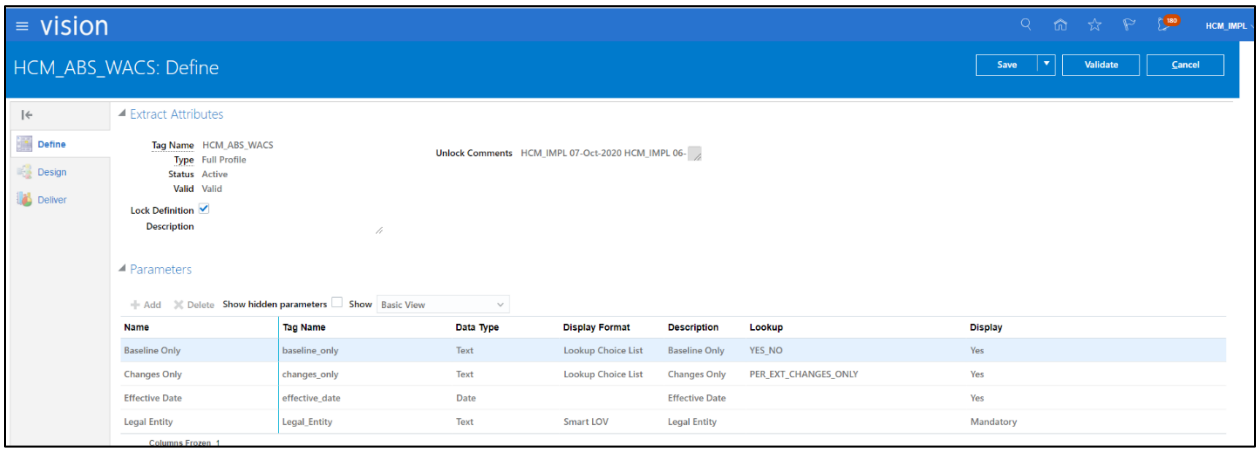
Verify Run Screen

To verify the Run screen:

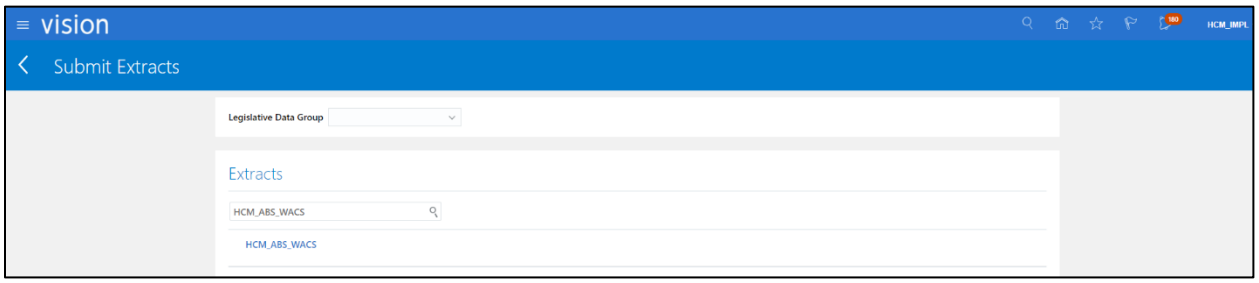
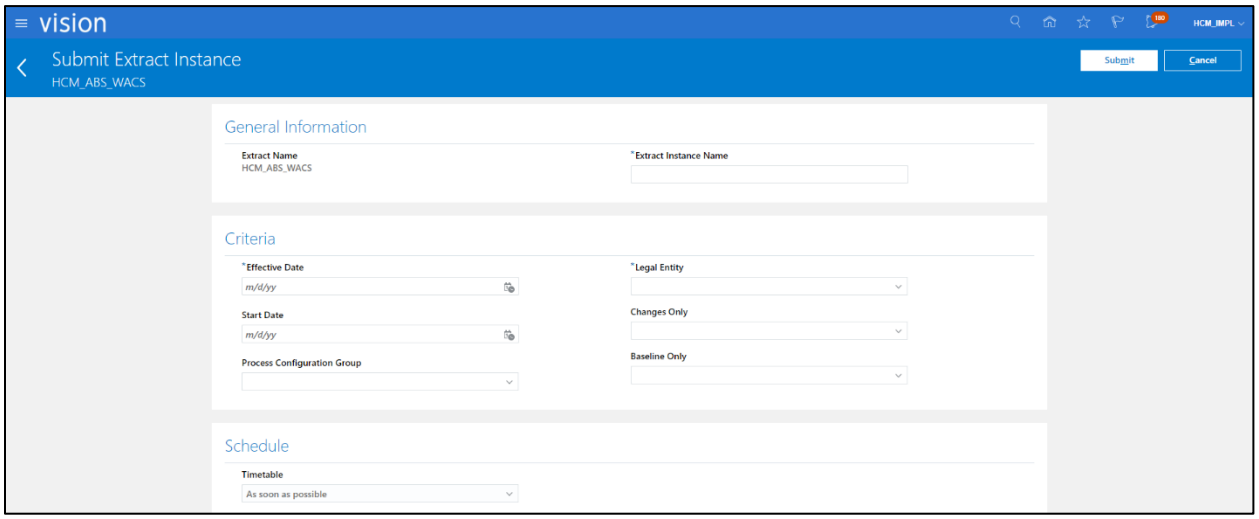
1. Check that all **Value Sets** and **Mandatory** fields are set.
2. Click the extract name.



3. Check that all values are populated on the **Run** screen.
   Verify the legal entity column is populated with the correct values.



4. On the **Submit Extracts** page, search the **Job Extract**.



5. Click the Extract Name. Verify the **Legislative Group** and **Job Set** values.