

# Oracle Fusion Cloud SCM

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## **Implementing Common Features for SCM**

25A



Oracle Fusion Cloud SCM  
Implementing Common Features for SCM

25A

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Author: Amrut Rao

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 Overview

## Oracle Fusion Cloud SCM Common Configuration Overview

This guide contains information to help you perform implementation tasks that are common to multiple Oracle SCM offerings. The information appears in the order in which the associated tasks appear in most of the offerings.

To start an implementation of SCM, an application implementation consultant must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

### Determining Which Tasks to Perform

Your offering contains task lists and tasks in the order in which you must perform them. Download the task list for your offering, and then consult this guide to do those tasks.

### Other SCM Guides to Use

You will also need the implementation guide specific to your offering to complete the implementation tasks. Some topics in this guide and your offering-specific guide may refer you to other guides.

You will need to refer to one or more of these guides as you go along:

- Getting Started with Your Manufacturing and Supply Chain Materials Management Implementation
- Oracle Fusion Cloud SCM Implementing Manufacturing and Supply Chain Materials Management
- Oracle Fusion Cloud SCM Implementing Order Management
- Oracle Fusion Cloud SCM Implementing Product Management
- Oracle Fusion Cloud SCM Implementing Supply Chain Planning
- Oracle Fusion Cloud SCM Implementing Innovation Management
- Oracle Fusion Cloud SCM Modeling Configurations for SCM
- Oracle Fusion Cloud SCM Configuring and Managing B2B Messaging

### Other Guides to Use

For more information about the common set for reference data, see the Oracle Fusion Cloud Global Human Resources Implementing Global Human Resources guide.

## 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

## Why does the Date field display a different value than my preferred date?

By default, the **Date** fields that don't have any associated time values show the date in the server time zone, UTC, irrespective of your preferred time zone.

Also, if you're using the calendar date picker to set today's date, the **Date** field gets populated with the current date in the server time zone, not your preferred time zone.



# 2 Currencies and Currency Rates

## 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 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.

**Note:** When setting up currencies, make sure you use the correct precision. Some currencies, for example, the Chilean peso, don't support precision at all.

### 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.

## 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	<p>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.</p> <p>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.</p>
Not Selected	<p>The inverse rate is calculated, but you can change the rate and update the daily rates table without the corresponding rate being updated.</p>

## Select Pivot Currencies

Select a pivot currency that'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 following conversion rate types are predefined: 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.
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 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.

## 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](#)





# 3 Enterprise Structures

## Overview of Enterprise Structures

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.

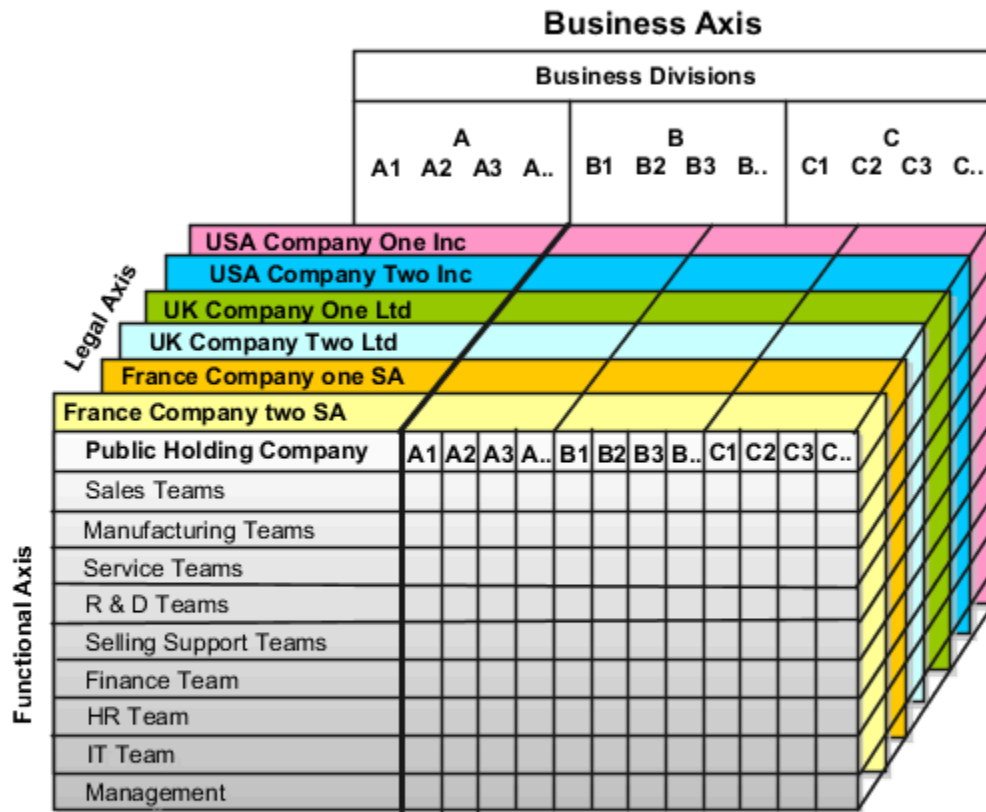
- Legal
- Managerial
- Functional

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.

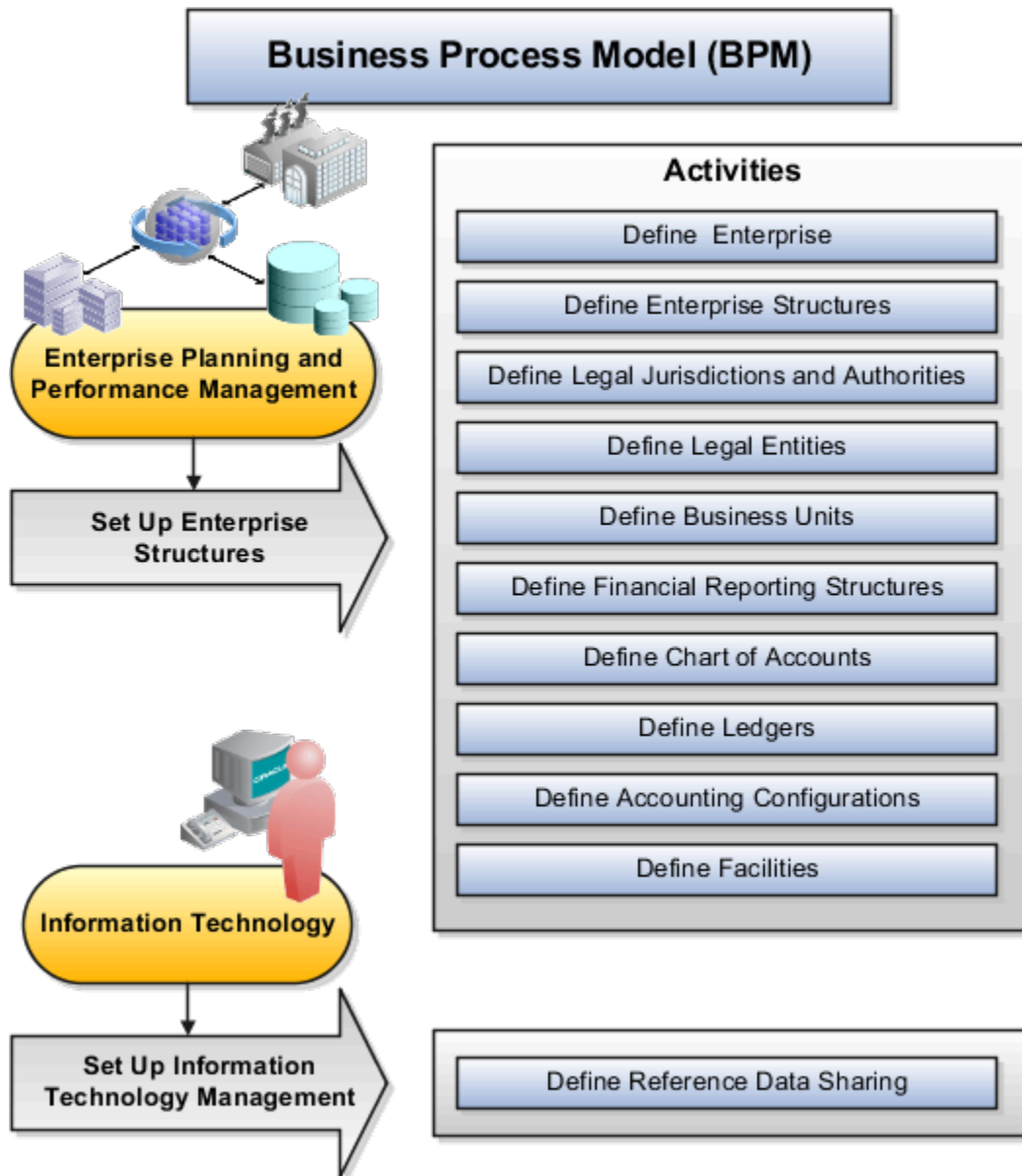
## Enterprise Structures Business Process Model

In Oracle Fusion Cloud Applications, the Enterprise Performance and Planning Business Process Model illustrates the major implementation tasks that you perform to create your enterprise structures.

This process includes:

- Set Up Enterprise Structures business process, which consists of implementation activities that span many product families.
- Information Technology, a second Business Process Model which contains the Set Up Information Technology Management business process.
- Define Reference Data Sharing, which is one of the activities in this business process and is important in the implementation of the enterprise structures. This activity creates the mechanism to share reference data sets across multiple ledgers, business units, and warehouses, reducing the administrative burden and decreasing the time to implement.

The following figure and table describe the Business Process Model structures and activities.



The table describes each BPM activity.

BPM Activities	Description
Define Enterprise	Define the enterprise to get the name of the deploying enterprise and the location of the headquarters.
Define Enterprise Structures	Define enterprise structures to represent an organization with one or more legal entities. Define organizations to represent each area of business within the enterprise.
Define Legal Jurisdictions and Authorities	Define information for governing bodies that operate within a jurisdiction.
Define Legal Entities	Define legal entities and legal reporting units for business activities handled by the Oracle Fusion Applications.

BPM Activities	Description
Define Business Units	Define business units of an enterprise to perform 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.
Define Financial Reporting Structures	Define financial reporting structures, including organization structures, charts of accounts, organizational hierarchies, calendars, currencies and rates, ledgers, and document sequences which are used in organizing the financial data of a company.
Define Chart of Accounts	Define chart of accounts including hierarchies and values to enable tracking of financial transactions and reporting at legal entity, cost center, account, and other segment levels.
Define Ledgers	Define the primary accounting ledger and any secondary ledgers that provide an alternative accounting representation of the financial data.
Define Accounting Configurations	Define the accounting configuration that serves as a framework for how financial records are maintained for an organization.
Define Facilities	Define your manufacturing and storage facilities as Inventory Organizations if Oracle Fusion Applications track inventory balances there and Item Organizations if Oracle Fusion Applications only track the items used in the facility but not the balances.
Define Reference Data Sharing	Define how reference data in the applications is partitioned and shared.

**Note:** Some product-specific implementation activities aren't listed here and depend on the applications you're implementing. For example, you can implement Define Enterprise Structures for Human Capital Management, Project Management, and Sales Management.

## 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 Cloud Applications.

The following are some questions and points to consider as you design your global enterprise structure in Oracle Fusion Applications.

- 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?

# 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 Cloud Enterprise Resource Planning (ERP) solution including Oracle General Ledger and all of the Oracle Fusion Cloud Applications 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.

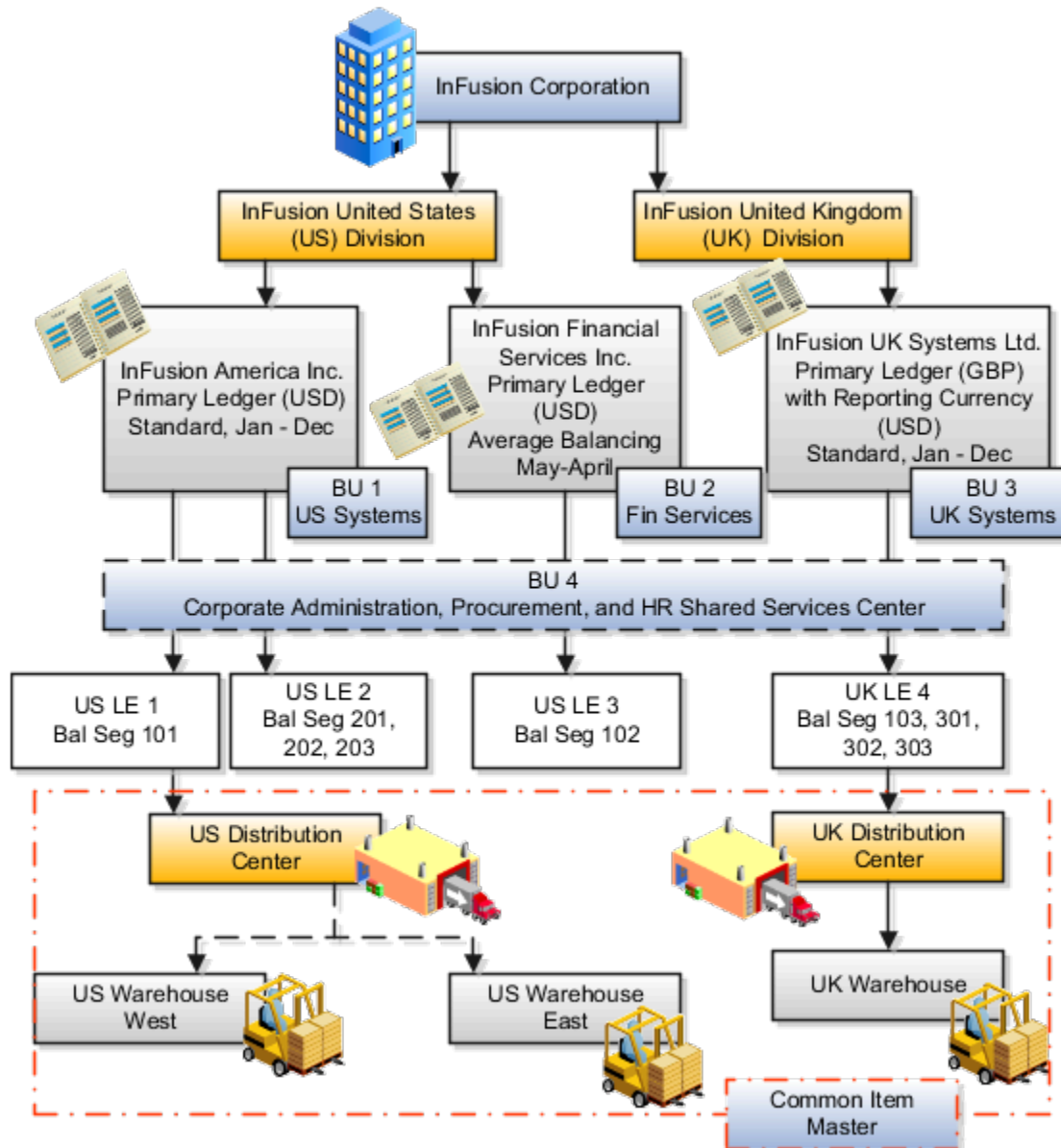
- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you want to achieve proper statutory reporting?
- Your managers need reports that show profit 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 Cloud Human Capital Management implementations don't require recording accounting transactions and therefore, don't require a ledger.

## Essbase Character and Word Limitations

The following is a comprehensive list of character and word limitations that apply to Oracle Essbase. All of the limitations apply to all of the Oracle General Ledger configurations summarized in the table.

The following table shows how the General Ledger configuration maps to Essbase.

General Ledger Configuration	Maps to Essbase
Chart of Account Name	Cube Name
Chart of Account Segment Name	Dimension Name
Chart of Accounts Segment Value	Dimension Member Name
Chart of Accounts Segment Value Description	Alias for Member
Tree and Tree Version Name	Dimension Member Name
Primary Ledger Name	Dimension Member Name in Ledger Dimension
Secondary Ledger Name	Dimension Member Name in Ledger Dimension
Reporting Currency	Dimension Member Name in Ledger Dimension
Ledger Set Name	Dimension Member Name in Ledger Dimension
Accounting Calendar Period Names	Dimension Member Name in Accounting Period Name
Scenario Name Defined in Predefined Value Set Called Accounting Scenario	Dimension Member Name in Scenario Dimension

Even if case sensitivity is enabled in an aggregate storage outline for which duplicate member names is enabled, don't use matching dimension names with only case differences. For example, don't:

- Name two dimensions Product and product.
- Use quotation marks or brackets.
- Use tabs in dimension, member, or alias names.

- Use accent characters.
- Use the characters for dimension or member names.

## Restricted Characters

The following table lists the characters that are restricted and can't be used at the beginning of cube, dimension, member, or alias names.

Character	Meaning
-	dash, hyphen, or minus sign
_	underscore

The following table lists the characters that are restricted and can't be used in cube, dimension, member, or alias names.

Character	Meaning
&	ampersand  <b>Note:</b> Aliases can include ampersands as long as the ampersand isn't the beginning character.
@	at sign
\	backslash  <b>Note:</b> Aliases can include backslashes as long as the backslash isn't the beginning character.
{ }	brace
,	comma  <b>Note:</b> Aliases can include commas as long as the comma isn't the beginning character.
"	double quotation mark
=	equal sign
<	less than sign
()	parentheses  <b>Note:</b> Member names and aliases can include parentheses as long as a parenthesis isn't the beginning character.

Character	Meaning
.	period  <b>Note:</b> Aliases can include periods as long as the period isn't the beginning character.
+	plus sign
'	single quotation mark
/	slash  <b>Note:</b> Aliases can include slashes as long as the slash isn't the beginning character.
	vertical bar

## Other Restrictions

- Don't place spaces at the beginning or end of names. Essbase ignores such spaces.
- Don't use the following types of words as dimension or member names:
  - Calculation script commands, operators, and keywords.
  - Report writer commands.
  - Function names and function arguments.
  - Names of other dimensions and members (unless the member is shared).
  - Generation names, level names, and aliases in the database.

The following table lists additional words that can't be used as the entire value for a cube, dimension, member, or alias. For example, you can't use **ALL** or **All** for an alias. However, you can use **All expenses** as an alias.

List 1	List 2	List 3
ALL	AND	ASSIGN
AVERAGE	CALC	CALCMBR
COPYFORWARD	CROSSDIM	CURMBRNAME
DIM	DIMNAME	DIV
DYNAMIC	EMPTYPARM	EQ
EQOP	EXCEPT	EXP

List 1	List 2	List 3
EXPERROR	FLOAT	FUNCTION
GE	GEN	GENRANGE
GROUP	GT	ID
IDERROR	INTEGER	LE
LEVELRANGE	LOOPBLOCK	LOOPPARMS
LT	MBR	MBRNAME
MBRONLY	MINUS	MISSING, #MISSING
MUL	MULOP	NE
NON	NONINPUT	NOT
OR	PAREN	PARENPARM
PERCENT	PLUS	RELOP
SET	SKIPBOTH	SKIPMISSING
SKIPNONE	SKIPZERO	TO
TOLOCALRATE	TRAILMISSING	TRAILSUM
UMINUS	UPPER	VARORXMBR
XMRONLY	\$\$\$UNIVERSE\$\$\$	#MI

The following table lists General Ledger Essbase keywords that are also restricted and can't be used as the entire value for a cube, dimension, member, or alias. For example, you can't use **ACTUAL** or **Actual** for an alias. However, you can use **Actual expenses** as an alias.

First Letter of Keyword	Keywords
A	ACTUAL, ADP, AED, AFA, AFN, ALLOCATED, AMD, ANG, AOA, AOK, AON, ARA, ARS, ATS, AUD, AWG, AZM, AZN

First Letter of Keyword	Keywords
B	BAM, BASE, BBD, BDT, BEF, BEGINNINGBALANCECR, BEGINNINGBALANCEDR, BGL, BGN, BHD, BIF, BMD, BND, BOB, BOV, BRC, BRL, BSD, BTN, BUK, BWP, BYB, BYN, BYR, BZD
C	CAD, CD, CDF, CHE, CHF, CHW, CLF, CLP, CNY, CONVERTED, COP, COU, CRC, CSD, CSK, CUP, CVE, CYP, CZK
D	DAILY ACTIVITY, DAY, DEM, DJF, DKK, DOP, DZD
E	ECS, ECV, EEK, EGP, ENDINGBALANCECR, ENDINGBALANCEDR, ENTERED, EOD, ERN, ESB, ESP, ETB, EUR
F	FIM, FJD, FKP, FRF
G	GBP, GEK, GEL, GHC, GHS, GIP, GMD, GNF, GRD, GTQ, GWP, GYD
H	HISTORY, HKD, HNL, HRD, HRK, HTG, HUF
I	IDR, IEP, ILS, INR, IQD, IRR, ISK, ITL
J	JMD, JOD, JPY
K	KES, KGS, KHR, KMF, KPW, KRW, KWD, KYD, KZT
L	LAK, LBP, LKR, LRD, LSL, LTL, LUC, LUF, LUL, LVL, LVR, LYD
M	MAD, MDL, MGA, MGF, MKD, MMK, MNT, MONTH, MOP, MRO, MRU, MS25, MS26, MTL, MUR, MVR, MWK, MXN, MXP, MXV, MYR, MZM, MZN
N	N/A, NAD, NGN, NIC, NIO, NLG, NOK, NPR, NZD
O	OMR
P	PAB, PATD, PEI, PEN, PERIOD, PERIODACTIVITYCR, PERIODACTIVITYDR, PGK, PHP, PKR, PLN, PLZ, PTA, PTD, PTE, PYG
Q	QAR, QATD, QTD, QUARTER
R	RMB, ROL, RON, RSD, RUB, RUR, RWF
S	SAR, SBD, SCR, SDD, SDG, SDP, SEASON, SEK, SGD, SHP, SIT, SKK, SLL, SOS, SRD, SRG, SSP, STAT, STD, STN, SUR, SVC, SYP, SZL
T	THB, TJR, TJS, TMM, TMT, TND, TOP, TOTAL, TOTALFORALLOCATIONS, TPE, TRL, TRY, TTD, TWD, TZS
U	UAH, UAK, UF, UGS, UGX, UKS, USD, USN, USS, UYI, UYP, UYU, UYW, UZS
V	VEB, VEF, VES, VND, VUV
W	WEEK, WST
X	XAF, XAG, XAU, XB5, XBA, XBB, XBC, XBD XCD, XDR, XEU, XFO, XFU, XGL1, XOOF, XPD, XPF, XPO, XPT, XTS, XXX
Y	YATD, YDD, YEAR, YER, YTD, YUD, YUM, YUN
Z	ZAL, ZAR, ZBIQA_C1, ZBIQA_C2, ZBIQA_C3 ZBIQA_C4, ZMK, ZMW, ZRN, ZRZ, ZWD, ZWL, ZWR





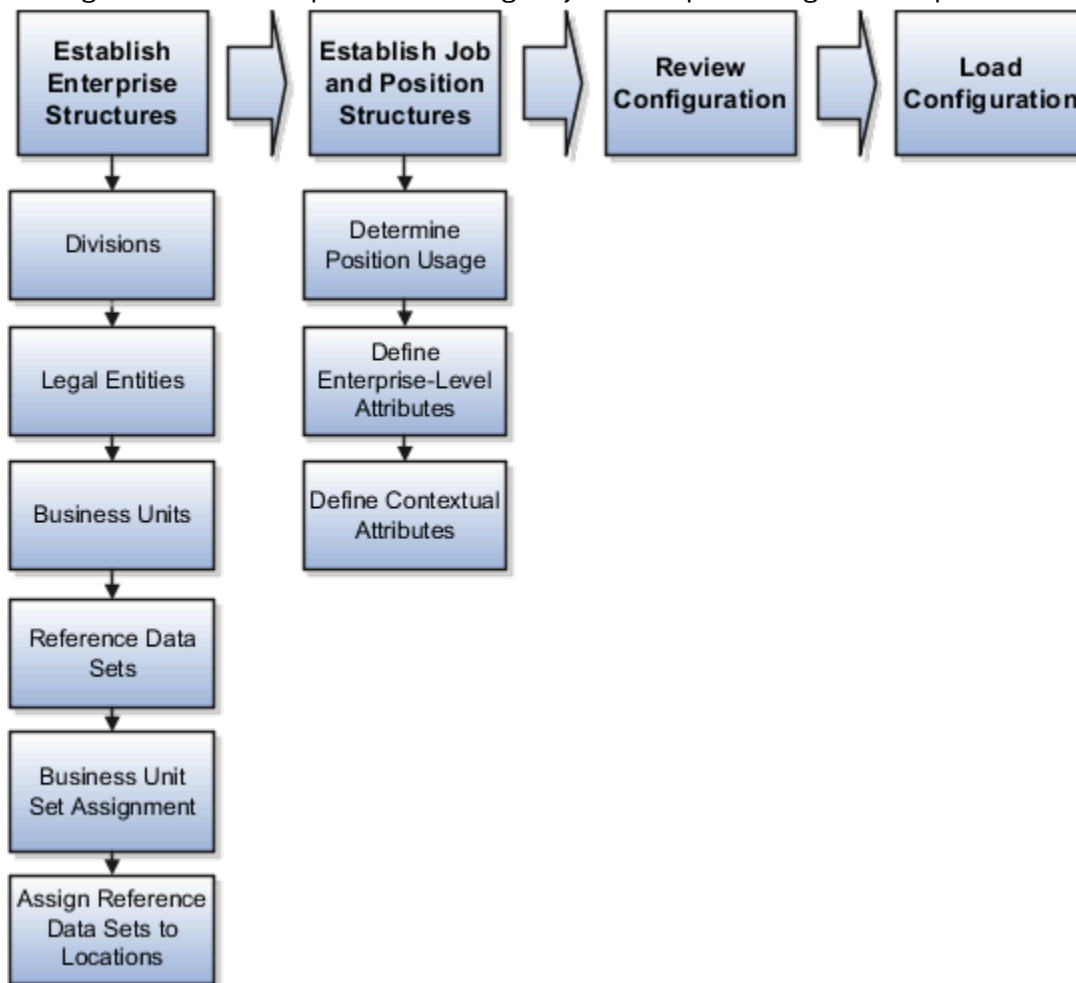
# 4 Initial Configuration with the Enterprise Structures Configurator

## 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.

This table lists the order of creation of business objects by the Enterprise Structures Configurator

Business Object	Task
Location	Location Details
Division	Manage Divisions
Business Unit	Manage Business Units
Set Assignment Override	Manage Set Assignments
Legislative Data Group	Manage Legislative Data Groups
Enterprise	Manage Enterprise HCM Information
Job and Position Flexfield Definitions	Manage Descriptive Flexfields

Business Object	Task
Legal Entity	<ul style="list-style-type: none"><li>• Manage Legal Entities</li><li>• Manage Legal Entity HCM Information</li><li>• Manage Legal Reporting Unit HCM Information</li></ul>
Organization Tree	Manage Organization Trees

## 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.

## 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.

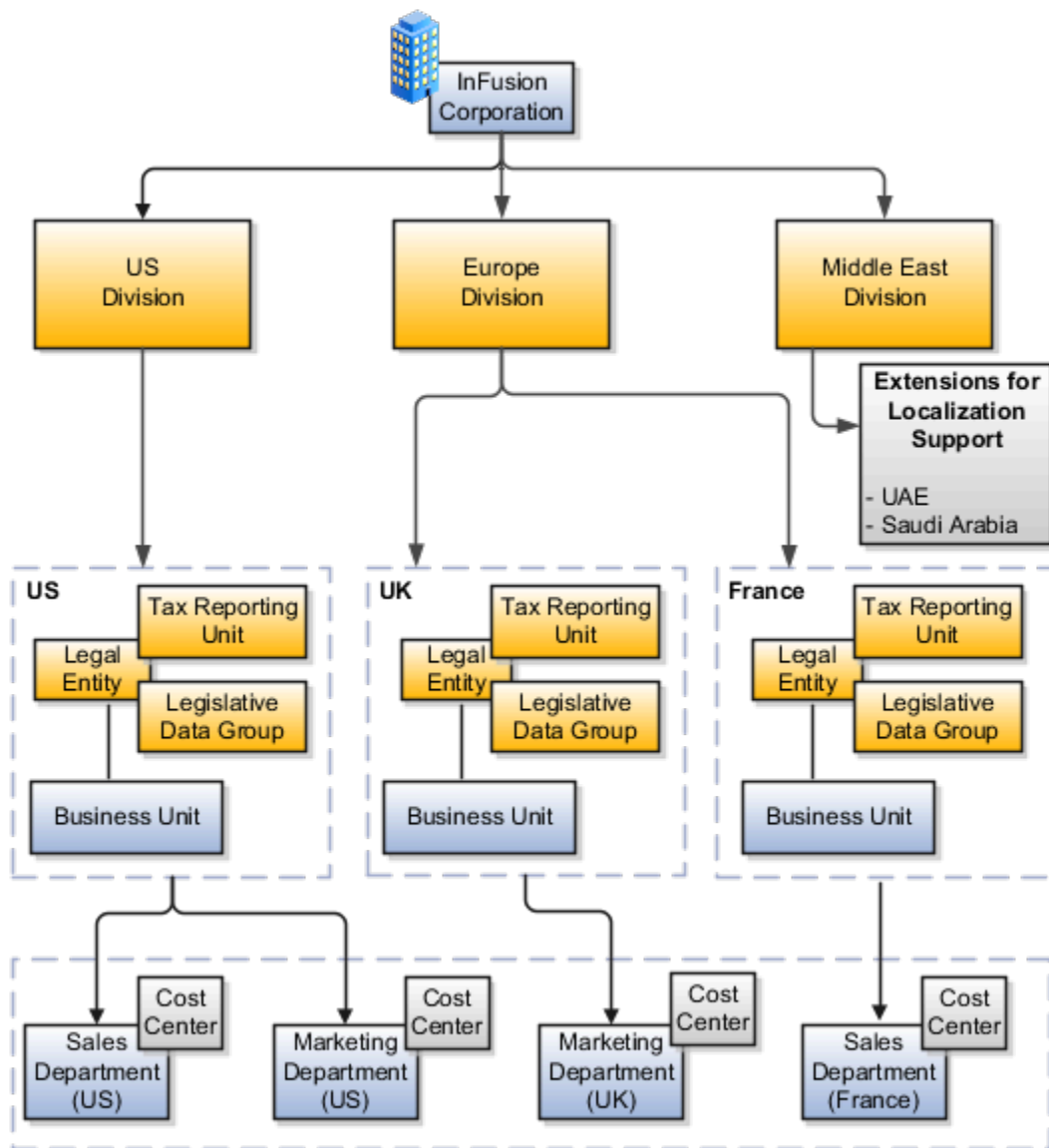
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

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.



## 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 Cloud 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.

## 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.

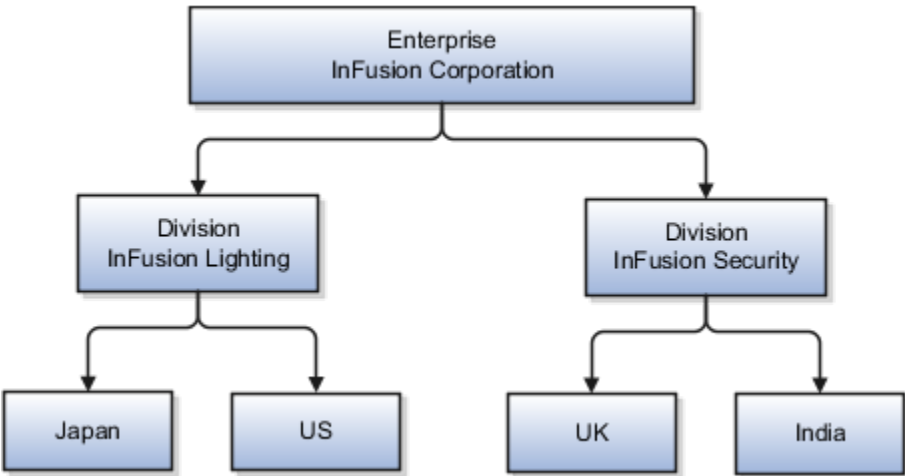
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically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

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

## 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.

Though there's no direct relationship between business units and legal employers, it's recommended that you either maintain a 1:1 relationship between the two or have many business units within a legal employer. Typically, a business unit is used to roll up financial transactions within a legal entity. So, if you set up business units at a higher level than legal entities, your financial transactions may fail.

In Oracle Fusion Cloud 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](#)

# 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.

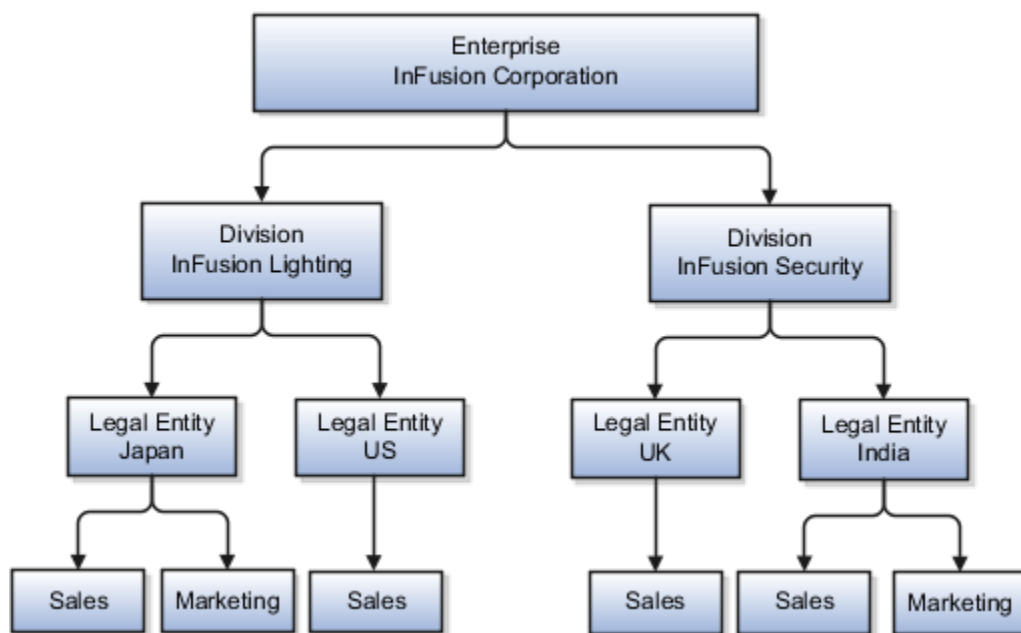
After you select a business unit level, the application generates a list of business units, and you select the ones you want the application to create. If you select a level that has two components, such as country and division, then the application displays a table listing both components. You select 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	<ul style="list-style-type: none"> <li>US</li> <li>UK</li> <li>Japan</li> <li>India</li> </ul>
Country and Division	<ul style="list-style-type: none"> <li>InFusion Lighting: Japan</li> <li>InFusion Lighting: US</li> <li>Infusion Security: UK</li> <li>Infusion Security: India</li> </ul>
Country and business function	<ul style="list-style-type: none"> <li>Sales: Japan</li> <li>Marketing: Japan</li> <li>Sales: US</li> <li>Sales: UK</li> <li>Marketing: India</li> <li>Sales: India</li> </ul>
Division	<ul style="list-style-type: none"> <li>InFusion Lighting</li> <li>InFusion Security</li> </ul>
Division and Legal Entity	<ul style="list-style-type: none"> <li>InFusion Lighting: Japan</li> <li>InFusion Lighting: US</li> <li>Infusion Security: UK</li> <li>Infusion Security: India</li> </ul>
Division and Business Function	<ul style="list-style-type: none"> <li>InFusion Lighting, Sales</li> <li>InFusion Lighting, Marketing</li> <li>InFusion Security, Sales</li> <li>InFusion Security, Marketing</li> </ul>
Business Function	<ul style="list-style-type: none"> <li>Sales</li> <li>Marketing</li> </ul>
Legal Entity	<ul style="list-style-type: none"> <li>Legal Entity: Japan</li> <li>Legal Entity: US</li> <li>Legal Entity: UK</li> <li>Legal Entity India</li> </ul>
Legal Entity and Business Function	<ul style="list-style-type: none"> <li>Legal Entity: Japan, Sales</li> <li>Legal Entity: Japan, Marketing</li> <li>Legal Entity: US, Sales</li> <li>Legal Entity: UK, Sales</li> </ul>

Business Unit Level	Suggested Business Units
	<ul style="list-style-type: none"> <li>Legal Entity India, Marketing</li> <li>Legal Entity India, Sales</li> </ul>

## 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?](#)

## Reference Data Sets and Sharing Methods

Oracle Fusion Cloud Applications reference data sharing feature is also known as Set ID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses.

As a result, there's 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're 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 reference data items.

### *Related Topics*

- [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 business units?](#)
- [What reference data objects can be shared across asset books?](#)

## 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.

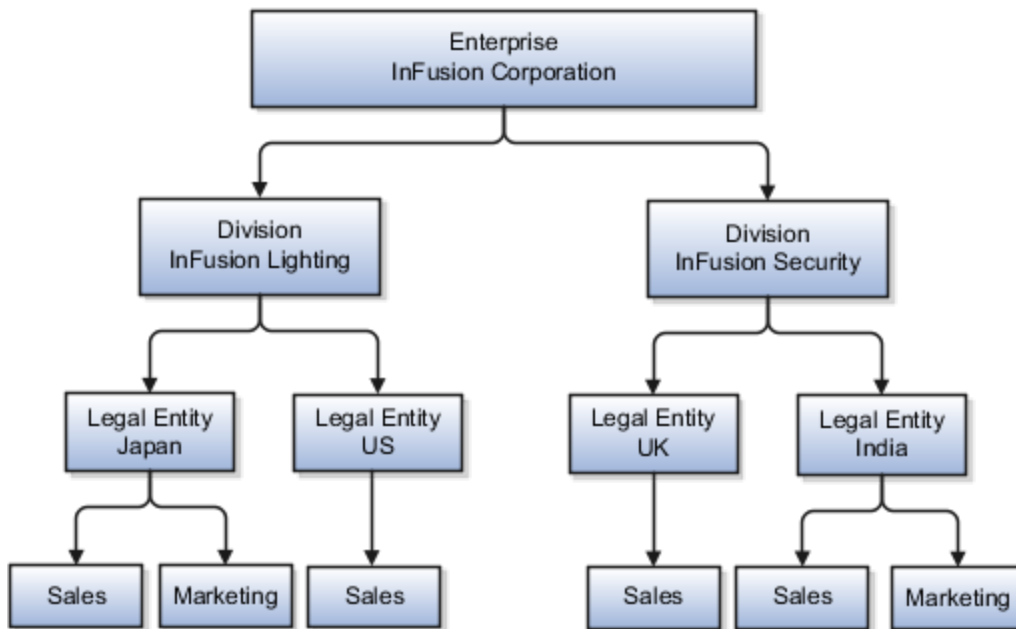
## Business Unit Set Assignment

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:

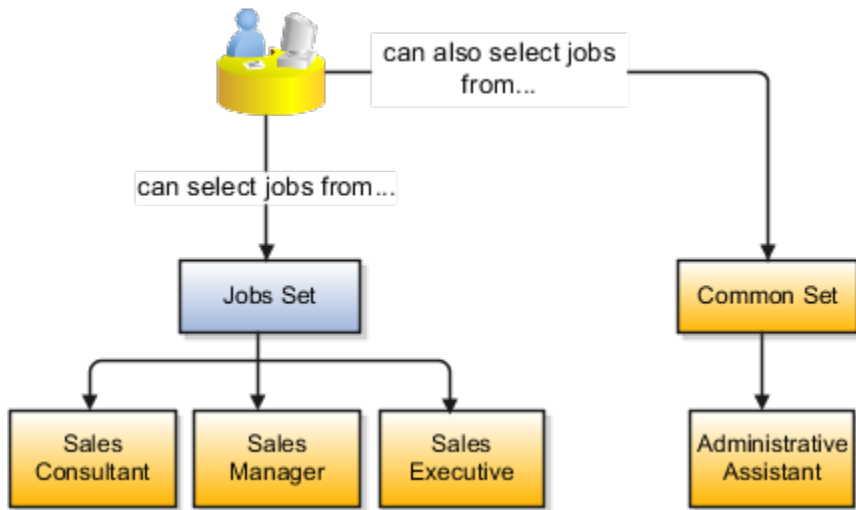
Business Unit	Default Set Assignment	Set Assignment Overrides
Sales_Japan	Sales_Japan_Set for grades, departments, and locations	Jobs set for jobs
Marketing_Japan	Mktg_Japan_Set for grades, departments, and locations	None
Sales_US	Sales_US_Set for grades, departments, and locations	Jobs set for jobs
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

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.



## 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. 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



## 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
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

Primary Industry	Workforce Setup
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

Industry	Scenario 1	Scenario 2	Scenario 3
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](#)

## 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

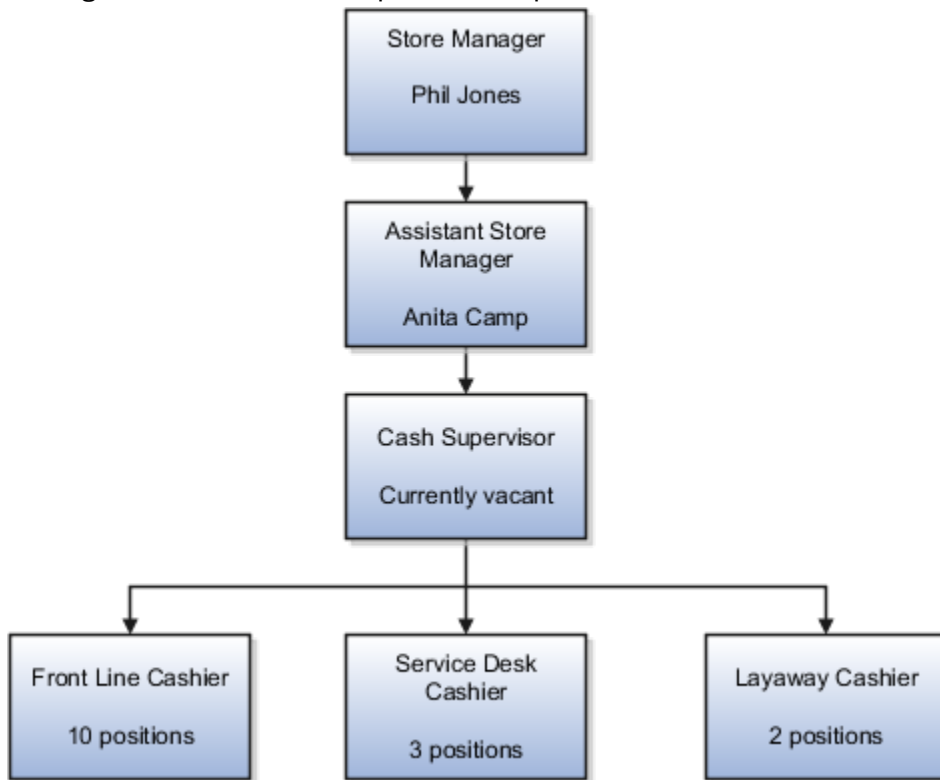
ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of 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.

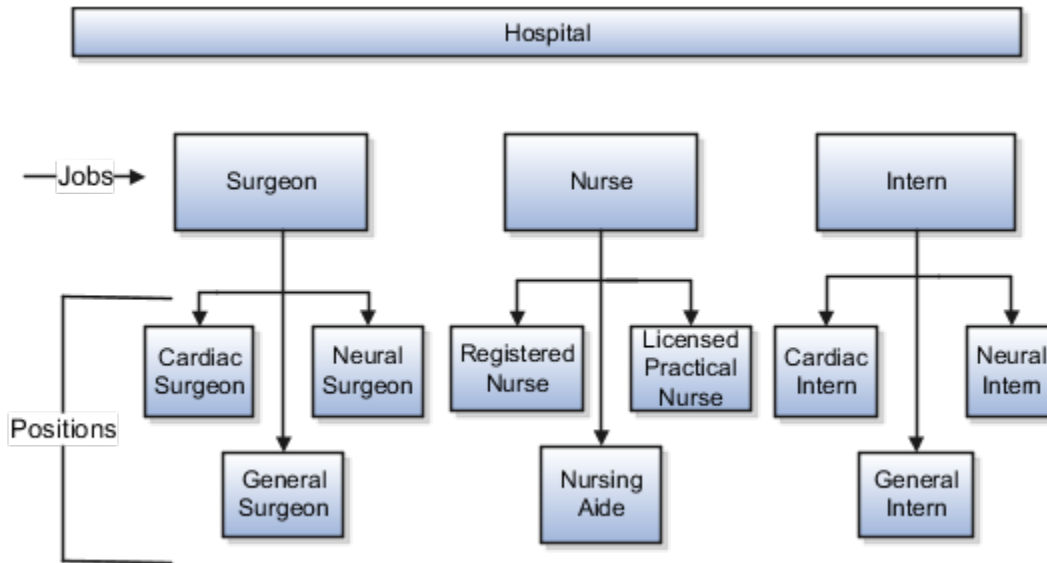


## Health Care Industry

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.



## Examples of Jobs

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

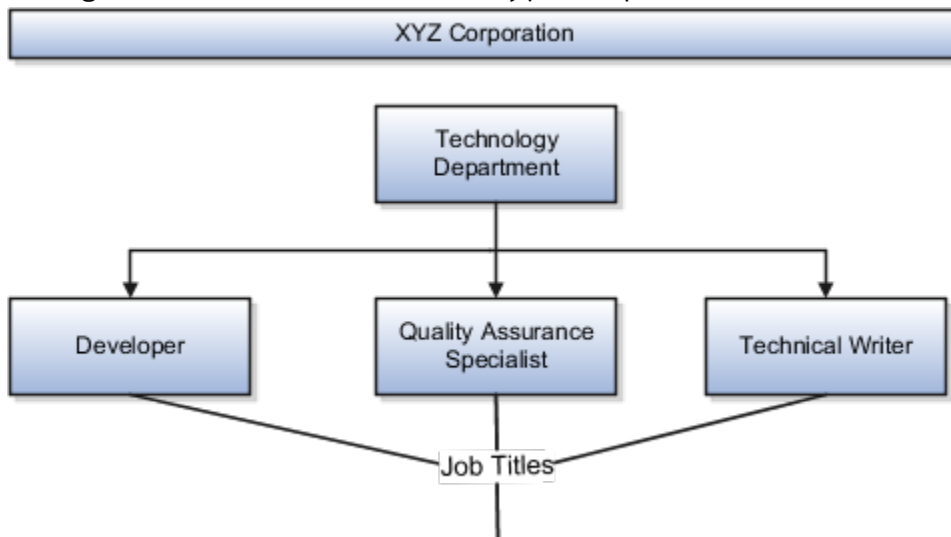
### Software Industry

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.



## 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.

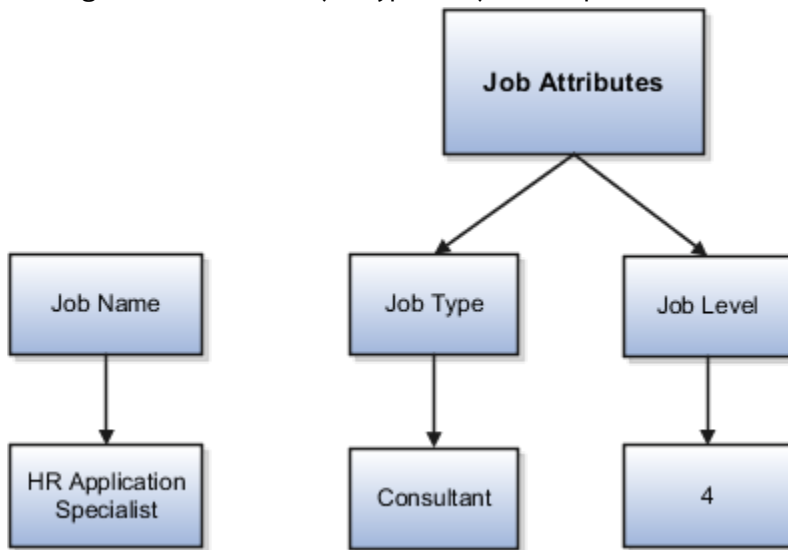
### Enterprise-Level Job Attributes

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. This includes 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.
- Group records in reports, such as to find all jobs of a specific job type.

Don't 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.



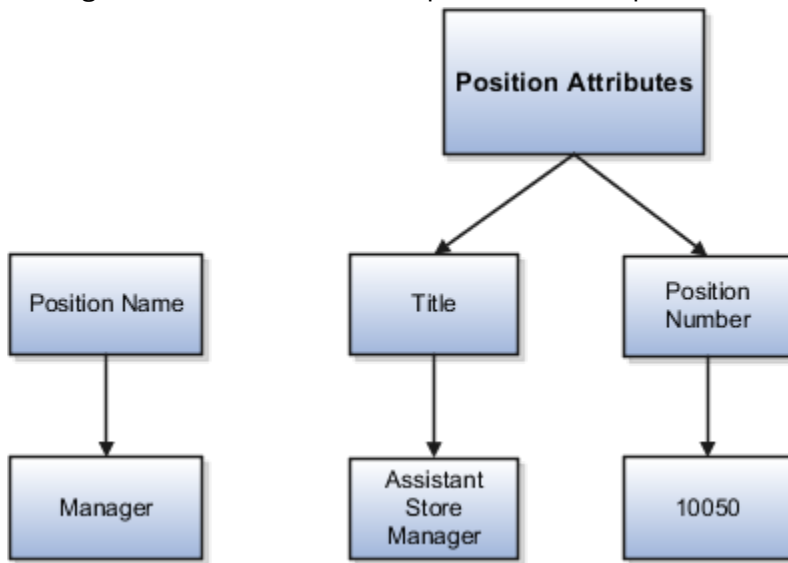
## Enterprise-Level Position Attributes

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:

1. Define a job type of Manager.Level 1.
2. Use it for comparison of positions across departments or lines of business or for setting common job requirements.
3. 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 are 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 might 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 might 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.

## FAQs for Initial Configuration

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

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

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.



## 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's the default reference data set?

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

### *Related Topics*

- [What happens if I override the set assignment?](#)

## 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.



# 5 Reference Data Sharing

## Enterprise HCM Information

### Define Enterprises

An enterprise is a collection of legal entities sharing common control and management.

#### Enterprise Defined

When implementing Oracle Fusion Cloud Applications you operate within the context of an enterprise that has already been created in the application for you. This is either a predefined enterprise or an enterprise that has been created in the application by a system administrator. An enterprise organization captures the name of the deploying enterprise and the location of the headquarters. In Oracle Fusion Applications, an organization classified as an enterprise is defined before defining any other organizations in the HCM Common Organization Model. All other organizations are defined as belonging to an enterprise.

### 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.

## 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.

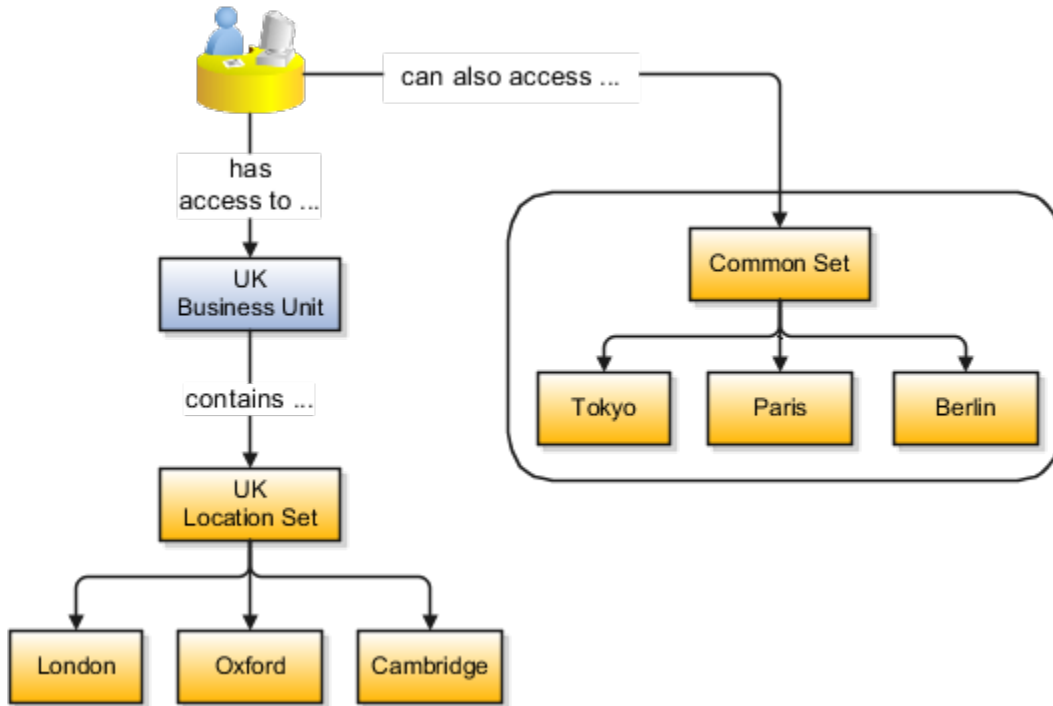
You can also create and maintain additional reference data sets, while continuing to use the common reference data set. Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion 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 Cloud Applications reference data sharing feature is also known as Set ID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses.

As a result, there's 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're 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 reference data items.

### Related Topics

- [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 business 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.

# Items and Supplier Site Reference Data Sharing

Some products, such as items and supplier sites, required special logic for reference data sharing and have implemented their own domain-specific ways for sharing data.

## Items

If you share your items across warehouses or manufacturing facilities, you can access them through a common item master. Configure one or multiple item masters for your enterprise, based your enterprise structure. A single item master is recommended because it provides simpler and more efficient maintenance. However, in rare cases, it may be beneficial to keep multiple item masters. For example, if you acquire another enterprise and want to continue to operate your lines of business separately, maintaining a second item master might be the best decision.

## Suppliers Sites

You can approve particular suppliers to supply specified commodities and authorize your business units to buy from those suppliers when the need arises. For example, you might be a household cleaning products manufacturer and need dyes, plastics, and perfumes to make your products. You purchase from a central supplier 70% of your perfume supplies with an additional supplier, in reserve, from whom you purchase the remaining 30%. At the same time, each of your business units purchases plastics and dyes from the same supplier, but from different local supplier sites to save transportation costs.

To implement business unit-specific supplier sites, Oracle Fusion Cloud Procurement supports a method for defining suppliers sites as owned and managed by the business unit responsible for negotiating the supplier terms. Your other business units that have a service provider relationship defined with your procurement business unit subscribe to the supplier sites using the supplier site assignments feature. In addition, Procurement allows sharing of the following procurement data objects across business units:

- Supplier qualification data, such as approved supplier lists
- Catalog content, such as agreements, smart forms, public shopping lists, and content zones
- Procurement configuration data

### *Related Topics*

- [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 business units?](#)
- [What reference data objects can be shared across asset books?](#)



## FAQs for Reference Data Sharing

### 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
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

Application Name	Reference Data Object	Method of Sharing
Receivables	Collectors	Assignment to one set only, with common values
Receivables	Lockbox	Assignment to one set only, with common values
Receivables	Memo Lines	Assignment to one set only, with common values
Receivables	Payment Terms	Assignment to one set only, with common values
Receivables	Remit To Address	Assignment to one set only, with common values
Receivables	Revenue Contingencies	Assignment to one set only, with common values
Receivables	Transaction Source	Assignment to one set only, with common values
Receivables	Transaction Type	Assignment to one set only, with common values
Advanced Collections	Collections Setups	Assignment to one set only, with common values
Advanced Collections	Dunning Plans	Assignment to one set only, with common values
Tax	Tax Classification Codes	Assignment to 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

Application Name	Reference Data Object	Method of Sharing
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

## What reference data objects can be shared across asset books?

The following list contains the reference data objects for Oracle Fusion Assets that can be shared across asset books and the method in which the reference data for each is shared.

Application Name	Reference Data Object	Method of Sharing
Assets	Bonus Rules	Assignment to one set only, no common values allowed
Assets	Depreciation Ceilings	Assignment to one set only, no common values allowed
Assets	Depreciation Methods	Assignment to one set only, with common values
Assets	Asset Descriptions	Assignment to one set only, no common values allowed
Assets	Property Types	Assignment to one set only, with common values
Assets	Prorate Conventions	Assignment to one set only, no common values allowed
Assets	Asset Queue Names	Assignment to one set only, with common values

Application Name	Reference Data Object	Method of Sharing
Assets	Retirement Types	Assignment to one set only, with common values
Assets	Unplanned Types	Assignment to one set only, with common values

## What reference data objects can be shared across cost organizations?

The following table contains the reference data objects for Oracle Fusion Cost Management that can be shared across cost organizations and the method in which the reference data for each is shared.

Application Name	Reference Data Object	Method of Sharing
Cost Management	Cost Structure	Assignment to one set only, no common values allowed

## What reference data objects can be shared across project units?

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

Application Name	Reference Data Object	Method of Sharing
Project Foundation	Project Definition	Assignment to multiple sets, no common values allowed
Project Foundation	Project Transaction Types	Assignment to multiple sets, no common values allowed

## 6 Geographies

### 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.

**Note:** During import of geography data from any provider if one or more geography levels aren't available, n/a is substituted for those geography levels. For example, the list of values in the address UIs of accounts, contacts, suppliers, persons, and so on are displayed as n/a for such geography levels.

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

Level	Geography Type
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.

If you delete a geography level, all the children in that geography hierarchy are also deleted. For example, under a state you have defined zones using a range of postal codes. Later, you delete the state because you no longer support that state in your business. All the zones defined within that state are also deleted.

## How do I manage geography validation?

After defining the geography hierarchy, you need to specify the structure 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 address validation 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*, and the overall address 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
- Address validation
- Address 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 address 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.

## Address Validation

You must set up address validation for those geography elements that you plan to use in your application. Address validation checks whether geography elements of an address such as state, city, postal code, and soon are valid as per master geography data. Setting up validation also helps ensure that the addresses are correct and deliverable during entry. You can select states or other address elements from lists to ensure accuracy during entry. For example, when you enter a postal code, the application can validate if the postal code exists. Note that address validation isn't the same as address verification. *Address Verification* updates and enhances your address. Address verification depends upon Oracle or any third-party address verification services to perform verification.

You can specify whether a geography type will be included in address validation. For example, when the user enters a United States address using the North American 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 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.

After setting geography validation, all features that directly and indirectly depend upon geographies are impacted. For example, multiple applications such as ERP, CX, and SCM that use geographies are impacted.

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	<ul style="list-style-type: none"> <li>Country</li> <li>Parroquia</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Angola	AO	<ul style="list-style-type: none"> <li>Country</li> <li>Provincia</li> <li>Municipio</li> <li>Comuna</li> <li>Localidad</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Additional address attribute 2</li> </ul>
Argentina	AR	<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>



Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Province</li> <li>Department</li> <li>Municipality</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Australia	AU	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Austria	AT	<ul style="list-style-type: none"> <li>Country</li> <li>Bundensland</li> <li>Bezirk</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Belgium	BE	<ul style="list-style-type: none"> <li>Country</li> <li>Gewest</li> <li>Provincie</li> <li>Gemeente</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Bolivia	BO	<ul style="list-style-type: none"> <li>Country</li> <li>Departemento</li> <li>Provincia</li> <li>Canton</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> </ul>
Bosnia and Herzegovina	BA	<ul style="list-style-type: none"> <li>Country</li> <li>District</li> <li>Kanton</li> <li>Opcine</li> <li>Nasalje</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Brazil	BR	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Bulgaria	BG	<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>• Oblast</li> <li>• Obshchina</li> <li>• Settlement</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Additional address attribute 1</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>
Canada	CA	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>
Cayman Islands	KY	<ul style="list-style-type: none"> <li>• Country</li> <li>• Island</li> <li>• District</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• State</li> <li>• City</li> <li>• Postal code</li> </ul>
Chile	CL	<ul style="list-style-type: none"> <li>• Country</li> <li>• Region</li> <li>• Provincia</li> <li>• Kommune</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• State</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul>
China	CN	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>
<b>Note:</b> China geography structure is supported but geocoding isn't supported.			
Croatia	HR	<ul style="list-style-type: none"> <li>• Country</li> <li>• Zupanije</li> <li>• Grad</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>
Cuba	CU	<ul style="list-style-type: none"> <li>• Country</li> <li>• Provincia</li> <li>• Municipio</li> <li>• City</li> <li>• Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul>
Cyprus	CY	<ul style="list-style-type: none"> <li>• Country</li> <li>• Periochi</li> <li>• Dimos</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Postal code</li> </ul>
Czech Republic	CZ	<ul style="list-style-type: none"> <li>Country</li> <li>Kraj</li> <li>Okres</li> <li>Obec</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Denmark	DK	<ul style="list-style-type: none"> <li>Country</li> <li>Amt</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Dominican Republic	DO	<ul style="list-style-type: none"> <li>Country</li> <li>Provincia</li> <li>Municipio</li> <li>Town</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Ecuador	EC	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Canton</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Estonia	EE	<ul style="list-style-type: none"> <li>Country</li> <li>Maakond</li> <li>Vald</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Finland	FI	<ul style="list-style-type: none"> <li>Country</li> <li>Laani</li> <li>Kunta</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
France	FR	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Department</li> <li>Commune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Germany	DE	<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Bundesland</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Great Britain	GB	<ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Township</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Greece	GR	<ul style="list-style-type: none"> <li>Country</li> <li>Periferia</li> <li>Nomi</li> <li>Dimotika</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Guadalupe	GP	<ul style="list-style-type: none"> <li>Country</li> <li>Commune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Postal code</li> </ul>
Guam	GU	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>Municipality</li> <li>Village</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul>
Guernsey	GG	<ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Parishes</li> <li>Villages</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Additional address attribute 2</li> <li>Additional address attribute 3</li> <li>Postal Code</li> </ul>
Hungary	HU	<ul style="list-style-type: none"> <li>Country</li> <li>Megye</li> <li>Jaras</li> <li>Telepules</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Iceland	IS	<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Jaras</li> <li>Telepules</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
India	IN	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Indonesia	ID	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Ireland	IE	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Post County</li> <li>Postal_Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>
Isles of Man	IM	<ul style="list-style-type: none"> <li>Country</li> <li>Locality</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul>
Israel	IL	<ul style="list-style-type: none"> <li>Country</li> <li>District</li> <li>Subdistrict</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Italy	IT	<ul style="list-style-type: none"> <li>Country</li> <li>Regione</li> <li>Provincia</li> <li>Comune</li> <li>Postal code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Jamaica	JM	<ul style="list-style-type: none"> <li>Country</li> <li>Parish</li> <li>Settlement</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
Japan	JP	<ul style="list-style-type: none"> <li>Country</li> <li>Prefecture</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Jordan	JO	<ul style="list-style-type: none"> <li>Country</li> <li>Muhafazat</li> <li>Liwa</li> <li>Tajma</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Kenya	KE	<ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Division</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>
Latvia	LV	<ul style="list-style-type: none"> <li>Country</li> <li>Rajons</li> <li>Pilseta</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Liechtenstein	LI	<ul style="list-style-type: none"> <li>Country</li> <li>Wahlkreis</li> <li>Gemeinde</li> <li>District</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Lithuania	LT	<ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Municipality</li> <li>Ward</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Luxembourg	LU	<ul style="list-style-type: none"> <li>Country</li> <li>Canton</li> <li>Commune</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Malaysia	MY	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>District</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Subdistrict</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>City</li> <li>Postal code</li> </ul>
Malta	MT	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Local_Council</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Martinique	MQ	<ul style="list-style-type: none"> <li>Country</li> <li>Department</li> <li>Arrondissement</li> <li>Commune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Mexico	MX	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>Municipality</li> <li>Locality</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul>
Netherlands	NL	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Municipality</li> <li>Town</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
New Zealand	NZ	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Town</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Norway	NO	<ul style="list-style-type: none"> <li>Country</li> <li>Fylke</li> <li>Kommune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Oman	OM	<ul style="list-style-type: none"> <li>Country</li> <li>Muhafazah</li> <li>District</li> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> </ul>
Peru	PE	<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Region</li> <li>Provincia</li> <li>Distrito</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Poland	PL	<ul style="list-style-type: none"> <li>Country</li> <li>Wojewodztwo</li> <li>Powiat</li> <li>Gmina</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Portugal	PT	<ul style="list-style-type: none"> <li>Country</li> <li>Distrito</li> <li>Concelho</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Puerto Rico	PR	<ul style="list-style-type: none"> <li>Country</li> <li>Commonwealth</li> <li>Municipio</li> <li>Barrio</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Qatar	QA	<ul style="list-style-type: none"> <li>Country</li> <li>Municipality</li> <li>Zone</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>
Reunion Island	RE	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Department</li> <li>Commune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Romania	RO	<ul style="list-style-type: none"> <li>Country</li> <li>Regiune</li> <li>Judet</li> <li>Settlement</li> <li>Comuna</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Russia	RU	<ul style="list-style-type: none"> <li>Country</li> <li>Federal_District</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> </ul>



Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Federal_Subject</li> <li>Oblast</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
San Marino	SM	<ul style="list-style-type: none"> <li>Country</li> <li>Comune</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>Postal code</li> </ul>
Singapore	SG	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>District</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Slovakia	SK	<ul style="list-style-type: none"> <li>Country</li> <li>Kraj</li> <li>Okres</li> <li>Obec</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Slovenia	SI	<ul style="list-style-type: none"> <li>Country</li> <li>Regija</li> <li>Upravna Enota</li> <li>Obcina</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
South Africa	ZA	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>District_Municipality</li> <li>Local_Municipality</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
South Korea	KR	<ul style="list-style-type: none"> <li>Country</li> <li>Jibang</li> <li>Siti</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Spain	ES	<ul style="list-style-type: none"> <li>Country</li> <li>Autonomous_Community</li> <li>Province</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Sri Lanka	LK	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>District</li> <li>Divisional_Secretariat</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Swaziland  <b>Note:</b> This country maybe labeled Eswatini in Manage Territories.	SZ	<ul style="list-style-type: none"> <li>Country</li> <li>District</li> <li>Inkhundla</li> <li>Town</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Sweden	SE	<ul style="list-style-type: none"> <li>Country</li> <li>Lan</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Switzerland	CH	<ul style="list-style-type: none"> <li>Country</li> <li>Kanton</li> <li>Bezirk</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Taiwan	TW	<ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Town</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Thailand	TH	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Changwat</li> <li>Amphoe</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Tunisia	TN	<ul style="list-style-type: none"> <li>Country</li> <li>Governorate</li> <li>Delegation</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>

Country Name	Country Code	Geography Type	Map to Attribute
		<ul style="list-style-type: none"> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Postal Code</li> </ul>
Turkey	TR	<ul style="list-style-type: none"> <li>Country</li> <li>Sehir</li> <li>Ilce</li> <li>Kasaba</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
United Arab Emirates	AE	<ul style="list-style-type: none"> <li>Country</li> <li>Emirate</li> <li>City</li> <li>Area</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Additional address attribute 2</li> </ul>
United States	US	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>
Uruguay	UY	<ul style="list-style-type: none"> <li>Country</li> <li>Departamento</li> <li>City</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>
Vatican City	VA	<ul style="list-style-type: none"> <li>Country</li> <li>Municipal</li> <li>Settlement</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>
Vietnam	VN	<ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Tihn</li> <li>Quan</li> <li>Thank Pho</li> <li>Postal Code</li> </ul>	<ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>

**Note:** For either the tax or address validation, don't skip any 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 address 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 address or tax validation.

## Address Validation Control

You can select the address validation level for a country. Validation will check if the entered address maps to the geography hierarchy data available for the country, and the address 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 address 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 address validation for a country, you must enable geography validation and then execute the *Validate Geographies of Addresses Against Master Geographies* task for that country. This validates all your geography elements.

### Related Topics

- [How can I save an address that didn't pass geography validation?](#)
- [How do I validate geographies of addresses against master geographies and generate naming references?](#)
- [Setting Up Geography Validation](#)

## How do I 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, geography types within the structure, geography hierarchy, and geography 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: <ol style="list-style-type: none"> <li>1. County</li> <li>2. Post Town</li> </ol>
What is the geography hierarchy?	Create the following hierarchy: <ol style="list-style-type: none"> <li>1. Country of United Kingdom</li> <li>2. County of Berkshire</li> <li>3. Post Town of Reading</li> </ol>
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 **Create and Add Geography Type** field.
7. Click **Add**.

8. Click **Save and Close**.

**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**.

# Import Geographies and Zones

## How do I 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:

- If you are licensed to use HCM Cloud Payroll for the United States, you must import your geography data from Vertex. For more information, see the United States Payroll implementation and administering guides.
- If you are licensed to use HCM Cloud Payroll for Canada, you can import your geography data from either Loqate, or your own geography data vendor. Loqate is the Oracle-licensed geography vendor across all Oracle applications, but it isn't mandatory. You may use any other geography vendor, but it must be comparable in structure by using a 2-character province code. For more information, see the Canada Payroll implementation and administering guides.
- By exporting this "Geography" data from the Oracle environment to Your environment, You agree that (a) Oracle is granting You only a restricted right to download the exported data specifically for Your use with the Oracle Fusion services, (b) this data may not be used, transferred, or uploaded for any other purposes; and (c) except for the restricted right granted in (a), all provisions of the Oracle Cloud Services Agreement (CSA) or Schedule C, as applicable to You, remain in full force and effect, including specifically section 3.4 thereof.
- Geography Round-Trip Export Import is currently not supported.

## 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.

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. The existing master geography hierarchy can be from Loqate or non-Loqate. 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 grayed out in the import list.

### Related Topics

- [Create Legal Jurisdictions, Addresses and Authorities](#)
- [Overview of Implementing Customer Data Management](#)
- [Setup Data Import and Export for Oracle Accounting Hub Cloud](#)

## 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
Bolivia	BO
Bosnia and Herzegovina	BA
Brazil	BR



Country Name	Country Code
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
Guadalupe	GP
Guam	GU
Guernsey	GG

Country Name	Country Code
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
Martinique	MQ
Mexico	MX
Netherlands	NL

Country Name	Country Code
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
Sri Lanka	LK
Swaziland	SZ
Sweden	SE

Country Name	Country Code
Switzerland	CH
Taiwan	TW
Thailand	TH
Tunisia	TN
Turkey	TR
United Arab Emirates	AE
United States	US
Uruguay	UY
Vatican City	VA
Vietnam	VN

## How do I replace the 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 HCM Payroll customers, 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:
  - o Offering: Sales
  - o Functional Area: Territories
  - o 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:
  - 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 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**.

**Note:** 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. The existing master geography hierarchy can be from Loqate or non-Loqate.

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. Note that countries may have different amount of data depending on the structure and the data can grow exponentially which correlates with different load times.

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.

Run the GNR process in the following situations:

- When you are using geography based address validation (not third party address validation services).
- GNR data is needed for your business processes (such as ERP Tax).

**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 Fusion 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.

## 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*

- [How do I replace the existing master geography data with revised Oracle-Licensed geography data?](#)

## How do I import Non-Oracle Licensed geography data?

You can use Import Management to create Geography data. It's recommended to use import management if you're importing Non-Oracle Licensed geography data or while loading your own geography from other vendors. You can also add alternate name or code to existing geographies with import. For more information see [Can you provide an example of importing geography data?](#).

To import Geography data, 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	<p>The record type code that represents the intent of the import data. The values are:</p> <ul style="list-style-type: none"> <li>0 - indicates the geography that already exists in the base table.</li> <li>1 - indicates the intent to create a new geography.</li> <li>2 - indicates the intent to add an alternate identifying name or code to an existing geography.</li> </ul>	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.
- You can't add alternate names or alternate code of country via import. You can do so only via UI.
- 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 Fusion 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](#)
- [How do I import data?](#)
- [Can you provide an example of importing geography data?](#)

## Can you provide an 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 Fusion Service in a source CSV file. A sample input CSV file for country as US is shown in this table.

RecordTypeCode	PrimaryGeography	CountryCode	LevelNumber	SourceId	ParentSourceId	LanguageCode
0	United States	US	1	1	<blank>	US

RecordTypeCode	PrimaryGeography	CountryCode	LevelNumber	Sourceld	ParentSourceld	LanguageCode
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:** Keep a note of the following:

- The hierarchy is modeled in the CSV file using the `Sourceld` and `ParentSourceld`. The `ParentSourceld` 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 `Sourceld` and `ParentSourceld` columns match the values for the original record respectively.
  - You can't update geographies via import.
  - You can't add alternate names or alternate code of country via import. You can do so only via UI.
  - 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. (CSV) file to create them together and import using import manager. Alternatively, you can add `PrimaryGeographyCodeType` and `PrimaryGeographyCode` from the UI after the import is complete.
- You must create source file (CSV) file with the attributes and import using import manager 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: <ul style="list-style-type: none"> <li>• 0 - indicates the geography that already exists in the base table.</li> <li>• 1 - indicates the intent to create a new geography.</li> <li>• 2 - indicates the intent to add an alternate identifying name or code to an existing geography.</li> </ul>
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.
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.
Sourceld	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.

Attribute Name	Value	Description
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

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*

- [How do I manage geography validation?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Overview of Geographies, Geographic Entities, and Locations](#)
- [How do I 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 Fusion 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

CountryCode	LevelNumber	GeographyType
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, District, City, and Postal Code. For Mexico,

Attribute Name	Value	Description
		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](#)
- [Import Your Territory Geographies Data](#)
- [Example of Importing Territory Geography Data](#)

# 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.

## 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](http://elocation.oracle.com/maps_oracle_dot_com_main.html)), which is a Geocoding service provided by Oracle.



**Note:** Geocoding for Hong Kong isn't supported.

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](#)
- [Populate Location Latitude and Longitude Information](#)

## 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

Field	Value
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  <b>Note:</b> 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.

## FAQs for GBG | Loqate Support

### Nokia Geography Reference Data

Oracle Applications Cloud provides third-party Nokia master geography data for import. The following table lists the countries for which the Nokia master geography data is available for import.

Country Name	Country Code
Andorra	AD
Argentina	AR
Austria	AT
Belgium	BE
Brazil	BR
Bulgaria	BG
Canada	CA
Cayman Island	KY

Country Name	Country Code
Chile	CL
Croatia	HR
Czech Republic	CZ
Denmark	DK
Dominican Republic	DO
Estonia	EE
Finland	FI
France	FR
Germany	DE
Greece	GR
Guadeloupe	GP
Hungary	HU
Iceland	IS
India	IN
Indonesia	ID
Ireland	IE
Isle of Man	IM
Israel	IL
Italy	IT
Jamaica	JM
Latvia	LV

Country Name	Country Code
Liechtenstein	LI
Lithuania	LT
Luxembourg	LU
Malaysia	MY
Malta	MT
Martinique	MQ
Mexico	MX
Netherlands	NL
New Zealand	NZ
Norway	NO
Peru	PE
Poland	PL
Portugal	PT
Puerto Rico	PR
Reunion Island	RE
Romania	RO
Russian Federation (Russia)	RU
San Marino	SM
Singapore	SG
Slovakia	SK
Slovenia	SI

Country Name	Country Code
South Africa	ZA
Spain	ES
Swaziland	SZ
Sweden	SE
Switzerland	CH
Taiwan	TW
Turkey	TR
United Arab Emirates	AE
United Kingdom	GB
United States	US
Uruguay	UY
Holy See (Vatican City State)	VA

## How many countries does Loqate support? How do I get support for any additional country?

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](#).

### Related Topics

- [How to submit an enhancement request on 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 frequent are updates to Oracle licensed geography reference data available?

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

## How is geography data updated? Are updates available for all countries at the same time?

When you import the geography data for a country 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 the steps in the [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#) topic.

### *Related Topics*

- [How do I replace the existing master geography data with revised Oracle-Licensed geography data?](#)

## 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 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:

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.

## How do I add a geography to the geography hierarchy?

You can add a new geography to the geography hierarchy. The new geography can be added under any level of the hierarchy for an existing geography type in the country geography structure.

For example, we can add a new postal code 94065 under United State, California, San Mateo, Redwood City.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.

4. Click **Hierarchy Defined** for United States.

**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.

5. Search using State as the Geography Type and CA as the Code.
6. Drill down to San Mateo and select Redwood City.
7. Click **Actions > Create**.
8. Type 94065 for Name in the **Primary Name and Alternative Names** section.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## Edit a Specific Geography in the Geography Hierarchy

You can edit the following details of a geography hierarchy using the Manage Geography Hierarchy page:

- geography's date range
- primary and alternate names
- primary and alternate codes
- creating geographies within the hierarchy such as adding a postal code for a city.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.
4. Click **Hierarchy Defined** for United States.

**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.

5. Search using State as the Geography Type and CA as the Code.
6. Select CA and click **Actions > Edit**.
7. (Optional) Select the row that you want to specify as the primary name under the **Primary and Alternative Names** section and click **Actions > Set Primary**.
8. (Optional) Select the row that you want to specify as the primary code under the **Primary and Alternative Codes** section and click **Actions > Set Primary**.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## Edit Alternative Names and Codes for an Existing Country

You can add or edit alternative names and codes for an existing geography in the geography hierarchy.

For example, you can add a FIPS code of 06 for the state of California.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.
4. Click **Hierarchy Defined** for United States.

**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.

5. Search using State as the Geography Type and CA as the Code.
6. Select CA and click **Actions > Edit**.
7. In the **Primary and Alternative Codes** section, click **Actions > Add**.
8. Type 06 under **Code** and select FIPS code as the **Code Type**.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## 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.

Navigate 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 scheduled process 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 scheduled process 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.

## 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. The existing master geography hierarchy can be from Loqate or non-Loqate geography data providers. 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 grayed out in the import list.

**Note:** If the hierarchy is defined, delete the geography hierarchy data first and then the geography structure.



# 7 Legal Jurisdictions and Authorities

## 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 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 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 Cloud 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 of Legal Jurisdiction and Authorities](#)
- [How do I 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 insurance 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](#)
- [Plan Legal Reporting Units](#)
- [Model Legal Entities](#)
- [How do I update existing setup data?](#)



# 8 Legal Entities

## 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 Cloud 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 Cloud 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 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 Cloud 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 Cloud 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 Procurement, Oracle Fusion Cloud Project Management, and Oracle Fusion Cloud Supply Chain and Manufacturing 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 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

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 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 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 Intercompany features 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 and Manufacturing 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 Legal Entity Configurator. You must enter legal employers on worker assignments in Oracle Fusion Cloud 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.



# 9 Legal Reporting Units

## Plan Legal Reporting Units

Each of your legal entities has at least one legal reporting unit. Some legal reporting units can also be referred to as establishments. You can define either domestic or foreign establishments.

Define legal reporting units by physical location, such as sales offices. For example, set up legal reporting units to represent your company and its offices for tax reporting.

### Planning Legal Reporting Units

Plan and define your legal reporting units at both the local and national levels if you operate within the administrative boundaries of a jurisdiction that's more granular than country. For example, your legal entity establishes operations in a country that requires reporting of employment and sales taxes locally as well as nationally. Therefore, you need more than one legally registered location to meet this legal entity's reporting requirements in each area. Additionally, legal entities in Europe operate across national boundaries, and require you to set up legal reporting units for the purposes of local registration in each country. There can be multiple registrations associated with a legal reporting unit. However, only one identifying registration can be defined by the legal authority used for the legal entity or legal reporting unit and associated with the legal reporting unit.



# 10 Chart of Accounts Structures and Structure Instances

## Chart of Accounts

The chart of accounts is the underlying structure for organizing financial information and reporting.

An entity records transactions with a set of codes representing balances by type, expenses by function, and other divisional or organizational codes that are important to its business.

A well-designed chart of accounts provides the following benefits:

- Effectively manages an organization's financial business.
- Supports the audit and control of financial transactions.
- Provides flexibility for management reporting and analysis.
- Anticipates growth and maintenance needs as organizational changes occur.
- Facilitates an efficient data processing flow.
- Enables delegation of responsibility for cost control, profit attainment, and asset utilization.
- Measures performance against corporate objectives by your managers.

**CAUTION:** Once you begin using your chart of accounts, making changes to its fundamental attributes is neither recommended nor supported. This includes your chart of account segments, including the segment labels as well as other characteristics of those segments.

The chart of accounts facilitates aggregating data from different operations, from within an operation, and from different business flows, thus enabling the organization to report using consistent definitions to their stakeholders in compliance with legislative and corporate reporting standards and aiding in management decisions.

Best practices include starting the design from external and management reporting requirements and making decisions about data storage in the general ledger, including thick versus thin general ledger concepts.

## Thick Versus Thin General Ledger

Thick versus thin general ledger is standard terminology used to describe the amount of data populated and analysis performed in your general ledger. Thick and thin are the poles; most implementations are somewhere in between.

Here are some variations to consider:

- A general ledger used in conjunction with an enterprise profitability management product, which has data standardized from each operation, is a thin general ledger. Use this variation if your solution is project-based, and Oracle Fusion Project Management is implemented. More detailed reporting can be obtained from the Projects system. In the thin general ledger, business units, divisions, and individual departments aren't represented in the chart of accounts.
- A thick general ledger:

- Has segments representing all aspects.
- Captures every detail of your business.
- Runs frequent posting.
- Defines many values in each segment.

A thick general ledger is designed to serve as a repository of management data for a certain level of management. For example, a general ledger designed to provide management data to supervise operations, such as daily sales, without invoice details.

- A primary and secondary ledger, with one thick general ledger and the other a thin general ledger, provides dual representation to meet reporting requirements.

## Thin General Ledger

With a thin general ledger, you use the general ledger for internal control, statutory reporting, and tracking of asset ownership. You minimize the data stored in your general ledger. A thin general ledger has many of the following characteristics:

- Minimal chart of accounts
  - Short list of cost centers
  - Short list of natural accounts
    - Short list of cost accounts
    - Summary level asset and liability accounts
  - Low number of optional segments
- Infrequent posting schedule

A thin general ledger:

- Has natural accounts at a statutory reporting level, for example, payroll expense, rent, property taxes, and utilities.
- Has cost centers at the functional expense level, such as Research and Development or Selling, General, and Administrative, rather than at department or analytic levels.
- Omits business unit, division, and product detail.

One example of an industry that frequently uses a thin general ledger is retail. In a retail organization, the general ledger tracks overall sales numbers by region. A retail point of sales product tracks sales and inventory by store, product, supplier, markup, and other retail sales measures.

## Thick General Ledger

With a thick general ledger, you use the general ledger as a detailed, analytic tool, performing analytic functions directly in the general ledger. Data is broken down by many reporting labels, and populated frequently from the subledgers.

You maximize the data stored in the general ledger. A thick general ledger has many of the following characteristics:

- Maximum use of the chart of accounts
  - Long list of natural accounts



- Long list of cost centers
  - Long list of costing accounts
  - Detailed asset and liability accounts
- Frequent posting schedule

A thick general ledger had details for cost of goods sold and inventory balances and track property plant and equipment at a granular level. Cost centers represent functional expenses, but also roll up to departmental or other expense analysis levels. Using product and location codes in optional segments can provide reporting by line of business. Posting daily, at the individual transaction level, can maximize the data stored in the general ledger.

One example of an industry that frequently uses a thick general ledger is electronic manufacturers. Detail on the revenue line is tagged by sales channel. Product is structured differently to provide detail on the cost of goods sold line, including your bill of materials costs. The general ledger is used to compare and contrast both revenue and cost of goods sold for margin analysis.

## Other Considerations

Consider implementing a thick ledger if there are business requirements to do any of the following:

- Track entered currency balances at the level of an operational dimension or segment of your chart of accounts, such as by department or cost center
- Generate financial allocations at the level of an operational dimension or segment
- Report using multiple layered and versions of hierarchies of the operational dimension or segment from your general ledger

Consider implementing a thin ledger in addition to a thick ledger, if there are additional requirements for:

- Minimal disclosure to the authorities in addition to the requirements previously listed. For example, in some European countries, fiscal authorities examine ledgers at the detailed account level.
- Fiscal only adjustments, allocations, and revaluations, which don't impact the thick general ledger.

The important consideration in determining if a thick ledger is the primary or secondary ledger is your reporting needs. Other considerations include how the values for an operational dimension or segment are derived and the amount of resources used in reconciling your different ledgers. If values for an operational dimension or segment are entered by the user, then a thick primary ledger is the better choice.

However, if values for the operational segment are automatically derived from attributes on transactions in your subledger accounting rules, then use a thick secondary ledger. This decision affects the amount of:

- Storage and maintenance needed for both the general ledger and subledger accounting entries
- System resources required to perform additional posting

- In summary, you have:
  - Minimum demand on storage, maintenance, and system resources with the use of a thin ledger
  - Greater demand on storage, maintenance, and system resources with the use of a thick ledger
  - Greatest demand on storage, maintenance and system resources with the use of both thick and thin ledgers

**Note:** Generally speaking, there is a trade-off between the volume of journals and balances created and maintained versus system resource demands. Actual performance depends on a wide range of factors including hardware and network considerations, transaction volume, and data retention policies.

## Summary

The factors you should consider in your decision to use a thick or thin general ledger for your organization, are your:

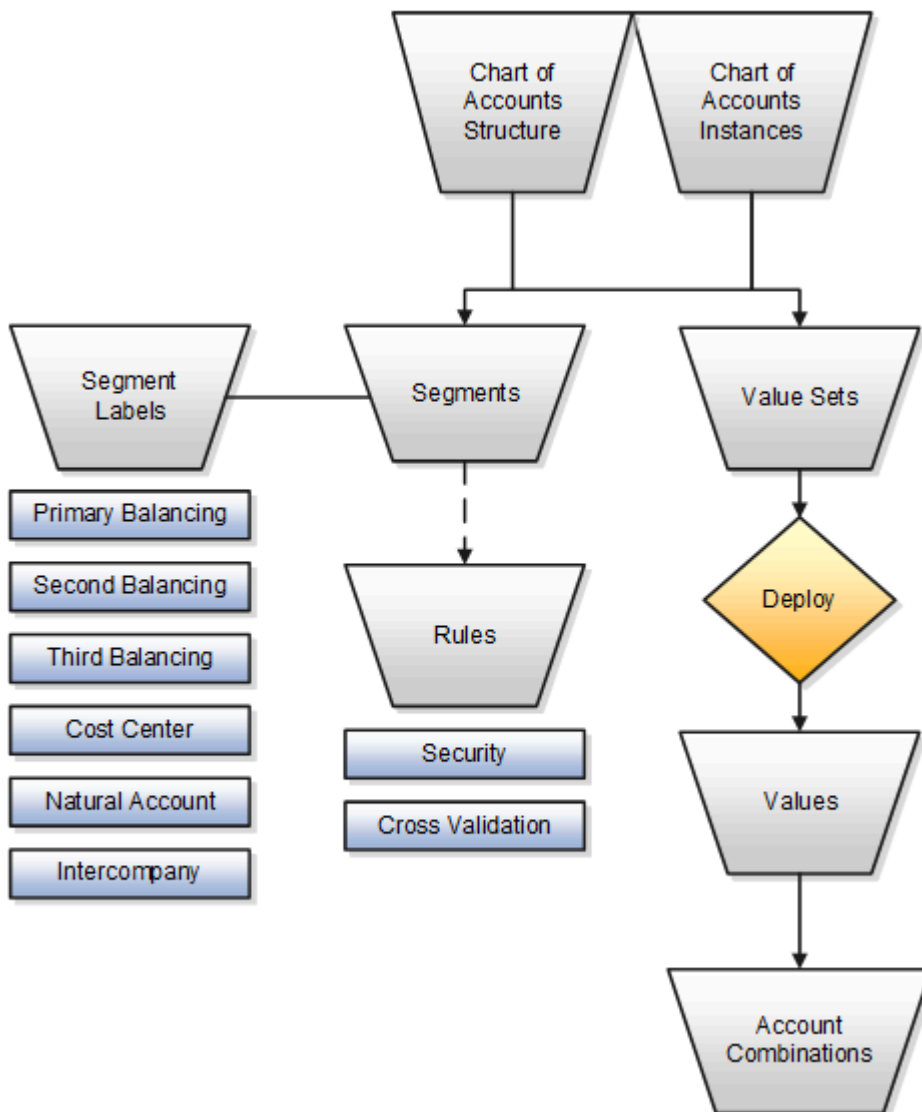
- Downstream EPM system and its capabilities
- Business intelligence system and its capabilities
- Subledger systems and their capabilities and characteristics, including heterogeneity
- General ledger reporting systems and their capabilities
- Maintenance required for the thick or thin distributions and record keeping
- Maintenance required to update value sets for the chart of accounts segments
- Preferences of the product that serves as a source of truth
- Level at which to report profitability including gross margin analysis
- Industry and business complexity

## Chart of Accounts Components

The important elements in a basic chart of accounts in Oracle Fusion Cloud Applications included a structure that defines the account values, segments and their labels, and rules (security and validation).

Account combinations link the values in the segments together and provide the accounting mechanism to capture financial transactions.

This figure illustrates the main components in the chart of account structure and the way they fit together. The chart of accounts consists of segments which have value sets attached to them to determine the values from each used in creating account combinations. Segments also have segment labels attached to them to point to the correct segment to use in general ledger processing, such as intercompany balancing or retained earning summarization. Segments are secured by security rules and accounts are secured by cross validation rules.



## Chart of Accounts

The chart of accounts defines the number and attributes of various segments, including:

- Order of segments
- Width of segments
- Prompts
- Segment labels, such as balancing, natural account, and cost center.

The chart of accounts further defines:

- Combination of value sets associated with each segment
- Type of segment
- Default values for the segments
- Additional conditions designating the source of the values using database tables

- Required and displayed properties for the segments

## Segments

A chart of accounts segment is a component of the account combination. Each segment has a value set attached to it to provide formatting and validation of the set of values used with that segment. The combination of segments creates the account combination used for recording and reporting financial transactions. Examples of segments that may be found in a chart of accounts are company, cost center, department, division, region, account, product, program, and location.

## Value Sets and Values

The value sets define the attributes and values associated with a segment of the chart of accounts. You can think of a value set as a container for your values. You can set up your flexfield so that it automatically validates the segment values that you enter against a table of valid values. If you enter an invalid segment value, a list of valid values appears automatically so that you can select a valid value. You can assign a single value set to more than one segment, and you can share value sets across different flexfields.

**CAUTION:** You must use Independent validation only for the Accounting Key Flexfield value sets. Other validations prevent you from using the full chart of accounts functionality, such as data security, reporting, and account hierarchy integration. Dependent values sets aren't supported.

## Segment Labels

Segment labels identify certain segments in your chart of accounts and assign special functionality to those segments. Segment labels were referred to as flexfield qualifiers in Oracle E-Business Suite. Here are the segment labels that are available to use with the chart of accounts.

- **Balancing:** Ensures that all journals balance for each balancing segment value or combination of multiple balancing segment values to use in trial balance reporting. The three balancing segment labels are: primary, second, and third balancing. The primary balancing segment label is required.
- **Cost Center:** Facilitates grouping of natural accounts by functional cost types, accommodating tracking of specific business expenses across natural accounts. As cost centers combine expenses and headcount data into costs, they're useful for detailed analysis and reporting. Cost centers are optional, but required if you're accounting for depreciation, additions, and other transactions in Oracle Assets, and for storing expense approval limits in Oracle Expenses. If you're implementing Oracle Fusion Cloud Procurement, you can use cost centers for business intelligence reporting and to route transactions for approval.
- **Natural Account:** Determines the account type (asset, liability, expense, revenue, or equity) and other information specific to the segment value. The natural account segment label is required.
- **Intercompany:** Optionally, assigns the segment to be used in intercompany balancing functionality.

**Note:** All segments have a segment qualifier that enables posting for each value. The predefined setting is Yes to post.

## Account Combinations

An account combination is a completed code of segment values that uniquely identifies an account in the chart of accounts, for example 01-2900-500-123, might represent InFusion America (company)-Monitor Sales (division)-Revenue (account)-Air Filters (product).

## Rules

The chart of accounts uses two different types of rules to control functionality.

- **Security rules:** Prohibit certain users from accessing specific segment values. For example, you can create a security rule that grants a user access only to his or her department.
- **Cross-validation rules:** Control the account combinations that can be created during data entry. For example, you may decide that sales cost centers 600 to 699 should enter amounts only to product sales accounts 4000 to 4999.

## Create Chart of Accounts, Ledger, Legal Entities, and Business Units in Spreadsheets

Represent your enterprise structures in your chart of accounts, ledger, legal entities, and business unit configuration to track and report on financial objectives and meet reporting requirements. These components provide the underlying structure for organizing financial information and reporting.

The chart of accounts within the ledger facilitates:

- Aggregating data from different operations, from within an operation, and from different business flows
- Consistent definitions to your stakeholders in compliance with legislative and corporate reporting standards and aids in management decisions

Rapid implementation is a way to configure a financial enterprise and financial reporting structures quickly using sheets in a workbook that upload lists of:

- Companies (legal entities)
- Ledgers by country
- Business units
- Chart of accounts and segment values
- Segment value hierarchies
- Financial sequences
- Required subledger accounts

Once the sheets have been uploaded, the application creates:

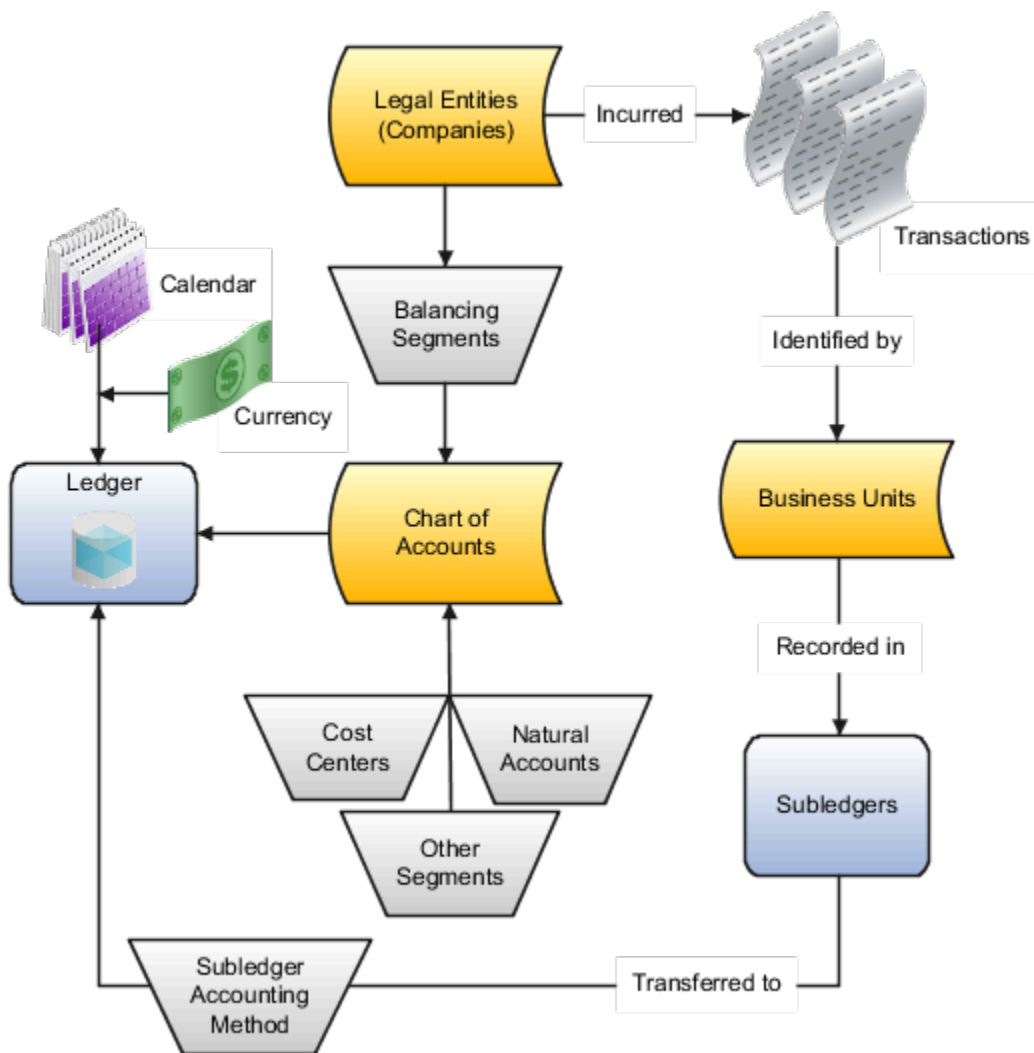
- Chart of accounts structure and instance
- Segment value hierarchies
- Key accounts such as retained earnings
- Required subledger accounts
- Accounting calendar
- Primary ledger for each country represented on the legal entities sheet
- Legal entities and their locations
- Business units
- Document and journal sequencing

- Set of Financial Reporting reports
- Three account groups

**CAUTION:** Once you begin using your chart of accounts, calendar, and ledger, making changes to their fundamental attributes is neither recommended nor supported. This includes your chart of account segments, including the segment labels as well as other characteristics of those segments, and your calendar structure or pattern.

The following figure illustrates the flow of the enterprise structure setup.

Legal entities (companies) incur transactions that are identified by business units with business functions. Transactions that are recorded in subledgers are transferred to the ledger. A ledger is characterized by a calendar, a currency, and a chart of accounts. A chart of accounts consists of segments, some of which are assigned segment labels, such as cost center, natural account, and primary balancing segment. Legal entities can be assigned primary balancing segment values.



Additional information for some of the common setup objects depicted in the figure follows:

- **Legal Entity:** Identifies a recognized party with rights and responsibilities given by legislation, which has the right to own property and the responsibility to account for itself.
- **Business Units:** 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. Usually a business unit has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. When created through the spreadsheet, all available business functions are automatically enabled for the business unit.
- **Ledger:** Maintains records and is a required component in your configuration. The rapid implementation process:
  - Creates primary ledgers by combining the chart of accounts, calendar, and currency as well as other required options defined in the rapid implementation workbook.
  - Assigns the standard accrual subledger accounting method to the primary ledger. The subledger accounting method is used to group subledger journal entry rule sets together to define a consistent accounting treatment.
  - Creates a General Ledger balances cube for each ledger with a unique chart of accounts and calendar combination. Each segment is created as a dimension in the balances cube along with the standard cube dimensions.
- **Subledger:** Captures detailed transactional information, such as supplier invoices, customer payments, and asset acquisitions. Uses subledger accounting to transfer transactional balances to the ledger where they're posted.
- **Chart of Accounts:** Configures accounts that consist of components called segments. Accounts are used to record balances and organize financial information and reporting.
- **Segment:** Identifies one of the components of a chart of accounts, which when combined with other segments, creates an account combination for recording transactions and journal entries. A segment is associated with a value set, which provides the set of values for that segment, along with the formatting and validation for those values.
- **Segment Label:** Identifies certain segments in a chart of accounts and assigns special functionality to those segments.
  - **Balancing Segment:** Ensures that all journals balance for each balancing segment value or combination of multiple balancing segment values for financial processes and reports. The three balancing segment labels are: Primary Balancing Segment, Second Balancing Segment, and Third Balancing Segment.
  - **Natural Account:** Determines the account type (asset, liability, expense, revenue, or equity) and specific categorization of the financial activity. Facilitates General Ledger processes, such as closing of the income statement accounts to retained earnings at the beginning of a new fiscal year.
  - **Cost Center:** Facilitates grouping of natural accounts by functional cost types, accommodating tracking of specific business expenses across natural accounts.

With the rapid implementation workbook you can also:

- Create more than one hierarchy for any of your chart of accounts segments during initial setup. You can also create additional hierarchies and hierarchy versions, as well as update existing hierarchy versions, after the initial setup is done by uploading the rapid implementation spreadsheet data.
- Create sequences for each legal entity or ledger based on the predefined country defaults. Document sequences are created for: Payables invoices, Payments, Receivables invoices, Receivables credit memos, Receivables adjustment activities. Reporting and accounting journal sequences are created for subledger journals and General Ledger journals.

### Related Topics

- [How Charts of Accounts, Ledgers, Legal Entities, and Business Units Are Created Using Spreadsheets](#)

## How Charts of Accounts, Ledgers, Legal Entities, and Business Units Are Created Using Spreadsheets

The rapid implementation process for setting up an enterprise structure includes several steps.

1. Downloading the Rapid Implementation for General Ledger workbook.
2. Entering data into the sheets.
3. Verifying the entered data and resolving any errors.
4. Uploading the chart of accounts file.
5. After successful upload of the chart of accounts file, uploading the general ledger, legal entity, and business unit file with the rest of the configuration.

The rapid implementation enterprise structure configuration is meant to be used as a one-time initialization. To the extent that you want to make certain allowed modifications to the configuration, you generally have to make those changes directly in the applications. After initial upload of the ledger, legal entity, and business unit file, the fundamental accounting configuration framework is only created once and is permanently set. This framework includes the ledger and its assigned chart of accounts, calendar and currency assignment, and the associated definitions of those components.

### Workbook Overview

You can download the workbook in one of two ways:

1. In the Setup and Maintenance work area, go to the **Manage Chart of Accounts Configurations** task in the Financial Reporting Structures functional area and click the **Download Setup Template** button.
2. In the Setup and Maintenance work area, create an implementation project that includes the **Define Financials Configuration for Rapid Implementation** task list. Download the workbook using the Create Chart of Accounts, Ledger, Legal Entities, and Business Units in Spreadsheet task.

The workbook includes the following sheets:

- Instructions
- Chart of Accounts, Calendar, and Ledger
- Business Units
- Companies and Legal Entities
- Natural Accounts
- Financial Sequences

New sheets for entering segment values and hierarchies for additional segments of your chart of accounts can be created automatically. After you enter the segments on the Chart of Accounts, Calendar, and Ledger sheet, click **Add Segment Sheets** or **Generate Additional Hierarchy**.



**Note:** The rapid implementation process creates a standard ledger. You can convert a standard ledger to an average daily balance ledger before the first period is opened by selecting the **Enable average balances** check box on the Specify Ledger Options page.

## Instructions

Review the Instructions sheet for important information about how to use the workbook and submit the accounting configuration. The sheet includes:

- Data preparation requirements
- Setup object concepts
- Best practices and recommendations
- Instructions on how to create additional hierarchies or hierarchy versions
- A completed workbook with sample data, which you can use to familiarize yourself with how to enter data, preview the sample report, and generate required upload files

## Chart of Accounts, Calendar, and Ledger

Enter the data to create your chart of accounts, calendar, and ledger.

**CAUTION:** Once you begin using your chart of accounts, calendar, and ledger, making changes to their fundamental attributes is neither recommended nor supported. This includes your chart of account segments, including the segment labels as well as other characteristics of those segments, and your calendar structure or pattern.

The following figure shows an example of the Chart of Accounts, Calendar and Ledger sheet with sample values.

*Segment	Segment Label	*Short Prompt	*Display Width
Company	Primary Balancing Segment	Co	4
LoB	Second Balancing Segment	LoB	2
Account	Natural Account Segment	Acct	5
CostCenter	Cost Center Segment	CC	3
Product		Prod	4
Intercompany	Intercompany Segment	IC	4

An explanation of each field on the sheet follows.

- **Name:** Enter the name of your primary ledger.  
A primary ledger is created for each unique country that's entered in the Companies and Legal Entities sheet. A country code is appended to the name that you specify. For example, one legal entity is based in the United

States and another in Canada. If you enter the ledger name of InFusion Ledger, two primary ledgers are automatically created, InFusion Ledger US and InFusion Ledger CA.

All of the primary ledgers that are created use the same chart of accounts, account hierarchies, and accounting calendar. Legal entities and their primary balancing segment values are assigned to the primary ledger of their respective countries. If the addresses provided for the legal entities on the Companies and Legal Entities sheet are all in the same country, then only one primary ledger is created.

- **Currency:** If you're not entering legal entities and only a single ledger should be created by the rapid implementation configuration, enter the ledger currency in which you want to maintain accounting for in that ledger. If you're entering legal entities, leave this field blank. The currency is automatically supplied based on the country.
- **Period Frequency:** Select from among the list of available frequencies for the ledger calendar.

**CAUTION:** For the accounting calendar created using the Rapid Implementation Enterprise Structure solution, the choices of patterns are limited to the period frequency and adjusting period options that are available for selection in the spreadsheet. It isn't possible to make alterations to the pattern or specified fiscal year start date once the calendar has already been created. The accounting periods of the calendar are automatically named using a preset format. If you want to change these period names, you have a limited window of time to make those changes. Use the Manage Accounting Calendars page in the application to make the changes before the accounting calendar is being used actively, such as when one of its accounting periods has been set to a status of Open.

- **Adjusting Periods:** Select the number of periods used to segregate closing, auditing, or other adjustments in General Ledger. The entries are tracked in the adjusting period and not in your monthly activity.
- **Fiscal Year Start Date:** Enter the start date of the accounting calendar. The date can't be changed after the submission of the configuration.

**CAUTION:** If you plan to run translations, enter a fiscal year start date for the entire accounting year that's before the first period for which you intend to run translations. You can't run translation in the first defined period of an accounting calendar. For example, if your fiscal year starts on January 1, and you want to start translations for the period of Mar-17, then you should select a fiscal year start date of January 1, 2016. Also when determining the fiscal year start date, you might want to consider whether you plan to load history.

- **Segment:** Enter the names for your segments. The value sets are created from the segments.
- **Segment Label:** Select segment labels to assign special functionality to segments.

Segment labels specifying the segment's purpose, such as balancing, cost center and natural account, can only be assigned once to a chart of accounts segment. The **Primary Balancing Segment** and **Natural Account Segment** labels must be assigned, while the other segment labels are optional. Segments that are assigned these two particular labels cannot be assigned any other label. However, segments that are assigned the other remaining labels can also be assigned additional labels, provided they're not **Primary Balancing Segment** or **Natural Account Segment**.

The **Intercompany Segment** label assignment is optional. If assigned, an Intercompany sheet is automatically added to the workbook when you select the **Add Segment Sheets** button. Use the sheet to enter your intercompany values and hierarchies. When you upload the chart of accounts file, the application creates a new value set for the Intercompany segment with the values that you entered. If you want to assign the Intercompany segment the same values as the Primary Balancing segment, copy all the parent and child values from the Companies and Legal Entities sheet to the Intercompany sheet.

If you enable segment value security on the primary balancing value set, the security enforcement won't conflict with the Intercompany segment because the value sets for the two segments will be different. The same

holds true if you enable segment value security on the intercompany value set. Security enforcement won't conflict with the Primary Balancing segment.

If you plan to use related value sets and create a relationship between the segments that involves your primary balancing segment or intercompany segments, there won't be a conflict of values because the value sets are different.

**Note:** If you want to assign the Intercompany segment the same value set as the Primary Balancing segment, you can change the value set assignment from the Manage Chart of Accounts Configurations page after you upload the chart of accounts configuration and before you upload the financial structures for the chart of accounts. If you decide to go with the same value set for both segments, you won't be able to change the value set association later on, once the ledger is assigned to the chart of accounts.

**Note:** For the posting process to apply intercompany balancing, you must select the **Enable intercompany accounting** option on the Specify Ledger Options page.

- **Short Prompt:** Enter a short name for the segment, which is used on applications pages.
- **Display Width:** Enter the segment size. Select the size carefully and leave room for growth. For example, if you have 89 cost centers, enter 3 for the display length to allow for more than 100 cost centers in the future.
- **Add Segment Sheets:** Select this button to create sheets for additional segments. Sheets are provided only for the Company and Natural Accounts segments.

From the new segment sheet, you can click the **Generate Additional Hierarchy** button to create more than one hierarchy for any chart of account segment. A worksheet is then automatically created and populated with the data already entered for that segment. Change this data as required for the new hierarchy. You can create additional hierarchies during initial setup, or after the initial setup is done.

**CAUTION:** You can't change the chart of accounts, accounting calendar, or currency for your ledgers after the setup is created.

## Business Units

Enter the name of your business units and related default legal entities.

The following figure shows an example of the Business Units sheet with sample values for the Name and Default Legal Entity Name fields.

Business Units	
Name	Default Legal Entity Name
USA Business Unit1	VCC InFusion Cupertino Cherries
USA Business Unit2	VSCC InFusion San Carlos Chocolates
Canada Business Unit1	Infusion Core Canada Ltd.

Business units are created with the names that you enter. You can enter more than one business unit per ledger. Based on the default legal entity specified for the business unit in the Business Units sheet, the business unit is assigned the primary ledger to which its default legal entity is assigned.

## Companies and Legal Entities

Enter parent and child values for your Company segment, which is the segment that's assigned the Primary Balancing Segment label on the Chart of Accounts, Calendar, and Ledger sheet. You can create up to nine levels of parent values to roll up your companies to meet corporate and local reporting requirements.

Enter your legal entities for the child values with the address, registration number, and reporting unit registration number. The registration number identifies legal entities registered for your company and recognized by law for which you want to record and perform transactions. The reporting unit registration number identifies the lowest level component of a legal structure that requires registrations.

The following figure shows part of the Companies and Legal Entities sheet with sample values. The sheet includes columns for different levels of parent values, the child value, and company description. The Legal Entity columns include name, identifier, country, address information, and registration numbers.

Companies and Legal Entities						
* Required						
Generate Additional Hierarchy						
Parent2	Parent1	Child	*Company Description	Name	*Identifier	*Country
			Total InFusion Companies			
			InFusion USA			
3800			InFusion USA Corporate Office			
		3686	InFusion USA Corporation	IFU InFusion USA Ltd.	US103111	United States
		3999	InFusion USA HQ	IFU InFusion USA Ltd.		
3100			InFusion Napa			
		3111	InFusion Marketing - US Napa	IFU InFusion USA Ltd.		
		3121	InFusion Sales -US Napa	IFU InFusion USA Ltd.		
	3200		InFusion Farms			
		3211	InFusion Growing -US	IFF InFusion Farms Ltd.	US104111	United States
		3221	InFusion Harvesting -US	IFF InFusion Farms Ltd.		

Legal Entity							
Address							
*Address Line	City	State	County	Province	Postal Code	*Registration Number	*Reporting Unit Registration Number
14800 Main	St. Helena	CA	Napa			IFS021	IFUS31
12320 Washington	Calistoga	CA	Napa			IFS031	IFUS41

To create additional hierarchies for the company segment for reporting or other purposes, click the **Generate Additional Hierarchy** button. A worksheet is automatically created and populated with the data already entered for that segment. Change this data as required for the new hierarchy. You can create additional hierarchies during initial setup, or after the initial setup is done.

When a new hierarchy sheet is created, the name for that sheet is derived by adding a counter to the sheet name. For example, when you click **Generate Additional Hierarchy** on the Companies and Legal Entities sheet, the new sheet is named Companies and Legal Entities 1. When you click **Generate Additional Hierarchy** again, another sheet is generated with the name Companies and Legal Entities 2.

**Note:** Adding legal entity information isn't supported on a new hierarchy sheet for the Company segment.

## Natural Accounts

Enter account hierarchies, account values, and specify account types.

The following figure shows part of the Natural Accounts sheet with sample parent and child values, descriptions, and account type.

Generate Additional Hierarchy					Note		
Parent4	Parent3	Parent2	Parent1	Child	*Description	*Account Type	Financial Category
				00000	Net Assets	Asset	
19999					Default	Asset	
	10000				Total Assets	Asset	
		11000			Total Cash	Asset	
			11010		Total Cash- Checking	Asset	
					Cash Checking - Others	Asset	
	13999				Total Receivables	Asset	
		13000			Total Current Receivables	Asset	
				13005	Accounts Receivable	Asset - Accounts Receivable	Accounts receivable

- **Parent:** Enter parent account values to define hierarchies. Hierarchies are used for chart of accounts mappings, revaluations, data access sets, cross-validation rules, and segment value security rules. The balances cube and account hierarchies are also used for financial reporting, Smart View queries, and allocations.
- **Child:** Enter child account values to define the postable accounts.
- **Description:** Enter descriptions for the segment values.
- **Account Type:** You must assign an account type to each account value. Account types are used in year-end close processes and to correctly categorize account balances for reporting. Select from among general account types and expanded account types. The general account types are: **Asset**, **Liability**, **Owner's Equity**, **Revenue**, **Expense**. Expanded account types provide specialized functionality and are used to:
  - Identify the intended usage of your natural account values to facilitate automation and enable completion of other required setup objects. For example, assign the **Asset - Intercompany Receivable** and **Liability - Intercompany Payable** expanded account types. The Rapid Implementation process then automatically creates a chart of accounts level intercompany balancing rule, which is a required setup for the application to perform intercompany balancing.
  - Automatically generate fully defined initial Financial Reporting reports and Account Groups based on your enterprise structure.

Examples of expanded account types include:

- **Asset - Accounts Receivable:** For Receivables receipt methods
- **Liability - Accounts Payable:** For Payables common options
- **Owner's Equity - Retained Earnings:** For General Ledger ledger options
- **Revenue - Top Revenues Parent Account:** For sample reports and account groups
- **Expense - Top Operating Expenses Parent Account:** For sample reports and account groups

You must assign the **Revenue - Top Revenues Parent Account** and **Expense - Top Operating Expenses Account** account types to the parent accounts that are your highest level and comprehensive revenue and operating expenses accounts. You can optionally assign the account type of **Expense - Top Cost of Sales Parent Account**, if it's applicable for your scenario.

The **Generate Financial Reports and Account Groups** process, which is automatically submitted when the accounting configuration is created in the application, generates a set of Financial Reporting reports and

account groups according to the accounting configuration defined in the workbook. The top parent accounts are used as the basis for deriving the accounts referenced in the reports and in the Account Groups.

The immediate descendants of the top parent accounts are used to define the rows on the reports. Depending on whether both the top operating expense and top cost of sales accounts are tagged, different variations of the income statements are generated. If the optional top cost of sales account is provided, the Financial Reporting reports that are income statements also include a gross margin section.

**CAUTION:** Assign account types carefully. If you assign an incorrect account type to a natural account segment value, accounting entries are recorded incorrectly and financial statements are inaccurate. Misclassified accounts are also potentially handled incorrectly at year end, with actual balances either getting zeroed out to retained earnings, or accumulating into the next year.

- **Financial Category:** Select a value to identify groups of accounts for reporting with Oracle Transactional Business Intelligence. You can add financial categories to parent values. Accounts that are tagged with expanded account types are automatically assigned a financial category. You can override the default category or leave it out.

**Note:** The list of accepted values is defined in the FINANCIAL\_CATEGORY lookup\_type.

- **Generate Additional Hierarchy:** To create additional hierarchies for the natural account segment for reporting or for other purposes, click the **Generate Additional Hierarchy** button. A worksheet is automatically created and populated with the data already entered for that segment. Change this data as required for the new hierarchy. You can create additional hierarchies during initial setup or after the initial setup is done.

## Financial Sequences

Enable document or journal sequences to assign unique numbers to transactions to meet legal requirements.

The following figure shows the Financial Sequences sheet with sample values for the Restart and Initial Value columns.

Sequences		
Transactions	*Restart	*Initial Value
Payables Invoices	Annually	1
Payments	Annually	1
Receivables Invoices	Annually	1
Receivables Credit Memos	Annually	1
Receivables Adjustment Activities	Monthly	1
Subledger Journals	Never	100
General Ledger Journals	Never	100

Document sequences are created for these transactions: Payables invoices, Payments, Receivables invoices, Receivables credit memos, Receivables adjustment activities. Reporting and accounting journal sequences are created for Subledger journals and General Ledger journals.

For each transaction, you can provide values for the following fields:

- **Restart:** Set when to restart the numbering: Annually, Monthly, Never.
- **Initial Value:** Specify the beginning number in the sequence.

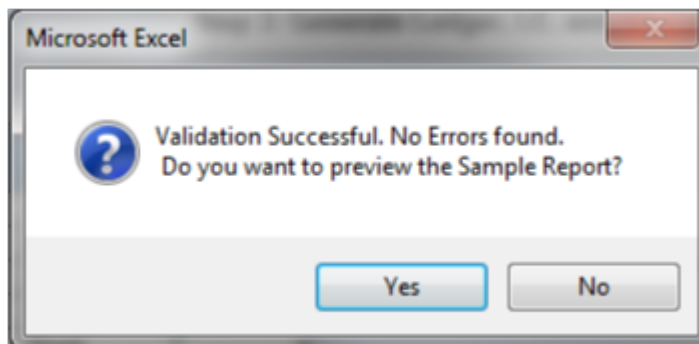
## How Worksheets Are Processed

After you complete the worksheets, proceed with validation, sample report preview, and file upload.

1. On the Chart of Accounts, Calendar, and Ledger sheet, click the **Step 1: Validate** button.

The validation checks the worksheets for missing or inappropriate setups. Errors are marked as actionable items in a validation report sheet that's dynamically generated. You can review the anomalies and make the corrections as indicated. The **Field** column on the validation report notes the issue. Click the text link to navigate to the appropriate field in the sheet that must be updated. When the validation is successful, a message appears with the option of previewing a sample of the reports that are automatically generated as part of the enterprise configuration.

The following figure shows the message that appears after a successful validation.

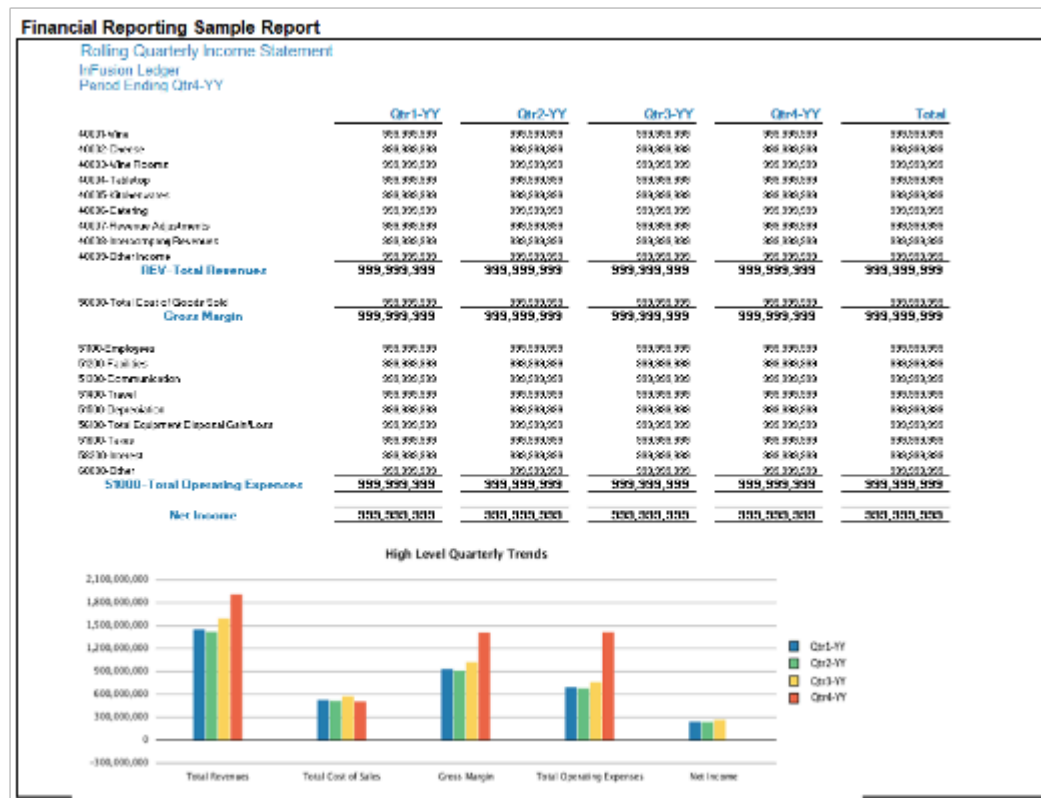


If you select to preview the sample report, a new sheet is automatically created called Preview Report. The preview incorporates elements of the setup that you provided. The rows on the report are derived based on the



top parent revenue and expense account values that you tagged on the Natural Accounts sheet. The preview also reflects the reporting hierarchy for your natural accounts.

The following figure shows an example of the sample Financial Reporting report.



You can use the preview to validate whether the hierarchy setup aligns to your reporting needs. If the natural account hierarchy requires adjustments, this is your chance to make those corrections before actually creating the account hierarchies in the application. You can modify your enterprise structure setup, validate the spreadsheet, and preview the revised sample reports for as many times as you need. The account hierarchies are created when you finally submit the accounting configuration in the rapid implementation spreadsheet.

2. Click **Step 2: Generate Chart of Accounts File**. The process generates a data file called **ChartOfAccounts.xml** with the entered chart of accounts and hierarchies setup data. Save the file to a network or local drive.
3. Click **Step 3: Generate Ledger, LE, and BU File**. The process generates a data file called **FinancialsCommonEntities.xml** with the entered ledger, legal entities, and business unit setup data. Save the file to a network or local drive.
4. From your implementation project, go to the **Upload Chart of Accounts** task. The Upload Enterprise Structures and Hierarchies process is launched.
5. Accept the default selection of the **Upload Enterprise Structure** option.
6. Click **Browse** and select the first file that you saved called **ChartOfAccounts.xml**.
7. Click **Submit**.
8. Verify that the process completed without errors or warnings.
9. From your implementation project, go to the **Upload Ledger, Legal Entities, and Business Units** task. The **Upload Enterprise Structures and Hierarchies** process is launched.
10. Accept the default selection of the **Upload Enterprise Structure** option.



11. Click **Browse** and select the second file that you saved called **FinancialsCommonEntities.xml**.
12. Click **Submit**.
13. Verify that the process completed without errors or warnings.

An individual set of the following Financial Reporting reports is generated for each ledger that's defined within the rapid implementation accounting configuration. If multiple primary ledgers are created as part of your configuration, a set of Financial Reporting reports is generated for each ledger.

- Income Statement
- Consolidated Income Statement
- Rolling Quarterly Income Statement
- Rolling Monthly Income Statement
- Trial Balances by Ledger Currency
- Trial Balances by Entered Currency

The process also generates three account groups. These include two for the infolets, Revenues and Expenses, and one for the Close Monitor called Close Monitor Summary Income Statement. A set of these three account groups is generated for the balances cube, to be shared among all the ledgers that are part of that balances cube.

## Additional Hierarchies After Initial Setup

To create additional hierarchies and hierarchy versions, or to update existing hierarchy versions after the initial setup:

1. Click the **Generate Additional Hierarchy** button on the applicable segment sheet. A new worksheet is automatically created and populated with the data already entered for that segment. Change the data as required.
2. Click the **Generate File for This Hierarchy Only** button. This generates a .zip file for the particular hierarchy.
3. From your implementation project, go to the **Upload Chart of Accounts** task. The **Upload Enterprise Structures and Hierarchies** process is launched.
4. Select the **Upload Hierarchy** option.
5. Select from among the following options and provide values for the required parameters:
  - a. Create hierarchy: Select to create another account hierarchy. Specify the value set, tree code, and start date.
  - b. Create version: Select to render a new version of an existing account hierarchy. Specify a value set, tree code, tree version, and start date.
  - c. Update existing version: Select to edit an existing version of an account hierarchy. Specify a value set, tree code, and tree version.
6. Click **Choose File** and select the .zip file that you saved earlier.
7. Click **Submit**.

### Related Topics

- [Overview of Trees](#)
- [How Financial Reporting Reports and Account Groups Are Generated](#)
- [Manage Setup Using Implementation Projects](#)

# Example of One Chart of Accounts Structure with Many Instances

In Oracle General Ledger, the chart of accounts model is framed around the concept of a chart of accounts structure, for which one or more chart of accounts structure instances can be created.

## 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 Cloud ERP solution including General Ledger and all of the Oracle Fusion Cloud subledgers. You are chairing a committee to discuss creation of a model for your global financial reporting structure including your charts of accounts for 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 systems for homes and businesses.

## Chart of Accounts Model

The chart of accounts structure provides the general outline of the chart of accounts and determines the number of segments, the type, the length, and the label (qualifier) of each segment. This forms the foundation of the chart of accounts definition object.

For each chart of accounts structure, it is possible to associate one or more chart of accounts structure instances. Chart of accounts structure instances for the same structure share a common configuration with the same segments, in the same order, and the same characteristics. Using one chart of accounts structure with multiple instances simplifies your accounting and reporting.

At the chart of accounts structure instance level, each segment is associated with a value set that conforms to the characteristic of that segment. For example, you assign a value set with the same segment type and length to each segment. You are using hierarchies with your chart of accounts segments. Each structure instance segment is assigned a tree code to indicate the source of the hierarchy information for the associated value set. The same value set can be used multiple times within the same or across different chart of accounts instances within the same structure or in different structures. This functionality reduces your segment value creation and maintenance across your charts of accounts.

The collective assignment of value sets to each of the segments forms one chart of accounts instance. At the chart of accounts structure instance level, you can select to enable dynamic insertion. Dynamic insertion allows the creation of account combinations automatically the first time your users enter that new account combination. The alternative is to create them manually. By deciding to enable dynamic insertion, you save data entry time and prevent delays caused by the manual creation of new account combinations. Well-defined cross-validation rules help prevent the creation of inappropriate account combinations.

Perform deployment after a new chart of accounts structure and structure instances are defined or any of their modifiable attributes are updated. Deployment validates and regenerates the necessary objects to enable your charts of accounts and chart of accounts structure instances. By unifying and standardizing your organization's chart of accounts, you are positioned to take full advantage of future functionality in General Ledger.

In summary, you are recommending to your company to unify the organization's chart of accounts in a single chart of accounts structure based on chart of accounts commonalities across ledgers. You have also decided to use the chart of accounts structure instance construct to serve different accounting and reporting requirements by using value sets specific to each of your entities.

## Create a Chart of Accounts Structure and Instance

In Oracle General Ledger, the chart of accounts model is framed around the concept of a chart of accounts structure, for which one or more chart of accounts structure instances can be created.

A chart of accounts structure defines the key attributes for your chart of accounts. These attributes include the number of segments, the segment sequences, the segment names, segment prompts, segment labels, for example natural account and primary balancing, and default value sets.

The chart of accounts instance is exposed in user interfaces and processes. By default, a chart of accounts instance inherits all of the attributes of the chart of accounts structure, meaning that all instances of the same structure share a common shape and have the same segments in the same order. However, at the chart of accounts instance level, you can override the default value set assignments for your segments and assign a unique account hierarchy that determines the parent and child relationships between the value set values. At the chart of accounts instance level, you can determine whether to generate new account combinations dynamically instead of creating them manually.

### Chart of Accounts Structure

You are creating a chart of accounts structure as you set up a chart of accounts for your enterprise, InFusion America, Inc. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Financials
  - Functional Area: Financial Reporting Structures
  - Task: Manage Chart of Accounts Structures
2. Select the **General Ledger** module and click **Search**.
3. Click **Manage Structures**.
4. On the Manage Key Flexfield Structures page, select the **General Ledger** row and click the **Create** icon.
5. On the Create Key Flexfield Structure page, enter the unique structure code **INFUSION\_AM\_COA\_STRUCTURE** and name **InFusion America COA Structure**. Provide an optional description of **InFusion America Inc. chart of accounts structure**.
6. Select a delimiter to visually separate the segment values.
7. Click **Save**.
8. To create a segment, click the **Create** icon to open the Create Key Flexfield Segment page.
  - a. Complete the fields, as shown in this table.

Field	Value
Segment Code	INFUSION_AM_CO
Name	InFusion America Company

Field	Value
Description	InFusion America Inc.
Sequence Number	1
Prompt	Company
Short Prompt	CO
Display Width	2
Column Name	Segment1
Default Value Set Code	INFUSION_AM_COMPANY

- b. Select a segment label, **Primary Balancing Segment**, to indicate its purpose within your chart of accounts.

**Note:** Two segment labels are required: primary balancing segment and natural account segment. These labels aren't used with each other or with other labels in a specific segment.

- c. Click **Save and Close**.
- d. Click **Done**.
- e. Define additional segments following the same steps.

## Chart of Account Instance

You are creating a chart of accounts instance as you set up your chart of accounts for your enterprise, InFusion America, Inc. Follow 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 Chart of Accounts Structure Instances
2. On the Manage Chart of Accounts Structure Instances page, select the **General Ledger** module and click **Search**.
3. Select the General Ledger row and click **Manage Structure Instances**.
4. On the Manage Key Flexfield Structure Instances page, click the **Create** icon.
5. On the Create Key Flexfield Structure Instance page, enter the unique structure instance code **INFUSION\_AM\_COA\_INSTANCE** and name **InFusion America COA Instance**. Provide an optional description, **InFusion America Inc. chart of accounts structure instance**.

6. Select the **Dynamic combination creation allowed** option to indicate that you want to dynamically generate account combinations.
7. Associate your instance with the structure InFusion America Structure.

**Note:** By default, an instance inherits the key attributes of the associated structure. Some attributes, such as the value set assigned to each the segment, can be modified.

8. Click **Save**.
9. To modify an instance segment, select the segment row and click **Edit**.
10. Select the **Required**, **Displayed**, and **BI enabled** options.

**Note:** Select the **Required** and **Displayed** options for all segments including those intended for future use. The recommended best practice is to define one segment for future use and set a default value. This ensures room for expansion in your chart of accounts and that the extra segment is populated in account combinations. Select the **BI enabled** option to use key flexfield segments in Oracle Fusion Transactional Business Intelligence. The business intelligence option is only valid when enabled on segments with segment labels. The second step is to populate the **BI Object Name** field for each of the segment labels on the Manage Segment Label page, which you open from the Manage Key Flexfields page.

11. Click **OK**.
12. Click **Save and Close**.
13. Define additional instances following the same process.

**Note:** Alternatively, proceed directly with creating your value set values by selecting the corresponding **Value Set Code** in the Segment Instances table.

14. Click **Done**.
15. Click **Deploy Flexfield**.
16. Click **OK**.

#### Related Topics

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [How do I update existing setup data?](#)

## Overview of Balancing Segments

Balancing segments ensure that all journals balance for each balancing segment value or combination of multiple balancing segment values. You can secure access to your primary balancing segment values only with data access sets.

The Oracle General Ledger application automatically calculates and creates balancing lines as required in journal entries.

The three balancing segment labels are:

- Primary
- Second
- Third

**Note:** The primary balancing segment label is required.

By enabling multiple balancing segments for your chart of accounts, you can produce financial statements for each unique combination of segment values across one, two, or three qualified balancing segments. This ability provides you greater insights into your operations as it affords you visibility along the critical fiscal dimensions you use to plan, monitor, and measure your financial performance.

The following explains processes that use balancing segments.

- Intercompany balancing: Adds lines to unbalanced journals using intercompany rules.
- Opening first period of the accounting year: Calculates retained earnings amounts at the level of granularity that totals revenue and expense account balances for multiple balancing segment value combinations. This applies to standard and average balances.
- Importing journals: Adds lines using the suspense account on unbalanced journals.
- Posting journals: Adds additional lines to unbalanced journals for the following enabled account types:
  - Suspense
  - Rounding
  - Net income
  - Retained earnings
  - Cumulative translation adjustments from replication of revaluation journals to reporting currencies and for multiple reporting currency account type specific conversion
- Posting prior period journals: Calculates any income statement impact and posts to the appropriate retained earnings account.
- Translating balances: Supports multiple balancing segments for the following accounts:
  - Retained earnings: Calculated translated retained earnings are post to the retained earnings accounts by balancing segment. Retained earnings accounts represent the summing of the translated revenue and expense accounts across multiple balancing segment values.
  - Cumulative translation adjustment: Amounts posted by balancing segment to these accounts represents currency fluctuation differences between ranges of accounts which use different rate types. For example, period end rates are used for asset and liability accounts and historical rates for equity accounts.
- Revaluing Balances: Supports multiple balancing segments when calculating gain or loss accounts.
- Creating Opening Balances: Initializes reporting currency balances by converting from the total primary currency. Any difference in the reporting currency amounts is offset by populating retained earnings accounts.
- Closing year end: Supports multiple balancing segments when calculating the income statement offset and closing account in the closing journals.

#### *Related Topics*

- [Considerations for Multiple Balancing Segments](#)

## Considerations for Multiple Balancing Segments

You can track financial results at a finer level of granularity than a single balancing segment.

In addition to the required primary balancing segment for the chart of accounts, which is typically associated with the company dimension of a business organization, two additional segments of the chart of accounts can be optionally qualified as the second and third balancing segments respectively. Possible chart of accounts segments that can be

tagged as these additional balancing segments include cost center or department, additional aspects of a business commonly used in measuring financial results.

Several points must be considered when using multiple balancing segments:

- Journal entry processing
- Implementation timing
- Change options
- Migration adjustments

## Journal Entry Processing

Multiple balancing segments ensure that account balances come from journal entries where the debits equal the credits. The financial reports are properly generated for each unique instance of account value combinations across the balancing segments. Consider this option carefully as it provides more granular reporting but requires more processing resources.

## Implementation Timing

When using optional second and third balancing segments, remember that these chart of accounts segment labels are set from the beginning of time. Ensure that balances are immediately maintained in accordance with the necessary balancing actions to produce consistent financial reporting for the wanted business dimensions. Multiple balancing segment ledgers that aren't maintained from the beginning of time, require extensive manual balance adjustments to catch up and realign the balances.

**Note:** Don't set a segment already qualified as a natural account or intercompany segment as any of the three balancing segments. Validations aren't performed when segment labels are assigned, so verify that all are assigned correctly before using your chart of accounts.

## Change Options

Once a segment has been enabled and designated as a balancing segment, you must not change the segment. Don't disable the segment or remove the segment labels. These settings must be consistently maintained throughout the life of the chart of accounts to control the accuracy and integrity of the financial data.

## Migration Adjustments

For charts of accounts migrated from Oracle E-Business Suite to Oracle General Ledger that uses a second and third balance segments, steps must be taken to ensure the proper transition. The required adjustments are extensive.

For ledgers associated with a migrated chart of accounts, the balances must be adjusted manually. The manual adjustment is to ensure that the second and third balancing segments are consistent as though these segment labels have been in place since the beginning of entries for these ledgers. Recomputing and updating of the following processes is required to reflect the correct balancing for each account using the second and third balancing segments.

- Intercompany balancing
- Suspense posting
- Rounding imbalance adjustments on posting
- Entered currency balancing
- Revaluation gains or losses

- Retained earnings calculations at the opening of each new fiscal year
- Cumulative translation adjustments during translation

**Note:** All previously translated balances must also be purged. New translations must be run to properly account for translated retained earnings and cumulative translation adjustments with the correct level of balancing.

#### Related Topics

- [Example of Using Multiple Balancing Segments](#)
- [How can I change segments in an existing chart of accounts structure?](#)

## Example of Using Multiple Balancing Segments

This simple example illustrates balancing along two balancing segments for a simple chart of accounts with three segments.

### Scenario

Your company has a chart of accounts with two balancing segments and three segments, qualified as follows:

- Company: Primary balancing segment
- Cost Center: Second balancing segment
- Account: Natural account segment

The following table shows a journal that was entered to transfer advertising and phone expense from company 1, cost center A to company 2, cost center B.

Line	Account	Debit	Credit
1	Company 1-Cost Center A-Advertising Expense Account	600	
2	Company 2-Cost Center B-Advertising Expense Account		600
3	Company 1-Cost Center A-Phone Expense Account	800	
4	Company 2-Cost Center B-Phone Expense Account		800

The posting process creates journal lines to balance the entry across the primary and second balancing segments, company and cost center. The following table shows all of the journal lines, including balancing lines 5 through 8, which were automatically created.



Line	Account	Debit	Credit
1	Company 1-Cost Center A-Advertising Expense Account	600	
2	Company 2-Cost Center B-Advertising Expense Account		600
3	Company 1-Cost Center A-Phone Expense Account	800	
4	Company 2-Cost Center B-Phone Expense Account		800
5	Company 1-Cost Center A-Balancing Account		600
6	Company 2-Cost Center B-Balancing Account	600	
7	Company 1-Cost Center A-Balancing Account		800
8	Company 2-Cost Center B-Balancing Account	800	

## FAQs for Chart of Accounts Structures and Structure Instances

### How can I use future accounting segments?

To plan for future growth in the business organization that requires additional segments in the chart of accounts. Extra segments can be added to the chart of accounts structure during your original implementation.

All segments of the chart of accounts are required and have to be enabled. The unused segments can be assigned value sets that have a single value in the chart of accounts structure instance. The value is set as a default for that segment so that the extra segments are automatically populated when an account account combination is used.



# 11 Chart of Accounts Value Sets and Value Set Values

## Value Sets for Charts of Accounts

A value set is a collection of account values that are associated with a segment of a chart of accounts structure instance.

When creating values sets, consider the following critical choices:

- Module Designation
- Validation Type
- Format Assignments
- Security Rules
- Value Definition

### Module Designation

The module designation is used to tag value sets and sets the value sets apart during upgrades and other processes. When creating value sets for a chart of accounts, the module can be specified as **General Ledger** to distinctly identify its intended use in an accounting flexfield, basically a chart of accounts.

### Validation Type

Assign one of the following validation types to chart of accounts value sets:

- Independent: The values are independently selected when filling out the segments in an account combination.
- Table: The values are stored in an external table to facilitate maintenance and sharing of reference data.

**CAUTION:** You must use Independent validation only for the Accounting Key Flexfield value sets. Other validations prevent you from using the full chart of accounts functionality, such as data security, reporting, and account hierarchy integration. Dependent values sets aren't supported.

### Format Assignments

Value sets for chart of accounts must use the **Value Data Type** of **Character**. The **Value Subtype** is set to **Text**. These two settings support values that are both numbers and characters, which are typical in natural account segment values. Set the maximum length of the value set to correspond to the length of the chart of accounts segment to which it's assigned. Best practices recommend restricting values to **Upper Case Only** or **Numeric** values that are zero filled by default.

### Security Rules

If flexfield data security rules are to be applied to the chart of accounts segment associated with the value set, the **Enable Security** option for the assigned value set must be selected. In addition, assign a data security resource name to

enable creation of a data security object automatically for the value set. The data security object is used in the definition of flexfield data security rules.

## Value Definition

Once these basic characteristics are defined for the value set, values can be added to the set on the Manage Values page.

1. Enter the value and description. Set the value to conform to the value set length and type.
2. Indicate whether the value is enabled and specify the start and end dates.
3. Assign the following attributes: **Summary**, **Allow Posting**.

**Note:** The **Allow Budgeting** attribute is reserved for future use.

4. If the value set is used with a natural account segment, you must set the **Account Type** attribute. Select one of the following options: **Asset**, **Liability**, **Owner's Equity**, **Revenue**, or **Expense**.

**CAUTION:** Assign account types carefully. If you assign an incorrect account type to a natural account segment value, accounting entries are recorded incorrectly and financial statements are inaccurate. Misclassified accounts are also potentially handled incorrectly at year end, with actual balances either getting zeroed out to retained earnings, or accumulating into the next year.

5. Other attributes that you can set are **Third Party Control Account**, **Reconcile**, and **Financial Category**, which is used with Oracle Transactional Business Intelligence reporting.

The **Third Party Control Account** attribute enables you to maintain detailed balances by third party for an account combination. Valid third-party information must be associated with the journal line if the account is a third party control account. General Ledger prevents manual journal entries from posting to third party control accounts. This ensures that journal lines that post to control accounts such as the supplier liability account and the customer receivables account, are associated with valid third-party information in the respective subledgers.

You can select one of the following options:

- **Customer Control Account:** Customer information is required when such accounts are used in subledger transactions or subledger journals.
- **Supplier Control Account:** Supplier information is required when such accounts are used in subledger transactions or subledger journals.
- **Third Party Control Account:** Third-party information is required when such accounts are used in subledger transactions or subledger journals.
- **Restrict GL Manual Journals:** Third-party information isn't required when such accounts are used in subledger transactions or subledger journals.

- **No:** Not a control account.

**CAUTION:** Don't enable the third party control account type for exchange gain or loss accounts because third-party information is required when a control account is used and this information isn't available for exchange gain or loss journal lines.

General Ledger prevents manual journal entries to all of the accounts whose **Third Party Control Account** attribute is set to a value other than **No**.

**Note:** If you change the **Third Party Control Account** attribute setting for a segment value, then run the **Inherit Segment Value Attributes** process to replicate the changes to the account combinations that contain that segment value.

**Tip:** Best practice is to define value set values after the value set has been assigned to a chart of accounts structure instance. Otherwise you can't define the required value attributes, such as the summary indicator, the posting allowed indicator, and the account type for natural account segments. The attributes must be added after the value set is assigned to a chart of accounts structure instance.

**Tip:** Run the **Publish Chart of Account Dimension Members and Hierarchies to Balances Cubes** process with the **Publish Detail Values Only** parameter set to **Yes** before you post journals to accounts with newly created value set values. The process creates and updates chart of accounts dimension members and hierarchies for GL balances cubes.

#### Related Topics

- [What happens when I run the Inherit Segment Value Attributes process?](#)

## Create a Value Set for Your Chart of Accounts

Create your value sets before creating your chart of accounts. A value set can be shared by different charts of accounts or across different segments of the same chart of accounts.

### Scenario

You are creating a company value set to be used in your chart of accounts for your enterprise, Vision Corporation. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Financials
  - Functional Area: Financial Reporting Structures
  - Task: Manage Chart of Accounts Value Sets
2. Click the **Create** icon in the Search Results section.
3. On the Create Value Set page, enter a unique value set code, **Vision Corporation**, and an optional description, **Company values for Vision Corporation**

4. Select **General Ledger** from the list in the **Module** field.
5. Select **Independent** as the validation type.

**Note:** You must use Independent validation only for Accounting Key Flexfield value sets. Other validations prevent you from using the full chart of accounts functionality, such as data security, reporting, and account hierarchy integration. Dependent values sets aren't supported.

6. Select **Character** for the validation data type.
7. Click **Save and Close**.

#### Related Topics

- [How do I update existing setup data?](#)

## Configure Chart of Account Segments for Business Intelligence

To map the Oracle General Ledger accounting flexfield in the Oracle Transactional Business Intelligence Repository (RPD file) for Oracle Financials, populate values in the Manage Key Flexfields user interface.

These values enable the chart of accounts segments for Oracle Transactional Business Intelligence. The values also provide the mapping with Business Intelligence object names that are used as dimensions for each of the chart of accounts segments.

Follow these steps to select the **BI enabled** option for all chart of account segments that you intend to map in the RPD file.

1. In the Setup and Maintenance work area, use the following:
  - Offering: Financials
  - Functional Area: Financial Reporting Structures
  - Task: Manage Chart of Accounts Structures
2. Enter GL# in the **Key Flexfield Code** field.
3. Click **Search**.
4. Click **Manage Structure Instances**.
5. Click **Search**.
6. Click the specific chart of accounts and click the **Edit** icon.
7. Click the specific segment and click the **Edit** icon.
8. Select the **BI enabled** option.
9. Click **Save**. This should be done for all segments in every chart of accounts structure instance that you intend to be mapped in the RPD.
10. Click **Save and Close**.
11. Click **Done**.

Follow these steps to specify a BI object name for each segment label. This name is the logical table name in the RPD that's used as the dimension for the corresponding segment.

1. In the Setup and Maintenance work area, use the following:
  - Offering: Financials

- Functional Area: Financial Reporting Structures
  - Task: Manage Chart of Accounts Structures
2. Enter GL# in the **Key Flexfield Code** field.
  3. Click **Search**.
  4. Select the **Actions** menu and click **Manage Segment Labels**.
  5. Populate the **BI Object Name** field for all of the segment labels that must be mapped in the RPD file. Complete the fields, as shown in this table.

Segment Label Code	BI Object Name
FA_COST_CTR	Dim - Cost Center
GL_BALANCING	Dim - Balancing Segment
GL_ACCOUNT	Dim - Natural Account Segment

6. Click **Save**.

**Note:** For all the nonqualified segment labels, populate the **BI Object Name** with one of the following values:

- Dim - GL Segment1
- Dim - GL Segment2
- Dim - GL Segment3
- Dim - GL Segment4
- Dim - GL Segment5
- Dim - GL Segment6
- Dim - GL Segment7
- Dim - GL Segment8
- Dim - GL Segment9
- Dim - GL Segment10

Deploy the flexfield using the **Deploy Flexfield** button on the **Manage Key Flexfields** page.

#### Related Topics

- [How do I update existing setup data?](#)

## FAQs for Chart of Accounts Value Sets and Value Set Values

### What happens when I run the Inherit Segment Value Attributes process?

Running the process eases chart of accounts maintenance by automatically replicating segment value attribute changes to the account combinations that contain that segment value.

For example, you enable a cost center segment value that had been previously disabled. Then you run the **Inherit Segment Value Attributes** process from the Scheduled Processes page to automatically reenable all account combinations containing that cost center.

Use the Segment Value Inheritance Execution Report to view the account combinations that were changed. You can prevent selected account combinations from being affected by selecting the **Preserve Attributes** option on the Manage Account Combinations page.

Here are some other points to note about the process.

- Individual segment value attributes override account combination attributes.
- Conflicting settings for the **Enabled**, **Allow Posting**, **From Date**, or **To Date** attributes are resolved by using the most restrictive setting of the individual segment values.
- Disabling a segment value disables the account combinations containing that value, even if the **Preserve Attributes** option is selected.
- The process replicates changes to the **Third Party Control Account** attribute.

### What happens when I run the Inherit Segment Value Attributes process?

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# 12 Accounting Calendars

## Create the Accounting Calendar

You usually create a single accounting calendar as part of your implementation. The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period.

These defined periods, often called enterprise periods, are used for many purposes in the applications. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

**Note:** If you used the Sales Assistant topics in the *Implementing Sales* guide to create your accounting calendar, then you don't need to do the steps listed here. For more information, see *What Setup Assistant Completes for You*.

Here are the high-level steps:

1. Plan your calendar periods and start year. See the Implementation Considerations section in this topic for more information.
2. Create the first-year calendar periods and generate the periods for each additional year. See the Create the Calendar section in this topic for more information.
3. Set the accounting calendar profile option. See the Set the Calendar Profile Option section in this topic for more information.
4. Run a scheduled process. See the Run the Time Dimension Process section in this topic for more information.

**CAUTION:** After your calendar is being used in transaction, you can't change the calendar options. For example, after you have generated forecasts, you can't change the calendar options.

## Implementation Considerations

Since you can't change the calendar after it's in use, ahead of time, you need to:

- Plan which periods your calendar will use.
- Decide which year you want the calendar to start. Consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

Period frequency is an important decision for your calendar, because the period frequency set in your fiscal calendar is the shortest period you can use. Here are some examples:

- Let's say you set the period frequency to yearly. Then, your reports and activities can be for each year, but can't be broken down by month.
- If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year.

- Say you want to set the period frequency to weekly. In this case, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies.

## Create the Calendar

When you create the accounting calendar, you're establishing the exact start and end dates for each period, for each year. Here's a procedure that uses the fictitious Vision Corporation to guide you through the steps:

1. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Manage Accounting Calendars
2. On the Manage Accounting Calendars page, click **Create**.
3. In the Create Accounting Calendar: Calendar Options page:
  - a. Name your calendar, for example, **Sales Calendar**.
  - b. Leave the **Adjusting Period Frequency** set to None.
  - c. For **Start Date**, Vision Corporation uses 1/1/10.
  - d. For **Period Frequency**, select the shortest time period you want to use for reports and activities. Vision Corporation is using **Monthly**. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month.
  - e. Vision Corporation selects **None** for the **Separator**.
  - f. Select the **Format** to use for period names.

4. Click **Next**. The Create Accounting Calendar: Period Details page appears, showing the generated periods. The image shows multiple columns, including:
  - Period name, which is month name, one for each month of the year
  - Year, which is 2010
  - Period number, one for each month
  - Quarter number for each period, assuming four quarters in the year
  - Start and end dates for the periods
  - A check box used to indicate whether a period is an adjusting period

Here's an example of the Create Accounting Calendar: Period Details page:

**Create Accounting Calendar : Period Details**

Name: Forecasts  
Description:   
Start Date: 1/1/10  
Period Frequency: Monthly  
Adjusting Period Frequency: None

**Period Details**

Period Name	Year	Period Number	Quarter Number	Start Date	End Date	Adjusting Period
Jan10	2010	1	1	1/1/10	1/31/10	<input type="checkbox"/>
Feb10	2010	2	1	2/1/10	2/28/10	<input type="checkbox"/>
Mar10	2010	3	1	3/1/10	3/31/10	<input type="checkbox"/>
Apr10	2010	4	2	4/1/10	4/30/10	<input type="checkbox"/>
May10	2010	5	2	5/1/10	5/31/10	<input type="checkbox"/>
Jun10	2010	6	2	6/1/10	6/30/10	<input type="checkbox"/>
Jul10	2010	7	3	7/1/10	7/31/10	<input type="checkbox"/>
Aug10	2010	8	3	8/1/10	8/31/10	<input type="checkbox"/>
Sep10	2010	9	3	9/1/10	9/30/10	<input type="checkbox"/>
Oct10	2010	10	4	10/1/10	10/31/10	<input type="checkbox"/>
Nov10	2010	11	4	11/1/10	11/30/10	<input type="checkbox"/>
Dec10	2010	12	4	12/1/10	12/31/10	<input type="checkbox"/>

5. If you need to, manually change the details for each period.
6. Click **Save and Close**.
7. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.
8. Click **Add Year**.
9. Click **Save and Close**.
10. Repeat the last three steps for each year you want to add.
11. Click **Done**.

**Note:** You can't change your calendar options after you start using the calendar, such as by generating forecasts.

## Set the Calendar Profile Option

After you finish creating your calendar, set the accounting calendar profile option. This profile option setting tells the applications which calendar to use. Use these steps:

1. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Manage Calendar Profile Option
  - Option: Manage Calendar Profile Option
2. Select the **Accounting Calendar Default** profile option.
3. In the Profile Values table, click **New**.
4. For **Profile Value**, select **Site**.
5. Click the **Profile Value** list, and select the name of the calendar you created.
6. Click **Save and Close**.

## Run the Time Dimension Process

You need to run the Refresh Denormalized Time Dimension Table for BI process to make calendar time periods available for analytics and reports. Use these steps:

1. Click **Navigator > Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, click the menu next to the **Name** field and click **Search**.
4. In the Search dialog box, enter **%Refresh%**, and click **Search**.
5. Select the **Refresh Denormalized Time Dimension Table for BI** process in the results that are returned and click **OK**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

### Related Topics

- [Accounting Calendar Options](#)

## Accounting Calendar Options

Define an accounting calendar to create your accounting year and the periods it contains. Specify common calendar options that the application uses to automatically generate a calendar with its periods.

Specifying all the options makes defining a correct calendar easier and more intuitive with fewer errors.

**CAUTION:** The choices you make when specifying the following options are critical, because it's difficult to change your accounting calendar after a period status is set to open or future enterable.

- Budgetary control only
- Start Date
- Period Frequency

- Adjusting Period Frequency
- Period Name Format

**Note:** To help create and maintain accounting calendars, the common calendar types of monthly, weekly, 4-4-5, 4-5-4, 5-4-4, 4-week, quarterly, and yearly, are automatically generated. By using the period frequency option, you no longer have to go through the tedious task of defining each period manually.

## Budgetary Control Only Check Box

Select the check box for Budgetary control only to use the calendar for budgetary control only. Budgetary Control refers to the group of system options and the validation process of determining which transactions are subject to validation against budgets and budget consumption to prevent overspending.

## Start Date

If you plan to run translation, specify a calendar start date that's a full year before the start date of the year of the first translation period for your ledger. Translation can't be run in the first period of a calendar. Consider how many years of history you're going to load from your previous application and back up the start date for those years plus one more. You can't add previous years once the first calendar period has been opened.

## Period Frequency

Use the period frequency to set the interval for each subsequent period to occur, for example, monthly, quarterly, or yearly. If you select the period frequency of Other, by default, the application generates the period names, year, and quarter number. You specify the start and end dates. You must manually enter the period information. For example, select the period frequency of Other and enter 52 as the number of periods when you want to define a weekly calendar. For manually entered calendars, when you click the **Add Year** button, the application creates a blank year. Then, you must manually enter the periods for the new year. The online validation helps prevent erroneous entries.

If the year has been defined and validated, use the **Add Year** button to add the next year quickly. Accept or change the new rows as required. For example, with the Other frequency type calendar, dates may differ from what the application generates.

**Note:** A calendar can have only one period frequency and period type. Therefore, if you have an existing calendar with more than one period type associated with it, during the upgrade from Oracle E-Business Suite, separate calendars are created based on each calendar name and period type combination.

## Adjusting Period Frequency

Use the adjusting period frequency to control when the application creates adjusting periods. For example, some of the frequencies you select add one adjusting period at year end, two at year end, or one at the end of each quarter. The default is None which adds no adjusting periods. If you select the frequency of Other, the **Number of Adjusting Periods** field is displayed. Enter the number of adjusting periods you want, and then manually define them.

## Period Name Format Region

In the Period Name Format section, enter the following fields:

- **User-Defined Prefix:** An optional feature that lets you enter your own prefix. For example, define a weekly calendar and then enter a prefix of Week, - as the separator, and the period name format of Period numberYY fiscal year. The application creates the names of Week1-11, Week2-11, through Week52-11.
- **Format:** A predefined list of values filtered on the selected separator, only displaying the options that match the selected separator.
- **Year:** The year displayed in the period names is based on the selected period name format and the dates the period covers or if the period crosses years, on the year of the start date of the period.
  - For example, April 10, 2016 to May 9, 2016 has the period name of Apr-16 and December 10, 2016 to January 9, 2017 has the name of Dec-16.
  - If period frequency is Other, then the period format section is hidden. The application generates a temporary period name for calendars with period frequency of Other, using a fixed format of Period numberYY. You can override this format with your own period names.

**Note:** For an accounting calendar that's associated with a ledger, changing period names or adding a year updates the accounting period dimension in the balances cubes.

### Related Topics

- [What's the difference between calendar and fiscal period naming?](#)
- [When do I update an existing calendar?](#)
- [How can I identify errors in my accounting calendar?](#)

## How Accounting Calendars Are Validated

Calendar validation is automatic and prevents serious problems when you begin using a calendar. Once you set a calendar period status to open or future enterable, you can't edit the period.

### Settings That Affect Calendar Validation

Calendar validation runs automatically after you save the calendar.

### How a Calendar Is Validated

The following table lists the validation checks that are performed when an accounting calendar is saved.

Validation	Data Example
Unique period number	2 assigned for two periods
Unique period name	Jan-17 entered twice



Validation	Data Example
Period number beyond the maximum number of periods per year	13 for a 12 period calendar with no adjusting periods
Entered period name contains spaces	Jan 17
Single or double quotes in the period name	Jan '17
Nonadjusting periods with overlapping dates	01-Jan-2017 to 31-Jan-2017 and 30-Jan-2017 to 28-Feb-2017
Period date gaps	01-Jan-2017 to 28-Jan-2017 and 31-Jan-2017 to 28-Feb-2017
Missing period numbers	Periods 1 through 6 are defined for a calendar with 12 months
Period number gaps	1, 3, 5
Period numbers not in sequential order by date	Period 1 covers 01-Jan-2017 to 31-Jan-2017 and period 2 covers 01-Mar-2017 to 31-Mar-2017, and period 3 covers 01-Feb-2017 to 28-Feb-2017.
Quarter number gaps	1, 3, 4
Quarters not in sequential order by period	1, 3, 2, 4
Period start or end dates more than one year before or after the fiscal year	July 1, 2015 in a 2017 calendar

#### Related Topics

- [How can I identify errors in my accounting calendar?](#)
- [What's the difference between calendar and fiscal period naming?](#)
- [When do I update an existing calendar?](#)

## FAQs for Accounting Calendars

### How can I identify errors in my accounting calendar?

Erroneous entries are identified online as you enter a new calendar or change data on an existing calendar. The application also automatically validates the data when you save the calendar.

## What's the difference between calendar and fiscal period naming?

The period naming format determines the year that's appended to the prefix for each period in the calendar.

For the example, your accounting year has a set of twelve accounting period with:

- Start date of September 1, 2014.
- End date is August 31, 2015.
- Period's date range following the natural calendar month date range.

**Calendar period naming format:** Select the calendar period format to append the period's start date's year to the prefix. For the period covering September 1, 2014 to December 31, 2014, then 2014 or just 14, depending on the period format selected, is appended to each period's name. For the remaining periods covering January 1, 2015 to August 31, 2015, then 2015 or 15, is appended to each period's name.

**Fiscal period naming format:** Select the fiscal period format to always append the period's year assignment to the prefix. If the accounting periods in the set of twelve are all assigned the year of 2015, then 2015 or just 15, depending on the period format selected, is appended to the period name of all 12 periods.

## When do I update an existing calendar?

Update an existing calendar before the new periods are needed as future periods, based on the future period setting in your accounting configuration.

If a complete year has been defined and validated, use the Add Year button to add the next year quickly. Accept or change the new rows as required. For example, with the Other frequency type calendar, dates may differ from what the application generates.

### *Related Topics*

- [What happens if I upgrade my calendar from Oracle E-Business Suite Release 12?](#)

## What happens if I upgrade my calendar from Oracle E-Business Suite Release 12?

The migration script assigns a period frequency that most closely matches your Oracle E-Business Suite Release 12 calendar.

When you use the Oracle Fusion Cloud Applications Add Year functionality for the first time, you have an opportunity to review and change the period frequency. The Calendar Options page opens only for calendars upgraded from Release 12 to allow a one time modification.

Make your changes to the period frequency, adjusting period frequency, and period name format, including the prefix and separator, as needed. Changes cannot conflict with the existing upgraded calendar definition. Update the calendar name and description in the calendar header, as needed, for all calendars. Period details for a new year are generated

automatically based on the latest calendar options. You can also manually update the calendar. The modified calendar options affect future years only.



# 13 Primary or Secondary Ledgers

## Overview of Accounting Configuration Offerings

Use the Setup and Maintenance work area in Oracle Applications to manage the configuration of legal entities, ledgers, and reporting currencies. To create a legal entity or ledger, first create an implementation project.

This implementation project can be populated by either adding a financials-related offering or one or more task lists.

**Note:** Setup tasks that are not related to the ledger or legal entity setup tasks are opened from either an implementation project or directly from the Setup and Maintenance work area.

The financial applications have two predefined implementations:

- The Oracle Accounting Hub Cloud offering is used to add the General Ledger and Subledger Accounting application features to an existing Enterprise Resource Planning (ERP) source system to enhance reporting and analysis.
- The Financials offering includes the General Ledger and Subledger Accounting application features and one or more subledger financial applications.

When adding an offering to an implementation project, update the tasks displayed by adding additional tasks.

## Ledgers and Subledgers

Oracle Fusion Cloud Applications reflect the traditional segregation between the general ledger and associated subledgers. Detailed transactional information is captured in the subledgers and periodically imported and posted in summary or detail to the ledger.

A ledger determines the currency, chart of accounts, accounting calendar, ledger processing options, and accounting method for its associated subledgers. Each accounting setup requires a primary ledger and optionally, one or more secondary ledgers and reporting currencies. Reporting currencies are associated with either a primary or secondary ledger.

The number of ledgers and subledgers is unlimited and determined by your business structure and reporting requirements.

### Single Ledger

If your subsidiaries all share the same ledger with the parent company or they share the same chart of accounts and calendar, and all reside on the same applications instance, you can consolidate financial results in Oracle General Ledger in a single ledger. Use the Financial Reporting functionality to produce individual entity reports by balancing segments. General Ledger has three balancing segments that can be combined to provide detailed reporting for each legal entity and then rolled up to provide consolidated financial statements.

## Multiple Ledgers

Accounting operations using multiple ledgers can include single or multiple applications instances. You need multiple ledgers if one of the following is true:

- You have companies that require different account structures to record information about transactions and balances. For example, one company may require a six-segment account, while another needs only a three-segment account structure.
- You have companies that use different accounting calendars. For example, although companies may share fiscal year calendars, your retail operations require a weekly calendar, and a monthly calendar is required for your corporate headquarters.
- You have companies that require different functional currencies. Consider the business activities and reporting requirements of each company. If you must present financial statements in another country and currency, consider the accounting principles to which you must adhere.

## Subledgers

Oracle subledgers capture detailed transactional information, such as supplier invoices, customer payments, and asset acquisitions. Oracle Subledger Accounting is an open and flexible application that defines the accounting rules, generates detailed journal entries for these subledger transactions, and posts these entries to the general ledger with flexible summarization options to provide a clear audit trail.

### *Related Topics*

- [Primary Ledgers, Secondary Ledgers, and Reporting Currencies](#)

## Primary Ledgers, Secondary Ledgers, and Reporting Currencies

Companies account for themselves in primary ledgers, and, if necessary, secondary ledgers and reporting currencies. Transactions from your subledgers are posted to your primary ledgers and possibly, secondary ledgers or reporting currencies based on balance, subledger, or journal level settings.

Local and corporate compliance can be achieved through an optional secondary ledger. Provide an alternate accounting method, or in some cases, a different chart of accounts. Your subsidiary's primary and secondary ledgers can both be maintained in your local currency. You can convert your local currency to your parent's ledger currency to report your consolidated financial results using reporting currencies or translation.

## Primary Ledgers

A primary ledger:

- Is the main record-keeping ledger.
- Records transactional balances by using a chart of accounts with a consistent calendar and currency, and accounting rules implemented in an accounting method..
- Is closely associated with the subledger transactions and provides context and accounting for them.

To determine the number of primary ledgers, your enterprise structure analysis must begin with your financial, legal, and management reporting requirements. For example, if your company has separate subsidiaries in several countries worldwide, enable reporting for each country's legal authorities by creating multiple primary ledgers that represent each country with the local currency, chart of accounts, calendar, and accounting method. Use reporting currencies linked to your country-specific primary ledgers to report to your parent company from your foreign subsidiaries. Other considerations that affect the number of primary ledgers required are:

- Corporate year end
- Ownership percentages
- Local government regulations and taxation
- Secondary ledgers

## Secondary Ledgers

A secondary ledger:

- Is an optional ledger linked to a primary ledger for the purpose of tracking alternative accounting.
- Can differ from its primary ledger by using a different accounting method, chart of accounts, accounting calendar, currency, or processing options.

When you set up a secondary ledger using the Manage Secondary Ledger task, you select a data conversion level. The data conversion level determines what level of information is copied to the secondary ledger. You can select one of the following levels: **Balance**, **Journal**, **Subledger**, or **Adjustment Only**.

- **Balance:** When you run the Transfer Balances to Secondary Ledger process, balances are transferred from the primary ledger to the secondary ledger.
- **Journal:** When you post journals in the primary ledger, the posting process copies the journals to the secondary ledger for the sources and categories that you specify in the Journal Conversion Rules section on the Map Primary to Secondary Ledger page.

In the Journal Conversion Rules section, you can do one of the following:

- Accept the default setting of **Yes** for the journal source and category combination of **Other**, and then specify the source and category combinations to exclude from the conversion.
- Set the journal source and category combination of **Other** to **No**, and then specify the source and category combinations to include in the conversion.

You can assign a secondary ledger only a subset of the primary balancing segment values that are assigned to a primary ledger and its legal entities. See the [Legal Entity-Specific Secondary Ledgers with Controlled Replication from Primary Ledgers](#) topic for more information on this feature.

- **Subledger:** When you run the Create Accounting process in the primary ledger, the process creates subledger journals for both the primary and secondary ledgers. When you run the Post Journals process in the primary ledger for journals that are created through methods other than the Create Accounting process, the posting process copies the primary ledger journals to the secondary ledger. For any journals that you don't want copied by posting, you can change the settings in the Journal Conversion Rules section on the Map Primary

to Secondary Ledger page. To prevent duplication, posting doesn't copy any journal that originated from subledgers, regardless of the settings in the Journal Conversion Rules section.

**CAUTION:** You don't have to specify journal conversion rules for your subledgers because journal conversion rules are applicable only to postings from Oracle General Ledger. The Create Accounting process automatically produces accounting for both the primary and the secondary ledger, regardless of the journal conversion rule settings.

- **Adjustment Only:** This level is an incomplete accounting representation that holds only adjustments. The adjustments can be entered as manual journals in General Ledger. This type of secondary ledger must share the same chart of accounts, accounting calendar, period type, and currency as the associated primary ledger.

**Tip:** To obtain a complete secondary accounting representation that includes both transactional data and adjustments, use ledger sets to combine the ledgers when running reports.

## Example

Your primary ledger uses US Generally Accepted Accounting Principles (GAAP) and you maintain a secondary ledger for International Financial Reporting Standards (IFRS) accounting requirements. You first decide to use the subledger conversion level for the IFRS secondary ledger. However, since most of the accounting between US GAAP and IFRS is identical, the adjustment only level is the better solution for the secondary ledger. The subledger level requires duplication of most subledger and general ledger journal entries and general ledger balances. The adjustment only level transfers only the adjustment journal entries and balances necessary to convert your US GAAP accounting to the IFRS accounting. Thus, requiring less processing resources.

**Tip:** To avoid difficult reconciliations, use the same currency for primary and secondary ledgers. Use reporting currencies or translations to generate the different currency views to comply with internal reporting needs and consolidations.

## Reporting Currencies

Reporting currencies maintain and report accounting transactions in additional currencies. Consider the following before deciding to use reporting currencies.

- Each primary and secondary ledger is defined with a ledger currency that's used to record your business transactions and accounting data for that ledger.
- Best practices recommend that you maintain the ledger in the currency in which the majority of its transactions are denominated. For example, create, record, and close a transaction in the same currency to save processing and reconciliation time.
- Compliance, such as paying local transaction taxes, is also easier using a local currency.
- Many countries require that your accounting records be kept in their national currency.

If you maintain and report accounting records in different currencies, you do this by defining one or more reporting currencies for the ledger. When you set up a reporting currency using the Manage Reporting Currency task, you select a currency conversion level. The currency conversion level determines what level of information is copied to the reporting currency.



You can select one of the following levels: **Balance, Journal, Subledger**.

- **Balance:** When you run the Translate General Ledger Account Balances process, balances are transferred from the specified ledger to the reporting currency and converted.
- **Journal:** When you post journals, the posting process copies the journals to the reporting currency for the sources and categories that you specify in the Journal Conversion Rules section on the Create or Edit Reporting Currency pages.

In the Journal Conversion Rules section, you can do one of the following:

- Accept the default setting of **Yes** for the journal source and category combination of **Other**, and then specify the source and category combinations to exclude from the conversion.
- Set the journal source and category combination of **Other** to **No**, and then specify the source and category combinations to include in the conversion.
- **Subledger:** When you run the Create Accounting process in the primary ledger, the process creates subledger journals for both the primary ledger and the reporting currency. When you run the Post Journals process in the primary ledger for journals that are created through methods other than the Create Accounting process, the posting process copies the primary ledger journals to the reporting currency. For any journals that you don't want copied by posting, you can change the settings in the Journal Conversion Rules section on the Edit Reporting Currency page. To prevent duplication, posting doesn't copy any journal that originated from subledgers, regardless of the settings in the Journal Conversion Rules section.

**CAUTION:** You don't have to specify journal conversion rules for your subledgers because journal conversion rules are applicable only to postings from Oracle General Ledger. The Create Accounting process automatically produces accounting for both the primary ledger and the reporting currency, regardless of the journal conversion rule settings.

**Note:** A full accounting representation of your primary ledger is maintained in any subledger level reporting currency. Secondary ledgers can't use subledger level reporting currencies.

Don't use journal or subledger level reporting currencies if your organization translates your financial statements to your parent company's currency for consolidation purposes infrequently. Standard translation functionality meets this need. Consider using journal or subledger level reporting currencies when any of the following conditions exist.

- You operate in a country whose unstable currency makes it unsuitable for managing your business. As a consequence, you manage your business in a more stable currency while retaining the ability to report in the unstable local currency.
- You operate in a country that's part of the European Economic and Monetary Union (EMU), and you select to account and report in both the European Union currency and your National Currency Unit.

**Note:** The second option is rare since most companies have moved beyond the initial conversion to the EMU currency. However, future decisions could add other countries to the EMU, and then, this option would again be used during the conversion stage.

#### *Related Topics*

- [How Balances for Reporting Currencies Are Calculated](#)
- [What's the difference between mapping with segment rules and mapping with account rules?](#)
- [When do account rules override segment rules in a chart of accounts mapping?](#)

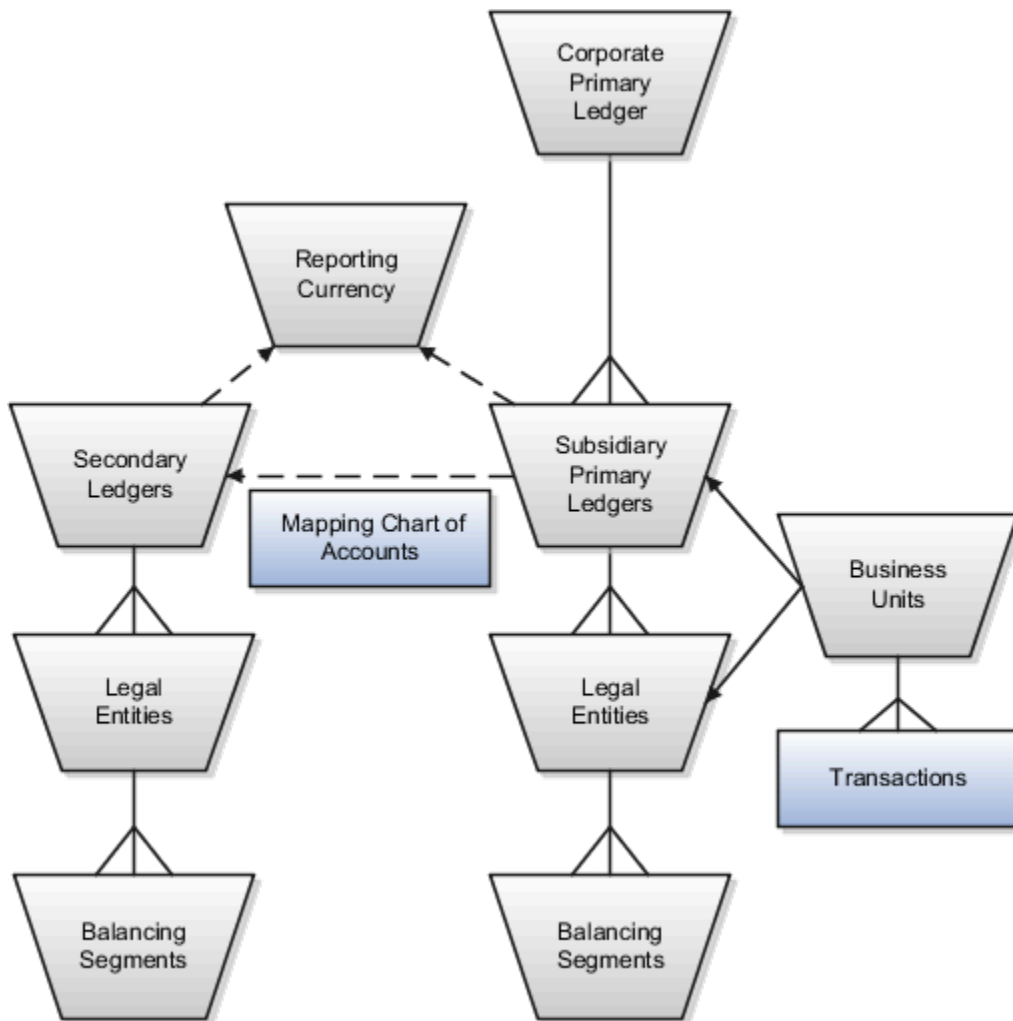
## Ledgers, Legal Entities, Balancing Segments, and Business Units

The process of designing an enterprise structure, including the accounting configuration, is the starting point for an implementation.

This process often includes determining financial, legal, and management reporting requirements, setting up primary and secondary ledgers, making currency choices, and examining consolidation considerations.

Primary ledgers are connected to reporting currencies and secondary ledgers to provide complete reporting options. You map the chart of accounts for the primary ledger to the chart of accounts for the secondary ledger. Legal entities are assigned to ledgers, both primary and secondary, and balancing segments are assigned to legal entities. Business units must be connected to both a primary ledger and a default legal entity. Business units can record transactions across legal entities.

The following figure provides an example of an enterprise structure with primary ledgers, secondary ledgers, a reporting currency, legal entities, business units, and balancing segments, and shows their relationships to one another.



## Primary Ledgers

A primary ledger is the main record-keeping ledger. Create a primary ledger by combining a chart of accounts, accounting calendar, ledger currency, and accounting method. To determine the number of primary ledgers, your enterprise structure analysis must begin with determining financial, legal, and management reporting requirements. For example, if your company has separate subsidiaries in several countries worldwide, create multiple primary ledgers representing each country with the local currency, chart of accounts, calendar, and accounting method to enable reporting to each country's legal authorities.

If your company just has sales in different countries, with all results being managed by the corporate headquarters, create one primary ledger with multiple balancing segment values to represent each legal entity. Use secondary ledgers or reporting currencies to meet your local reporting requirements, as needed. Limiting the number of primary ledgers simplifies reporting because consolidation isn't required. Other considerations such as corporate year end, ownership considerations, and local government regulations, also affect the number of primary ledgers required.

## Secondary Ledgers

A secondary ledger is an optional ledger linked to a primary ledger. A secondary ledger can differ from its related primary ledger in chart of accounts, accounting calendar, currency, accounting method, or ledger processing options.

Reporting requirements, for example, that require a different accounting representation to comply with international or country-specific regulations, create the need for a secondary ledger.

If the primary and secondary ledgers use different:

- Charts of accounts, a chart of accounts mapping is required to instruct the application on how to propagate journals from the source chart of accounts to the target chart of accounts.
- Accounting calendars, the accounting date, and the general ledger date mapping table are used to determine the corresponding nonadjusting period in the secondary ledger. The date mapping table also provides the correlation between dates and nonadjusting periods for each accounting calendar.
- Ledger currencies, currency conversion rules are required to instruct the application on how to convert the transactions, journals, or balances from the source representation to the secondary ledger.

**Note:** Journal conversion rules, based on the journal source and category, are required to provide instructions on how to propagate journals and types of journals from the source ledger to the secondary ledger.

## Reporting Currencies

Reporting currencies are the currency you use for financial, legal, and management reporting. If your reporting currency isn't the same as your ledger currency, you can use the foreign currency translation process or reporting currencies functionality to convert your ledger account balances in your reporting currency. Currency conversion rules are required to instruct the application on how to convert the transactions, journals, or balances from the source representation to the reporting currency.

## Legal Entities

Legal entities are discrete business units characterized by the legal environment in which they operate. The legal environment dictates how the legal entity should perform its financial, legal, and management reporting. Legal entities generally have the right to own property and the obligation to comply with labor laws for their country. They also have the responsibility to account for themselves and present financial statements and reports to company regulators, taxation authorities, and other stakeholders according to rules specified in the relevant legislation and applicable accounting standards. During setup, legal entities are assigned to the accounting configuration, which includes all ledgers, primary and secondary.

## Balancing Segments

You assign primary balancing segment values to all legal entities before assigning values to the ledger. Then, assign specific primary balancing segment values to the primary and secondary ledgers to represent nonlegal entity related transactions such as adjustments. You can assign any primary balancing segment value that hasn't already been assigned to a legal entity. You are allowed to assign the same primary balancing segment values to more than one ledger. The assignment of primary balancing segment values to legal entities and ledgers is performed within the context of a single accounting setup. The Balancing Segment Value Assignments report is available to show all primary balancing segment values assigned to legal entities and ledgers across accounting setups to ensure the completeness and accuracy of their assignments. This report lets you quickly identify these errors and view any unassigned values.

## 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. When a business function produces financial transactions, a business unit must be assigned a primary ledger, and a default legal entity. Each business unit can post transactions to a single primary ledger, but it can process transactions for many legal entities. Normally, it has a manager, strategic objectives, a level of autonomy,

and responsibility for its profit and loss. You define business units as separate task generally done after the accounting setups steps.

The business unit model:

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

For example, if your company requires business unit managers to be responsible for managing all aspects of their part of the business, then consider using two balancing segments, company and business unit to enable the production of business unit level balance sheets and income statements.

Transactions are exclusive to business units. In other words, you can use business unit as a securing mechanism for transactions. For example, if you have an export business that you run differently from your domestic business, use business units to secure members of the export business from seeing the transactions of the domestic business.

#### Related Topics

- [Create a Primary Ledger](#)
- [Assign Legal Entities and Balancing Segments](#)
- [Specify Ledger Options](#)

## Create a Primary Ledger

Create a primary ledger as your main record-keeping ledger. A primary ledger records transactional balances by using a chart of accounts with a calendar, currency, and accounting rules implemented in an accounting method.

The primary ledger is closely associated with the subledger transactions and provides context and accounting for them.

### Scenario

You have been assigned the task of creating a primary ledger for your company Vision Corporation.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Financials
  - Functional Area: General Ledger
  - Task: Manage Primary Ledger
2. Click the **Create** icon.
3. Complete the fields, as shown in this table.

Field	Value
Name	Vision Corporation
Description	Vision Corporation primary ledger for recording transactions.

Field	Value
Chart of Accounts	Vision Corporation Chart of Accounts
Accounting Calendar	Standard Monthly
Currency	USD
Accounting Method	Standard Accrual

4. Click **Save and Close**.

**Note:** You can't change the chart of accounts, accounting calendar, or currency for your ledger after you save the ledger.

*Related Topics*

- [Specify Ledger Options](#)
- [How do I update existing setup data?](#)

# 14 Ledger Options

## Specify Ledger Options

This example demonstrates specifying the ledger options for a primary ledger. 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 Cloud ERP solution including Oracle General Ledger and all Oracle subledgers.

After defining your InFusion America primary ledger, in the Setup and Maintenance work area, go to the following:

- Offering: Financials
- Functional Area: General Ledger
- Task: Specify Ledger Options, with the ledger scope set to InFusion America

**Note:** Both primary and secondary ledgers are created in the same way and use the same user interface to enable their specific ledger options.

## General Information Options

1. Accept the default name and description for the selected ledger.
2. Review the currency and chart of accounts for the specified ledger, which are automatically provided.

## Accounting Calendar Options

1. Review the accounting calendar that defaults from your ledger.
2. Select **Jan-2022** as the first open period of your ledger.  
Select a period after the first defined period in the ledger calendar to enable running translation. You can't run translation in the first defined period of a ledger calendar. In this example, your calendar began with Jan-2021.
3. Enter **3** in the **Number of Future Enterable Periods** field.  
Any value between 0 and 999 periods can be specified to permit entering journals, but not posting them in future periods. Minimize the number of open and future periods to prevent entries in the wrong period.

## Subledger Accounting Options

1. Accept the default accounting method, which you selected when you created the primary ledger.
2. In the **Journal Language** field, select **American English** as your journal language. You can configure the display of subledger journal descriptions to use either the journal language set for the ledger or the user session language.

## Period Close Options

1. Enter your retained earnings account: 101-00-31330000-0000-000-0000-0000.  
This account is required. General Ledger moves the revenue and expense account balances to this account at the end of the accounting year.

2. Enter your cumulative translation adjustment account: 101-00-31350000-0000-000-0000-0000.

The Cumulative Translation Adjustment (CTA) account is required for ledgers running translation.

3. Don't enter a value for the **Default Period End Rate Type** or **Default Period Average Rate Type** fields.

The values entered here are used as the default for balance level reporting currency processing. The InFusion America primary ledger is using the subledger level reporting currency processing.

## Journal Processing Options

1. Complete the fields, as shown in this table.

Field	Value
Enable Suspense	General Ledger
Default Suspense Account	101-00-98199999-0000-000-0000-0000
Rounding Account	101-10-98189999-0000-000-0000-0000
Entered Currency Balancing Account	101-10-98179999-0000-000-0000-0000
Balancing Threshold Percent	10
Balancing Threshold Amount	100

2. Enable the following entry and import options:

- Enable journal approval: Enable the journal approval functionality.
- Notify when prior period journal is entered: Notify the user when a prior period date is selected on a journal entry.
- Allow mixed statistical and monetary journals: Enter both monetary and statistical amounts on the same line in a journal entry.
- Validate reference date: Require a reference date in an open or future enterable period.
- Separate journals by accounting date during journal import: Create individual journal entries for each accounting date.

3. Select InFusion America Accrual Set from the list of values in the **Journal Reversal Criteria Set** field and click the **Run AutoReverse after open period** option to reverse accrual journal entries automatically when a new period is opened.



4. Click the **Enable intercompany accounting** option to enable automatic balancing for primary, second, and third balancing segments on intercompany journals and transactions.

To complete the intercompany accounting functionality, you must define intercompany rules.

**Note:**

- This example describes setting options for a standard ledger. You can convert a standard ledger to an average daily balance ledger before the first period is opened by selecting the **Enable average balances** check box on the Specify Ledger Options page.
- You can also convert an average daily balance ledger to a standard ledger before submitting the Review and Submit Accounting Configuration task, provided the average daily balance ledger wasn't created through the rapid implementation process.

*Related Topics*

- [What happens if I change the retained earnings account?](#)
- [What happens if I change the cumulative translation adjustment account?](#)
- [How Single Currency Journals Are Balanced](#)
- [How MultiCurrency Journals Are Balanced](#)
- [How You Configure the Language for Subledger Journal Descriptions](#)

## Assign Legal Entities and Balancing Segments

Optionally, assign legal entities and balancing segments to your accounting configuration.

### Assign Legal Entities

Assign one or more legal entities to your accounting configuration by following these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Financials
  - Functional Area: General Ledger
  - Task: Assign Legal Entities, with the ledger scope set
2. Click the **Select and Add** icon.
3. Enter your legal entity information.
4. Click **Apply**.
5. Click **Done**.
6. Click **Save and Close**.

### Assign Balancing Segments to Legal Entities

Assign balancing segment values to your legal entities by following these steps:

1. In the Setup and Maintenance work area, go to the following:

- Offering: Financials
  - Functional Area: General Ledger
  - Task: Assign Balancing Segment Values to Legal Entities, with the ledger scope set
2. Click the **Create** icon.
  3. Select the balancing segment value. Optionally, add a start date.
  4. Click **Save and Close** to close the Assign Company Values window.
  5. Click **Save and Close**.

## Assign Balancing Segments to Ledgers

Assign balancing segment values directly to your ledger by following these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Financials
  - Functional Area: General Ledger
  - Task: Assign Balancing Segment Value to Ledger, with the ledger scope set
2. Select the balancing segment value.
3. Optionally enter a start date.
4. Click **Save and Close**.

**Note:** The balancing segment values that are assigned to the ledger represent nonlegal entity transactions, such as adjustments. If you use legal entities, you must assign balancing segment values to all legal entities before assigning values to the ledger. The only available balancing segment values that can be assigned to ledgers are those not assigned to legal entities.

### Related Topics

- [Overview of Balancing Segments](#)
- [How do I update existing setup data?](#)

## FAQs for Ledger Options

### What happens if I change the cumulative translation adjustment account?

Changing the cumulative translation adjustment (CTA) account is a very significant revision to your accounting configuration and should be avoided if possible. To prevent data corruption, your CTA can only be changed if you delete translated balances.

### Related Topics

- [How Translated Balances Are Deleted](#)

## What happens if I change the retained earnings account?

Changing the retained earnings account is a very significant revision to your accounting configuration and should be avoided if possible.

To prevent data corruption, your retained earnings account can only be changed if you first perform the following set of steps:

1. To reverse what was closed out to the incorrect retained earnings account, enter and post journals to bring the ending balances for your income statement accounts to zero at the end of each accounting year. Use a temporary account, such as a suspense account, for the offsetting amount.
2. Update the retained earnings account.
3. Reverse the journal entries used to bring the income statement accounts' ending account balances to zero to reinstate each accounting year's profit and loss, and now close these out to the new retained earnings account in the following accounting year.

**Note:** The recommended reversal method for the journals is **Change Sign**.

4. If you have translated balances for the ledger, follow the process of deleting translated balances for a change in the retained earnings account.

### *Related Topics*

- [How Translated Balances Are Deleted](#)



# 15 Reporting Currencies

## How Balances for Reporting Currencies Are Calculated

Reporting currency balances, set at the journal or subledger level, are updated when Oracle General Ledger journals are posted and converted to your reporting currencies.

This process includes:

- General Ledger manual journals, periodic journals, and allocations.
- At the subledger level, journals from Oracle Subledger Accounting.
- Other journals imported from sources other than your Oracle Fusion subledgers.

When you post a journal in a ledger that has one or more reporting currencies defined, the posting process:

- Creates journals converted to each of your reporting currencies.
- Includes them in the same batch as the original journal with a status of Posted.

## Settings That Affect Reporting Currency Balances

Reporting currencies share a majority of the ledger options with their source ledger. For example, the reporting currency uses the same suspense account and retained earnings accounts as its source ledger. However, there are certain options that must be set specifically for reporting currencies, such as the currency conversion level. The currency conversion levels are Balance, Journal, and Subledger.

**Note:** Secondary ledgers can't use subledger level reporting currencies.

Multiple dependencies exist between a reporting currency and its source ledger. Therefore, complete your period opening tasks, daily journal or subledger level reporting currencies accounting tasks, and period closing tasks in the correct order. The following table describes some of the tasks for each task type.

Type	Tasks
Period Opening	Open the accounting period in both your ledger and reporting currencies before you create or import journals for the period. Converted journals are only generated in your reporting currency if the period is open or future enterable.
Daily	Enter daily conversion rates to convert journals to each of the reporting currencies.
Period Closing	<ul style="list-style-type: none"><li>• Finish entering all regular and adjusting journals for the period in your ledger.</li><li>• Post all unposted journals in your ledger if not already done in the previous step.</li><li>• Post all unposted journals in your reporting currencies if not already done in the previous step.</li><li>• Run revaluation in both your ledger and reporting currencies. Post the resulting revaluation batches in each ledger.</li><li>• As needed, translate balances in your ledger.</li></ul>

Type	Tasks
	<ul style="list-style-type: none"> <li>• Generate needed reports from both your ledger and reporting currencies.</li> <li>• Close your accounting period in both your ledger and reporting currencies.</li> </ul>

## How Reporting Currencies Are Calculated

If you use reporting currencies at the journal or subledger level, journals are posted in your reporting currency when you:

- Create accounting.
- Post journal entries.
- Translate balances.

General Ledger and Subledger Accounting automatically generate journals in your reporting currencies where the entered currency amounts are converted to the reporting currency amounts. Other factors used in the calculation of reporting currency balances are listed:

- **Manual Journals:** Enter a manual journal batch in your reporting currency at the journal or subledger level by using the Create Journals page. Select the journal or subledger level reporting currency from the ledger's list of values. Continue in the same manner as entering any other manual journal.
- **Conversion Rounding:** Use the reporting currency functionality to round converted and accounted amounts using the same rounding rules used throughout your Oracle Fusion Cloud Applications. The reporting currency functionality considers several factors that are a part of the currencies predefined in your applications, including:
  - **Currency Precision:** Number of digits after the decimal point used in currency transactions.
  - **Minimum Accountable Unit:** Smallest denomination used in the currency. This might not correspond to the precision.
- **Converted Journals:** Generate and post automatically journals in your reporting currencies when you post the original journals in the source ledger for the following types of journals:
  - Manual journals
  - Periodic and allocation journals
  - Unposted journals from non-Oracle subledger applications
  - Unposted journals from any Oracle subledger that doesn't support reporting currency transfer and import
  - Optionally, revaluation journals
- **Unconverted Journals:** Rely on the subledger accounting functionality to convert and transfer Oracle subledger journals, for both the original journal and the reporting currency journal, to the General Ledger for import and posting. The reporting currency conversion for these journals isn't performed by the General Ledger.
- **Approving Journals:** Use the journal approval feature to process reporting currency journals through your organization's approval hierarchy. You can enable journal approval functionality separately in your source ledger and reporting currencies.
- **Document Numbers:** Accept the default document numbers assigned by the General Ledger application to your journal when you enter a journal in your ledger. The converted journal in the reporting currency is assigned

the same document number. However, if you enter a journal in the reporting currency, the document number assigned to the journal is determined by the reporting currency.

- **Sequential Numbering:** Enable sequential numbering to maintain the same numbering in your reporting currency and source ledger for journals, other than those journals for Oracle subledgers. Don't create separate sequences for your reporting currencies. If you do, the sequence defined for the reporting currencies is used. The sequences can cause the document numbers not to be synchronized between the ledger and reporting currencies.

**Note:** General Ledger enters a document number automatically when you save your journal if:

- The Sequential Numbering profile option is set to **Always Used** or **Partially Used**.
- Automatic document numbering sequence is defined.

If you use manual numbering, you can enter a unique document number.

- **Revaluation:** Run periodically revaluation in your ledger and reporting currencies as necessary to satisfy the accounting regulations of the country in which your organization operates.
- **Account Inquiries:** Perform inquiries in the reporting currency. You can:
  - Drill down to the journal detail for the reporting currency balance.
  - Drill down to see the source ledger currency journal amounts from any automatically converted journal that was created when the original journal posted.

**Note:** Be careful when changing amounts in a reporting currency, since the changes aren't reflected in your source ledger. Making journal entry changes to a reporting currency makes it more difficult to reconcile your reporting currency to your source ledger. In general, enter or change your journals in your source ledger, and then allow posting to update the reporting currency.

**Note:** If you use journal or subledger level reporting currencies, statistical journals are generated for your reporting currencies, but the journals aren't converted.





# 16 Business Units Overview

## 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.

Though there's no direct relationship between business units and legal employers, it's recommended that you either maintain a 1:1 relationship between the two or have many business units within a legal employer. Typically, a business unit is used to roll up financial transactions within a legal entity. So, if you set up business units at a higher level than legal entities, your financial transactions may fail.

In Oracle Fusion Cloud 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](#)

# 17 Business Functions for Business Units

## Business Functions

A business unit can perform many business functions in Oracle Fusion Applications.

### Business Functions

A business function represents a business process, or an activity that can be performed by people working within a business unit and describes how a business unit is used. The following business functions exist in Oracle Fusion applications:

- Billing and revenue management
- Collections management
- Customer contract management
- Customer payments
- Expense management
- Incentive compensation
- Materials management
- Payables invoicing
- Payables payments
- Procurement
- Procurement contract management
- Project accounting
- Receiving
- Requisitioning
- Sales

Although there is no relationship implemented in Oracle Fusion Applications, a business function logically indicates a presence of a department in the business unit with people performing tasks associated with these business functions. A business unit can have many departments performing various business functions. Optionally, you can define a hierarchy of divisions, business units, and departments as a tree over HCM organization units to represent your enterprise structure.

**Note:** This hierarchy definition isn't required in the setup of your applications, but is a recommended best practice.

Your enterprise procedures can require a manager of a business unit to have responsibility for their profit and loss statement. In such cases, any segment that allows the identification of associated revenue and costs can be used as a profit center identification. The segment can be qualified as the **Cost Center Segment**.

However, there are cases where a business unit is performing only general and administrative functions, in which case your manager's financial goals are limited to cost containment or recovering of service costs. For example, if a shared

service center at the corporate office provides services for more commercially-oriented business units, it doesn't show a profit and therefore, only tracks its costs.

In other cases, where your managers have a responsibility for the assets of the business unit, a balance sheet can be produced. The recommended best practice to produce a balance sheet is to setup the business unit as a balancing segment in the chart of accounts. The business unit balancing segment can roll up to divisions or other entities to represent your enterprise structure.

When a business function produces financial transactions, a business unit must be assigned to a primary ledger, and a default legal entity. Each business unit can post transactions to a single primary ledger, but it can process transactions for many legal entities.

The following business functions generate financial transactions and will require a primary ledger and a default legal entity:

- Billing and revenue management
- Collections management
- Customer payments
- Expense management
- Materials management
- Payables invoicing
- Project accounting
- Receiving
- Requisitioning

## Business Unit Hierarchy: Example

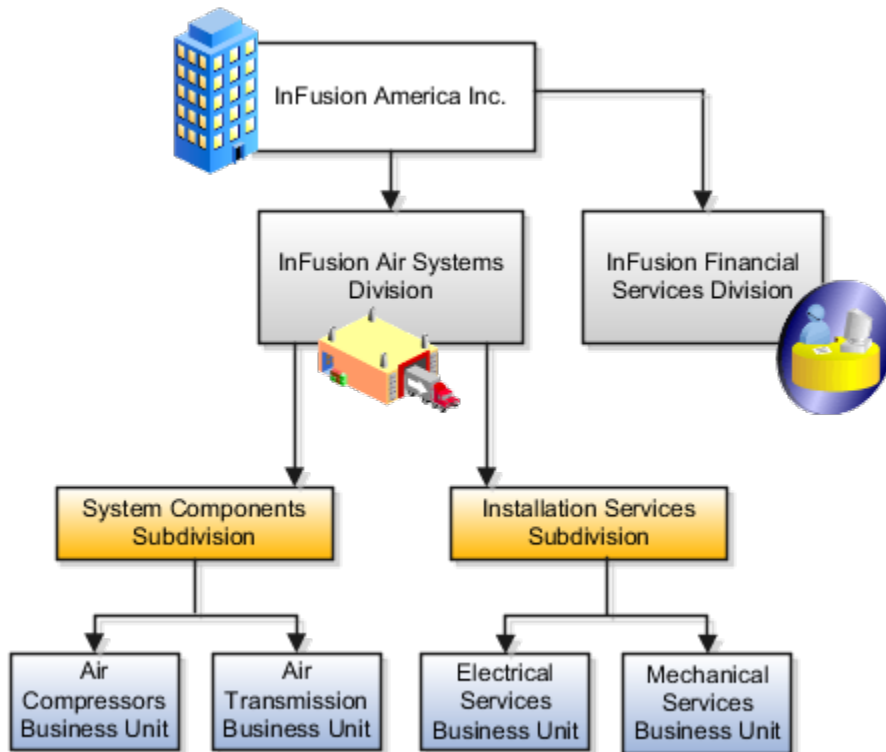
For example, your InFusion America Company provides:

- Air quality monitoring systems through your division InFusion Air Systems
- Customer financing through your division InFusion Financial Services

The InFusion Air Systems division further segments your business into the System Components and Installation Services subdivisions. Your subdivisions are divided by business units:

- System Components by products: Air Compressors and Air Transmission
- Installation Services by services: Electrical and Mechanical

The following figure shows an example of a business unit hierarchy.



Oracle Fusion applications facilitates independent balance sheet rollups for legal and management reporting by offering up to three balancing segments. Hierarchies created using a second or third balancing segment can provide the divisional results. For example, it's possible to define second or third balancing segment values to correspond to business units, and arrange them in a hierarchy where the higher nodes correspond to divisions and subdivisions, as in the InFusion US Division example.



# 18 Source Systems

## How You Set up Source Systems

This topic explains source systems and how to set up a source system.

You can set up source systems to help users to identify the source of the import data. You can specify whether the source system is a spoke system, such as a legacy system, or a purchased system, such as data from a third party provider. You can also specify what types of entities the source system contains. For example, you can specify that a source system contains customer data.

You can configure the following for a source system:

- Source system code, name, and description
- Source system type
- Enable for Items, Trading Community Members, Order Orchestration and Planning, and Assets

### Source System Code, Name, and Description

You can create a source system code to uniquely identify the source system. Source system codes are used by the application to create references between source IDs and the application database IDs.

**Note:** Ensure you update the source system code before you create the source system.

### Source System Type

You must set up a source system as either a spoke system or a purchased system.

### Enable for Items, Trading Community Members, Order Orchestration and Planning, and Assets

You can select one or more of the following entity types to import from the source system into the application database:

- Items
- Trading Community Members
- Order Orchestration and Planning
- Assets

You must enable the correct entity types because each import UI filters source systems based on their entity type. For example, if you set up a source system for Trading Community Members, Items, and Assets, then the source system can be selected as a data source only in this UI and not in different UI.

## Source System Entities

Source system entities are entities that you can import using a specified source system, such as addresses and parties.

When you import data from a source system, all the entities in the source system data are also imported. You can select multiple source references in the Manage Source System Entities task to allow multiple source system records to map to a single record.

### *Related Topics*

- [Source System Entities](#)

## FAQs for Source Systems

### What happens if I allow multiple source system references?

When you import data from a source system, you can merge multiple or duplicate source system records and create one record in the application. This is referred to as allowing multiple source system reference.

If you don't allow multiple source system references, then for every source system record, a duplicate record is created in the application.



# 19 Import Person and Organization

## Data Import Objects

Data import objects are business entities, such as competitors, partners, or resource teams that can be imported into the registry. You select the business entity or data import object when creating a data import batch.

### Data import process

The data import batch process changes depending on the import object selected. The following sets of business objects have the same import process flow:

1. Customer, reference, competitor, and custom party: You can check for duplicates, or deduplicate the batch, before importing the batch. You can deduplicate within the import batch as well as between the import batch and the registry.
2. Employee resource, resource team, partner, and partner contact: You can't deduplicate within the import batch or registry data.

When creating the data import batch, you can:

- Preview data before it's import.
- Specify if addresses will be cleansed before import.
- Set how many errors are allowed before the import is terminated.



# 20 Supplier Definition

## Create a Supplier and Supplier Site

Creating suppliers and supplier sites is an essential part of the procurement process. A supplier is modeled as a global entity. It's not created within a business unit or any other organizational context.

A procurement business unit establishes a relationship with a supplier through the creation of a site, which maintains internal controls for how to procure to pay transactions are carried out with the supplier.

1. Within the application, navigate to the **Suppliers > Create Supplier** task.
2. On the Create Supplier dialog box, enter:
  - Name  
If Streamline B2B Document Sharing With Intelligent Oracle Business Network Connectivity is enabled, you can use the type-ahead autosuggestion to search and select the company, you must register as a supplier, from a global directory. Selecting from the global directory helps identify if the supplier has an OBN trading partner account.
  - Tax Country
  - Tax Registration Number
3. Click **Create**.  
The complete list of supplier attributes that can have values are Alternate Name, Corporate Web Site, SIC, Current Fiscal Year's Potential Revenue, Year Established, Industry Category, and Industry Subcategory. If required, you can review the defaulted values and update them.
4. On the Edit Supplier page, Profile tab, enter:
  - Supplier Type
  - When there are mergers or acquisitions, the supplier contact of the parent company might have increased responsibility to respond to the negotiations of their subsidiaries. If you're a subsidiary supplier of a parent company, in the **Parent Supplier** field, search and select you parent company.
  - In Profile Details, on the Organization tab, select the **One-time Supplier** option if the supplier is created with a purpose of single transaction and isn't expected to be in continuous business after being paid once.
5. On the Edit Supplier page, Addresses tab, click the **Create** icon.
6. On the Create Address page, enter:
  - Address Name
  - Country

**Note:** The Country field automatically defaults to the country set in your Work Location, as seen in the Personal Information page, Employment Details tab.

  - Address Line 1
  - City
  - County

- State
- Postal Code
- Language
- Address Purpose

Select all applicable boxes. At a minimum select Purchasing.

7. If smart address search is enabled, then for a supplier, you can search a specific address and include that address information here.
8. Click **Save and Close**.

Repeat address creation for all addresses you do business with for this supplier.

9. With your supplier selected, open the Sites tab and click the **Create** icon.
10. On the Create Site page, enter:

- Address Name

Select the address for this supplier site.

You can create supplier sites with a name of up to 240 characters, this will assist to better identify them; providing flexibility to satisfy the requirements of any naming convention.

- If the supplier is an OBN trading partner, you can enable B2B messaging to improve your transaction efficiency. On the **General** tab, in the B2B Communication, click the contextual action for **OBN Enabled** to view the supplier's supported documents configured in OBN.
- To improve transaction efficiency, in **Enable B2B messaging**, select **Yes**.

11. Click **Save**.
12. Click the Receiving subtab and enter:
  - Receipt Routing
13. Click the Site Assignments subtab and click **Autocreate Assignments**. This may only be appropriate for your first site. Other sites may require manual creation.
14. Click **Save and Close**.
15. With your supplier selected, open the Contacts tab and click the **Create** icon.
16. On the Create Contact page, enter:

- First Name
- Last Name
- Email
- Select Administrative contact check box
- To facilitate mergers or acquisitions, the parent supplier contact may respond to the negotiations of its subsidiaries. To provide access to the parent supplier contact, select **Create user account**, and on the Data Access tab, confirm that the parent supplier information is included.

The parent contact can respond to its subsidiaries' negotiations in the Oracle Supplier Portal.

17. Click the Create icon.
18. In the Contact Addresses region, click the **Select and Add** icon:
  - Select the contact address.
  - Click **Apply**.

- Click **OK**.
- 19. In the User Account region, click the Create user account check box. Accept all the applicable privileges for this contact.
- 20. Click **Save and Close**.
- 21. Click **Save and Close**.

*Related Topics*

- [B2B Document Sharing with Intelligent Oracle Business Network Connectivity](#)

## Supplier Numbering

The Procurement Application Administrator configures supplier numbering. Suppliers created through the Create Supplier task flow, through the supplier registration process, or through supplier import, are automatically numbered. The starting supplier number is defined in the Specify Supplier Numbering Setup page.

The predefined default number is 1, The supplier number increments with each additional supplier created.

The next supplier number can be updated at any time, not just during initial setup. This can be used, for example, to skip a range of supplier numbers. The application validates that the next supplier number specified is not already used.

*Related Topics*

- [Create Suppliers with the Import Suppliers Process](#)

## Define Procurement Agents

Configure procurement agents to enable access to information such as purchasing documents, suppliers, approved supplier list entries, and business intelligence spend data.

1. Navigate to the Manage Procurement Agents task and click the **Go To Task** icon.
2. The Manage Procurement Agents page opens. Click the **Create** icon.
3. The Create Procurement Agents page opens: Select your Procurement BU.
4. Enter the user ID of the agent into the Agent field.
5. Select your Requisitioning BU.
6. In the Agent Access region, enable your choice of access rights for this agent:
  - a. Manage Requisitions
  - b. Manage Purchase Orders
  - c. Manage Purchase Agreements  
Enable access to blanket purchase agreements and contract agreements.
  - d. Manage Negotiations  
Enable access to Sourcing negotiations, if implemented by your organization.
7. Verify that Allowed is checked for all Actions that you intend for this agent:

a. Manage Catalog Content

Enable access to catalog content. This action allows an agent to add or update blanket purchase agreement line information as part of the collaborative catalog authoring

b. Manage Suppliers

Enable access to create and update supplier information.

c. Manage Approved Supplier List Entries

Enable access to create and update approved supplier lists.

8. Click **Save and Close**.

9. Click **Done**.

**Note:** For more details on Define Procurement Agents, see the Define Purchasing Configuration chapter of the "Oracle Procurement Cloud Implementing Procurement Guide."

## Procurement Agents

Use the Manage Procurement Agents task to manage procurement agents, including defining an agent's access to procurement functionality within a procurement business unit.

Find the task in the Procurement Foundation and Payables functional areas.

**Note:** To register as a Procurement agent, a user must first be registered as an employee.

## Procurement BU

Assign the agent to one or more procurement business units (BU).

## Action

Enable the agent with access to one or more procurement actions for each procurement business unit.

- Manage Requisitions: Enable access to purchase requisitions.
- Manage Purchase Orders: Enable access to purchase orders and work confirmations.
- Manage Purchase Agreements: Enable access to blanket purchase agreements and contract agreements.
- Manage Negotiations: Enable access to Sourcing negotiations, if implemented by your organization.
- Manage Sourcing Programs: Enable access to track and manage sourcing programs.
- Manage Catalog Content: Enable access to catalog content. This includes local catalogs, punchout catalogs, content zones, smart forms, information templates, and collaborative authoring.
- Manage Suppliers: Enable access to create and update supplier information.
- Manage Supplier Qualifications: Enable access to initiatives, qualifications, and assessments, if Supplier Qualification is implemented by your organization.
- Manage Approved Supplier List Entries: Enable access to create and update approved supplier lists.

- **Analyze Spend:** Used by the business intelligence functionality to enable access to view invoice spend information.

## Access to Other Agents' Documents

Assign an access level to documents owned by other procurement agents for each procurement business unit.

**Note:** An agent can perform all actions on their own documents as long as they have procurement BU access.

- **None:** The agent has no access to documents owned by other agents.
- **View:** Permits the agent to search and view other agents' documents.
- **Modify:** Permits the agent to view, modify, delete, and withdraw other agents' documents.
- **Full:** Permits the agent full control of other agents' documents. This includes the view, modify, delete, withdraw, freeze, hold, close, cancel, and finally close actions.

### Related Topics

- [How You Manage Procurement Agent Security](#)

## Set Up a Supplier for Contract Manufacturing

In contract manufacturing, the contract manufacturer is modeled as a regular supplier. The original equipment manufacturer (OEM) must define the following to set up the supplier:

- A contract manufacturer must be defined as a **Supplier**. To do this, in the Setup and Maintenance work area, use the following:
  - Offering: Manufacturing and Supply Chain Materials Management
  - Functional Area: Manufacturing Master Data
  - Task: Manage Suppliers
- Each contract manufacturer's manufacturing site must be defined as a supplier site. You must assign a procurement business unit to each site. This is the organization authorized to provide procurement services for the site.

For general details about supplier setup and setup steps common to all SCM offerings, refer to the Implementing Common Features for SCM guide.





# 21 Workforce Structure Locations

## 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.

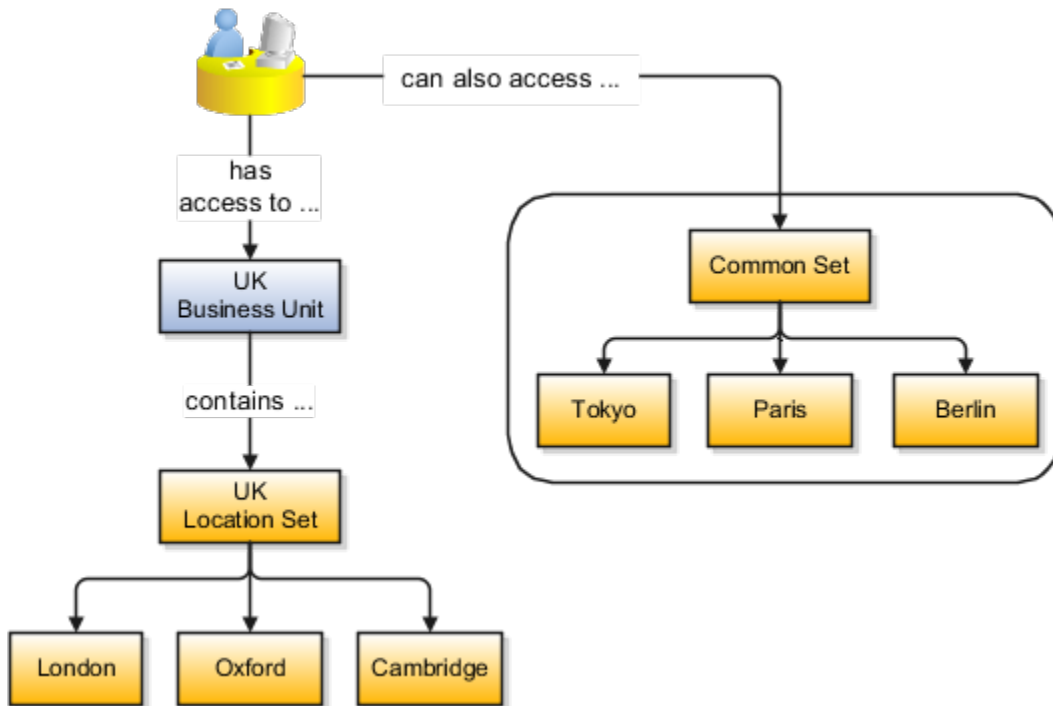
## Location Sets

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.



## Upload 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.

## Update Location Details

If you need to update or correct the details of a location, here's how you can do that:

1. Go to **My Client Groups > Location Details**.
2. On the page, click **Show Filters**.
3. Search for the location you need to correct or update using the filters and select it.
4. On the location's details page, click **Actions** and select **Update** or **Correct**.
5. Update the details as required and click **Submit**.

### Related Topics

- [Why can't I see my location in the search results?](#)
- [What happens if I inactivate a location?](#)
- [Upload Workforce Structures Using a Spreadsheet](#)

## FAQs for Locations

### 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.

### 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 Identified](#)

### 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 inactivate a location?

Starting from the effective date that you entered, you can no longer associate the location with other workforce structures, assignments, or applications.

If the location is already in use, it will continue to be available to the components that currently use it.

## How can I 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 as of the current date and must exist in the location set that you selected.

# 22 Facilities

## Quick Setup

### Prerequisites to Running Quick Setup for the Facilities Functional Area

Before you can run Quick Setup to set up the SCM common components like calendars, UOM classes and inventory organizations, you must ensure some settings.

Before you can run Quick Setup, you must ensure the following:

- There is at least one Financials business unit with the Materials Management function assigned.
- You have at least one organization location in Oracle Fusion HCM. You can use the Manage Inventory Locations task in Setup and Maintenance work area to set this information up.

### Why can't I select some UOM classes using Quick Setup?

In the Quick Setup flow, you can't select Unit of Measure (UOM) classes that already exist in your Oracle Fusion instance. Existing UOM classes are disabled to avoid data being overwritten.

If the UOM class data already exists in your Oracle Fusion instance, then you can't perform setup on this existing data using Quick Setup. The flow also checks whether any of the units already exist in another class. If so, the UOM class in Quick Setup is disabled to prevent you from selecting a class that would result in overwriting existing units.

If no units exist in the Oracle Fusion instance, then you can select the UOM classes in the second train stop of the Quick Setup flow.

### Why can't I start or run Quick Setup?

You can't run Quick Setup if you haven't completed the prerequisite steps required to run the flow.

Here are the prerequisites:

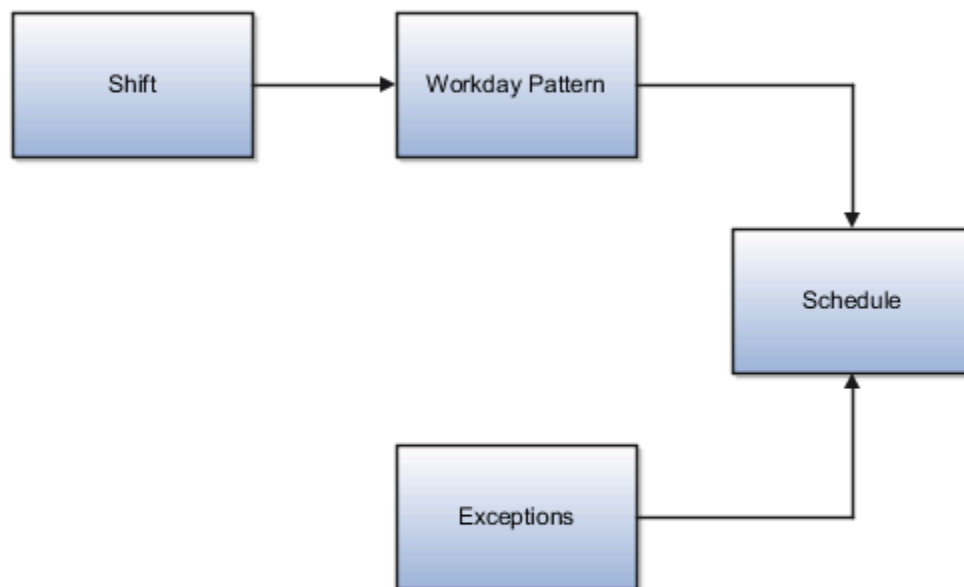
- Create at least one business unit with the Materials Management function assigned.
- Create at least one organization location in Oracle Fusion HCM. You use the **Manage Inventory Locations** task in the **Setup and Maintenance** work area.

# Facility Shifts, Workday Patterns, and Schedules

## Schedule Components

Schedules are comprised of workday patterns, any nonworking days, and exceptions.

Begin by creating shifts and then assigning those shifts to workday patterns. Next, create a schedule that's a collection of workday patterns and exception dates.



## Shift

A shift is a period of time, typically expressed in hours, and defined by a start time and an end time, or a duration. A shift can be for a work period or an off period. You can create time, duration, and elapsed shifts.

## Workday Pattern

A workday pattern is a collection of shifts for a specific number of days. You can create time, duration, and elapsed workday patterns.

## Exception

An exception is a record of a date that overrides the availability of a resource to which a schedule has been assigned. For example, a resource is assigned a schedule that includes December 25 as a working day. An exception can be created for December 25 and then applied to that schedule to override resource availability for that date. Exceptions can also be for a date and time period such as 9 a.m. to 11 a.m. on December 25th.

## Schedule

A schedule is defined by a sequence of workday patterns to be followed between certain dates. A schedule can also contain exception dates that override the availability of resources to which the schedule is assigned.

When defining a schedule, in addition to the effective dates, you can set additional options such as:

- Marking a schedule as active.
- Setting the first day of the week to specify which day is the start of the week in cases where the schedule doesn't model weekends and has 7 working days each week.
- Adding quarter types such as 4-4-5 or 4-5-4.

**Note:** You can't change the schedule start date or period type once the schedule is assigned to one or more organizations, plants, or work centers. Instead, create a new schedule with the desired information.

### *Related Topics*

- [Examples of Managing Workday Patterns](#)
- [Examples of Managing Shifts](#)

## Examples of Managing Shifts

A shift is a period of time, typically expressed in hours, that's used to build workday patterns. Workday patterns are used to build schedules.

You should model only the dates you need because you can always extend the end date. This allows for smaller volumes of initial data and improved performance. There are multiple types of shifts you can create. The following scenarios illustrate each type.

## Managing Time Shifts

Next month you're adding a second shift for your manufacturing operations. This new shift will start just after your regular first shift. You can create a time shift that starts at 4:00 p.m. and ends at 12:00 a.m. There are restrictions in

updating existing shifts and patterns. Shifts and patterns can't be updated if the change affects a schedule, that's they're associated to a schedule. If a shift is created but not assigned to a pattern (or assigned to a pattern but the pattern isn't assigned to a schedule) it can be updated. If a pattern is created and not assigned to a schedule it can be updated.

## Managing Time Shifts with Punch Details

Your division has decided that the employees in the office must clock in and out for lunch starting next week. All employees will take the same lunch hour. Add punch shift details to the existing shift so that employees punch in at 8:00 a.m.; they punch out for lunch from 11:30 a.m. to 12:30 p.m.; they punch back in at 12:30 p.m.; and they punch out for the day at 5:00 p.m.

## Managing Time Shifts with Flexible Details

Jorge Sanchez is a contractor who's starting work in your department next week. His hours will be flexible, so you need to create a new time shift with flexible details that he can use to record his time. He will have a flexible start time from 7:00 a.m. to 9:00 a.m. and a flexible end time from 4:00 p.m. to 6:00 p.m. His core work hours will be from 9:00 a.m. to 4:00 p.m.

## Managing Duration Shifts

One of the divisions in your organization doesn't use fixed start and end times for its daily shifts; the division only records the total duration of the shift and indicates if resources are available or not during that time. All of the employees in the division are available for 24 hours straight, and then they're not available for the next 24 hours. You should create a duration shift that indicates that resources are available for 24 hours, and create a second duration shift that indicates that resources aren't available for 24 hours.

## Managing Elapsed Shifts

The employees in the Human Resources department all work 8 hours a day, but the start and end times vary by employee. Some employees start as early as 6:00 a.m., while others don't start until 9:00 a.m. Create an elapsed shift with a duration of 8 hours, where all employees are assumed to be available for the number of hours in the shift at any time during the day.

# Examples of Managing Workday Patterns

A workday pattern is a collection of shifts for a specific number of days. There are multiple types of workday patterns you can create. The following scenarios illustrate each type.

## Managing Time Workday Patterns

Your department works a Monday through Friday workweek with 8 hour shifts each day. Time patterns always have time shifts. That is, the shift will have start time and end time. You can create a time workday pattern with a length of 7 days and details of an 8 hour time shift for days 1 through 5. Days 6 and 7 are considered nonworking days.

## Managing Duration Workday Patterns

A new group of employees starts next month, and each employee will work a schedule where he or she is available for 10 hours, and then not available for the next 16 hours, and then available for 10 hours again, and so on. This pattern starts on midnight of the first day of the next month. Create a duration workday pattern with a 10-hour available



duration shift, followed by a 16-hour not available duration shift. Do not specify the pattern length or start and end days, and the pattern will repeat for the length of the schedule to which it is associated.

## Managing Elapsed Workday Patterns

In the summer, several divisions in your organization work only 4 hours on Fridays. They work extended hours on Wednesdays and Thursdays to cover the 4 hours they will not work on Fridays. Create an elapsed workday pattern with a length of 7 days. Days 1 and 2 will have an 8-hour shift assigned, while days 3 and 4 will have a 10-hour shift assigned. Finally, day 5 will have a 4-hour shift assigned. As in the time workday pattern, days 6 and 7 are considered nonworking days.

### *Related Topics*

- [Examples of Managing Shifts](#)
- [Schedule Components](#)



# 23 Inventory Organizations

## Inventory Organizations

An inventory organization is a logical or physical entity in the enterprise that's used to store definitions of items or store and transact items.

### Inventory Management

Inventory organizations store and transact items, in addition to item definitions. An inventory organization used for item and inventory management is associated with one business unit, one legal entity, and one primary ledger. Use inventory organizations for item and inventory management when the storage or movement of inventory needs to be physically and financially tracked. Inventory organizations used for item and inventory management can represent facilities such as manufacturing centers, warehouses, or distribution centers.

## Guidelines for Using Inventory Organization

In Oracle Fusion, storage facilities, warehouses, and distribution centers are implemented as inventory organizations.

Inventory organizations are:

- Managed by a business unit, with the materials management business function enabled.
- Mapped to a legal entity and a primary ledger.

Two types of inventory organizations exist.

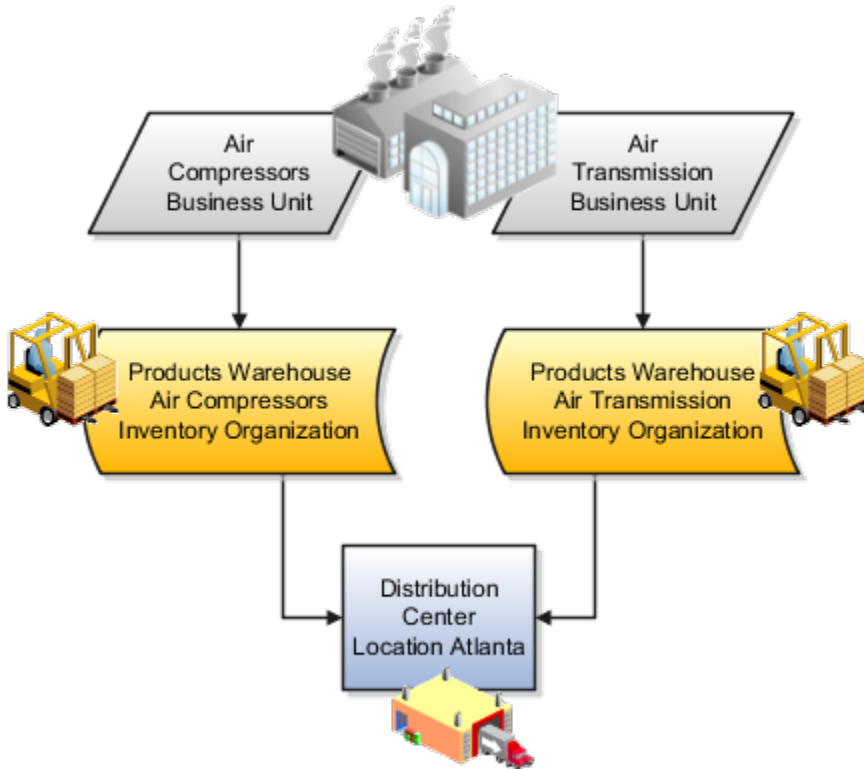
- Manufacturing facilities
- Storage facilities

Storage and manufacturing facilities are related to other organizational entities through a business unit that stores, manufactures, and distributes goods through many factories, warehouses, and distribution centers. The material parameters are set for both the facilities, enabling movement of material in the organization. This business unit has the business function of Materials Management enabled. Oracle Fusion Applications permit many inventory organizations to be assigned to one business unit.

### Distribution Center as an Inventory Organization

A distribution center can store inventory that is the responsibility of different business units. In this situation, assign an inventory organization to each business unit as a representation of the inventory in the distribution center. The multiple inventory organizations representing the inventory are defined with the same location to show that they're a part of the same distribution center.

In the following figure the two business units, Air Compressors and Air Transmission, share one distribution center in Atlanta. The two inventory organizations, Air Compressors and Air Transmission represent the inventory for each business unit in the Atlanta distribution center and are both assigned the Atlanta location.

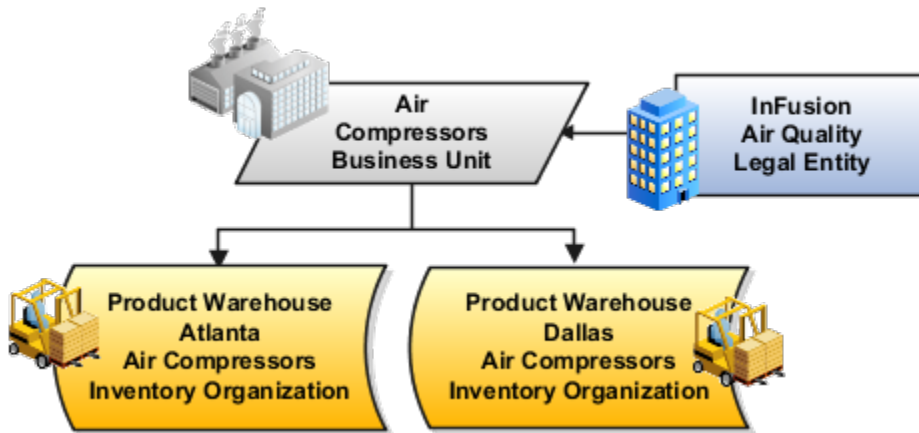


## Legal Entities Own Inventory Organizations

A legal entity owns the inventory located in a storage or manufacturing facility. This ownership is assigned through the relationship of the inventory organization representing the inventory and the legal entity assigned to the inventory organization. The legal entity assigned to the inventory organization shares the same primary ledger as the inventory organization's business unit.

The inventory is tracked in the inventory organization owned by the legal entity of which the business unit is part. All transactions are accounted for in the primary ledger of the legal entity that owns the inventory.

This figure illustrates the inventory owned by InFusion Air Quality legal entity. The InFusion Air Quality legal entity is associated with the Air Compressors business unit, which is associated with the two Air Compressors inventory organizations. Therefore, InFusion Air Quality legal entity owns the entire inventory in both the Dallas and Atlanta locations.



## Facility Schedules Are Associated with Inventory Organizations

A prerequisite to defining an inventory organization is to define a facility schedule. Oracle Fusion Applications permit you to associate an inventory organization with a schedule.

Facility schedules permit creating workday calendars for inventory organizations that are used in the Oracle Fusion Supply Chain Management product family. For example, use workday calendars in the scheduling of cycle counts and calculating transit time.

## Considerations for Inventory Organizations

You can create an inventory organization and should consider the dependencies and required parameters before you create the organization. After you create an inventory organization, you can change the name of an inventory organization but not the code.

Before creating inventory organizations, consider the following:

- Set up inventory organization dependencies
- Plan inventory organization parameters
- Profit center business units
- Copy inventory organizations

## Setting Up Inventory Organization Dependencies

When you create an inventory organization, you must associate it to dependencies, such as business units and legal entities. For this reason, create these dependencies before creating an inventory organization.

## Planning Inventory Organization Parameters

Before creating an inventory organization, plan the inventory organization's parameters.

Consider the following when planning to configure an inventory organization's parameters:

- Which schedule to use.
- Whether to configure locator control and if so, the level at which to enforce the locator control.

If you set the locator control to No locator control, later you can change it to Locator control determined at subinventory level. Only newly created subinventories will use locator controls. Any subinventories created before this change will continue to have no locator controls.

If you set the locator control to Locator control determined at subinventory level, you can update it to No locator control, only if every subinventory beneath the organization has no locators. If any subinventory below the organization uses locators, you won't be able to change the locator control.

- How you want to configure movement request settings such as pick slip batch size and replenishment movement request grouping.

Consider the size of your operation, your usage of subinventories, and the type of labor or equipment required when considering whether you want to use organization- or subinventory-level replenishment movement request grouping.

- How you want to configure lot, serial, and packing unit generation settings.

To make appropriate choices for these settings, you should be familiar with:

- Your company's guidelines for creating lot names, serial numbers, and packing unit numbers
- Whether your company requires you to assign the same lot number to multiple items in the same organization, or a specific lot number to only one item in the same organization
- Whether your company requires you to lot control purchase order or shipping order material
- How you want to configure item sourcing details, such as the picking rule to use, and whether to specify the inventory organization as a logistics services organization.

## Profit Center Business Units

When defining inventory organizations, you must specify a profit center business unit to generate intercompany trade transactions for various business flows. If you don't associate a profit center business unit to an inventory organization, it may result in trade transaction errors during cost processing.

See Also [Profit Center Business Units](#)

## Copying Inventory Organizations

Before creating new inventory organizations, you should determine if copying an existing inventory organization is the appropriate method. The Copy Inventory Organizations task can be used to simplify creating inventory organizations when a source organization exists, and is suitable to be used as the basis for making a series of copies where the new organizations vary by name, code, and location.

For example, your business uses third-party companies for shipping and new companies are added often. The new third-party companies will use the same parameters as the existing companies, only the name and location vary. You can use a suitable existing inventory organization and create new inventory organizations that use the new company's name, code, and location.

**Note:** Organizations enabled for contract manufacturing or for item sourcing can't be used as the source organization when copying Inventory Organizations.

See Also [Copy Inventory Organizations](#)

- Related Topics
- Profit Center Business Units

# Inventory Organization Parameters

Use the Manage Inventory Organization Parameters page to set up default inventory parameters for your organization.

1. In the Setup and Maintenance work area, use the **Manage Inventory Organizations** task:
  - Offering: Manufacturing and Supply Chain Materials Management
  - Functional Area: Facilities
  - Task: Manage Inventory Organizations
2. Click the **Create** icon to create a new inventory organization.
3. Enter the basic information for your organization, such as **Name, Organization, Management Business Unit, and Legal Entity**.
4. Specify a **Profit Center Business Unit** to generate intercompany trade transactions for various business flows. If you don't associate a profit center business unit to an inventory organization, it may result in trade transaction errors during cost processing.
5. Enter a value for the **Location Address** if a value didn't already default based on your management business unit.
6. Click **Next** to access the Manage Inventory Organization Parameters page.

Let's look at the sections of the Manage Inventory Organization Parameters page:

- General
- Lot, Serial Number, and Packing Unit
- Item Sourcing Details

## General

Once you enter the Manage Inventory Organization Parameters page, the General parameters are visible. They are broken into these sections:

- Item Definition Settings
- Inventory Settings
- Additional Usages
- Movement Request

Here are the **Item Definition Settings** fields:

Field	Description
Item Master Organization	Select an item master organization. You can create items in the item master organization and assign them to other organizations within your business unit.

Field	Description
	<p><b>Note:</b> An enterprise typically needs only one item master organization, and that should usually be an item organization, not an inventory organization.</p>
Item Grouping Behavior	<p>Item attributes are defined in the organization or referenced from one another.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• Definition organization</li> <li>• Reference organization</li> </ul> <p>The attribute values of items in a reference organization are derived from the item definition organization.</p> <p>For more details about item grouping, see the Oracle SCM Cloud: Implementing Product Management guide.</p>
Item Definition Organization	Item organization that stores the item attribute values.
Starting Revision	Enter the initial alphabetic or numeric revision.

Here are the **Inventory Settings** fields:

Field	Description
Schedule	Select a schedule. Schedules represent the working and nonworking time in a warehouse, and are comprised of workday patterns and exceptions.
Time Zone	<p>Select a time zone.</p> <p>Schedules are time zone neutral. Multiple warehouse can share schedules if desired, each having an appropriate time zone to reflect the local time.</p>
Locator Control	<p>Select a locator control option.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <b>No locator control:</b> Inventory transactions in this organization don't require locator information.</li> <li>• <b>Previously defined locator control:</b> Inventory transactions in this organization require a valid, predefined locator for each item.</li> <li>• <b>Dynamic entry locator control:</b> Inventory transactions in this organization require entry of a locator for each item. You can chose a valid, predefined locator or define a locator dynamically at the time of transaction.</li> <li>• <b>Locator control determined at subinventory level:</b> Inventory transactions use locator control information that you define at the subinventory level.</li> </ul>
Enable inventory tracking by project	Select to enable Oracle Projects integration on the inventory organization. Materials management transactions and manufacturing transactions gather the project details.



Field	Description
Enable inventory tracking by country of origin	Select to report and track the country of origin on on-hand quantity and inventory transactions in receiving, shipping, and inventory.
Warehouse accepts substitute items	Select if the warehouse accepts substitute items in place of ordered items.
Allow negative balances	<p>Indicate whether to allow negative balances. This parameter determines if inventory transactions can drive the inventory balance of an item negative.</p> <p>If selected, you can overpick and move more than the available on-hand quantity.</p>
Allow negative on-hand transactions	Indicate whether to allow negative on-hand transactions. This parameter determines whether negative on-hand transactions are permitted during cycle counting.
Use original receipt date	<p>Select to use the original receipt date. Organizations can maintain the original receipt date when transferring material between locations within a warehouse.</p> <p>For example, an inventory organization performs a purchase order receipt on 1-May-2020. The material is subsequently transferred on 10-May-2020 from the original put away subinventory to another subinventory. When the material is transferred, if this option is selected, both the original receipt date and the transaction date associated with the subinventory transfer transaction are captured.</p>
Round reorder quantity	Select to round the reorder quantity. When you specify to round reorder quantities, the min-max planning reorders for item subinventories automatically round up or down.
Automatically cancel transfer order backorders	Indicate whether the remaining quantities on backordered transfer order lines are automatically canceled.
Use current item cost	Select to use the existing item cost when creating transactions. If selected, the <b>Use Current Item Cost</b> field also defaults to <b>Yes</b> on the Create Miscellaneous Transactions page.

Here are the **Additional Usages** fields:

Field	Description
Organization is a manufacturing plant	<p>Select to set an organization as in-house manufacturing plant.</p> <p><b>Note:</b> If the organization is set as a contract manufacturing plant, you must also provide the supplier and supplier site information for the plant.</p>
Organization performs maintenance activities	Select to set the organization as a maintenance organization
Organization represents a contract manufacturer	Select to set an organization as contract manufacturing organization.

Field	Description
Integrated System Type	<p>You can indicate that another system is managing the warehouse execution. Select one of these values:</p> <ul style="list-style-type: none"> <li>• <b>Oracle Inventory Management</b> (this is the default value): For tasks related to pick release, pick confirm, and /or for inventory receiving.</li> <li>• <b>Warehouse Management System:</b> To send sales orders or transfer orders to the WMS and get ship confirmation or to send purchase order to get receipt confirmation.</li> <li>• <b>Third-Party Logistics:</b> If the warehouse management system is managed by a third party.</li> </ul>
Integrate manufacturing and maintenance with WMS	Specify if the plant uses a Warehouse Management System that is integrated to Oracle Manufacturing and Maintenance. This field is available only if you specify the integrated system type of Warehouse Management System. The default value is unselected.
Supplier	If the organization is set as a contract manufacturing plant, enter the supplier information for the plant.
Supplier Site	If the organization is set as a contract manufacturing plant, enter the supplier site information for the plant.
Organization is associated with an internal customer	<p>Select to use the destination organization as the customer for internal material transfers.</p> <p>Once enabled, you can enter the customer name and account number that has been setup for your destination inventory organization.</p>
Customer Name	If the organization is associated with an internal customer, enter the customer name for your destination inventory organization.
Account Number	If the organization is associated with an internal customer, enter the account number for your destination inventory organization.

Here are the **Movement Request** fields:

Field	Description
Pick Slip Batch Size	Enter the amount of order lines to process together.
Replenishment Movement Request Grouping	<p>Choose your grouping selection for replenishment movement requests:</p> <ul style="list-style-type: none"> <li>• Destination subinventory</li> <li>• Organization</li> <li>• None</li> </ul> <p>Consider the size of your operation, your usage of subinventories, and the type of labor or equipment required when considering whether you want to use organization or subinventory-level replenishment movement request grouping.</p>

Field	Description
Automatically delete picks when movement requests are canceled	Indicates whether the removal of the pick happens automatically when the movement request or sales order is canceled.
Close movement request lines at pick confirmation	Select to automatically close replenishment movement requests from min-max planning that are partially filled at pick confirmation time.

## Lot, Serial Number, and Packing Unit

Click the **Lot, Serial Number, and Packing Unit** link to set organization parameters for these areas:

- Lot Control
- Lot Generation
- Child Lot Control
- Serial Number Generation
- Packing Unit Generation

Here are the **Lot Control** fields:

Field	Description
Uniqueness	<p>Specify whether lot numbers should be unique for an item.</p> <ul style="list-style-type: none"> <li>• <b>No uniqueness control:</b> If you don't establish lot number uniqueness, you can assign the same lot number to multiple items in the same organization and across organizations. Organizations that choose <b>No uniqueness control</b> can enter any lot as long as the lot doesn't exist in any organization that's set to <b>Across items</b>.</li> <li>• <b>Unique across items:</b> If you control lot number uniqueness at the master level, you can assign a specific lot number only to one item in the same organization and across organizations.</li> </ul> <p>When you perform transactions, Inventory checks the lot number uniqueness control to generate lot number defaults.</p>
Generation	<p>Specify how to generate lot number defaults.</p> <ul style="list-style-type: none"> <li>• <b>At item level:</b> You can generate sequential lot numbers based on an alphanumeric prefix that you specify when you define an item.</li> <li>• <b>At organization level:</b> Inventory can generate lot number defaults for the entire organization using the Lot Generation options for the prefix, zero pad suffix, and total length. In this case, you must define a lot number prefix at the organization level.</li> <li>• <b>User defined:</b> If you don't want Inventory to generate lot number defaults automatically for you, you can enter your own lot numbers when you receive items.</li> </ul>
Allow Different Lot Status	<p>Select your choice for allowing different lot statuses:</p> <ul style="list-style-type: none"> <li>• <b>No:</b> Disallow transacting of new lot quantities into existing lots.</li> <li>• <b>With exception:</b> Allow transacting of lot quantities if the on-hand balance of the destination organization is zero.</li> <li>• <b>Yes:</b> Allow new lot quantities to inherit the status of the existing lot.</li> </ul>

Field	Description
Automatically Create Lot UOM Conversion	<p>Specify whether to automatically create lot UOM conversions:</p> <ul style="list-style-type: none"> <li>• <b>No:</b> Lot UOM conversions aren't created automatically.</li> <li>• <b>User confirmation:</b> When lot UOM conversions are created as a result of user confirmation, lot-specific UOM conversions are created using the lot quantities received.</li> <li>• <b>Yes:</b> When lot UOM conversions are created automatically, lot-specific UOM conversions are created using the parameters of the lot quantities received.</li> </ul> <p><b>Note:</b> This field is currently reserved for future use.</p>

Here are the **Lot Generation** fields:

Field	Description
Prefix	<p>If you select <b>At organization level</b> for the lot control generation option, optionally enter an alphanumeric lot number prefix for lot numbers generated by the application at the organization level.</p> <p>Inventory can generate lot number defaults for the entire organization if you define a lot number prefix at the organization level.</p>
Total Length	<p>Enter the maximum length for lot numbers.</p> <p><b>Note:</b> When using Oracle Work in Process (WIP); if the WIP parameter is set to default the lot number based on inventory rules, then WIP validates the length of the lot number against the length that you enter in this field.</p>
Zero pad suffix	Indicate whether to add zeroes to right-justify the numeric portion of lot numbers.

Here are the **Child Lot Control** fields:

Field	Description
Generation	<p>Select a value for generating child lots:</p> <ul style="list-style-type: none"> <li>• <b>Parent:</b> The application bases the child lot numbers on the same sequence as the lot number. For example, if a parent lot is P1, then the child lot is P2.</li> <li>• <b>Parent and child:</b> The parent lot acts as a prefix, and the application adds the next available number to form the child lot. For example if the parent lot is P1, then the child lot is P1-1.</li> </ul>
Prefix	Enter an alphanumeric prefix if the child lot generation is set to <b>Parent and child</b> .
Total Length	Enter the total amount of characters for the child lot. This includes the prefix if applicable.

Field	Description
Zero pad suffix	Indicate whether to add zeroes to right-justify the numeric portion of lot numbers.
Copy lot attributes	Select to ensure the child lots inherit the parent lot information.
Format validation	Select to ensure that manually entered lots conform to the predetermined naming convention.

Here are the **Serial Number Generation** fields:

Field	Description
Uniqueness	<p>Choose the type of serial number uniqueness for your organization:</p> <ul style="list-style-type: none"> <li>• <b>Unique across organizations:</b> Enforces unique serial numbers throughout all organizations. The same serial number uniqueness rules apply as when you set serial number uniqueness rules to be within an organization. Additionally, setting serial number uniqueness control across organizations prevents the same serial number from being assigned to more than one item, regardless of the inventory organization.</li> <li>• <b>Unique within inventory items:</b> Enforces unique serial numbers for inventory items. After a serial number is assigned to a particular item, you can't assign the same serial number to the same item, regardless of whether that item exists in the same or different inventory organization.</li> <li>• <b>Unique within model and inventory items:</b> Enables configurations of the same model to be assigned the same serial number as the base model item. This is useful in ATO (assemble-to-order) configurations where you generate a serial number for the base configuration, and need to generate the same serial number for the next configuration of the same model.</li> <li>• <b>Unique within organization:</b> Enforces unique serial numbers within the current organization. The same serial number uniqueness rules apply as when you set serial number uniqueness control to be within items. Additionally, setting serial number uniqueness control to be within an organization prevents the same serial number from existing multiple times within the same inventory organization.</li> </ul>
Generation	<p>Specify the level at which to generate serial control:</p> <ul style="list-style-type: none"> <li>• <b>At item level:</b> You can generate sequential serial numbers based on an alphanumeric prefix that you specify when you define an item. Define the starting serial number prefix and the starting serial number when you define the item.</li> <li>• <b>At organization level:</b> Inventory can generate serial number defaults for the entire organization. In this case, you must define a lot number prefix at the organization level.</li> <li>• <b>User defined:</b> If you don't want Inventory to generate serial number defaults automatically for you, you can enter your own lot numbers when you receive items.</li> </ul>
Prefix	Select an alphanumeric serial number prefix to use for system-generated serial numbers when generation is at the organization level.
Starting Serial Number	<p>Enter a starting serial number to use for system-generated serial numbers. Inventory uses the starting serial number prefix and the starting serial number to create predefined serial numbers.</p> <p><b>Note:</b> If serial number generation is at the organization level, you must enter a starting serial number.</p>

Field	Description
System Selects Serial Number	<p>Choose if you want to have the application perform pick release for serialized items automatically.</p> <ul style="list-style-type: none"> <li>• <b>No:</b> If set to <b>No</b>, you must enter the serial numbers when confirming the picks manually.</li> <li>• <b>Yes:</b> If set to <b>Yes</b>, the application performs automatic pick release for serialized items.</li> </ul>

Here are the **Packing Unit Generation** fields:

Field	Description
Total Length	Define the maximum length for packing units.
Prefix	Enter the prefix to add to every packing unit that's generated in this organization.
GS1-128	Indicates if the packing unit should adhere to the GS1 standards, given the prefix and suffix.
Starting Packing Unit	<p>Enter a starting packing unit number to use for system-generated packing units</p> <p>Inventory uses the starting packing unit prefix and the starting packing unit number to create predefined packing units.</p>
Suffix	Enter the suffix to append to every packing unit that's generated in this organization.

## Item Sourcing Details

Click the **Item Sourcing Details** link to set organization parameters for these areas:

- Picking Defaults
- Item Sourcing Details
- Distribution Parameters

Here are the **Picking Default** fields:

Field	Description
Picking Rule	<p>Select a default picking rule. Picking rules define the priority that Order Management Cloud uses to pick items.</p> <p><b>Note:</b> This rule won't be used in a WMS-enabled organization. Instead, the WMS picking rules are used.</p>
Subinventory Order	Enter a default subinventory picking order. This value indicates the priority with which you pick items from a subinventory, relative to another subinventory, in which a given item resides. The value that you enter appears as the default when you define a subinventory.

Field	Description
Locator Order	<p>Enter a default locator picking order. This value indicates the priority with which you pick items from a locator, relative to another locator, where a given item resides. The value you that enter appears as the default when you define a locator.</p> <p><b>Note:</b> A picking order of 1 means that Order Management Cloud picks items from that subinventory or locator before others with a higher number (such as 2, 3, and so on).</p>
Quantity Exception Reason	Select a default value to use when changing the quantity of inventory to pick
Pick confirmation required	<p>Select if you want your pickers to pick confirm manually. If you don't select this check box, pick confirmation occurs automatically.</p> <p><b>Note:</b> This check box is deselected for WMS-enabled organizations.</p>
Overpicking for movement requests enabled	Select to enable overpicking for movement requests. If selected, you can overpick more than the request quantity for movement requests.
Allow overpicking for special handling	Enable overpicking for sales orders, transfer orders, and work orders. This lets you specify more than the requested quantity on your pick-and-move requests for sales orders, transfer orders, and work orders.
Automatically populate picked quantity during pick confirm	Select to confirm pick slips without entering quantities manually. This lets you automatically populate the picked quantity during pick confirm.
Capture picking exceptions	Select to capture picking exceptions when confirming pick transactions on a pick slip.

Here are the **Item Sourcing Details** fields:

Field	Description
Type	<p>Select the item sourcing type:</p> <ul style="list-style-type: none"> <li>• <b>Organization:</b> Replenish items internally from another subinventory in the same organization or another organization</li> <li>• <b>Supplier:</b> Replenish items externally from an external supplier.</li> <li>• <b>None:</b> No default source for item replenishment.</li> </ul>
Organization	Select the organization used to replenish items. You must enter a value in this field if you selected <b>Organization</b> in the <b>Type</b> field.
Subinventory	Select the subinventory used to replenish items. You must enter a value in this field if you selected your current organization in the <b>Organization</b> field. You can't enter a value in this field if you selected <b>Supplier</b> in the <b>Type</b> field.

Field	Description
Purchasing by revision	If you select this check box, the revision information passes to the purchasing interface tables when you create a requisition in Inventory for revision-controlled items. If you don't select this check box, the requisition is created without revision control.

In the **Distribution Parameters** section, you can select the **Logistics services organization** check box to create an inventory organization as a logistics services organization. If selected, the inventory organization isn't costed, and shipment lines from different logistics service provider customers can't be packed in the same packing unit.

#### Related Topics

- [Considerations for Inventory Organizations](#)
- [Item Definition Organization and Reference Organization](#)
- [Considerations While Creating Item Definition Organization and Reference Organization](#)
- [Profit Center Business Units](#)

## Copy Inventory Organizations

The Copy Inventory Organizations task is used to simplify creating inventory organizations when a source organization is constructed and is suitable to be used as the basis for making a series of copies where the new organizations vary by name, code, and location.

To copy an existing inventory organization:

1. Navigate to the Copy Inventory Organizations task.
2. Select an existing inventory organization to use as the source organization. If the source organization is a master organization, then the newly created organizations will use the source organization as the master organization. If the source organization is a child organization, then the newly created organizations will be a child to the master organization that the source organization points to.
 

**Note:** Organizations enabled for contract manufacturing or for item sourcing can't be used as the source organization when copying Inventory Organizations. This is because these settings require choices that are unique. As a result, they can't be copied into the new organizations being created.
3. Select additional information to copy:
  - The Inventory organization parameters checkbox is always selected.
  - The Organization data security checkbox copies the user assignments from the source organization into the newly created organization.
  - If the source inventory organization is a plant, select the Plant parameters checkbox if you wish to duplicate the plant parameters as well. If the Plant parameters checkbox is selected, then the Subinventory structure and Locators checkboxes must also be selected to ensure these values are also copied.
  - The Locators checkbox copies all locators in the source inventory organizations into each new copy. Locators must have a parent subinventory. All subinventories in the source organization will be duplicated in each new copy.
4. For each new inventory organization that you are creating, enter a unique name, unique code, and location.



5. Click the Submit button.
6. Note the process ID.

After you submit the process, you can navigate to the Scheduled Processes monitor to verify that the process completed successfully.

#### *Related Topics*

- [Copy Inventory Organizations](#)

## How Rounding the Reorder Quantity Affects Min-Max Planning Reorder Calculations

When you specify to round reorder quantities, min-max planning reorders for item subinventories are automatically rounded up or down.

### Settings That Affect Rounding the Reorder Quantity

Reorder quantities for an item subinventory are calculated based on:

- The setting that you select for the **Round reorder quantity** parameter on the Manage Inventory Organization Parameters page, General tab, of the inventory organization containing the item subinventory
- The value that you specify for the **Fixed Lot Multiple** text box on the Add Item to Subinventory window

### How Rounding the Reorder Quantity Affects Min-Max Planning Reorder Quantity Calculations

If you enable rounding the reorder quantity for the inventory organization, and specify the fixed lot multiple for the item subinventory, the reorder quantity is rounded up. If you disable rounding the reorder quantity for the inventory organization, and specify the fixed lot multiple for the item subinventory, the reorder quantity is rounded down.

**Note:** To round reorder quantities, you must specify a fixed lot multiple.

### Example: Rounding the Reorder Quantity

Assume that the reorder quantity is 24. If you enable rounding the reorder quantity and specify 10 for the fixed lot multiple, the reorder quantity is rounded up to 30. If you disable rounding the reorder quantity and keep the fixed lot multiple at 10, the reorder quantity is rounded down to 20.

# Considerations for Selecting Lot Number Uniqueness Control

Use the Inventory Organization Parameters page to specify if lot numbers should be unique for an item.

Select one of these lot number uniqueness control options to apply to the items in your inventory organization:

- No uniqueness control
- Across items

When you perform transactions, Oracle Inventory Management checks the lot number uniqueness control to generate lot numbers.

## No Uniqueness Control

Choose this option if you don't want to establish lot number uniqueness. When selected, you can assign the same lot number to multiple items in the same organization and across organizations. Organizations that choose **No uniqueness control** can enter any lot as long as the lot doesn't exist in any organization that's set to **Across items**.

## Across Items

Choose this option to control lot number uniqueness across items. With this option, you can assign a specific lot number to only one item in the same organization and across organizations. The application verifies that the lot number doesn't exist for any other item in any other organization.

This table shows what's allowed:

Organization	Uniqueness Setting	Item	Lot Number
M3	No control	INV-101	LOT2
M3	No control	INV-102	LOT2
M4	No control	INV-103	LOT2
M5	No control	INV-104	LOT2

This table shows what's not allowed:

Organization	Uniqueness Setting	Item	Lot Number
M3	No control	INV-101	LOT1
M3	No control	INV-102	LOT1

Organization	Uniqueness Setting	Item	Lot Number
M4	No control	INV-103	LOT1
M5	No control	INV-104	LOT1

It is important to understand that when you use this setting for an organization, the same lot number can't exist for any other item in any other organization. However, it's possible to have the same item with the same lot number in multiple organizations.

**Note:** You can change the setting for the lot number uniqueness control at the inventory organization level if there are no open transactions.

## Set Up a Supplier for Contract Manufacturing

In contract manufacturing, the contract manufacturer is modeled as a regular supplier. The original equipment manufacturer (OEM) must define the following to set up the supplier:

- A contract manufacturer must be defined as a **Supplier**. To do this, in the Setup and Maintenance work area, use the following:
  - Offering: Manufacturing and Supply Chain Materials Management
  - Functional Area: Manufacturing Master Data
  - Task: Manage Suppliers
- Each contract manufacturer's manufacturing site must be defined as a supplier site. You must assign a procurement business unit to each site. This is the organization authorized to provide procurement services for the site.

For general details about supplier setup and setup steps common to all SCM offerings, refer to the Implementing Common Features for SCM guide.

## FAQs for Inventory Organizations

### What's an item subinventory?

An item subinventory is an association of an item with a subinventory that's created when you add an item to a subinventory.

You might want to restrict an item to a subinventory to store it with other items that have a similar size, volume, weight, specific storage requirement such as refrigeration, or the type of labor and equipment used to create the item. You

also add an item to a subinventory to either perform min-max planning on the item, or include the item in an ABC classification set for ABC analysis.

## What happens if I create an inventory organization as a logistics services organization?

If you create an inventory organization as a logistics organization, the inventory organization isn't costed, and shipment lines from different logistics service provider customers can't be packed in the same packing unit.

## Can I change an inventory organization code?

No, you can't change an inventory organization code.

Inventory organization codes are used in multiple setups, so changing the code could have many unanticipated repercussions. You should instead create a new organization with the desired code and identical setup, and then disable the unwanted code.

# 24 Item Organizations

## Setup Tasks for Item Organizations

You must create item organizations before you can create items in Oracle Product Hub. These tasks are completed in the Setup and Maintenance work area.

Task	Description
Manage Item Organizations	Item organizations are used when the organization does not have dependencies on business units or legal entities.
Manage Organization Trees	In Product Hub, organization hierarchies (trees) are used across some of the mass change flows, including the Assign to Organization, Assign Items to Supplier Organization, and Create Item Structure from Common flows.

## Item Organizations

An item organization defines an item when inventory balances aren't stored and inventory storage or inventory movement isn't reflected in Oracle Fusion Cloud Applications.

For example, you would use an item organization in a retail scenario, if you need to know the items that are listed by and sold through each retail outlet even though inventory and transactions are recorded in another system. In sales applications, item organizations are used to define sales catalogs.

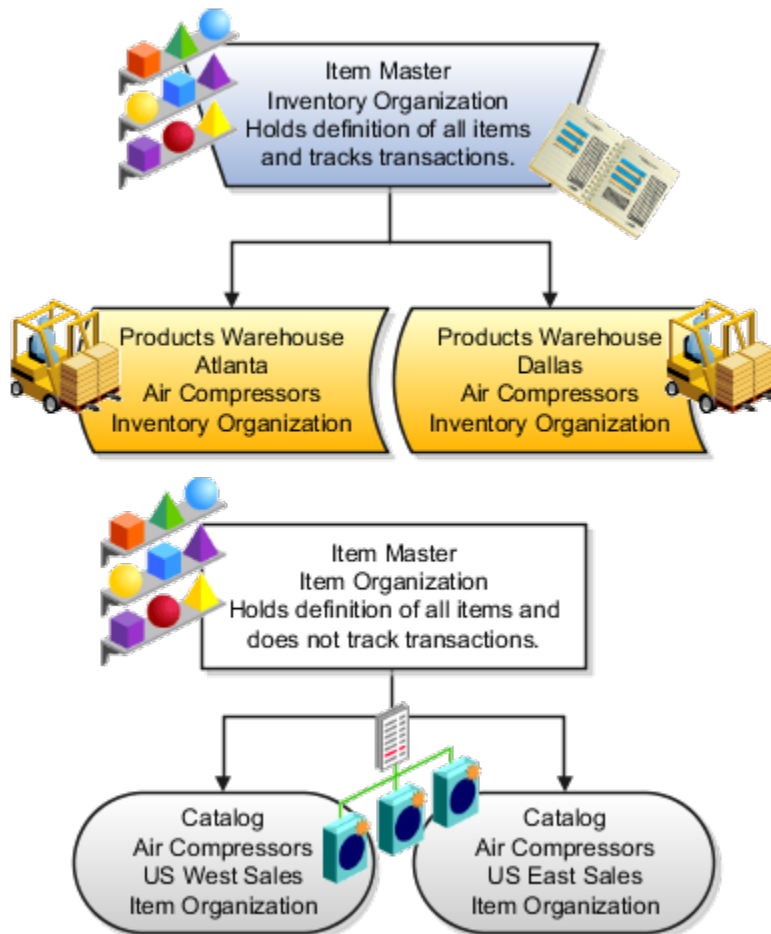
### Note:

- Items belong to an item organization.
- Item attributes that are associated with financial and accounting information are hidden from the item if it exists within the item organization.
- Item organizations can be changed by administrators to an inventory organization by updating the necessary attributes. There's no difference in the way items are treated in these two types of organizations except that there can't be any financial transactions in the downstream applications for items that are assigned to an item organization.

## Item Master Organizations

An item master organization lists and describes items that are shared across several inventory organizations or item organizations.

The following example shows the choice between inventory organizations that track inventory transactions, stored in two warehouses, and item organizations that just track items, listed in two sales catalogs.



For the most efficient processing, you should:

- Have a single item master.
- Include an item and its definition of form, fit, and function only once in the item master.
- Separate the item master organization from organizations that store and transact items.

**Note:** Oracle Fusion Cloud Applications permit multiple item masters, however, use this capability cautiously. If you acquire a company, there may be value in keeping the old item master for a transition period. If you manage your subsidiaries as separate businesses, there may be reduced value in a single item master.

## FAQs for Item Organizations

### How can I change an item organization to an inventory organization?

Use the Manage Item Organizations task in the Setup and Maintenance work area to make this change. On the Edit Item Organization page, change the value in the Usage field to Inventory management.

### How can I define a profit center business unit for an item organization?

On the Edit Item Organization page, change the value in the Usage field to an inventory organization.

### Can I use the same item number across multiple item master organizations?

Item numbers must be unique across all the item master organizations. Therefore, you can't create an item in a different master organization unless it uses a unique item number. For additional details and considerations about setting up multiple master organizations, see *Item Master Organizations* .





# 25 Approvals and Notifications

## Configure Workflow Approvals and Notifications

With approval management in BPM Worklist, you configure workflow tasks that users act on for approvals, including the notifications involved. For example, specify levels of approval needed, control approval routing, and configure email notifications.

After all assignees approve a workflow task, whatever got approved takes effect. Some tasks are just FYI, and assignees don't need to do anything. Either way, here are some examples of what you can do to configure workflow tasks, including notifications:

- Set how many levels of approval are needed for transactions over a particular amount
- Define whom the assignees would be, based on the supervisory hierarchy in Oracle Fusion Cloud HCM
- Create approval groups so that the workflow task can be assigned to the set of users in the group instead of an individual user
- Control when to send notifications to users involved with the task
- Disable or enable in-app or email notifications, or both

### Get Started

In the Offerings work area, enable the Approval Routing Administration feature at the offering level so that these setup tasks are available in the Application Extensions functional area:

- Manage Task Configurations
- Manage Approval Groups

These setup tasks take you to BPM Worklist, where you do most of the setup and configuration related to workflow. But, depending on your offering, you might use a different functional area or even another approval setup task. Some product families have pages or tools that you can use instead of, or in addition to, BPM Worklist, depending on what you want to configure.

### Manage Workflow Tasks

After users create a task, for example by submitting something for approval, you can use the Transaction Manager: Transactions page in the Transaction Console work area to keep track of the workflow task. And also to jump in when you need to, especially if something goes wrong.

For workflow data, you can use the tables that start with `FND_BPM` in the Oracle Fusion Cloud Applications Tables and Views for Common Features guide, and the Manage Tasks API in the REST API for Common Features in Oracle Fusion Cloud Applications guide. Don't query other tables or use other APIs that aren't documented.

### Related Topics

- [Oracle Fusion Cloud Applications Tables and Views for Common Features](#)
- [REST API for Common Features in Oracle Fusion Cloud Applications](#)
- [Configure Offerings](#)
- [How do I update existing setup data?](#)

## Roles That Give Workflow Administrators Access

Workflow administrators for a specific product family need a predefined, family-specific workflow role to access tasks and manage submitted tasks for that family. To configure workflow tasks, they also need BPM Workflow System Admin Role (BPMWorkflowAdmin).

For example, administrators with the family-specific roles can do things like reassign submitted tasks, but they also need BPM Workflow System Admin Role to define approval rules. Other than the family-specific workflow roles, there's also BPM Workflow All Domains Administrator Role (BPMWorkflowAllDomainsAdmin). This gives administrators access to all product families. Assign to the administrators a role that contains the workflow roles appropriate for their needs.

### Workflow Roles

Here are the roles that give access to workflow administration.

Product Family	Role Name	Role Code
All	BPM Workflow All Domains Administrator Role	BPMWorkflowAllDomainsAdmin
All	BPM Workflow System Admin Role	BPMWorkflowAdmin
Financials	BPM Workflow Financials Administrator	BPMWorkflowFINAdmin
Higher Education	BPM Workflow Higher Education Administrator	BPMWorkflowHEDAdmin
Human Capital Management	BPM Workflow Human Capital Management	BPMWorkflowHCMAdmin
Incentive Compensation	BPM Workflow Incentive Compensation Administrator	BPMWorkflowOICAdmin
Procurement	BPM Workflow Procurement Administrator	BPMWorkflowPRCAdmin
Project Management	BPM Workflow Project Administrator	BPMWorkflowPRJAdmin
Sales	BPM Workflow Customer Relationship Management Administrator	BPMWorkflowCRMAdmin

Product Family	Role Name	Role Code
Supply Chain Management	BPM Workflow Supply Chain Administrator	BPMWorkflowSCMAdmin

## Things to Know About the Roles

Here are some things to know about how these workflow 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 workflow 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 Role and Abstract Role](#)
- [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.

#### *Related Topics*

- [How do I update existing setup data?](#)

## 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.

The screenshot shows the 'Deadlines' subtab configuration page. On the left is a navigation menu with icons and labels for General, Assignees, Data, Deadlines (selected), Notifications, Access, and Configuration. The main content area is titled 'Deadlines' and contains the following settings:

- Due Date:** A checkbox labeled 'Static' is checked. To its right are three input fields: 'Day' with the value '14', 'Hour' with the value '0', and 'Minutes' with the value '0'. Each field has up and down arrow buttons.
- Expiration Settings:** A section header with a triangle icon.
- Expiration Level:** Three radio buttons: 'Do Nothing', 'Task Level', and 'Assignee Level' (which is selected).
- Duration:** A checkbox labeled 'Static' is checked. To its right are three input fields: 'Day' with the value '30', 'Hour' with the value '0', and 'Minutes' with the value '0'. Each field has up and down arrow buttons.
- Escalation Override Class:** A text input field.
- Action:** Three radio buttons: 'Expire only', 'Escalate' (which is selected), and 'Renew'. Below these is the text 'Take above action when any of the following is met'.
- Maximum Escalation Levels:** A text input field with the value '2' and up/down arrow buttons.
- Exclude Saturday and Sunday:** A checkbox which is checked.

## 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.
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](#)

## Assignments and Routing

### 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 Reports](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)

### 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 participant. In BPM Worklist, the Assignees subtab in the Task Configuration tab has a diagram that maps out 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:

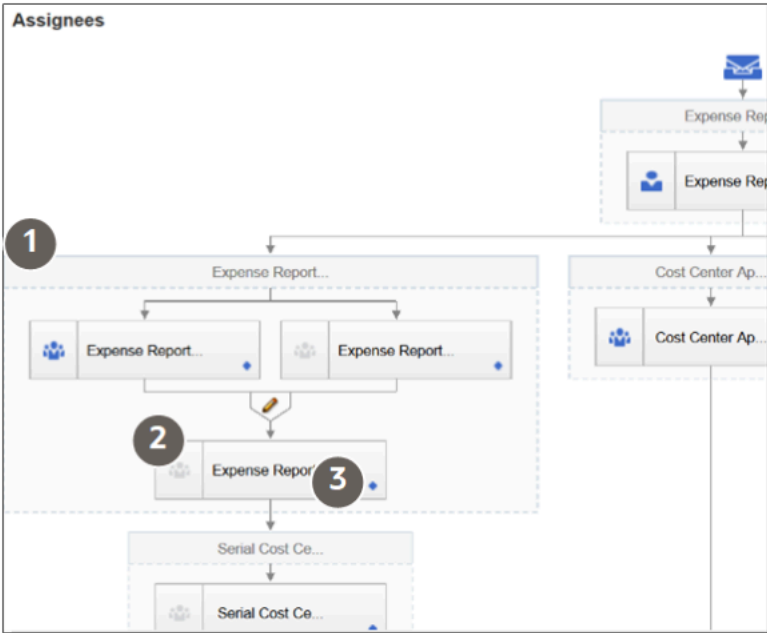
- Parallel: The task gets assigned and notifications are sent to all of the participants in the stage at once.

- 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 an icon 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 specific users that can act on workflow tasks. You can set up approval rules so that tasks can get routed to an approval group. 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 transactions over a certain amount must have approvals 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.

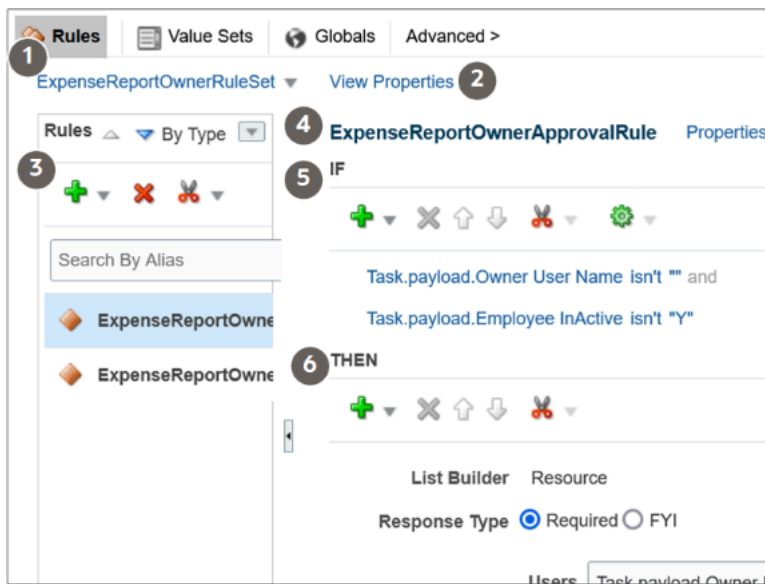
4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, find the participant you want to work on. Click the **Go to rule** icon and select **Go to rule**. Or, select the participant and, in the pane after 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.  <ul style="list-style-type: none"> <li>○ 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.</li> <li>○ 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</li> </ul>

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 <b>Reference User</b> 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 <b>Hierarchy Type</b> and <b>Effective Date</b> 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 <b>Reference User</b> field, you entered "KLEE".
<code>","", ""</code>	You left the <b>Hierarchy Type</b> and <b>Effective Date</b> 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**

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
**List Builder**    Supervisory

**Response Type**    ☒ Required    ☐ FYI

**Number of levels**    1

**Starting Participant**    HierarchyBuilder.getMa 

☐    **Top Participant**    HierarchyBuilder.getPri 

**Auto Action Enabled**    False    

**Auto Action**    null

**Rule Name**    "ExpenseReportManage

**Dimension Id**    null

## Test and Apply Your Rule Set

1. Click the **Validate** button in the Assignees tab to see if there's anything wrong with the rules that needs to be fixed. Results appear in the Business Rule Validation – Log subtab after the Rules subtab.
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



## 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 recommended list builders:

- Approval Group
- Job Level
- Position
- Resource
- Supervisory

### 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 Fusion Cloud HCM. 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	<input type="text"/>	relative to	<input type="text"/>	▼
	At least	<input type="text"/>	relative to	<input type="text"/>	▼

- 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 <b>Starting Participant</b> 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	<p>The assignees are the manager (job level 2) and director (job level 3).</p> <ul style="list-style-type: none"> <li>Starting participant: Manager at job level 2 is included no matter what.</li> <li>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.</li> <li>At most condition: No match because the director's manager, the vice president, has a job level (5) that's more than X2.</li> </ul>
2	5	No	<p>The assignees are the manager (job level 2), director (job level 3), and vice president (job level 5).</p> <ul style="list-style-type: none"> <li>Starting participant: Manager at job level 2 is included no matter what.</li> <li>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.</li> <li>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 president's job level (6) is more than X2.</li> </ul>
4	6	No	<p>The assignees are the manager (job level 2), director (job level 3), vice president (job level 5), and senior vice president (job level 6).</p> <ul style="list-style-type: none"> <li>Starting participant: Manager at job level 2 is included no matter what.</li> <li>At least condition: Director, whose job level (3) is less than X1, and the vice president, who is the last assignee for</li> </ul>

At Least (X1)	At Most (X2)	Include All Managers at Last Level	Assignees
			<p>this condition because her job level (5) is the first that's the same as or more than X1.</p> <ul style="list-style-type: none"> <li>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.</li> </ul>
4	6	Yes	<p>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).</p> <p>This example is the same as the previous one, except that the <b>Include all managers at last level</b> 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.</p>
1	1	No	<p>The only assignee is the manager (job level 2).</p> <ul style="list-style-type: none"> <li>Starting participant: Manager at job level 2 is included no matter what.</li> <li>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.</li> <li>At most condition: No match because the manager's manager, the director, has a job level (3) that's more than X2.</li> </ul>

## Position

Create approval rules based on the position hierarchy in Oracle Human Capital Management Cloud. The approval process will ascend the position hierarchy, starting at the position level specified in the approval rule and continuing until a sufficient position is found, based on other conditions in the rule.

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 defines the number of levels the approval request should proceed to. It has two values, x1 (at least) and x2 (at most). It can be relative to Starting Point, Creator, or Absolute.
  - Starting Point: Here the values x1 or x2 are relative to the Starting Participant defined in the Rule. Again, x1 and x2 are relative to the position level of this user.
  - Creator: Here the values x1 or x2 are relative to the creator of the task.
  - Absolute: Here the values x1 or x2 (at least and at most) will be absolute values starting from the first position level.
- Starting Participant is the first participant in a list, usually a manager. This isn't affected by any other condition like at-least, at-most, or Top Participant. Substitution can happen after all the rules are executed.
- Top Participant is the last participant in the approval. If this participant is assigned in the approval flow and not skipped, then the request doesn't go beyond this participant.
- Utilized Participant: From the calculated list of participants, only participants specified in this option are used. Choose Everyone, First and Last manager, or Last manager.
- Auto Action Enabled: The list builder automatically acts on task based on the next option.
- Auto Action: Specifies the outcome to be set. This can be null if auto action is not enabled.

Let's take a look at an example of what the assignee list would be from this position hierarchy:

User with position level PL1 reports to PL2 and so on to level PL6. The task creator has PL1, and the Starting Participant is set as one higher than the creator, or PL2.

At least (relative to)	At most (relative to)	Utilized Participants	Approval Chain
3 (Absolute)	3 (Absolute)	All Approvers <ul style="list-style-type: none"> <li>• Starting participant: PL2</li> <li>• At least = PL3</li> <li>• At most = PL5</li> </ul>	PL2 > PL3 > > PL4 > PL5.
3 (Starting Participant)	3 (Starting Participant)	All Approvers <ul style="list-style-type: none"> <li>• Starting participant: PL2</li> <li>• At least = PL3</li> <li>• At most = PL5</li> </ul>	PL2 > PL3 > PL4 > PL5
3 (Starting Participant)	3 (Starting Participant)	Final Approver Only <ul style="list-style-type: none"> <li>• Starting participant: PL2</li> <li>• At least = PL3</li> <li>• At most = PL5</li> </ul>	PL5
3 (Starting Participant)	3 (Starting Participant)	Manager and Final Approver	PL2 > PL5

At least (relative to)	At most (relative to)	Utilized Participants	Approval Chain
		<ul style="list-style-type: none"> <li>Starting participant: PL2</li> <li>At least = PL3</li> <li>At most = PL5</li> </ul>	
1 (Absolute)	1 (Absolute)	All Approvers <ul style="list-style-type: none"> <li>Starting participant: PL2</li> <li>At least = no match</li> <li>At most = no match</li> </ul>	PL2

## 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 Fusion Cloud HCM. 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.WorkflowSubmitter, -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
Response Type	Required
Number of Levels	1
Starting Participant	<code>HierarchyBuilder.getPrincipal("workflowsystem",-1,"","")</code> or <code>HierarchyBuilder.getPrincipal(Task.creator,-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.
  - o In the field before the operator, enter **Lists\_collection**.
  - o 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.
  - o In the field before the operator, enter a variable.
  - o 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.
  - o Each: There's a match every time something in the collection meets the conditions. Notifications are sent for each match.
  - o 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.
  - o None: The entire collection is evaluated, and a notification is sent when nothing matches.
  - o 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.

```

IF
  ER is a Expense Report and
  ER.Expense Report Total same or more than 1000
  and
  Lists_collection is a Lists
  and
  At least one {
    item is a Expense Item
    {
      item.Expense Source equals ignore case item.Travel Type
    }
  }
  
```

## Prevent Assigning Approvals to Specific Users

In rare cases, workflow tasks get routed to the person who created the task or someone who should not approve due to conflicts of interest. To prevent this, you can configure tasks to skip certain users in the approval chain.

**Note:** The skipped 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](#)

## When Tasks Are Automatically Released to Approval Groups

When a workflow task is assigned to an approval group, anyone in the group can claim it. But if they don't act on the task after a certain amount of time, the task is automatically released to the group.

While a task is claimed, no one else in the approval group can act on it. But when the task is released, anyone in the group can claim and act on it. The time that a user has before the task is automatically released can depend on multiple factors. The factors that you can control are the task priority and expiration policy.

### No Expiration Is Set

If the task has no expiration, it's automatically released based only on the task's priority.

#### Duration Based on Priority

Task Priority	Duration in Days
1	1
2	2
3	3
4	4
5	5

So, if a task has a priority of 3, the user who claimed the task has 3 days to act before it's automatically released.

## Expiration Is Set

If the task is configured to expire, it's automatically released based on the task's priority and the expiration policy. The priority determines the expiration percentage, which is used in this formula to calculate how much time there is before the task is automatically released:

$$(\text{Expiration Date} - \text{Calendar Date}) * \text{Expiration \%}$$

### Percentage Based on Priority

Task Priority	Expiration Percentage
1	30
2	40
3	50
4	60
5	76

For example, a task has a priority of 3, and its expiration policy is set to 10 days. Whether the policy is set at the task or assignee level, it doesn't affect the calculation. Let's say someone claimed the task on May 5, and today is May 10. The expiration date is May 15 because the expiration is set to 10 days. The calculation based on the formula would then be:

$$(15 - 10) * .50 = 2.5$$

So, the user has two and a half more days from today to act on the task before it's automatically released.

### Related Topics

- [Define the Due Date and Expiration Policies for Workflow Tasks](#)

## Change the Workflow Task Priority

Workflow tasks can have a priority from 1 to 5, and they are most likely predefined with 3. You can change the priority to affect when the task is automatically released after someone claims but doesn't act on it.

Here's how you check what the priority is and change 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. On the General subtab, select a new value for the **Priority** list, with 1 as the highest and 5 as the lowest.
5. 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](#)

## Limit Whom to Reassign or Delegate Workflow Tasks To

When users reassign or delegate workflow tasks, by default they can select any user. You can create and set a profile option so that users can select only someone with the same legal employer, or only from specific legal employers.

**Note:** Here's when the data restriction you set up applies or doesn't apply:

- Applies even when users are defining vacation rules that control what happens to tasks that are assigned to them while they're out of office.
- Applies only to users defined as employees in Oracle Fusion Cloud HCM.
- 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 **true** as the profile value. This setting will take effect after about an hour.

### Related Topics

- [Set Profile Option Values](#)
- [Configure Employee List of Values](#)

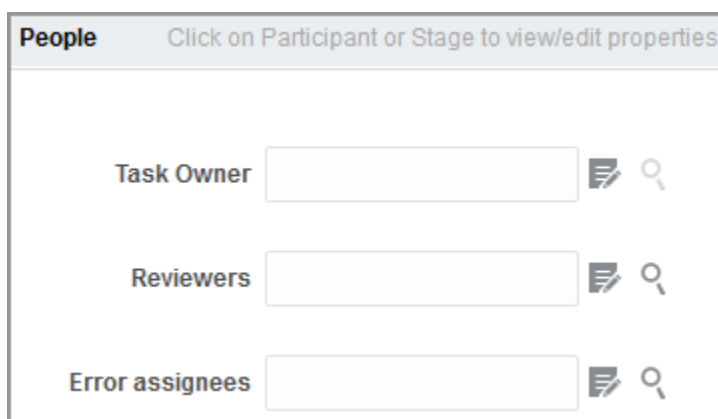
## Define People to Support Workflow Tasks

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](#)

## 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](#)

## Workflow Notifications

### Disable or Enable Workflow Notifications

If you have BPM Workflow System Admin Role (BPMWorkflowAdmin), you can disable or enable email and in-app notifications for all users. For example, disable when testing changes to approval rules, to avoid sending test notifications. When done testing, reenable notifications.

When workflow tasks are assigned to users, they can get email notifications, as well as in-app notifications from a few places:

- The Things to Finish section on the home page.
- The notifications list in the global header.

- The Notifications page, which users can open from either of the first two places to see all their in-app notifications.

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.

**Note:** If the Approvals work area is enabled, it replaces 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:
  - All: This is the default value.
    - Email notifications are enabled.
    - Workflow notifications are included in the global header, home page, and Notifications page.
  - None:
    - Email notifications are disabled.
    - Workflow notifications aren't included in the global header, home page, and Notifications page.
  - Email:
    - Email notifications are enabled.
    - New workflow notifications won't appear in the global header, home page, and Notifications page.
  - 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](#)

## Define When to Send Workflow Notifications

When notifications are enabled, each workflow task sends notifications as part of the approval process. For any workflow task, you can change the setup to control when notifications are sent and whom they're sent to.

**Note:** 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.
    - **Reviewers:** The user who can only add comments and attachments to a task.
    - **Additional Assignees:** Additional users who the task is currently assigned to; this is used when you want to specify an email address instead of selecting an existing assignee. You can specify the user as an XPATH from the task payload using the expression builder, or enter an email address directly.

For the Additional Assignees option, here's what you do for the **Recipient** field:

      - a. Select **Additional Assignees**.
      - b. Click the **Additional Assignees** icon.
        - a. In the Variables tab of the Expression Builder, select the attribute you want in the hierarchy. For example, expand Task > payload and find the XPATH attribute there.
        - b. Click the **Insert Into Expression** button.
        - c. Click **OK**.
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:
  - After Assignment: After the task is assigned to the assignee
  - 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.

☒ Enable Reminder

Repeat 2

Initiating Action After Assignment

Frequency Day 3 Hour 0 Minutes 0

**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. This setting will take effect after about an hour.

### 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 approval rules, a task can be assigned to the same user more than once. You can aggregate the task so that a separate notification isn't sent to the assignee every time they're assigned the same task.

For example, the rules in a stage results in assigning a task to your manager. But then, a later stage in the same task also results in assigning the task to them. Here's how you can set things up so they would get only one notification in this scenario:

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](#)

## Remove Prefix from Subject Lines and Titles in Workflow Notifications

By default, email and in-app workflow notifications have a prefix in the subject line or title, such as Action Required. Remove the prefix only if you have a specific requirement, for example to grab readers' attention about special offers.

For example, **Action Required: Early Payment Offer - Accelerate Payments for up to USD 1000** becomes **Early Payment Offer - Accelerate Payments** without the prefix. You can remove the prefix for any scenario in the Notifications subtab for a particular task. For example, you can exclude the prefix when the task status is Assigned and notifications are sent to the assignees. Your setup won't apply to FYI notifications, which will always show the prefix.

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. For any of the notification scenarios in the subtab, select the **Exclude Notification Prefix** check box.
6. 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](#)

## Show Approve and Reject Options in Notifications

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 how you make sure that the Approve and Reject options appear in 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](#)

## Synchronize Notifications in the Global Header and Home Page with Workflow Tasks

Users can get in-app notifications for the same workflow task in various UIs, as well as email notifications. The **Synchronize Notifications in Global Header** scheduled process ensures that all the in-app notification UIs reflect the latest task status.

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.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

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.

**Note:** If the Approvals work area is enabled, it replaces 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. How often you should run the process depends on the volume of approvals. For example, there might be more during month-end or year-end activities. But if you do need to run the process more frequently, don't schedule it to run more often than every 30 minutes.

How long the process takes to run also depends on the volume of approvals. If you're running the process for the first time, or it hasn't run in a very long time, then the process might take hours to finish.

You need to have the Manage Scheduled Job Definition (FND\_MANAGE\_SCHEDULED\_JOB\_DEFINITION\_PRIV) privilege to run this process. Your security administrator can assign a custom job role with 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](#)

## Define Where and How Users Can Act On Workflow Tasks

For any workflow task, you can prevent users from acting on tasks through email. Or, require them to verify their identity before updating the task outcome. You can also make comments required, optional, or not allowed.

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's more detail about what you can configure for a workflow task:

- Set it up so that users can act on tasks only when they're in the application, not from emails.
- Make it required, 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 required.

#### Note:

- These settings apply only to new tasks that users submit 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 does something else immediately to the task, like save, if such actions are available. 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](#)

## Reflect Changes from Edited Reports Sooner

When you use the Customize option to edit a predefined report, your changes won't be reflected until a refresh that happens every 24 hours. For changes to take effect sooner, use profile options to change the refresh interval.

The refresh applies your changes to Oracle Fusion Cloud Applications, but you can immediately see your changes in Microsoft Word and Oracle Analytics Publisher. For example, you download a predefined .rtf layout template and edit the file in Word. You can see the modified output using the preview in Word. After you upload the .rtf file to the catalog, you can open the report in Analytics Publisher and see your changes. But, if you're accessing the report from Fusion Applications, you see the updated output only after the refresh.

When you're done configuring and testing reports, use the same profile options to turn the refresh back to every 24 hours. But even if you don't, the refresh automatically resets to 24 hours when it's been more than 8 hours since you set the profile options. The 24-hour refresh interval helps optimize performance.

## 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
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	<ul style="list-style-type: none"> <li>• BIP_CLIENT_REFRESH_TIME_FIN</li> <li>• BIP_CLIENT_REFRESH_TIME_HCM</li> <li>• BIP_CLIENT_REFRESH_TIME_PRC</li> <li>• BIP_CLIENT_REFRESH_TIME_PRJ</li> <li>• BIP_CLIENT_REFRESH_TIME_SCM</li> </ul>
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	<ul style="list-style-type: none"> <li>• BIP_CLIENT_REFRESH_TIME_FIN_AP</li> <li>• BIP_CLIENT_REFRESH_TIME_HCM_PER</li> <li>• BIP_CLIENT_REFRESH_TIME_PRC_PON</li> <li>• BIP_CLIENT_REFRESH_TIME_PRJ_PJE</li> <li>• BIP_CLIENT_REFRESH_TIME_SCM_EGO</li> </ul>

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 that 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. If you enter 15, your changes are reflected in Fusion Applications 15 minutes after they're saved in the BI catalog. For example, 15 minutes after you upload an edited .rtf layout template to the catalog, or after you update report properties in Analytics Publisher.

**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 8 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](#)
- [How do I update existing setup data?](#)

## Email Notifications

### 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 scenario in the Notifications subtab, the Notification Header column determines what's in the email header, which 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 `<your pod>.fa.sender@workflow.mail.<your data center>.cloud.oracle.com`. You can change the email address, add a sender name, or do both.

For example, you indicate that Your Company is the sender name to display, and the from address should be `your.company@oracle.com`. The From field in emails would show: `Your Company <your.company@oracle.com>`. Your setting for the from address also applies to the reply-to address.

**Note:** Make sure that the sender name and email address make sense together in the From field. For example, if you set up the From field to show the task submitter's email address, you should set up the sender name to be the task submitter's name.

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.

### Change the From and Reply-To Address

Before you define the address for the From and Reply-To fields, set a profile option to make that change possible. If you're not using the default email address, you must do additional setup steps.

Here's how you change the from and reply-to address for a specific workflow task:

1. If you plan to use any address other than the default, you need to do these steps to avoid email delivery issues:
  - Make sure that Sender Policy Framework (SPF) is set up.
  - Verify that whichever email address you want to use is valid.
2. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
3. Set the From and Reply To Email Address Configuration Enabled (ORA\_FND\_BPM\_FROM\_EMAIL\_ADDRESS\_ENABLED) profile option to **Yes** at the Site level. This setting will take effect after about an hour.
4. 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.
5. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
6. Select the task from the search results and click the **Edit task** icon in the toolbar.
7. Open the Notifications subtab.
8. On the Notifications subtab, click the **Expand More** icon.
9. Select one of the **Email: From and Reply To address** options.
  - Select **Default email address** to use the default from and reply-to address. The address that you see for this option is the default from address. The default reply-to address is separate and could be a different predefined value.
  - Select **Submitter** to show the task submitter's email address. If that address can't be determined for a specific notification, the default email address is used.
  - Select the last option to show a specific email address. Enter the address in quotes, for example **"your.company@oracle.com"**.

10. Click the **Save** icon in the **Tasks to be configured** toolbar.

**Tip:** If you later want to revert to the default email address for all workflow tasks, just set the profile option back to **No** at the Site level.

#### Related Topics

- [Set Up Sender Policy Framework \(SPF\)](#)
- [Set Profile Option Values](#)
- [Search for Workflow Tasks to Configure](#)

## Add Sender Name to the From Field

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.

### All Workflow Tasks

Here's how you define the sender name for all workflow tasks that have no other applicable setup. This setting applies to tasks that require action as well as FYI-only tasks.

The screenshot shows the 'Application Preferences' page with the 'Administration' tab active. The 'Notification' section includes a 'Notification Mode' dropdown set to 'All'. Below it is a 'Test Notification Email Address' field. The 'Email "From:" Display Name' section has three radio button options: an empty one, 'Submitter', and 'Previous Approver' (which is selected).

1. 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**.

If you're already in BPM Worklist, just open the Administration tab.

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**.

## Specific Workflow Task

To specify the sender name for a specific actionable or FYI 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 the second option and do one of the following:
    - Enter the text to display, surrounded by quotes, for example **"Oracle"**.
    - Leave this field blank if you want nothing to appear in the From field.
    - Follow these steps to display the task submitter's user name, which is what they enter to sign in to the application:
      - a. Click the **Sender Name** icon after the field.
      - b. In the Expression Builder, select **task:creator**.

- c. Click the **Insert into Expression** button, then **OK**.
    - 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](#)

## Set Up Attachments in Workflow Email Notifications

Workflow email notifications can have attachments. Many workflow tasks have this already set up by default. You can enable or disable email attachments, as well as set the maximum number and size of attachments.

Here's an example of attachments in workflow. When you request information from someone as part of the approval process, they might respond with a message and a file attachment. The email notification you get when they respond would include their attachment.

### 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](#)

## Send Test Workflow Email Notifications to One Address

While 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](#)

## More Setup for Workflow Email Notifications

The More section on the Notifications subtab has other setup options for email notifications. In general, you would leave the default settings in this section for every workflow task, but here are some setup options you should know about.

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.  
Here's what happens if these check boxes in the More section are selected:
  - **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, which is: **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's 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.
6. If you do make any changes, click the **Commit task** icon in the **Tasks to be configured** toolbar when you're ready to roll out your changes.

## Workflow Task Life Cycle

### Set Up the Approvals Work Area

By default, when users click Navigator > Tools > Worklist, they get the Worklist: Notifications and Approvals work area. You can set things up so that they get the Approvals work area instead with Navigator > Tools > Approvals. The Worklist menu item would no longer be available.

#### Before You Start

Verify that your environment has the latest fixes applied. Also, ensure it's enabled for hybrid search:

1. In the Setup and Maintenance work area, on the Setup page, open the **Tasks** panel tab and click **Review Topology**. If you don't see this link, ask your security administrator to give you the Review Topology Manager (ASM\_REVIEW\_TOPOLOGY\_HIERARCHY) privilege.
2. Select the Enterprise Application Configuration subtab.
3. In the **Enterprise Application** list, search for and select **Oracle Hybrid Search**.
4. Click the **Run** icon in the Validate External Enterprise Application Endpoint URL row. The Validate Enterprise Application and Module Endpoint URLs page should show a URL in the External Endpoint URL column for Oracle Hybrid Search.

If your environment doesn't have the latest fixes applied or isn't enabled for hybrid search, contact your help desk and get things sorted out before you set anything up.

#### Do the Setup

Verify that your environment has the latest fixes applied. Also, ensure it's enabled for hybrid search:

1. In the Schedule Processes work area, run the **Migrate Approvals Task Statistics** scheduled process. This process gathers statistics about the number of existing tasks to be ingested, already ingested, and estimates on how long batches might take to run in your environment.

2. After the process is completed, review the log file to make decisions about how you want to ingest your historical data.
  - o Based on the numbers of approval tasks that exist for each year by month, for example, you might want to delay ingesting more than a month of historical data, and then ingest more later using batches.
  - o You can view batches that have been migrated, if any, and those that haven't been processed to determine your strategy.
  - o Using this information, determine how far back you want to go during your migration and consider how you might batch the processing during migration. For example, you might initially want to avoid migrating historic data, or limit it to the recent past.
3. In the Scheduled Processes work area, run the **Create Search Index for Worklist** scheduled process. Don't schedule this to run on a recurring basis. This process creates search indexes for existing workflow tasks. The search engine for the Approvals work area uses these indexes.
  - o You can set **Batch Reprocess (optional)** to Yes to batch the processing. The default is No.
  - o When you first run the process, the setting for the **Re-create Index** parameter doesn't matter because the index doesn't exist yet. You can search for the process in the Scheduled Processes work area to check if you ran the process already. In cases where you're running batches, don't re-create the index.
  - o Use the **Time Value** to specify the period you want to use, for example Day, Week, or Month.
  - o You can set **Reprocess (optional)** to Yes to reingest all tasks, including those with Completed status. The index definition is retained.
  - o The default parameter for the **From** date is 30 days, you can set it to index further if you want to. The default for **Reprocess Batch Size** is 50, but can be increased.

**Note:** In rare cases, you might need to run the process again in the future, for example, to fix problems with the index. If this is necessary, at that time set the **Re-create Index parameter** to **Yes** so that the existing index is re-created from scratch. This drops the existing index, so make sure this is really needed before you submit the process.

4. In the event that issues are encountered in the creation of the index or you're updating to a new version of the Approvals work area, you can use scheduled processes to continue processing or maintain an existing index while rebuilding its metadata.
  - o Run the **Sync Approvals Tasks** scheduled process to identify tasks that failed to ingest and try again, checking the status of the process and deleting any unneeded tasks from the index.
  - o Run the **Reset Approvals Migration Status** scheduled process to reset flags after a failed run of the Create Search Index for Worklist scheduled process.
  - o Run the **Generate Approvals Smart Search** scheduled process to rebuild search metadata from already deployed definition files. When you're updating to a new version of the Approvals work area, this process updates definitions without rebuilding the index.
5. Make sure the **Create Search Index for Worklist** process is done running.

6. Set the Approval Requests UI Enabled (ORA\_FND\_APPROVALS) profile option.
  - a. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
  - b. On the Manage Applications Core Administrator Profile Values page, search for and select the **Approval Requests UI Enabled** (ORA\_FND\_APPROVALS) profile option.
  - c. In the Profile Values section, set the profile value depending on whether you want the Approvals work area to be available to all users or only some users.
    - For all users, select **Yes** in the Profile Value column for the Site level.
    - For only some users:
      - a. Leave the profile value set to **No** at the Site level.
      - b. Click the **New** icon on the toolbar.
      - c. In the new row, select **User** in the **Profile Level** column.
      - d. In the **User Name** column, select the user you want to make the work area available to.
      - e. Select **Yes** in the **Profile Value** column.
      - f. Repeat steps ii through v to add more users.
7. Click **Save and Close**.

Users can get to the Approvals work area next time they sign in.

#### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Set Up the Worklist Region on My Dashboard

The Worklist: Notifications and Approvals region displays the workflow tasks assigned to the user. You can add this region to My Dashboard for all users, and set 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. If the Page Composer isn't active, click the **Activate a sandbox** link in the warning dialog box to activate a sandbox with that tool.
3. Click your initials in the global header, and select **Edit Pages** in the Administration menu group.
4. Click the **Add Content** button where you want to place the region.
5. Open the Application Content folder in the Add Content dialog box.
6. Click **Add** for the Worklist: Notifications and Approvals item.
7. Click **Close**.
8. 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](#)
- [Create and Activate Sandboxes](#)
- [Configure Offerings](#)
- [How do I update existing setup data?](#)

## Monitor and Troubleshoot

### Manage Workflow Transactions

After workflow tasks are created, it's helpful to keep track of them and jump in when needed, especially when something goes wrong. If you have the appropriate access, 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. For example, you can see the conditions in the approval rules that might have caused an error.
- Depending on what's going on with the transaction and what access 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.

- You can also click the **Refresh** icon for a specific row in the table to refresh individual transactions.
  - Also, the **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs to refresh the statuses.
  - 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 access 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](#)
- [Automatically Refresh Transaction Statuses](#)
- [Actions for Managing Transactions](#)
- [Use Filters with Keyword Searches](#)
- [Save Keyword Searches with Filters](#)

## 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.

**Note:** 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.
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](#)

## Automatically Refresh Transaction Statuses

The **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs every hour. It refreshes the statuses on the Transaction Manager: Transactions page in the Transaction Console work area.

Hourly is the recommended frequency, and it should be enough, especially since you can just refresh using the **Refresh** icons on the page. But if you really need to, say due to an extraordinary volume of transactions, you can submit the process to run on a more frequent schedule.

- Be careful if you do this, because you are adding load to the queue of all scheduled processes. Consider if that potential performance impact is really warranted.
- If your manually submitted process has any scheduled runs that overlap with the automatic hourly ones, your process would run instead of the automatic one.
- The automatic process still runs whenever there's no overlap with your process.
- The time it takes for the process to finish depends on the volume of transactions, but it usually ends in minutes. So if it's taking hours or longer, something is most likely wrong.

To run this scheduled process, you need a custom job role that has the Perform HCM Approval Transaction Actions (PER\_PERFORM\_APPROVAL\_TRANSACTION\_ACTIONS\_PRIV) privilege. If you can access transactions on the Transaction Manager: Transactions page, you already have this privilege.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Actions for Managing Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to manage and troubleshoot transactions. There are many actions you can take. 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 custom 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.

Action	Description
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. This action isn't available if the workflow task is based on a Position list builder.
Recover	Restart the process after the transaction stopped due to errors. After you address the issue, use this action to pick up where the process had stopped and try what had ended up in error again.
Reject	Reject the transaction if the workflow task is currently assigned to you to approve or reject.
Resend Email Notification	Send an email notification to the current assignee of the workflow task, for example, if they can't find the original email. This action is available only if the transaction is in progress and involves a workflow task that's currently assigned. <ul style="list-style-type: none"> <li>In some cases, the in-app notification is sent as well.</li> <li>If someone from a group of approvers has claimed the task but hasn't acted on it, the notification is still sent to the entire group.</li> </ul>
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](#)

## Archive and Purge Transactions

To optimize the performance of the Transaction Manager: Transactions page in the Transaction Console work area, archive and purge completed transactions. Run the **Archive Transaction Console Completed Transactions** scheduled process to remove transactions from the page.

A transaction must meet these criteria to be eligible for archive and purge:

- The transaction has the Completed status for at least a certain amount of time. The default is three months.

If you have access to the Approval Rules tab in the Transaction Console work area, you can change the duration for all transactions of specific business processes. Here are the options you can select:

- 3 months
  - 6 months
  - 9 months
  - Don't archive
- All workflow tasks in the transaction are already archived and purged.

If you have access to the Approval Rules tab, you can also click the **Archive** icon to run the scheduled process immediately.

## Before You Start

You need a custom job role that has the Run Approval Transactions Archive Process (PER\_RUN\_APPROVAL\_TRANSACTIONS\_ARCHIVE\_PROCESS\_PRIV) privilege.

Review this before you submit the process:

- You're strongly advised to schedule the process to run once a day, during off hours.
- Make sure that the process doesn't try to start while another run of the same process is still going. This process is self-incompatible and only one instance of the process can run at any given time.
- The time it takes for the process to finish depends on the volume of transactions, but it usually ends in minutes. If you're running the process for the first time, or it hasn't run in a very long time, the process might take much longer to finish. So it's best to run it daily, as recommended.

## Parameters

If you have access to the Approval Rules tab, most likely you don't need to worry about these parameters. You can just define and use the settings on that tab. But if you don't have access, you can use these parameters to override those settings. Another reason you might use these parameters is if you have a need to archive immediately at any given time, for one or more business processes.

- **Days:** Enter the number of days that a transaction must already have the Completed status to be eligible for archive and purge.
  - Enter **0** if you want all transactions with the Completed status to be eligible immediately.
  - This parameter isn't available by default, but requires setup.
  - This parameter applies to transactions in all business processes.
  - If you leave this parameter blank, or the parameter isn't available, the setting for each business process on the Approval Rules tab takes effect. For example, the **3 months** default, or **Don't archive**.
- **Process Name:** Select all or specific business processes.
  - The scheduled process includes transactions for the selected business process names.
  - If you leave this parameter blank, the scheduled process considers all business processes except the business processes set to **Don't archive** on the Approval Rules tab, if any.

Let's say you enter **30** for the Days parameter and leave the Process Name parameter blank. Business processes set to **Don't archive** on the Approval Rules tab are excluded. The 30 days would still apply to all other business processes on the tab.

## Purge Archived Transactions

You can set up purge policies to archive transactions in the Transaction Console based on your organization's data retention policies.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)
- [How Workflow Tasks Are Archived and Purged](#)

## Things to Check If There Are Issues with Workflow Tasks

After you configure workflow tasks, it's possible to have some issues when they're actually in use. 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.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

## Review Employee Vacation and Delegation Rules

Use the Employee Vacation and Delegation Rules Report to get details about the rules that users defined to reassign or delegate the workflow tasks assigned to them. This report is available as a scheduled process.

For example, your employee is on vacation, and you need to know what happens to tasks assigned to them during that time. The report tells you if they have set up a rule to reassign or delegate to someone else to approve. You can also see who the designated person is.



## Before You Start

Review this before you run the report:

- You can run the report as a scheduled process from the Scheduled Processes work area if you have a custom role that contains the following:
  - Run BPM Workflow Reports (FUN\_RUN\_BPM\_WORKFLOW\_REPORTS\_PRIV)
  - Run BPM Workflow Reports (FUN\_RUN\_BPM\_WORKFLOW\_REPORTS\_PRIV\_OBI)
- Run the report on an as needed basis, whenever you need information about users' vacation or other delegation rules. Don't submit this report to run on a recurring schedule.

## Report Parameters

The report includes rules that are active, inactive, or both on the day that you run the report. Let's say you run the report on November 10, and select **October 1** for the From Date parameter and **October 30** for the To Date parameter.

And for example, there are three rules with these active dates:

1. September 25 to October 10
2. October 5 to October 15
3. October 30 to November 30

The report can potentially include any of these rules, which have active dates within the period you set in the From Date and To Date parameters. What you select for the Rule Status parameter determines which of the three rules are actually included in the report:

- Active: Only the third rule is included because only that rule is still active on November 10.
- Inactive: Only the first two rules are included because those are inactive on November 10.
- All: All three rules are included.

**Note:** If you leave the From Date and To Date parameters blank, the report runs as if you had entered the first and last date of the current month.

## Report Output

You don't need to define the output when you submit the report. You will get a spreadsheet with these sections:

- Originator Employee Details: Information about the user who defined the rule.
- Rule Details: Information about the rule, including when the rule is effective and any conditions that a workflow task must meet for the rule to apply. There are two types of rules:
  - Vacation: A rule for when the user is out of office.
  - Delegation: Any other rule that the user defined for tasks assigned to them, for example to delegate or reassign tasks based on certain conditions.
- Destination Employee Details: Information about the person whom tasks are delegated or reassigned to.

If you don't get a spreadsheet, or the spreadsheet is blank, one thing you can do is to contact your security administrator. Confirm if you do in fact have the privileges listed earlier.

*Related Topics*

- [Submit Scheduled Processes and Process Sets](#)
- [View Output from Scheduled Processes](#)

# 26 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.

### 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.

#### *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 are 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 Data 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)
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.

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 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.

#### *Related Topics*

- [How Attachment Entities and Attachment Categories Work Together](#)
- [Modules in Application Taxonomy](#)

# 27 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 perform 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*

- [Hide or Show Help Icons](#)
- [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 with help icons. You can disable or enable help icons by default, for everyone.

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*

- [How do I 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.

Your security administrator can assign custom job roles with this privilege to 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 only human resources (HR) specialists should be able to see those policies. You can use a help security group to limit access like this.

Let's look at the steps to create a help security group that includes only a custom 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

Ask your security administrator for the name of the custom job role granted to HR specialists in your company.

### 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 the custom job role for HR specialists as the role name.
7. Click **Save and Close**.

#### Related Topics

- [Set Up Help](#)
- [Configure Offerings](#)
- [How do I update existing setup data?](#)
- [Add Your Content to a Help Window](#)
- [Create and Edit Added Help](#)



# 28 Application Toolkit Configuration

## 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](#)
- [Set Watchlist Preferences](#)
- [Why can't I see 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 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](#)
- [How do I update existing setup data?](#)

## Application Toolkit Administrator Profile Values

### 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:

- `http://maps.google.com/maps?output=embed&q=`
- `http://maps.live.com/default.aspx?where1=`
- `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?](#)

# 29 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](#)
- [Set Your General Preferences](#)

## 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](#)
- [How do I 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 Translation 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. To specify this setting, use the **File Format for Export to Excel** profile option.

**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](#)
- [How do I update existing setup data?](#)
- [What's the difference between Export to Excel and desktop integration for Excel?](#)

# 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 application modules are organized in a hierarchy, the highest level being the 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](#)

# ISO Reference Data

## 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
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazilian)
- Polish
- Romanian
- Russian
- Slovak
- Spanish
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

## 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

- [How do I 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 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 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

# Applications Core Common Reference Objects

## Manage Applications Core Messages

### 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.

## Manage Applications Core Administrator Profile Values

### Guidelines for Setting Up General Troubleshooting

To share application-related issues with the help desk, users can record the on-screen activity while they reproduce the issues. The help desk can then view those recordings for troubleshooting the issues.

Some advanced users might also need detailed information present on the About This Page dialog box. Therefore, to set up your application for troubleshooting, make sure that your users have the required access to record and view issues. It's also important to determine 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?](#)

## Configure CORS Headers

To enable CORS in Oracle Applications Cloud, configure CORS headers so that client applications in one domain can use HTTP requests to get resources from another domain. Set values for profile options that correspond to the CORS headers.

To view the profile option, go to the Setup and Maintenance work area and use the Manage Applications Core Administrator Profile Values task in the Application Extensions functional area.

### CORS Profile Options

This table lists the profile options you can set for CORS headers.

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
Access-Control-Allow-Origin	Allowed Origins for Cross-Origin Resource Sharing (ORA_CORS_ORIGINS)	<p>These are the values you can enter to indicate which origins are allowed:</p> <ul style="list-style-type: none"> <li>• URL of the specific origin. For example, <b>http://www.exampledomain.com</b>.</li> <li>• Space-separated list of origins. For example, <b>http://www.exampledomain.com http://us.example.com http://software.example.com</b></li> </ul> <p><b>CAUTION:</b> Asterisk (*) is no longer supported as a valid value to allow access to resources from all origins. If you have already set asterisk (*) as the value for the allowed origins, make sure to replace it with the allowed origins.</p>



CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
		<p><b>Note:</b> These are some key points to remember while using the profile values:</p> <ul style="list-style-type: none"> <li>You must set a value for this header to enable CORS.</li> <li>Never enclose URL and asterisk in quotation marks.</li> <li>Domain names must contain only valid URL characters.</li> <li>The profile value is applicable at the Site level.</li> </ul>
Access-Control-Max-Age	CORS: Access-Control-Max-Age (CORS_ACCESS_CONTROL_MAX_AGE)	Default value for caching preflight request is 3600 seconds.
Access-Control-Allow-Methods	CORS: Access-Control-Allow-Methods (CORS_ACCESS_CONTROL_ALLOW_METHODS)	Default values for allowed methods are <b>OPTIONS, HEAD, GET, POST, PUT, PATCH, and DELETE</b> .
Access-Control-Allow-Headers	CORS: Access-Control-Allow-Headers (CORS_ACCESS_CONTROL_ALLOW_HEADERS)	Default values for allowed headers are <b>Accept, Accept-Encoding, Authorization, Cache-Control, Content-Encoding, Content-MD5, Content-Type, Effective-Of, If-Match, If-None-Match, Metadata-Context, Origin, Prefer, REST-Framework-Version, REST-Pretty-Print, Upsert-Mode, User-Agent, X-HTTP-Method-Override, and X-Requested-By</b> .
Access-Control-Allow-Credentials	CORS: Access-Control-Allow-Credentials (CORS_ACCESS_CONTROL_ALLOW_CREDENTIALS)	<p>Select <b>True</b> or <b>False</b> to allow or prevent sending user credentials with the request. The default is False.</p> <p><b>CAUTION:</b> Don't set the value to True without assessing the risk. The value shouldn't be set to True if the value for ORA_CORS_ORIGINS is set to asterisk (*). The Access-Control-Allow-Credentials header won't be set if ORA_CORS_ORIGINS value is *. Setting the value to True affects all the Fusion Applications REST endpoints.</p>

#### Related Topics

- Set Profile Option Values
- CORS

## 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](#)

## 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](#)

# 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, perform bulk ingest, and manage search capabilities.

- Make sure the **Enable/Disable Search Ext Framework (ORA\_FND\_SEARCH\_EXT\_ENABLED)** profile option is set to **Yes**. By default, this functionality is enabled and can't be edited.
- Make sure that you've 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:** This job should only be run once and not on a regular or scheduled basis.

- Submit the **ESS job to run Bulk ingest to OSCS** process for ingesting bulk data to Oracle Search 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. See the product-specific documentation to find 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.

**Note:** This job should only be run once and not on a regular or scheduled basis.

#### Related Topics

- [Set Profile Option Values](#)

## What do I do if I get errors stating that the Oracle Search Cloud Service or 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.

**Note:** This job should only be run once and not on a regular or scheduled basis.

#### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Manage Global Search Configurations

### Examples of Global Search Configurations Set as Enabled or Default

Each global search configuration contains settings for the global search, and a configuration can apply to specific pages or applications.

Use the Manage Global Search Configurations page to enable or disable configurations, and select the one to use as the default. The following scenarios explain which configurations actually apply to the global search, depending on the configurations that you enable or set as default.

#### Predefined Default

The predefined Default configuration is always enabled and set as a default. This configuration is the working default unless a custom global search configuration is also set as a default. In this scenario, you don't enable any other configuration, so this Default configuration applies to the global search on all pages, in all applications.

#### Custom Default

You create a global search configuration that applies to page A and application B. Later, you set your configuration as the default. Only this configuration and the predefined Default configuration are enabled. Both are set as default.

The result is that:

- Your configuration overrides the predefined Default one and becomes the working default.
- Even though you defined your configuration to apply to page A and application B, it now actually applies to all pages and all applications. This is because your configuration is the working default, and no other configuration is enabled.

## Specific Pages or Applications

You're using either the predefined Default configuration or a custom configuration as the default. You also enable:

- **Configuration 1:** Applies to application A
- **Configuration 2:** Applies to application B and a few pages in application A

The result is that:

- Configuration 1 applies to all pages in application A, except the few pages that use configuration 2.
- Configuration 2 applies to all pages in application B, plus the few pages in application A.
- The default configuration applies to all other applications and pages.

### Related Topics

- [Create Global Search Configurations](#)

## Create Global Search Configurations

Predefined global search configurations control how the global search works. You can't edit predefined configurations, but you can duplicate them and edit the copies, or create your own from scratch.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Global Search Configurations** task in the Application Extensions functional area.
2. On the Manage Applications Core Global Search Configurations page, do any of these tasks:
  - Click the **Create** icon.
  - Select a row and click the **Duplicate** icon.

**Note:** Once you create a configuration, you can't delete it, but you can disable it.

3. For the short name (identifier for your configuration), enter an alphanumeric code with uppercase letters and no spaces.
4. Enter a user-friendly display name and description for the configuration.
5. Select the **Default** check box to use your configuration as the default instead of the predefined Default configuration. If another custom configuration was already set as the default, then your configuration becomes the new custom default.
6. Select a product family if the configuration is for applications or pages within a specific family. Otherwise, select **Common**.
7. If you're creating a duplicate, click **Save and Close**. To go on to the next steps and define more settings, select your configuration and click **Edit**.
8. Enter a module within the product family you selected. If you selected the Common family, then select the **Oracle Middleware Extensions for Applications** module.
9. Use these tabs to define your configuration:
  - Autosuggest: Determine what's available to users in the global search autosuggest, as well as how the autosuggest works.
  - Search Field: Control the **Search** field in the global header and in the search results dialog box.
  - Search Results: Enable or disable saved and recent searches, select the search categories available to users, and define settings for filters.
  - Pages: Indicate the applications or pages that this global search configuration applies to.

**Note:** If the Pages subtab isn't available or editable, you must deselect both the **Default** and **Enabled** check boxes on the Edit Global Search Configurations page. After completing your updates in the Pages tab, you can again select these check boxes.

## 10. Save your work.

### Related Topics

- [Modules in Application Taxonomy](#)
- [Set Up Autosuggest for Global Search](#)
- [Set Up Filters for Global Search](#)
- [Specify Pages for Global Search Configuration](#)
- [How do I update existing setup data?](#)

## Configure Attachment Search

You can enable or disable the file and content search for specific content types of attachments.

You can also set the maximum file size and content size so that your users can't search the file or content if the sizes exceed the specified limits. If enabled, the searched attachments are available for download.

Before you start, ensure that the **Enable Search Attachment (ORA\_FND\_SEARCH\_ATTACH\_ENABLED)** profile option is enabled.

Here's how you can configure the attachment search.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Global Search Configurations** task in the Application Extensions functional area.
2. On the Manage Applications Core Global Search Configurations page, click **Configure Attachment Search**.
3. On the Configure Attachment Search page, click the **Create** icon, and then specify the values in these fields.

**Tip:** Alternatively, click **Create from Sample** to get the sample values, such as index names, content type, and maximum file size. Also, to view values for specific index names, you can select the index name from the **Index Name** list, and click **Create from Sample**.

Field	What You Do
Index Name	Select the index name specific to your product.
Content Type	<p>Enter the content type.</p> <p>You specify the content type with a specific hierarchical structure, and based on that structure, you get the match of the attachments. Let's look at some examples.</p> <ul style="list-style-type: none"> <li>○ If you specify the content type as <b>application/vnd.ms-excel</b> (for example, type/subtype), you get the exact match of the attachments.</li> </ul> <p><b>Note:</b> The subtype in this example doesn't have a fixed structure. That means you can use either a dot or a hyphen to get the exact match of attachments for specified content type.</p>

Field	What You Do
	<ul style="list-style-type: none"> <li>○ If you specify <b>application/vnd.ms-*</b>, you get the match of attachments, which are of different types, such as Microsoft Word or Microsoft Excel.</li> <li>○ If you specify <b>application/vnd.*</b>, you get the match of the attachments, which are applicable to all suppliers.</li> <li>○ If you specify <b>*/*</b>, you get all the possible matches.</li> </ul>
Enable File Search	Determine whether users can search the attachment.
Enable Content Search	Determine whether users can search the content in the attachment. For example, suppose you set this value as <b>Yes</b> for a specific type of attachment. Then, if a user searches for a keyword that's available in an enabled attachment, that attachment will appear in the search results.
Maximum File Size	Specify the maximum file size of the attachments that users can search content for. If the file size of an attachment is greater than the specified size, the content of the file won't appear in the search results at all. Only the metadata, such as file name, will be searchable.
Maximum Content Size	Specify the maximum content size of the attachments that users can search content for. Suppose you set this value as 200KB, users get the content in the attachments pertaining to this size in the search results. Make sure that this size is less than or equal to the maximum file size.

4. Click **Save and Close**.

*Related Topics*

- [How do I update existing setup data?](#)

## Set Up Autosuggest for Global Search

Use global search configurations to determine what's available to users in the autosuggest. You select the suggestion groups to include in configurations. The configurations also determine how the autosuggest looks and behaves.

### Prerequisite

Create a global search configuration or edit an existing one. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Functional Area: Application Extensions
  - Task: Manage Applications Core Global Search Configurations
2. On the Manage Applications Core Global Search Configurations page, click the **Create** icon to create a global search configuration, or select an existing row and click the **Edit** icon to change it.

### Defining the Content

To define synonyms, select suggestion groups and determine how they're displayed in the autosuggest:

1. On the page to create or edit global search configuration, click the Autosuggest tab.
2. In the Synonyms section on the Autosuggest tab, select **Enable Synonyms** to let users search using synonyms.



3. Optionally, enter the following:
  - **Synonym Context Code:** A logical grouping such as a product family, navigation group, or work area that determines the subset of synonyms to search on. For example, if you enter Academics, every time the user enters a term and clicks the **Search** icon, the search runs on all terms related to Academics and their synonyms.
  - **Synonym Object Type:** A business object name that would determine the subset of synonyms to search on. For example, if you enter Curriculum, every time the user enters a term and clicks the **Search** icon, the search runs on all terms related to Curriculum and their synonyms.
4. Click **Manage Synonyms**.
5. To add search terms and create synonyms for them, on the Manage Synonyms page:

- a. Click the **New** icon and do the following:

- Enter a short name in uppercase, with no spaces. This name is required as an identifier.
- Select a module name, which is required to map the data with a specific product or area. There are no restrictions on where the synonyms can be used.
- Optionally, enter a context code and object type. This information can be used to ensure that certain synonyms are only used when a global search configuration having the same values is in effect.
- Enter the primary synonym, which is the main term or business object to which other synonyms are to be matched.
- Enter at least one synonym that matches the primary synonym.

- b. Click **Save and Close**.

6. Select the **Enable personalization of search groups** check box to allow users to override your configuration. Users can hide, show, and reorder suggestion groups for their autosuggest.
7. In the Suggestion Group section on the Autosuggest tab, move the groups you want to include into the **Selected Groups** pane. Use the **Move**, **Move All**, **Remove**, and **Remove All** icons to move the groups.

The **Enabled** column in the Available Groups pane indicates if the group is defined (on the Manage Suggestion Groups page) to be displayed by default or not in the autosuggest.

8. In the **Enabled** column in the Selected Groups pane, select one of the following values:
  - **Inherit:** In the autosuggest, the group is displayed or hidden by default depending on what's defined for the group.
  - **Yes:** The group is displayed by default, no matter what's defined for the group.
  - **No:** The group is hidden by default, no matter what's defined for the group.

**Note:** The **Displayed by Default** column shows the resulting behavior in the autosuggest, based on what you select in the **Enabled** column.

9. Using the **Move to Top**, **Move Up**, **Move Down**, and **Move to Bottom** icons, order the selected groups as you want them to appear in the autosuggest.

**Tip:** Click **Manage Suggestion Groups** at any time to edit or create suggestion groups. When you return to the Autosuggest tab, click **Refresh** to reflect the changes you made to suggestion groups.

## Defining the Appearance

Optionally define settings in the Appearance section on the Autosuggest tab:

- **Show Suggestion Group Headings:** Select this option to display suggestion group headings (text and icon) in the autosuggest. Even if you do so, if a group is defined on the Manage Suggestion Groups page to not show headings, then its heading won't be displayed.
- **Show Icons:** Select this option to display icons next to suggestions in the autosuggest.
- **No Suggestions Message:** Enter the message that appears when no suggestions match the user's search term. If you leave this field blank, then no autosuggest or anything at all appears when there are no matches.

## Defining the Behavior

Optionally define settings in the Behavior section on the Autosuggest tab:

- **Show Top Suggestions:** Enable this option to display suggestions in the autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions in the Recent Items group.
- **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in the autosuggest.
- **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

### Related Topics

- [Create Global Search Configurations](#)
- [Suggestion Groups for Global Search](#)

## Considerations for Disabling Saved and Recent Searches for Global Search

You can use global search configurations to determine if saved searches and recent searches are enabled in the global search.

### Saved Searches

When you disable saved searches, here are a few things to keep in mind:

- The Save button in the search results dialog box also gets disabled. So, your users can't create or edit saved searches for global search.
- The Saved Searches suggestion group doesn't get disabled. So, your users can still see any applicable saved searches in the global search autosuggest.

### Recent Searches

When you disable recent searches, here are a few things to keep in mind:

- The application doesn't save recent searches.
- The Recent Searches suggestion group doesn't get disabled. So, your users can still see in their autosuggest any applicable searches that they recently ran before you disabled recent searches.

### Related Topics

- [Create Global Search Configurations](#)

## Set Up Filters for Global Search

To determine how users can filter their search results, define the appropriate settings when you create or edit global search configurations.

You can set up search categories so that users can limit the scope of their search to begin with, or refine their search results.

### Prerequisite

Create a global search configuration or edit an existing one. Follow these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Functional Area: Application Extensions
  - Task: Manage Applications Core Global Search Configurations
2. Click the Create icon to create a global search configuration, or select an existing one and click the Edit icon to change it.

### Setting Up Categories to Narrow Search Scope

To let users select the categories to search on before running the search:

1. On the page to create or edit global search configuration, click the Search Results tab.
2. In the Saved and Recent Searches section, select the check boxes to enable saved searches and recent searches.
3. In the Filters section, enable personalization of search categories.
4. In the Search Categories section, select the categories that users can search on. If you don't select any, then every category is available to users.
5. For each of your selected categories, select **Yes** or **No** in the Enabled column to have it enabled or disabled by default.

### Setting Up Categories as Search Result Filters

To let users filter search results based on category:

1. In the Filters section, select a filter display style so that the list of all available category names are displayed:
  - **Inline:** In the Filters pane in the search results
  - **LOV:** In a Categories dialog box that users can open from the Filters pane
2. Select the check boxes to show subcategories, facets, or both. Categories are always displayed. Subcategories are an additional level of filters that appear after categories, and facets are a level after categories.
3. In the Search Categories section, select the categories to use as filters. This is the same set of categories to be used for personalization. If you don't select any, then every category is available to users.

### Setting Other Options for Filters

You can also use the Filters section to:

- **Show hit counts:** Show the number of search results that match each filter value

- **Enable clear all filters:** Allow users to clear all filters with one click of a button
- **Show applied filters:** Show all the filters that have been applied

In the Last Updated Date Filters section, select the criteria to use as filters, based on the last update date. If you don't select any, then every date filter is available to users.

In the Appearance section, set the **Show Icons** option **Off** if you don't want to display the icons.

#### Related Topics

- [Create Global Search Configurations](#)

## Specify Pages for Global Search Configuration

As part of defining your global search configuration, you can specify the pages or applications (or both) that your configuration applies to. If you want your configuration to apply to all pages in all applications, then skip these steps.

### Before You Start

If you want the global search configuration to apply to specific applications, you need to find the application short name.

1. In the Setup and Maintenance work area, go to the **Manage Taxonomy Hierarchy** task in the Application Extensions functional area.
2. On the Manage Taxonomy Hierarchy page, expand the Oracle Fusion node.
3. Select the row (with the Application module type) for your application, and click **Edit Module**.
4. In the Application Details section, see the **Application Short Name** column and note down the value to use as the application short name.

### Add Pages or Applications

Follow these steps:

1. On the Create or Edit Global Search Configurations page, open the Pages tab.
2. Click the **Create** icon.
3. In the **View Type** column, indicate if the configuration applies to a specific page or application.
4. Enter a view ID to identify the page or application:

**Tip:** You can use **%** as a wildcard for the page or application value, such as **Example%** for all pages that start with **Example**.

- **Page:** Enter the last part of the URL you get when you open that page. For example, enter **ExamplePage** from the URL `http://exampleServer/homePage/faces/ExamplePage`.
  - **Application:** Enter the application short name with a wildcard at the end, for example **HomePageApp%**.
5. Add more pages or applications as needed.

#### Related Topics

- [Create Global Search Configurations](#)
- [Modules in Application Taxonomy](#)
- [How do I update existing setup data?](#)

# Manage Suggestion Groups

## Suggestion Groups for Global Search

A suggestion group is a category of suggestions that users see in the autosuggest for the global search.

For example, if the user enters Report in the **Search** field, then the Navigator suggestion group in the autosuggest shows any Navigator menu names with Report.

### Managing Suggestion Groups

Each suggestion group can have a heading, for example Recent Items, as well as an icon that appears before the heading text. The icon helps users identify what the group is all about.

You can manage suggestion groups to:

- Show or hide the group by default in the autosuggest
- Enter the heading text
- Define if the heading text appears in the autosuggest or not
- Identify the image file to use as the icon

**Tip:** You can copy predefined suggestion groups and edit them to create your own versions.

To manage suggestion groups, open the Setup and Maintenance work area and use either the:

- Manage Suggestion Groups task
- Autosuggest tab when you create or edit global search configurations using the Manage Global Search Configurations task

### Using in Global Search Configurations

Just because a suggestion group is defined to be displayed by default doesn't necessarily mean that it in fact appears in the autosuggest. Global search configurations determine which groups are included for the autosuggest, whether icons appear for the headings, and so on.

You can use a suggestion group in many or all global search configurations. And ultimately, if personalizing suggestion groups is enabled, then users can show, hide, and reorder the suggestion groups included in the global search configuration.

#### *Related Topics*

- [Create Global Search Configurations](#)
- [Set Up Autosuggest for Global Search](#)
- [Change Heading Text and Icons for Suggestion Groups](#)

## Change Heading Text and Icons for Suggestion Groups

This example shows how to change the icon and text for a suggestion group heading in the global search autosuggest. In this example, you start out with the predefined Default global search configuration enabled, and no custom configurations.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which predefined suggestion group do you want to change?	Recent Items
What do you want the new heading text to be?	Recently Visited Pages
Which image do you want to use as the icon?	A .png file (16 by 16 pixels) that's used on your company Web site
Do you want the new suggestion group to appear in the autosuggest by default?	Yes
Which pages should the changes apply to?	All pages

To use a new icon and heading text for the suggestion group:

- Make a copy of the predefined Recent Items suggestion group.
- Update global search configurations to use your suggestion group.

### Duplicate the Predefined Suggestion Group

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Global Search Suggestion Groups** task in the Application Extensions functional area.
2. On the Manage Applications Core Global Search Suggestion Groups page, select the Recent Items group and click **Duplicate**.
3. In the new row, enter **RECENTPAGES** as the short name.
4. Change the display name to **Recent Pages**.
5. Change the description to **Version of Recent Items with revised heading and icon**.
6. With your new row still selected, click **Edit**.
7. In the Heading section, enter **Recently Visited Pages** in the **Text** field.
8. In the **Icon** field, enter the full URL to your .png file.
9. Click **Save and Close**.

### Update Global Search Configurations

1. Back in the Setup and Maintenance work area, go to the following:
  - Functional area: Application Extensions
  - Task: Manage Applications Core Global Search Configurations

2. Select the Default configuration and click **Duplicate**.
3. Fill out the row for your new configuration, selecting the **Default** check box.
4. With the row still selected, click the **Edit** icon.
5. In the Autosuggest tab, click the **Refresh** button in the Suggestion Group section if you don't see your suggestion group.
6. Move the Recent Pages group into the **Selected Groups** list, and move the Recent Items group out.
7. In the **Enabled** column for the Recent Pages group, select **Yes**.
8. In the Appearance section, make sure that headings are set to be displayed.
9. Click **Save and Close**.

#### *Related Topics*

- [Create Global Search Configurations](#)
- [Set Up Autosuggest for Global Search](#)
- [Examples of Global Search Configurations Set as Enabled or Default](#)
- [How do I update existing setup data?](#)





# 30 Manage 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.

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.

The 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:** You can't audit LOB (BLOB, CLOB, and NCLOB), rich text, and long text attributes.

## 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 a Microsoft Excel file, there's a limit on the number of rows that are displayed in the file.

- For Oracle Fusion Middleware products, the maximum limit is 25000. By default, the limit is set as 10000. You can change this limit using the FND\_AUDIT\_FMW\_EVENT\_LIMIT profile option.
- For Oracle Fusion Application Business Objects, the maximum limit is 10000 per table. This is set as the default value. Sometimes, the actual rows returned might be more than the limit set, because a single transaction can update multiple tables. To decrease this limit, you can create the FND\_AUDIT\_EXPORT\_ENTITY\_LIMIT profile option and set a lesser value for it.

See *Why is it taking so long to get search results when exporting audit summary of Fusion Application Business Objects?*

## 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.

### Oracle Fusion Middleware Products

- Configure business objects to enable auditing in Oracle Fusion Middleware products. Refer to Oracle Applications Cloud Common Features Reference.

See: [Auditing Web Services](#)

### Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Applications Cloud Common Features Reference.

See: [Introduction to Oracle Fusion Middleware Audit Framework](#)

See: [Managing Audit](#)

## Business Objects with Auditing allowed in SCM

This is a list of some of the business objects that are available for auditing. See the related product documentation for more information on the impact of enabling any of these objects for auditing.

SCM Product Area	Available Business Objects
Demand Management	Planning Measures
E-Signatures and E-Records	Electronic Signature Preferences
Innovation Management	Requirements

SCM Product Area	Available Business Objects
Inventory Management	Interorganization Parameters
	Intersubinventory Parameters
	Locators
	Subinventories
	Lot and Serial Numbers
Product Development	Items and Change Orders
Product Hub	Item Classes, Trading Partner Items, Competitor Items, Customer Items, Manufacturer Items, Supplier Items, Rule Sets, Items, Item Structures, Packs and Catalogs
Receiving	Receiving Parameters
Manufacturing	Standard Operations, Work Definitions, and Work Orders

# 31 Enterprise Scheduler Job Definitions and Job Sets

## Home Page Setup

### 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](#)
- [What are scheduled processes?](#)
- [Configure Offerings](#)
- [Best Practices for Scheduled Processes in Fusion Applications](#)

## 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.
- For your own SQL query, you can see the Tables and Views guides for more information, if you want to base the list of values source on a specific table or view.

Your list of values source might behave differently from similar sources used in predefined jobs. There are some limitations to creating custom sources. For example, you can't add new filtering criteria or configure the search.

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.

- 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.
- 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>

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

- [How do I update existing setup data?](#)
- [Configure Offerings](#)

# Manage Job Definitions

## 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	<p>Select this if you want the parameter to be a check box.</p> <p>Select <b>True</b> or <b>False</b> to determine if the check box is selected or not.</p>
Date or time	<p>Select <b>Date and time</b> or <b>Date only</b> option.</p> <p>Select a value from the <b>Default Date Format</b>.</p> <p><b>Note:</b> 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 <b>yyyy-MM-dd</b>, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.</p>
Number	<p>Select a <b>Number Format</b>.</p> <p>Select <b>Left</b> or <b>Right</b> for data alignment.</p>
String	<p>Select a <b>Page Element</b>.</p> <p>Select <b>Text box</b> if you want the user to provide a text.</p>



Data Type	Fields
	<p>Select <b>Choice list</b> 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.</p> <p>Select <b>List of values</b> if you want a list with unlimited options with a search facility.</p>

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](#)

## 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](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)

## 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.

**CAUTION:** Make sure your user name doesn't contain any spaces. If you create a custom job definition using a user name that contains spaces, other users might get errors when they submit this custom job definition.

## 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, <b>AtkEssPrograms1</b> . 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. <ul style="list-style-type: none"> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select <b>CrnEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select <b>FscmEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select <b>EarHcmEss</b>.</li> </ul>
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select <b>BIPJobType</b> . 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: <b>Custom/&lt;Family Name&gt;/&lt;Product Name&gt;/&lt;Report File Name&gt;.xdo</b> .  Make sure to include the <b>.xdo</b> file extension for the report definition.
Enable submission from Scheduled Processes	Leave the check box selected.

5. In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
6. 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.
7. 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](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)

## Duplicate 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.

1. However, 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. Make sure that all mandatory parameters are populated properly.
8. Click **Save and Close**.

#### Results:

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](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)

## 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.

Column Name	Description
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	<p>The name of the job type that the job definition is based on.</p> <ul style="list-style-type: none"> <li>• BIPJobType: Jobs that run as Oracle Analytics Publisher reports</li> <li>• CJobType: Jobs that are implemented in C and run in the container</li> <li>• HostJobType: Jobs that run as host scripts executed from the command line</li> <li>• JavaJobType: Jobs that are implemented in Java and run in the container</li> <li>• PerlJobType: Jobs that are implemented in Perl and run in the container</li> <li>• PlsqlJobType: Jobs that run as PL/SQL procedures stored in a database server</li> <li>• SqlldrJobType: Jobs that are implemented in SQL*Loader and run in the container</li> <li>• SqlplusJobType: Jobs that are implemented in SQL*Plus and run in the container</li> </ul> <p><b>Note:</b> If you create a brand new job definition (not by duplicating an existing one), the only job type you can use is BIPJobType.</p>

## 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 to Run Reports as Scheduled Processes](#)
- [Edit Job Definitions](#)
- [What are scheduled processes?](#)
- [Use Query By Example](#)

## 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?	<p><b>Region, Country and City.</b></p> <p><b>Region</b> list of values includes the names of the regions like North America, EMEA, JAPAC and so on. The <b>Country</b> list of values includes the names of countries like USA, Canada, France, England, India, Japan and so on. Similarly <b>City</b> list of values includes the names of different cities like New York, Washington, London, Paris, Mumbai, Tokyo and so on. The <b>Country</b> parameter list of values includes only the countries like USA, Canada and so on, if user selects North America. The <b>City</b> parameter list of values includes the names of the cities in the country that the user has selected.</p>
What are view criteria?	<p>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.</p> <p>To filter countries based on the selected region, you must select <code>getCountriesByRegion</code> and pass <b>Region</b> as a bind variable.</p>

## 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 aren't predefined.

**Note:** Remember, when you're creating a job set, you should use jobs only from a single module. If you need to use jobs from multiple modules, create separate job sets.

### 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, <b>ExportMetadataTables1</b> .  <b>Note:</b> 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](#)
- [How do I 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
<b>SYS_allowMultPending</b>	Specifies if the same job definition can have multiple pending requests.
<b>SYS_application</b>	Specifies the logical name of the Scheduling Services folder application used for request processing. Oracle Enterprise Scheduler automatically sets this property during request submission.
<b>SYS_effectiveApplication</b>	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 <b>EFFECTIVE_APPLICATION</b> system property. This property can only be specified through metadata and cannot be specified as a submission parameter.
<b>SYS_priority</b>	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.
<b>SYS_product</b>	Specifies the product used for submitting the request.
<b>SYS_request_timeout</b>	Enables the job request to time out.
<b>SYS_requestExpiration</b>	<p>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.</p> <p>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.</p>
<b>SYS_retries</b>	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
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, sometimes you might need to give more 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.

Action	Description
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 **Data 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 data 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 identify 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 **Data 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.

1. 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 for Enterprise Scheduler Job Definitions and Job Sets

### 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.

**Note:** You need to test the custom role to make sure it doesn't have any roles or privileges that give access to predefined processes.

## 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.

## 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 **CrmEss**.
- 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**.

## 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](#)





# 32 Applications Core Configuration

## Lookups

### Overview of Lookups

Lookups are lists of values in applications. You define a list of values as a lookup type comprising a set of lookup codes, each code's translated meaning, and optionally a tag.

On the UI, users see the list of translated meanings as the values available for selection. 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 users to select. For example, the two lookup codes Y and N are defined in the REQUIRED\_INDICATOR lookup type.

**Note:** Don't include spaces in lookup codes. Use the underscore character (\_) to separate the words if needed. For example, instead of creating the lookup code as DEV PROGRAM, create it as DEV\_PROGRAM.

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
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
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: Lookups aren't available to users as part of generic REST Resources (Standard, Common, or Set-Enabled). To make it available, your security administrator must assign a specific function security policy for each lookup type to a role and assign that role to the selected users.

**Note:** The function security policy is provided only for predefined lookup types.

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.
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 might define lookups in an application view to restrict the UI pages where they might appear.

In lookups management tasks, lookups might 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 set determinant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

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.

## Deleting Lookup Types and Lookup Codes

You can delete lookup types and lookup codes from the lookups management tasks in the Setup and Maintenance work area. For example, you can delete lookups that are part of the Purchasing module, from the Manage Purchasing Lookups task in the Setup and Maintenance work area. Select the required lookup type to see the lookup codes associated with it. To delete a lookup code, select the required code and click the **Delete** icon. To delete a lookup type, similarly, select the required lookup type and click the **Delete** icon.

You can also use REST resources to delete lookup types and lookup codes.

- For more information about deleting a lookup type using REST resources, see the Delete a standard lookup section in the *REST API for Common Features in Oracle Fusion Cloud Applications* guide.
- For more information about deleting a lookup type, see the Delete a lookup code section in the *REST API for Common Features in Oracle Fusion Cloud Applications* guide.

Here are a few things to know about deleting lookup types and codes:

- Certain lookup types and codes can't be deleted, for example, predefined lookup types and codes can't be deleted.
- You can't delete lookup codes in bulk. Instead, you can delete an entire lookup type.

#### Related Topics

- [How can I access predefined lookups?](#)
- [Example of a Set-Enabled Lookup](#)
- [What's the difference between a lookup type and a value set?](#)
- [Example of a Standard Lookup](#)
- [Enter or Edit Translated Text](#)
- [Create Roles in the Security Console](#)

## 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 create or edit lookup codes only if the configuration level for that lookup type 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

Lookup Code	Meaning	Enabled	Display Sequence
RED	Stop	Yes	1
GREEN	Proceed	Yes	3
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.

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. Note that you can create or edit lookup codes only if the configuration level for that lookup type supports it.

### 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](#)

## FAQs for Lookups

### How can I access predefined lookups?

Search for predefined lookups using any of the manage lookups tasks.

1. In the Setup and Maintenance work area, go to any of the following tasks that contains the lookups you're looking for:
  - Manage Standard Lookups
  - Manage Common Lookups
  - Manage Set-enabled Lookups
2. Enter any of the search parameters and click **Search**. If you don't know the lookup type or the meaning, use the **Module** field to filter search results.



3. Click a lookup type to view its lookup codes.

**Tip:** Click the Query By Example icon to filter the lookup codes.

#### Related Topics

- [Use Query By Example](#)
- [How do I update existing setup data?](#)

## 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

Area of Difference	Lookup Type	Value Set
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 results.

**Note:** Lookup tags are optional descriptions of attribute values. These descriptions aren't validated. In some product-specific implementations, tags are used for specific purposes. For more information, see product-specific documentation.

### Related Topics

- [Overview of Lookups](#)
- [Considerations for Deleting Tags from Lookup Codes](#)

## 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

- [How do I update existing setup data?](#)
- [Use Query By Example](#)

# 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.

However, you might notice gaps in the numbering sequence because automatic sequencing isn't gapless.

## 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. See the corresponding product documentation for specific details and also to identify 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 identified:

- **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.

**Note:** The **Display Message?** checkbox is deprecated. However, it might be visible on the page, to support legacy values.

## 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 finds 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 runtime, when users create documents, the document sequence to be assigned is decided 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 allowed only for newly created document sequences. You can't audit document sequences that are already in use by a specific product.

#### Related Topics

- [Guidelines for Managing Modules in Application Taxonomy](#)

## 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 profile option task that correlates to the product or functionality of the profile option you want to set. If needed, use the **Manage Administrator Profile Values** task, which provides access to all profile options.
2. Search for and select the profile option.

3. In the Profile Values section, select or enter a value in the **Profile Value** column for any default row with a predefined Site level.
4. If there isn't any row, or if you need more rows, click the **New** icon.
  - o 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**. Otherwise, select **User**.

**Note:**

- Don't select **Site** if a row for the Site level already exists. There can only be one row for the Site level, but you can have multiple rows for the User level.
  - The **Product** level is deprecated and can no longer be used. However, it might be visible in the list to support legacy profile values.
- o User Name: If you select **User** as the profile level, select the user name and specify the associated profile value.
  - o Profile Value: Select or enter the value corresponding to the selected profile level. For an existing entry, you can modify only the profile value.
5. Click **Save and Close**. Changes in the profile values affect users the next time they sign in.

## 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.
- If you want to access the profile option using REST API, you must add it to the Authenticated User Profile Option Values (`ORA_FND_AUTH_REST_ACCESS`) profile category.

*Related Topics*

- [Hierarchy in Profile Levels](#)
- [Set Profile Option Values](#)
- [Profile Categories](#)
- [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	<ul style="list-style-type: none"> <li>Attachment File Directory - 2</li> <li>Indicate Attachments - 1</li> </ul>	<ol style="list-style-type: none"> <li>1. Indicate Attachments</li> <li>2. Attachment File Directory</li> </ol>

### 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**. Search functionality is case-sensitive.

**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. In the results, 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*

- [Overview of Files for Import and Export](#)
- [Import Profile Values](#)

## Flexfields

### 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 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 Transactional Business Intelligence. But for descriptive flexfields, you must deploy your changes to a 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 Transactional Business Intelligence.

**Note:** You can't deploy your changes in value sets, key flexfields, and extensible flexfields to your 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.

You can locate flexfields on a page using the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Highlight Flexfields** to locate flexfields on a page. 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 the Application Composer tool 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*

- [Modify Flexfields Using Page Composer](#)

## Modify Flexfields 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. By default, you get the Design view to modify pages. But for this page, you must use the Source view. Set the **Source View for Page Composer Enabled** profile option (FND\_PAGE\_COMPOSER\_SOURCE\_VIEW) to **Yes** so that the View menu is available for you to switch between the two views. You can find the profile option in the **Manage Administrator Profile Values** task in the Setup and Maintenance work area.

After you switch to Source view, 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. Set the **Source View for Page Composer Enabled** profile option (FND\_PAGE\_COMPOSER\_SOURCE\_VIEW) to **Yes** so that the View menu is available for you to



switch between the two views. You can find the profile option in the **Manage Administrator Profile Values** task in the Setup and Maintenance work area.

After you switch to Source view, 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 <b>True</b> or <b>False</b> or an <b>EL expression</b> .
Auto Submit	Indicates whether the component submits automatically when users change the segment's value. You can set the value to <b>True</b> or <b>False</b> or an <b>EL expression</b> .
Rendered	Indicates whether the flexfield is rendered on the page. You can set the value to <b>True</b> or <b>False</b> or an <b>EL expression</b> . 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 <b>True</b> or <b>False</b> or an <b>EL expression</b> . 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: <ul style="list-style-type: none"> <li><b>No value:</b> Renders all descriptive flexfield segments. By default, all descriptive flexfield segments are rendered.</li> <li><b>global:</b> 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.</li> <li><b>contextSensitive:</b> 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.</li> </ul>
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.

## Key Flexfield Modification

In Page Composer, open the page with the flexfield you want to modify. Set the **Source View for Page Composer Enabled** profile option (FND\_PAGE\_COMPOSER\_SOURCE\_VIEW) to **Yes** so that the View menu is available for you to switch between the two views. You can find the profile option in the **Manage Administrator Profile Values** task in the Setup and Maintenance work area.

After you switch to Source view, look for the `<KffComponent>` 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 <b>True</b> or <b>False</b> or an <b>EL expression</b> .
Auto Submit	Indicates whether the component submits automatically when users change the segment's value. You can set the value to <b>True</b> or <b>False</b> or an <b>EL expression</b> .
Rendered	Indicates whether the flexfield is rendered on the page. You can set the value to <b>True</b> or <b>False</b> or an <b>EL expression</b> . 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 <b>True</b> or <b>False</b> or an <b>EL expression</b> . 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: <ul style="list-style-type: none"> <li><b>No value:</b> Renders all descriptive flexfield segments. By default, all descriptive flexfield segments are rendered.</li> <li><b>global:</b> 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.</li> <li><b>contextSensitive:</b> 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.</li> </ul>
ShortDesc	A text that appears when a user hovers over an element.

Property	Description
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.

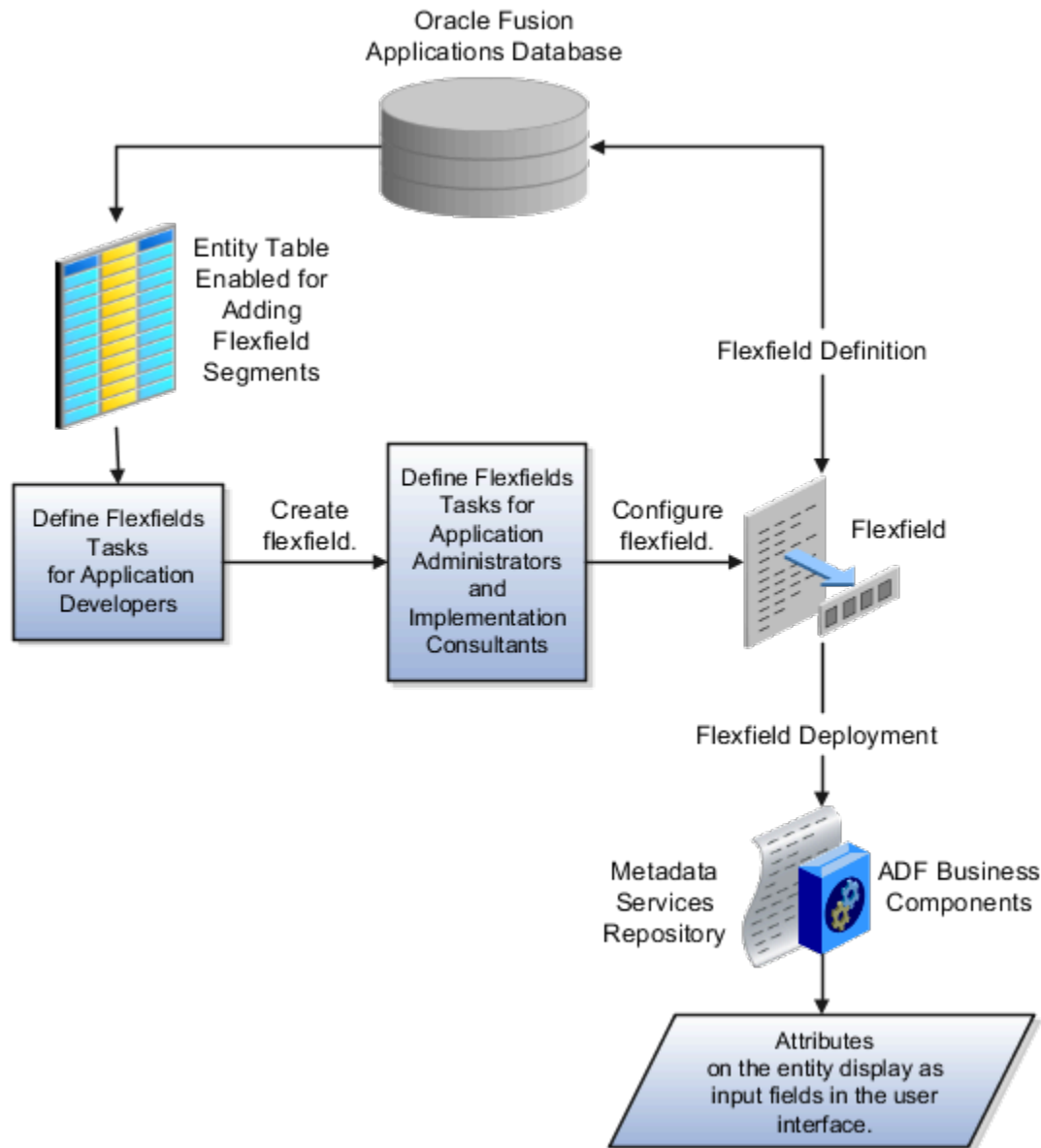
**Note:** Flexfield segments can't be edited using their individual component elements. They can only be edited from the properties panel of the `<descriptiveFlexfield>` element they belong to. To find these components, open the properties panel of the descriptive flexfield, switch to the relevant tab, 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](#)
- [Set Profile Option Values](#)

## 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 Fusion Cloud Applications architecture work together:

- Integration
- Deployment
- Import and export
- Runtime
- Patching

## Integration

The attributes that you add by configuring flexfields are available throughout the Oracle 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 Transactional 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 the Application Composer tool, 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](#)

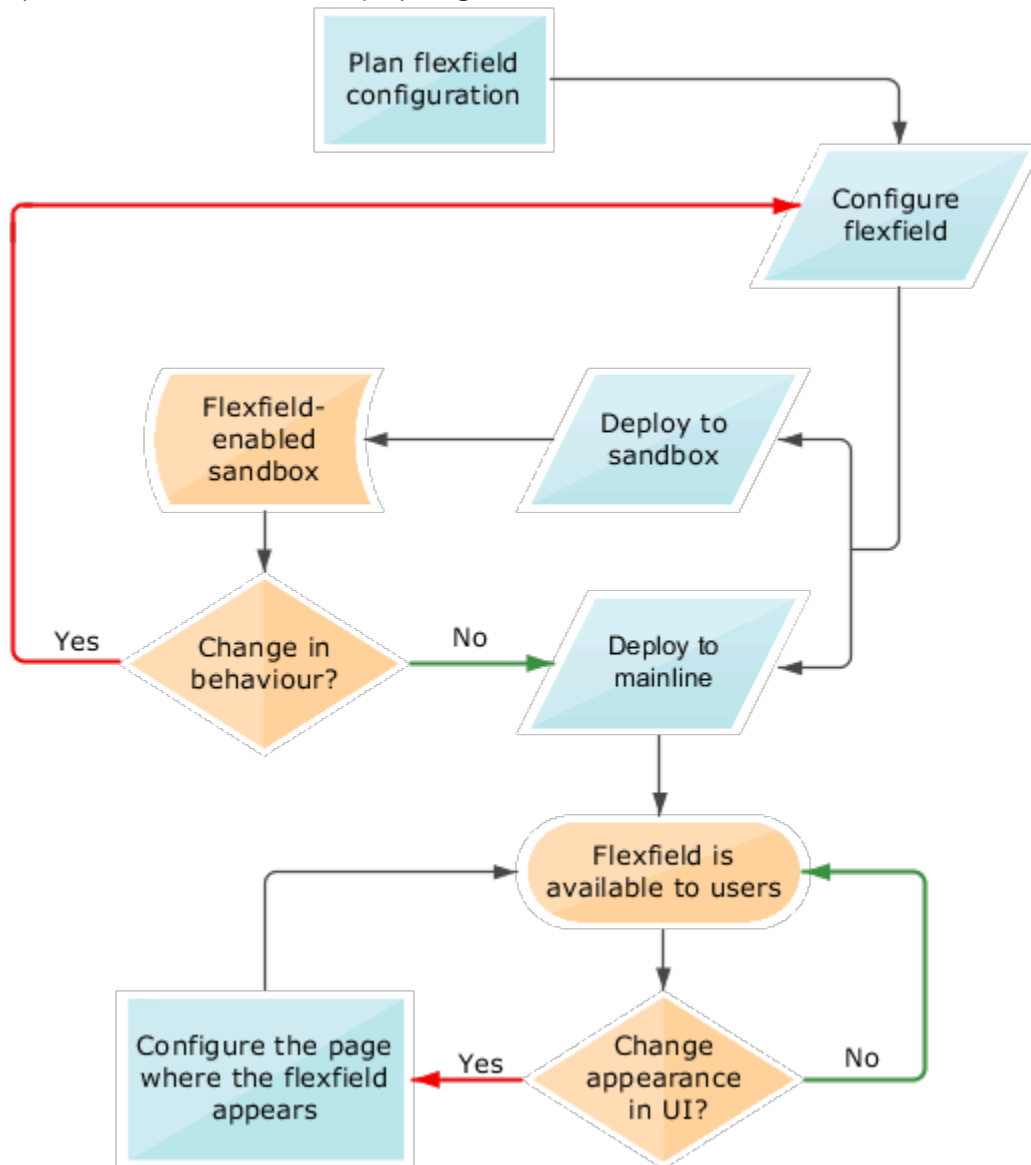
# Flexfield Management

## 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 Fusion Cloud Applications 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 Transactional 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 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. Click your user image or name in the global header to open the **Settings and Actions** menu, and 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

- [Modify Flexfields 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.
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.

Property	Description
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	<p>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.</p> <p>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.</p>
Instruction help text	<p>The field-level instruction help text to display for the field.</p> <p>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.</p>

## 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](#)

## 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

☒ Display next notification after my response

B. Drop-down List

Sales Region

West
Northwest
West
Southwest
North
Central
South
Northeast
East
Southeast

C. List of Values

My Airport Codes

HNL
HNL Honolulu, HI
SAN San Diego, CA
SFO San Francisco, CA
SJC San Jose, CA
LAX Los Angeles, CA
NYC New York, NY - All airports
BOS Boston, MA
PDX Portland, OR
Search...

D. Pop-up List of Values

Search

Advanced

Required

Value Y

Search Reset

Value

YME

OK Cancel

E. Search Enabled List of Values

Location

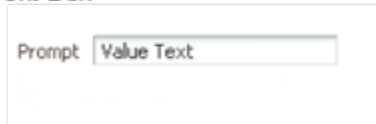
#### F. Radio Button Group



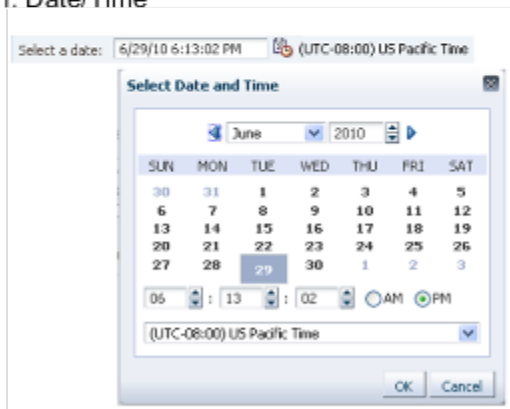
#### G. Text Area



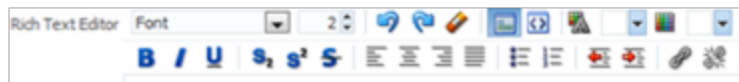
#### H. Text Box



#### I. Date/Time



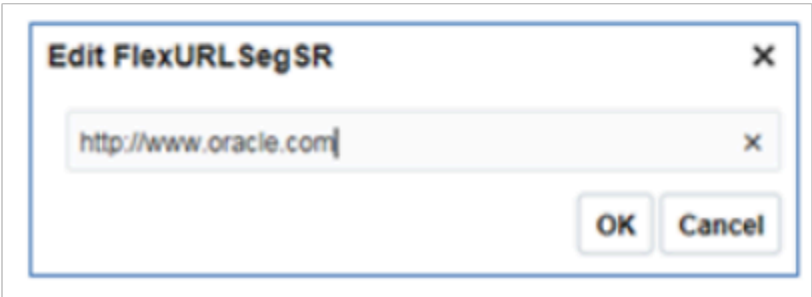
#### J. Rich Text Editor



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 <b>Search</b> 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	<p>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.</p> <p><b>Note:</b> This display type is available for extensible flexfields only.</p>
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
		<b>Note:</b> 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.

**Note:** Default values for global, context, and context-sensitive segments are shown only when a descriptive flexfield row is created. Also, when a context segment value is changed on a UI that renders new context-sensitive segments, these segments display default values for both new and existing rows.

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.

**Note:** New usages of Groovy default values and validators in flexfields are deprecated because they won't be automatically upgraded in future releases. However, flexfields already using Groovy will continue to work. If you want to add Groovy expression to new flexfields, you must set the **Flexfield Groovy Usage Support Restricted** (ORA\_FND\_FLEX\_GROOVY\_RESTRICTED) profile option to **N**.

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

Default Type	Default value specified?	Derivation value specified?	Initial action	Action after parameter changes
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
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

- [How do I 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 Fusion Cloud Sales Automation and Oracle Fusion Cloud Fusion 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 to view flexfield definition changes reflected in the application user interface page.

### *Related Topics*

- [How Flexfield Deployment Status is Calculated](#)

# Flexfield Deployment

## Overview of Flexfield Deployment

Deployment generates or refreshes the Application Development Framework (ADF) business component objects that render flexfields on the UI. Deployment adds user-defined attributes to the Web Services Description Language (WSDL) schemas exposed by Oracle Fusion Cloud ADF services and used by SOA composites.

Flexfields are deployed for the first time when the application is provisioned. After you configure a flexfield, you must deploy it to make the changes 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 Fusion Cloud Applications 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.
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 Fusion Cloud Applications 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 Fusion Cloud Applications 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](#)

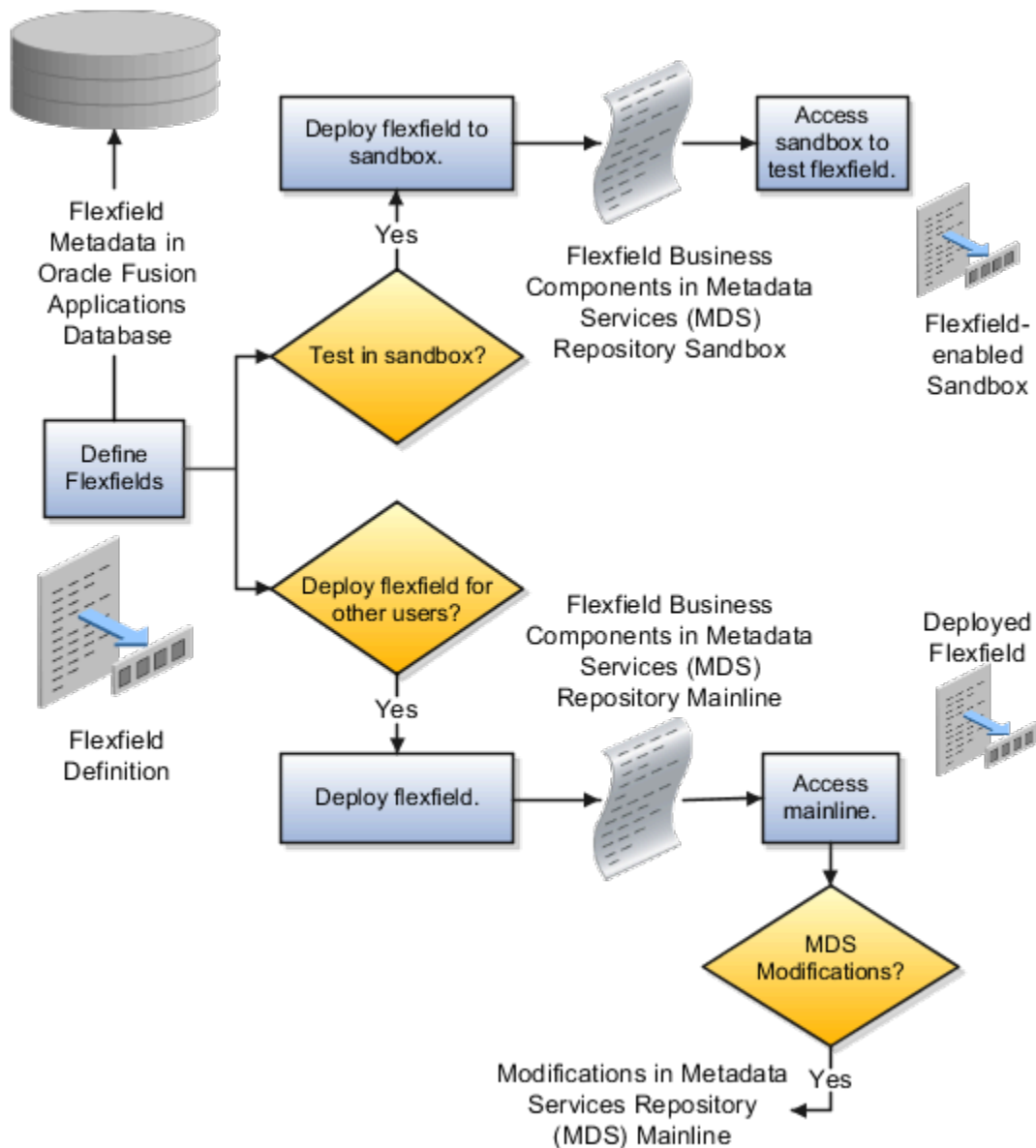
## How Deploying a Flexfield-Enabled Sandbox Works with Mainline Metadata

When you deploy a flexfield to a sandbox, the flexfield definition corresponds to the flexfield metadata definition in the Oracle Fusion Cloud Applications database. When the flexfield is ready for use, it must be deployed to the mainline metadata.

A flexfield-enabled sandbox uses the following components.

- Flexfield metadata in the Fusion Applications 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 Cloud 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. Use the **Manage Descriptive Flexfields** task to change the flexfield definition, if required.

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 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.

## 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.

For a dependent value set, you must assign an existing independent value set to it. You can't assign a value set whose validation type is Dependent.

**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.

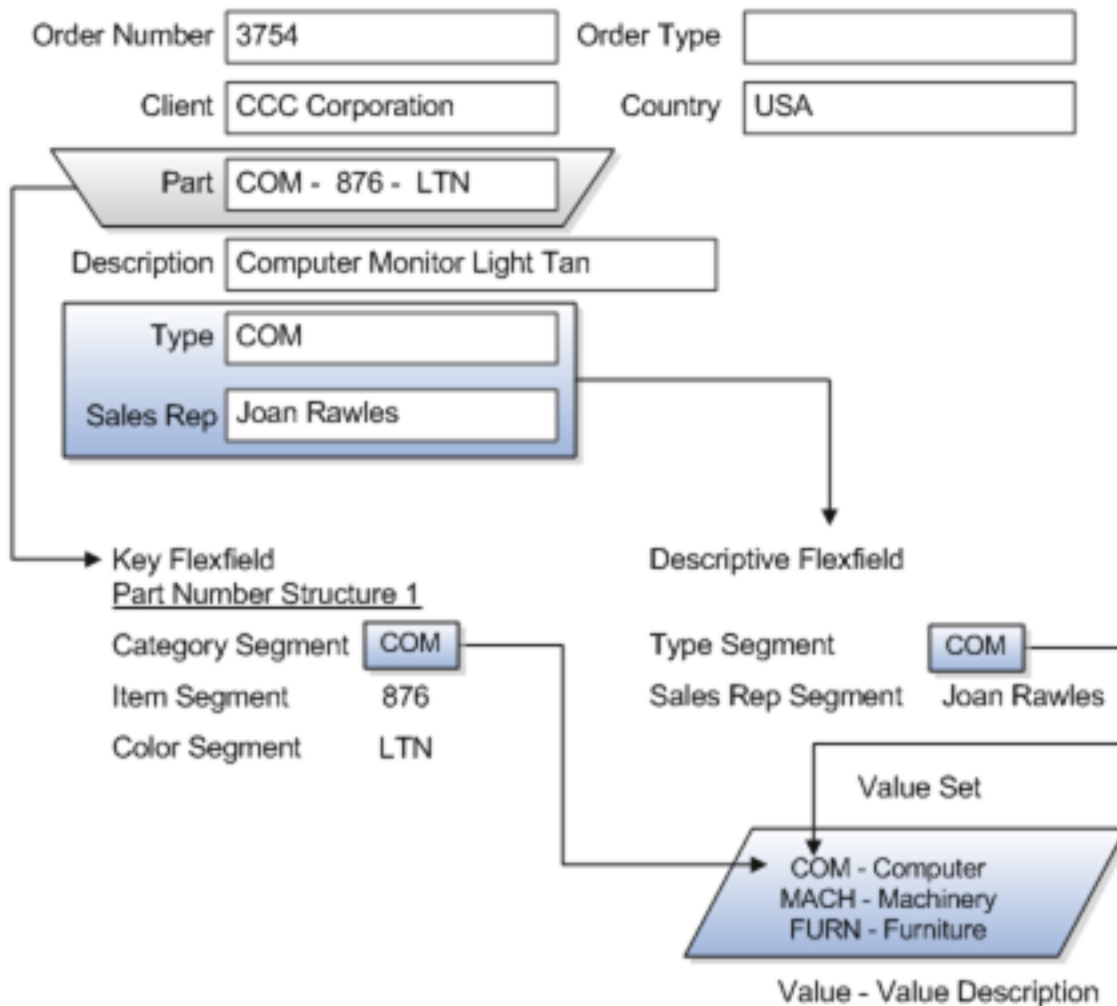
For key flexfields, the attributes in the view object corresponding to the account combination ID, structure instance number (SIN), and data set number (DSN) can't be transient. They must exist in the database table. For key flexfields, the SIN segment is the discriminator attribute, and the account 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](#)
- [Chart of Accounts Components](#)
- [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](#)

## 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 UI 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

You can use the format only validation type to enter any value as long as it meets your specified formatting rules. The value must not exceed the maximum length specified for that value set, and it must meet any format requirements for

that value set. For example, if the value set permits only numbers, you can enter the value 456 for a value set with a maximum length of three or more, but not the value ABC.

You can also define a range of valid values for your value set by using the Minimum Value and Maximum Value fields. After you've defined a range of values, you can't define a new valid value that falls outside this range. For example, you might create a value set with a number type format where the user can enter only the values between 0 and 100.

**Note:** For value sets with the value data type of Character, you can enforce minimum and maximum values only if the value set code ends with `_VALIDATE_CHAR_MINMAX`.

## 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 of the business object attributes that use the value sets. When creating value sets, you first provide a name and description, and then define the valid values.

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 and Edit 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
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

- [How do I 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, 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 Fusion Cloud 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.

```
VALUESETCODE|VALUE|ENABLEDFLAG
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 **Account** field, select the user account containing the flat file.
  - c. In the **Related Value Set File Name** field, enter the name of the related value set file you uploaded using the File Import and Export page.
  - d. In the **Related Values File Name** field, enter the name of the related values file you uploaded using the File Import and Export page.
  - e. 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](#)
- [Overview of Files for Import and Export](#)
- [Upload Value Set Values Process](#)

## 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 values in the value set you want to add or update. You upload these flat files 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



Column Name	Type
End Date Active	DATE, formatted as YYYY-MM-DD
Sort Order	NUMBER(18)
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.

**Note:** Here are some alternate ways of doing this task:

- Using the File Import and Export page. For more information, see [Export and Import of CSV File Packages](#).
- Using the SOAP web services or REST APIs. For more information, see the Value Sets REST Endpoints section in the [REST API for Common Features in Oracle Fusion Cloud Applications](#) guide.

### 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](#)
- [Export and Import of CSV File Packages](#)
- [REST API for Common Features in Oracle Fusion Cloud Applications](#)
- [What are scheduled processes?](#)

## Translation of Flexfield and Value Set Configurations

When you first configure a flexfield or segment, the **translatable** text 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 use the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Set Preferences** to translate the text for a particular 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 and Edit Table-Validated Value Sets Based on Lookups](#)

## FAQs for 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 Fusion Cloud Applications 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](#)

## 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

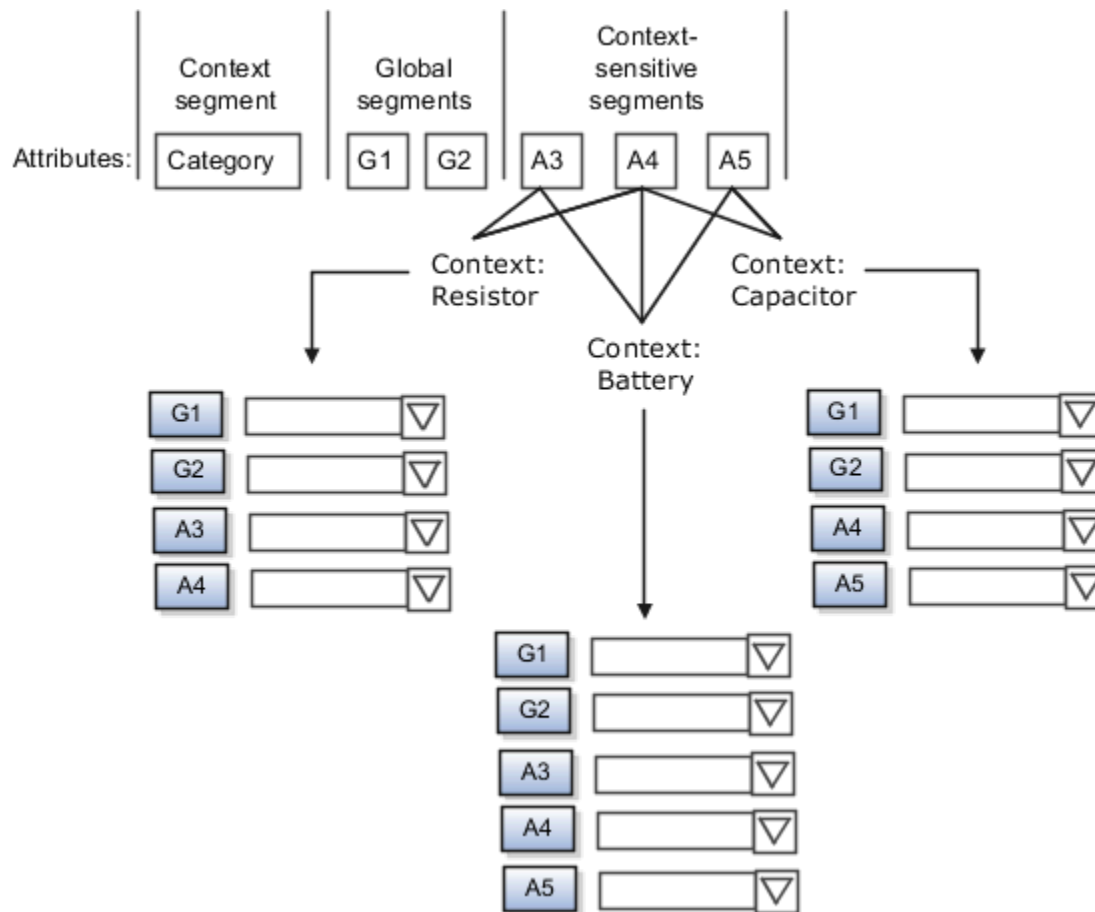
You can also define a Measurements context that uses the same columns for other attributes:

- 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. Make a list of UI pages and other artifacts that are affected by the configuration. Verify that you have the appropriate roles to view and configure the flexfields.

You can locate flexfields on a page using the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Highlight Flexfields** to locate flexfields on a page. Once you have configured the flexfields, plan to deploy them for test and production users. Review the tools and tasks available for managing flexfields to add and edit 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 Transactional 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 Fusion Cloud Applications 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 Transactional 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 Fusion Cloud Applications database and configuring their flexfield-level properties, defining and managing descriptive flexfield contexts, and configuring global and context-sensitive segments.

Every descriptive flexfield is registered to include a context segment, which you may choose to use or not.

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?](#)

## 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

Field	Value
Value Set	GL_100_CHARACTERS
Default Type	Parameter
Default Value	LookupType
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 Transactional Business Intelligence (OTBI) 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 BI.

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 Data Extensions for Oracle Transactional Business Intelligence process to import the flexfield changes into the Oracle Transactional 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 Transactional Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Data Extensions for Oracle 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 Transactional 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 Descriptive Flexfields

## 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

- [How do I 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

- [How do I 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

- [How do I 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

- [How do I 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

- [How do I 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

- [How do I update existing setup data?](#)

## 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?](#)
- [How do I update existing setup data?](#)

## Considerations for Planning Extensible Flexfields

Once you have identified a flexfield, plan the configuration. Make a list of the UI pages and other artifacts that are affected by the configuration. Verify that you have the appropriate roles to view and configure the flexfields.

You can locate flexfields on a page using the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Highlight Flexfields** to locate flexfields on a page. After you configure the flexfields, plan to deploy them for test and production users. Review the tools and tasks available for managing flexfields to add and edit 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
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 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 Transactional Business Intelligence (OTBI) includes a BI Enabled setting for each of its segment instances. When a segment instance is BI-enabled, it's available for use in OTBI.

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 OTBI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Data Extensions for OTBI process to import the flexfield changes into the Oracle Transactional 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 Transactional Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Transactional 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 Transactional 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 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 Transactional 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

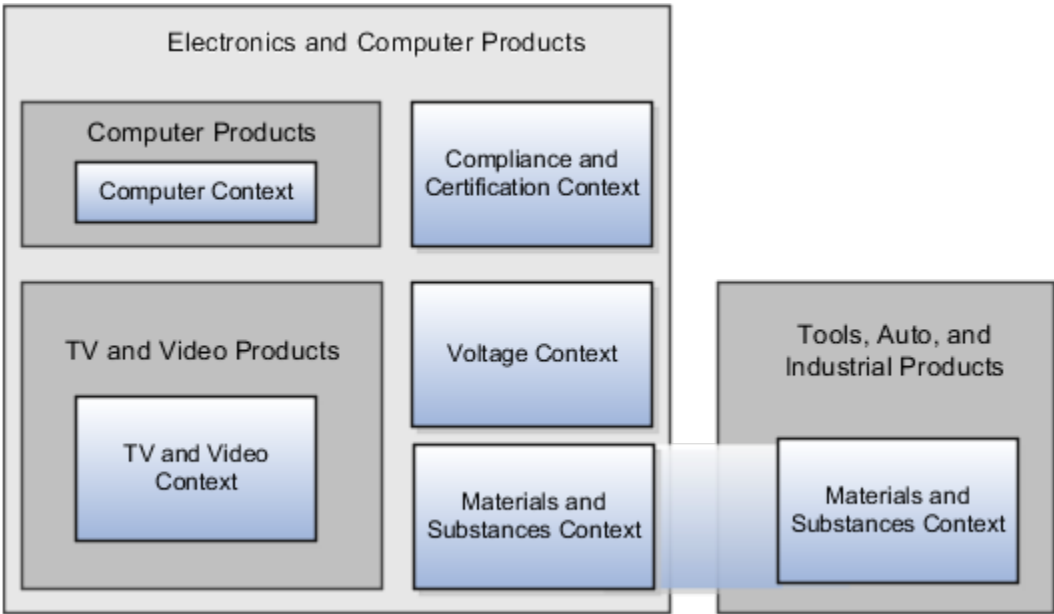
While configuring an extensible flexfield, you can disable a category. The Enabled column in the Category table of the Edit Extensible Flexfield page, indicates which categories are enabled.

**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

Display Name	Code	Description
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

## 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 UI for the Electronics and Computers category.

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(%)  Overall Part Reuse(%)

Estimated Recovery Cost  Overall Part Recovery(%)

Estimated Recycling Cost  Overall Material/Substance Reuse(%)

**Compliance and Certification**

ISO 14001 ☐ Energy Star ☒

TCO ☐ RoHS ☒

Blue Angel ☐

**Operating Conditions**

Optimal Temp (Cel)  Wet Bulb Temp (Cel)

Humidity (%)  Min Dew Point

**Materials and Substances**

Actions View

Material/Substance	Contained Recyclate(%)	Percent of Unit Mass(%)	Mass(mg)
Lead/Lead Cor	<input type="text" value="3"/>	<input type="text" value="2"/>	<input type="text" value="4"/>

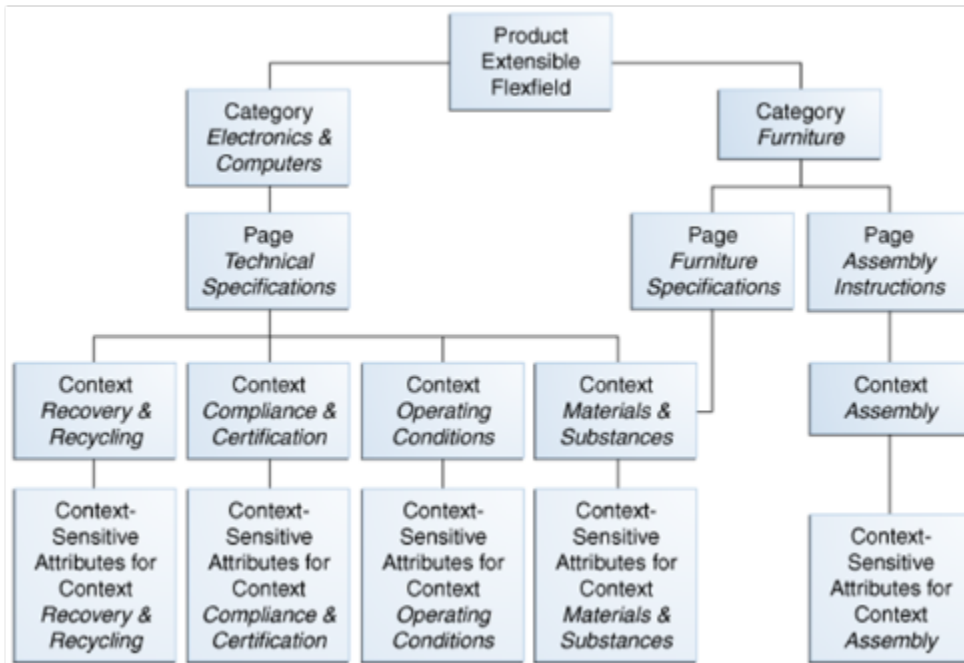
Use logical pages to determine how the contexts appear on the user interface. Use a context to store all the materials and substances required to make a single product. You can configure a context to store multiple rows per entity. The multiple rows are displayed in a table, like the Materials and Substances 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

Context	Edit Privilege	View Privilege
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

- [File Format for Importing Extensible Flexfields](#)
- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)
- [Import Value Set Values Using Web Services](#)



## FAQs for 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 UI?](#)

## 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 <b>True</b> , <b>False</b> , or <b>EL expression</b>

Property	Description
Required	Indicates whether users must enter some data for the component before they save. You can set the value to <b>True</b> , <b>False</b> , or <b>EL expression</b> .
Read-only	Indicates whether the users can modify the segment. You can set the value to <b>True</b> , <b>False</b> , or <b>EL expression</b> .
Visible	Indicates whether the segment is visible on the page. You can set the value to <b>True</b> , <b>False</b> , or <b>EL expression</b> .
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 <b>EL expression</b> .
Override	Indicates whether a certain child component inside a parent component is visible. You can set the value to <b>True</b> , <b>False</b> , or <b>EL expression</b> . 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>
```

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 Oracle ADF module ignores the rendered property at the segment level. For example, consider this snippet of code:

```
<fnd:keyFlexfieldPartial value="#{bindings.KfflPaInstanceIterator}" 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 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?](#)
- [How do I 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 these tasks:

- Determine the purpose of the key flexfield.
- Identify the number and length of its available segment columns.
- Identify if your key flexfield permits more than one structure.
- Identify if more than one structure must be defined.

- Identify 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.

**Note:** Table-validated value sets with ID columns and translated independent or dependent value sets aren't supported in 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 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

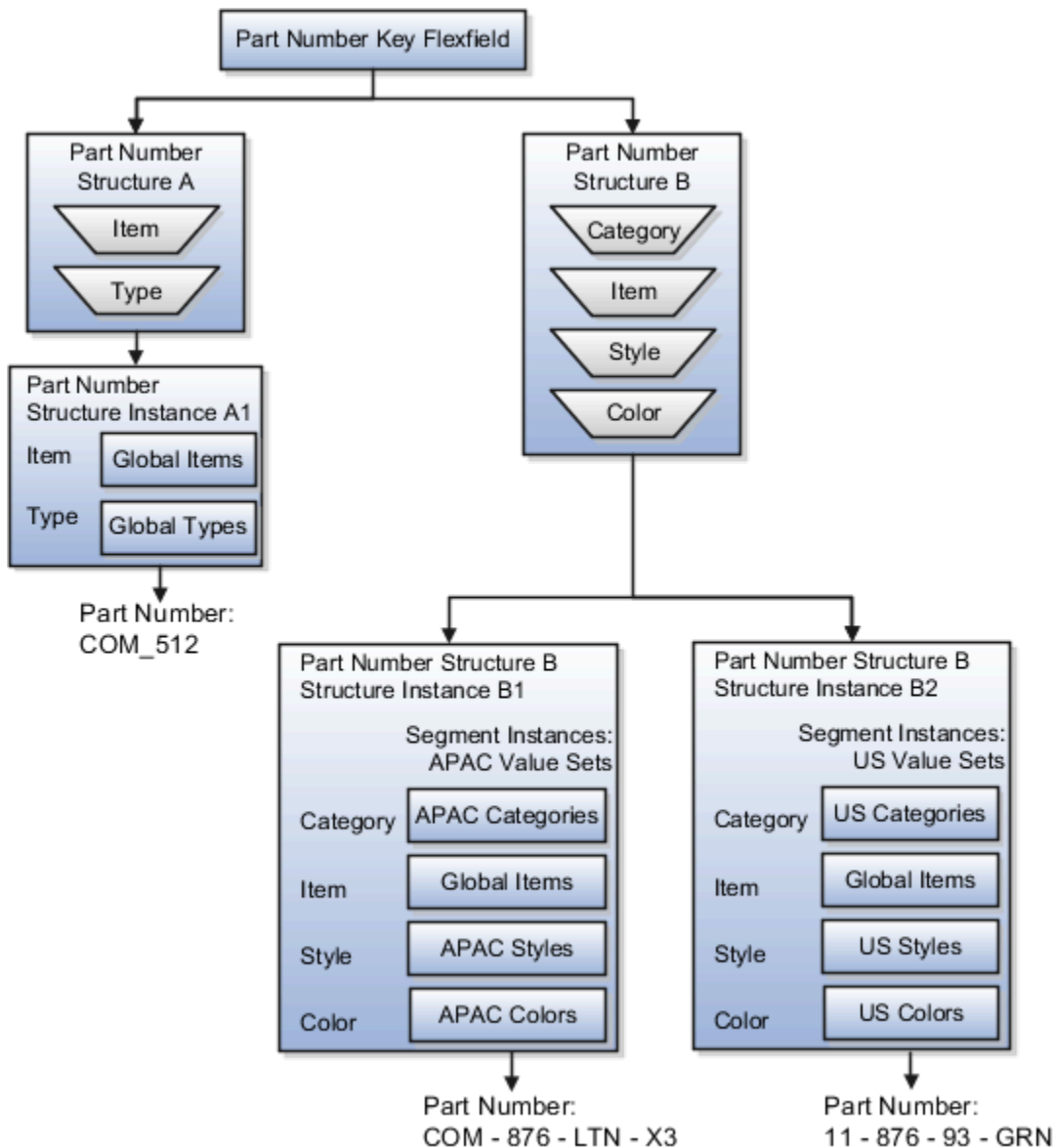
The differences among structure instances include whether dynamic combination creation is permitted. Likewise, at the structure instance level, differences among segment instances are based on the following:

- 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 define cross-validation rules across segments to control the creation of key flexfield code combinations. These rules enforce 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:
  - Offering: Financials

- Functional Area: Financial Reporting Structures
  - Task: Manage Cross-Validation Rules
2. On the Rules tab, select the chart of accounts for your organization and select the **Companies 131 and 151** cross-validation rule.

The following figure shows the section of the Edit Cross-Validation Rules page with the condition and validation filter details for companies 131 and 151. A condition is defined for company values equal to 131 or 151, and the validation specifies the department value equals 40 and the product value equals 211.

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**.

The following figure shows the Validation Filter window with three validations: department equals 40, department equals 30, and product equals 211.

**Validation Filter**

Department Equals 40

Department Equals 30

Product Equals 211

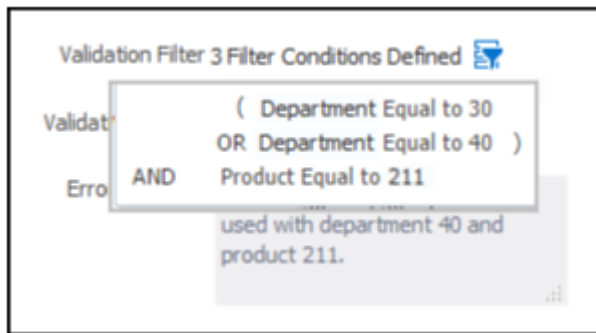
Search Reset Add Fields Reorder

OK Cancel

6. Click **OK**.

7. Click **Save**.

The following figure shows the details for the updated validation on the Edit Cross-Validation Rules page. The validation specifies departments equal to 30 or 40, and the product equal to 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*

- [How do I update existing setup data?](#)

## Considerations for Enabling Key Flexfield Segments for Business Intelligence

A key flexfield registered in the database as enabled for Oracle Transactional Business Intelligence (OTBI) 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 Transactional 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 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 Transactional Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle 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.

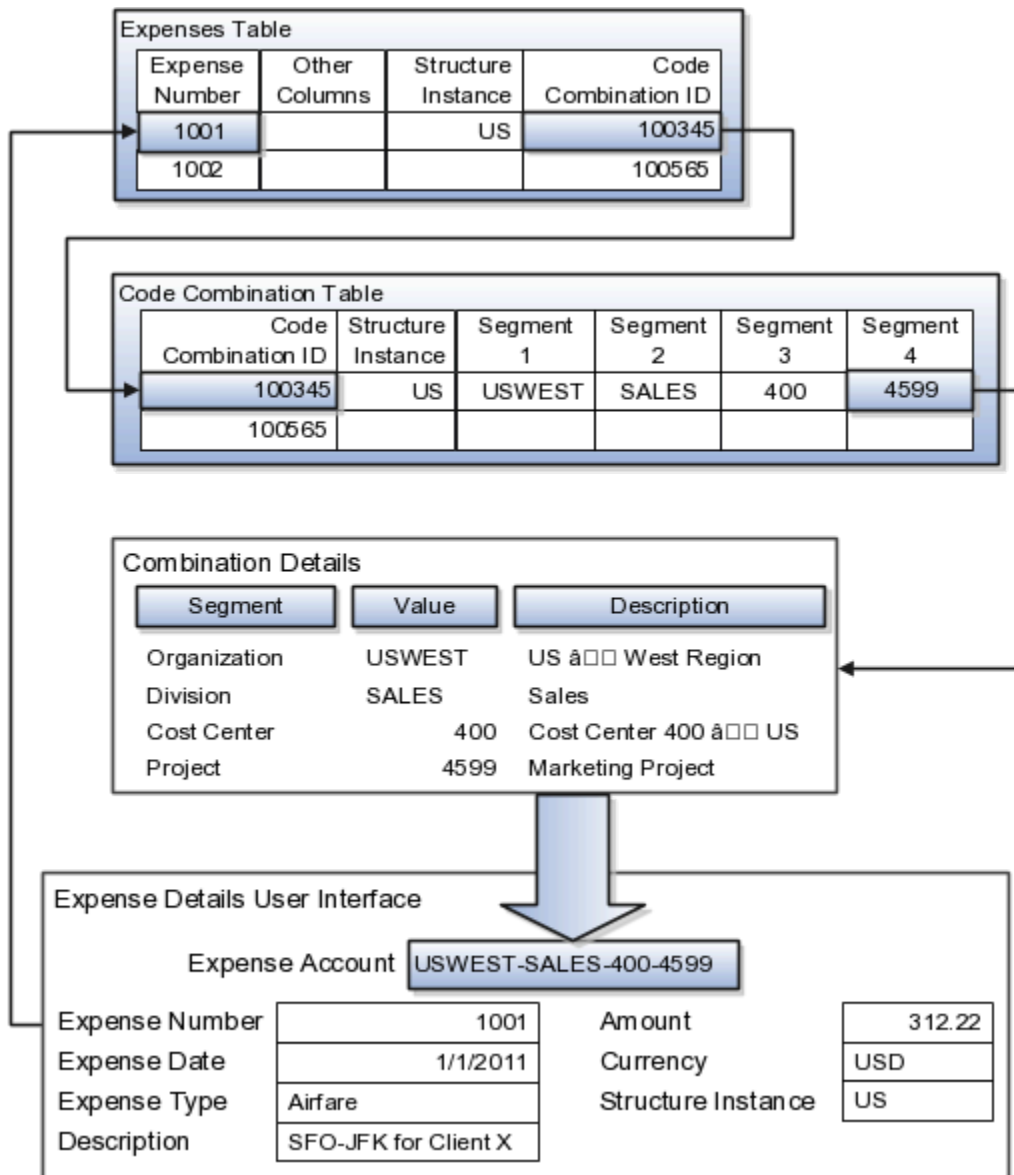
### Entering Expense Accounts

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.

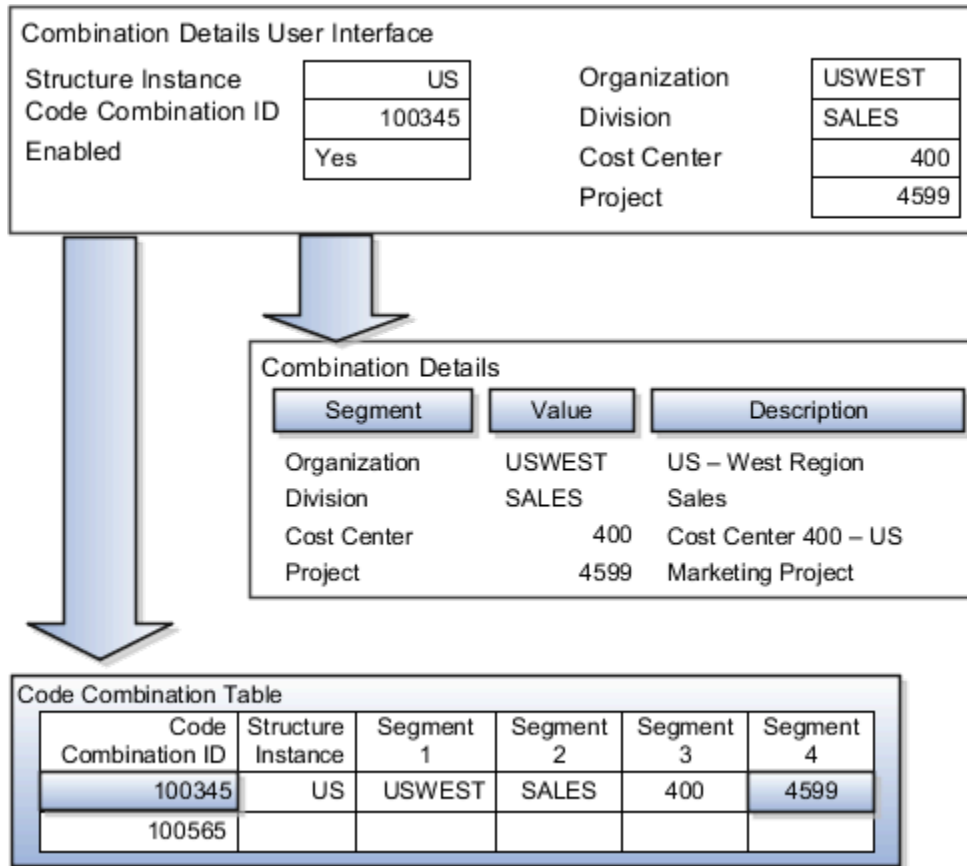
The expense account field is a foreign key reference to a account combination (EXPENSE\_LINES.EXPENSE\_ACCOUNT = ACCOUNT.COMBINATION).

### 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€” 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](#)

## 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, do these.

- 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, do these.

- 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.

Instead of writing a unique message for every possible situation, you can use tokens to display the variable values at run time.

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](#)



# 33 Carriers

## Shipping Methods

A shipping method is defined for every carrier. You must define and activate a shipping method after creating a carrier.

After a shipping method is created, it is assigned to one or more organizations. The organization can then use the carrier and shipping method combination to deliver shipments to and from its warehouses. The active status of the shipping method indicates that it is in use by the selected carrier in all assigned organizations.

You can define a shipping method by selecting these options:

- Service Level
- Mode of Transport

### Service Level

Service Level is the priority of transportation that affects how quickly goods are transported. For example, Next day, Overnight, Express, Door to Door.

### Mode of Transport

Mode of transport refers to the means used to deliver shipments to the customer. For example, Rail, Air, Road.

## Inbound Tracking Rules

Inbound tracking rules enable you to view the status of your shipments through the use of your carrier's website. When you click on a tracking number, you're directed to the carrier's website to view the tracking details associated with that shipment.

This aspect of inbound tracking rules can assist you in viewing shipment information:

- Associating the carrier and the carrier's website

### Associating the carrier and the carrier's website

Associating the carrier and carrier's website enables you to track your shipments by viewing all of the current tracking numbers for a given carrier and shipment.

#### *Related Topics*

- [Considerations for Creating Tracking Rules](#)

## Considerations for Creating Tracking Rules

Tracking rules enable you to configure the carrier's website within the application. After you configure the carrier's website, you can view the tracking information through the carrier's website when you select a tracking number.

Before creating tracking rules, consider these questions:

- What base URL to enter?
- Which request method to select?
- What parameters to select?

### Base URL

You must contact your carrier to obtain the website URL used to track shipments.

### Request Method

You must contact your carrier to determine the request method to be selected; GET or POST. You can use the GET method if the parameters can be shown in the URL. You can use the POST method if the parameters are processed in the back end.

### Parameters

You must contact your carrier to determine the parameters for the carrier. Consider if you require any constant value for the carrier's website for tracking shipments. Consider the most frequently used search value while tracking a shipment in the carrier's website. For example, if you frequently track shipments using the tracking number, then tracking number should be your lookup parameter.

# 34 Transit Times

## Transit Times

You can define the shipping method and transit time required for a shipment to be transported from a point of origin to a destination. This enables you to effectively calculate the initial ship date so that it arrives on the planned delivery date.

For example, you define an origin to destination combination from Florida to London. Next, you assign the shipping method, Air, to it and define a transit time of 3 days. When you receive an order with a requested delivery date of July 3, 2025 for destination London, the transit time you defined earlier helps you determine the initial ship date. The initial ship date is date by when the shipment should be shipped from your warehouse in Florida in order for it to reach the customer on the planned arrival date of July 3, 2025. In this case, the initial ship date is calculated as being 3 days prior to the requested delivery date on July 1, 2025. Shipping costs are applied based on the shipping method used.

The following aspects can assist you in creating transit time records for future use:

- Origin and destination combination
- Shipping method assignment

## Origin and Destination Combination

Defining an origin and destination combination enables you to create a shipping lane between locations where you deliver shipments. These locations can be an internal location such as a warehouse or supplier address, a geography such as a region or country, or a zone that is a grouping of geographies such as Asia Pacific

**Note:** You cannot delete a transit time record for an origin and destination combination if an open shipment exists for the same combination.

## Shipping Method Assignment

You must assign a shipping method to a specific origin and destination combination. For example, Express by Air. You can assign more than one shipping method to an origin and destination combination.

After you assign the shipping method, you can specify the transit time in number of days required to transport goods between the defined origin and destination using that specific shipping method. This enables you to calculate the initial ship date for shipments when you receive an order.

Additionally, you can choose to specify the maximum weight and volume capacity that can be transported daily using the assigned shipping method. You can also assign the cost per unit and the currency in which the cost is calculated. This will further assist you in planning the delivery of shipments by the requested delivery date.

## Considerations for Origin Type and Destination Type

After you specify an origin and destination location, you can define the transit times by different shipping methods.

For example, you can ship goods from origin A to destination B by truck, rail, and air. You can define the transit time by shipping method, such as:

- Truck- 5 days
- Rail- 2 days
- Air- 1 day

When an order is placed for delivery from origin A to destination B, the customer also specifies the date on which the goods are required to reach the destination. This is known as the requested delivery date. After the shipping method is determined, the specified transit time is used to calculate the date on which the shipment should be shipped from origin A to reach destination B by the requested delivery date. The application verifies the dates and adjusts to avoid nonworking dates, such as weekends or holidays.

Your origin location may have Saturdays and Sundays as nonworking days while your destination location may have Fridays and Saturdays as nonworking days. If the customer specifies a Sunday as the requested delivery date, the application will adjust the date to Monday. If the selected transit time is 5 days, the shipment will arrive on Saturday. The application will adjust that date to the next working day at the destination location, which is Sunday.

Before selecting the origin and destination types consider what the ship-from organization and ship-to location is.

## Origin and Destination Types and Locations

First, determine the point of origin and the destination. Then select the origin type and destination type. The origin and destination types are: Internal Location, Supplier Address, Ship-to Address, Geography, and Zone. The origin and destination locations will appear based on what you select as origin and destination types. For example, the location types can be an internal location such as a warehouse or supplier address, a geography such as a region or country, or a zone that is a grouping of geographies such as Asia Pacific. After you specify the origin and destination combination, you can add multiple shipping methods and transit times at a later point in time. This also lets you offer a range of shipping methods and time choices to your customer.

## Use of Transit Times for Anticipated Delivery or Shipping Dates

Similar to the requested delivery date, the application might correct nonworking dates when calculating the scheduled ship date. It uses only internal locations or supplier addresses to adjust for nonworking time. For example, weekends or holidays would be considered nonworking time. Internal locations and supplier addresses can be mapped to a schedule using the location. The application may consider subinventory locations when adjusting dates.

**Note:** Inventory organizations are associated with schedules. Subinventories for an inventory can optionally have an associated location. If the user has a subinventory with a different location than the parent inventory organization, the application first searches if any inventory organizations have the location. If one is found, the schedule for that inventory organization is used to adjust for non-working time. If no inventory organization is found using the location, then all subinventories are searched for the location. If one is found, the parent inventory organization's schedule is used. For supplier addresses, you can model a schedule using the Manage Transportation Schedules task in the Setup and Maintenance workarea for either the supplier site or the supplier level. If the transit time uses an external supplier address as the origin or destination, the application searches for the supplier address in your existing managed transportation schedules, first at the supplier site and then at the parent supplier. If either is found with a schedule in the Manage Transportation Schedules data, that schedule is be used for adjusting dates. Zones and geographies aren't used to calculate the anticipated delivery date for inventory because a schedule isn't associated with a zone or geography.



# 35 Items

## Setup Tasks to Define Items

Before you can define items in Oracle Product Hub, you must complete several tasks in the Setup and Maintenance work area.

Task	Description
Manage Item Profile Options	Profile options manage configuration data centrally and influence the behavior of applications.
Manage Advanced Item Profile Options	This task is used by Product Hub. If you don't install Product Hub, you don't need to define these options.
Define Units of Measure	Units of Measure must be created before you can create or import items.
Manage Lifecycle Phases	Item Lifecycle Phases are used as an indicator of the stage for an item within the lifecycle process. Each phase represents a set of tasks and deliverables that are required before promoting an item to the next phase.
Manage Product and Child Value Sets	In Product Hub, value sets are primarily used to define attributes that have a specific set of values. Each value set is associated with one or more attributes in the same attribute group or in a different attribute group.
Manage Attachment Categories for Product Management	Used to create attachment categories and associate them with item classes.
Manage Operational Attribute Groups	Operational attributes determine the behavior of the item with respect to various applications outside of Product Hub, such as Oracle Fusion Cloud Purchasing or Oracle Fusion Cloud Inventory Management.
Manage Item Attribute Groups and Attributes	Used to determine how the attributes appear in the user interface, as well as how they're used in the application.
Manage Item Classes	Item classes are created at the root item class or within a parent item class, and inherit values based on selections made when defining the item class.  For Product Hub customers, the Manage Item Classes task is used to create and manage item classes, user defined attributes and data security.
Manage Item Class Descriptive Flexfields	Descriptive flexfields appear in the user interface as additional information and can also appear in search results tables.
Deploy Item Flexfields	After you associate attribute groups and pages with an item class, you must deploy flexfields to view the pages or attribute groups at runtime. The metadata that was created for the attribute group isn't synchronized with the production data in Product Hub until the flexfield is deployed.

Task	Description
Manage Item Statuses	Item statuses are used to define the state an item is in and based on the state, the default values for item operational attributes.
Manage Item Types	Item types are date effective and are made active or inactive by adjusting the start and end dates.
Manage Cross Reference Types	Cross-References provide the functionality to map additional information about an item in the form of a value and cross-reference type. For example, the cross-reference can map a relationship between an item and an old part number.
Manage Item Descriptive Flexfields	Used to define descriptive flexfields that are specific to items.
Download Import Template	Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload.
Upload Item Data	After you have created the CSV file, the next step in the Import process will upload the CSV Zip file to the designated location within Oracle WebCenter Content.
Load Interface File through Scheduled Process	Once the CSV file is uploaded to Oracle WebCenter Content , you use the Load Interface File for Import scheduled process to move the data from Oracle WebCenter Content folder to the interface tables.
Import Items	The Item Import task creates an Enterprise Scheduled Service (ESS) process that takes the data that's loaded in the interface tables and uses the import process to move the data to the production tables.
Monitor Item Imports	Use this task to monitor the ESS process status in the search results table
Manage Related Item Subtypes	A related item is an item relationship between two existing items. How the two items are related is defined by a subtype.
Manage Item Revision Descriptive Flexfields	Use descriptive flexfields associated at Item Revision level to capture item revision information whose values may differ between revisions of the same item.
Manage Item Relationship Descriptive Flexfields	Item types are date effective and are made active or inactive by adjusting the Start Date and End Date.
Manage Trading Partner Item Descriptive Flexfields	When defining descriptive flexfields associated with trading partner items, you must use certain prefixes when naming the context segments, in order for the segments to be displayed for the respective trading partner type.
Define Item-Specific UOM Conversions	After you define units of measure, define the conversions used for items.

#### Related Topics

- [How can I create a new item structure type?](#)

## Overview of Item Status

Every item has an Item Status attribute. By setting the item status, you can change the default values for a subset of operational attributes referred to as status-controlled attributes of the item, according to how the status has been set up.

### Set Up Item Statuses

You can use predefined item statuses, and also define your own statuses.

To create, edit or delete item statuses, use the **Manage Item Statuses** task:

- Offering: Product Management
- Functional Area: Items
- Task: Manage Item Statuses

The predefined item statuses are:

- Active
- Inactive

For each item status, the **Details** section of the Item Statuses page contains the operational attribute groups and status-controlled attributes governed by the selected item status. The same set of status-controlled attributes applies to all statuses. You define how the item status affects each attribute.

The defined status-controlled attributes are listed under the reference for the **Item Status** attribute, which is a member of the Item Main specifications. Examples of status-controlled attributes are Build In WIP, Customer Orders Enabled, and Invoice Enabled. All of the status-controlled attributes have the values Yes and No.

Whenever a defined status is applied to an item by a user, the value of each of the status-controlled attributes in this list is set to the value you choose here, subject to the usage you select. Note that the affected attribute value in the item might not be different after the item status is applied.

To set the values and usages for the status-controlled attributes, in the Details table, set the **Attribute Value** control to **Yes** or **No**, then set the **Usage**. The usage values are:

- Defaulted - Lets you override the value during the import and update of an item.
- Inherited - Sets the values of the item status-controlled attributes when the status value changes. You can't override the value.
- None -The item status attribute values won't be changed.

Any change made to an item status isn't applied automatically to existing items. The change will be applied when the item status value is next changed while editing the item.

The **Controlled at** field isn't editable and is populated from the value set on the Manage Attribute Groups page.

### Apply Item Statuses

You can use an item status to change the default values for status-controlled attributes.

To set the item status of a particular item, select a value of the **Item Status** field on the Edit Item page for the item.

When you change the item status of an item, that status can change the default values of the status-controlled attributes of the item, depending on how the item status has been set up. In turn, the status-controlled attributes can change the value of certain operational attributes, which can affect the actions that you can perform on the item.

#### *Related Topics*

- [Interdependent Item Attributes](#)
- [Item Main Specifications](#)

## Cross-Reference Types

Cross-references provide the functionality to map additional information about an item in the form of a value and cross-reference type.

For example, the cross-reference can map between an item and an old part number, where the value is the value for the old part number and the type is Old Part Number. Cross-reference types are part of item relationships where the item relationship type is cross-reference. There are no values seeded for cross-reference types. You define the values using the **Manage Cross Reference Types** task. Cross-reference types are date-enabled and can be made active or inactive by adjusting the values of the start date and end date. To use the item relationship for cross-reference, you must enable cross-reference types by checking the **Enable** check box.

## Product Value Sets: Explained

Value sets are specific to the application in which they will be used. In Product Hub, value sets are primarily used to define attributes that have a specific set of values. Each value set is associated with one or more attributes in the

Value sets can be edited or new value sets can be created from the Manage Product Value Sets page. The Edit icon launches the Edit Value Sets page, which redraws in the same region of the local area. The Create icon launches the Create Value Sets page, which redraws in the same region of the local area.

The validation type determines how the value of field is validated for the assigned value set. The following are the seeded values:

- Format Only
- Independent
- Dependent
- Subset
- Table

The value data type determines the data type for the value set. The following are the seeded values:

- Character
- Number
- Date

- Date/Time

## Define Product Child Value Sets

The Manage Product Child Value Sets task uses the same page as the Manage Product Value Set task.

A child value set is used to define variants for stock-keeping units or SKUs. A SKU contains the common properties for an item. For example, a shirt can be produced with sizes; small, medium, and large. The variant is used to represent the sizes of the shirt.

You define child value sets as follows:

- Create a value set with validation type of independent, for example *All Sizes*.
- Select the new value set in the **Manage Product Value Sets** results table, for example All Sizes.
- Click **Manage Values**, create several values, for example Small, Medium, Large, Extra Large.
- Create a value set with validation type of Subset and enter the first value set you created for the independent value set, for example: Plus Sizes.
- Select the value set Plus Sizes in the **Manage Product Value Set** result table.
- Click **Manage Values** and then click the **Add** icon. The dialog will show a list of values based on the value set named Plus Sizes. Select two of them. The value set Plus Sizes is a child of All Sizes.

## Default Item Class

There are two ways to work with a default item class, depending on whether or not you're able to use Oracle Product Hub.

### With Product Hub

You can designate a single item class to be the default item class selection when users search for or create items in the Product Information Management work area. This item class is then defaulted in flows where users have to explicitly select an item class.

To begin, identify an item class that's heavily used in your enterprise. You can then designate it as the default. Here's how:

1. In the Setup and Maintenance work area, use the **Manage Item Classes** task:
  - Offering: Product Management
  - Functional Area: Items
  - Task: Manage Item Classes
2. Query the item class to be used as the default.
3. On the Edit Item Class page, select **Default Item Class**.

Subsequently, the item class designated as the default becomes the item class selected by default:

- In the **Item Class** field in the Create Item dialog box, when users create items
- In the item class query field in the page header, when users search for items on the Manage Items page

Other considerations:

- For new installations of Product Hub, the Root Item Class is selected as the default item class.
- For updated installations of Product Hub, you can select any other item class to designate it as the default item class.
- Whenever a new item class is selected as the default, the previously selected default item class is automatically deselected.

## Without Product Hub

For non-Product Hub customers, the Manage Default Item Class task is used because these customers can't create additional item classes nor can they create user defined attributes such as extensible flexfields. You can access this task from the Product Management offering in the Setup and Maintenance work area. An exception to this rule is that Product Development customers can create additional item classes and extensible flexfields. The Manage Default Item Class task launches an edit page for the Root Item Class.

The Manage Default Item Class task has three tabs:

- Basic: Item Class descriptive flexfields and attachment categories are defined on this tab.
- Item Management: Item number generation method is defined using this tab.
- Lifecycle Phases: The lifecycle phases that the items assigned to this item class will use are defined on this tab.
- Item Templates: The item templates that are used to create items are defined on this tab.

### Related Topics

- [Item Classes](#)

## Item Profile Options

Profile options manage configuration data centrally and influence the behavior of applications. The profile options have a default value, which you can use for initial installations.

Review these profile options and determine if you want to change the default values.

Profile Options	Description
EGP_DISPLAY_IMAGES	Specifies if images are displayed in the search results table in the Manage Items page.
EGP_UPDATEABLE_ITEM	By default, you can't change the item number after you have created the item. However, if you set this option to Yes, you can update items even after they're created.

Profile Options	Description
EGP_ITEM_IMPORT_ITEMS_PER_THREAD	When you import items, the application creates multiple threads of operation to process the imported items. This profile option controls how many items the application can process per thread. It's a technical option used to optimize the item import performance. The default value is 20. Contact Oracle Support to determine the optimal value before you make a change.
EGP_ITEM_IMPORT_NUMBER_OF_THREADS	<p>Determines the number of parallel threads of execution used when the item import process is run. The default value is 12. You can use these criteria to configure the profile option:</p> <ul style="list-style-type: none"> <li>Number of service servers configured on your instance: You can get this information by contacting Oracle Support.</li> <li>Other active processes: Other application processes that may be concurrently running on this server and utilizing the same service servers.</li> </ul> <p>If the item import is the only process running on the instance, you can configure the number of threads up to 16 times the number of service servers. If there are other processes likely to be running concurrently, reduce the number of threads proportionally.</p> <p>This profile option works in conjunction with the EGP_ITEM_IMPORT_ITEMS_PER_THREAD profile option.</p>
ORA_EGP_TPI_UPDATEABLE	Set this profile option to Yes to allow editing of the trading partner item number. This number refers to customer item number, manufacturer part number, competitor item number, or supplier item number.
EGP_CONVERSION_MODE	<p>Set this profile option as <b>No</b> to restrict the import of items revisions with a past date and if the item is assigned to any existing change orders in Scheduled or Completed status.</p> <p>Setting this as No prevents change orders from getting stuck after the import.</p>

## Access the Profile Options

In the **Setup and Maintenance** work area, use this navigation to access and manage the item profile options:

- Offering: Product Management
- Functional Area: Items
- Task: Manage Item Profile Option

## Overview of Import Items

Item Management provides the ability to create and management item data through two methods: the Product Information Management work area and a process to import items from files located in a specific folder in Oracle WebCenter Content.

The objects listed below are supported through both methods:

- Items
- Item revisions
- Item category assignments
- Item associations

- Item relationships
- Item flexfields
- Item translatable flexfields
- Item revision flexfields
- Item revision translatable flexfields
- Item supplier flexfields
- Item translatable supplier flexfields
- Item style variant attribute value Sets
- Trading partner items

**Note:** You must license Oracle Product Hub to use certain flexfields.

The following is an overview of the item import process:

1. Download the item import template file from the Oracle Fusion Cloud SCM File-Based Data Import (FBDI) for SCM.
2. Enter data in tabs within the item import template file.
3. Generate CSV (ZIP file).
4. Upload to Oracle WebCenter Content.
5. Move the data into Item Management interface tables.
6. Import data to Item Management product tables.

#### *Related Topics*

- [Oracle Fusion Cloud SCM File-Based Data Import \(FBDI\) for SCM](#)
- [Organize Your Data in the FBDI Spreadsheet Import Template](#)
- [Generate the CSV File](#)
- [Upload the CSV File to Oracle WebCenter Content](#)
- [Load Data from Oracle WebCenter Content to Interface Tables](#)
- [Import Data from Item Management Interface Tables to Item Management Production Tables](#)

## Item Lifecycle Phases

Item Lifecycle Phases are used as an indicator of the stage for an item within the lifecycle process. Each phase represents a set of tasks and deliverables that are required before promoting an item to the next phase.

Each item must have a lifecycle phase associated with it.

Four lifecycle phase types are predefined in the application: Design, Preproduction or Prototype, Production and Obsolete. You can use the predefined phase types to create new values for the lifecycle phases.

Companies can use different terms to describe the same item lifecycle phase. For example, the phases named Production and In Manufacturing both refer to the lifecycle phase during which an item can be used to build and ship products.

Lifecycle phases are associated with item classes. The items in an item class can be assigned to any of the lifecycle phases associated with that item class.



**Note:**

- The lifecycle phase of a child item is not automatically promoted when the parent item is promoted.
- The best practice is to make items Effective on Approval, if they are in the design lifecycle phase.

Before you create or import items, create lifecycle phases. Assign phases to the item class used to create the items. You can also assign them to a parent item class of the item class used to create the item. When an item is assigned to a lifecycle phase, that phase is visible as part of the item's attributes. In item structures, lifecycle phases are used to control specific processes.

### Effective Date in the Design Lifecycle Phase

The effective date for items in the Design lifecycle phase can't be modified.

If the item is in the Design lifecycle phase, the item on the change order is effective on approval.

If a future effective date is set for the affected object in a change order, a warning message appears with the following buttons:

- Continue: To continue with the future effective date.
- Edit: To cancel the current Save action, return to edit mode and correct the future effective date.

### Change the Lifecycle Phase

In the Product Information Management work area, you can change the lifecycle phase directly on the item or by assigning it to a change order for a commercial item.

In the Product Development work area, you can change the lifecycle phase of an item by assigning it to a change order.

## Item Classes

Item classes are created under the root item class, or within a parent item class, and inherit values based on selections made when defining the item class.

To create and manage item classes, user-defined attributes, and data security, use the **Manage Item Classes** task in the Setup and Maintenance work area:

- Offering: Product Management
- Functional Area: Items
- Task: Manage Item Classes

You can define item classes in a hierarchy where the child levels indicate the sublevels or types of the parent item class. All items are created within an item class. The item class hierarchy can be used to control processes for some levels of the hierarchy.

You can also use item classes for classification purposes and in some cases, item creation may not be allowed. By optionally setting the **Item Creation Allowed** attribute to No, item creation in an item class can be prevented. However, a child item class of that item class can be set to allow for item creation.

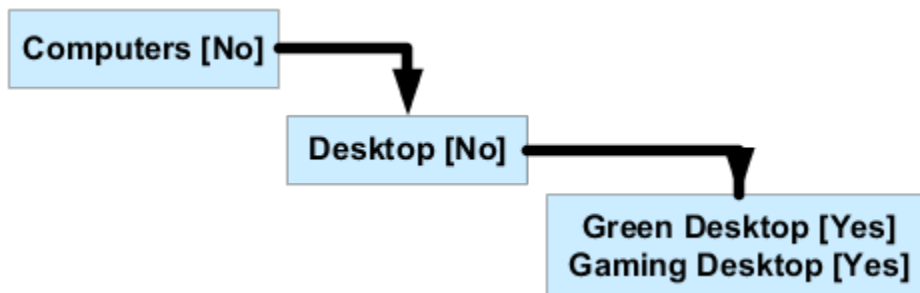
**Note:**

- When you create an item class, make sure you specify the API name.
- Avoid creating item classes with names such as Item, ItemCategory, ItemRevision, ItemSupplier, RevisedItemLineApproval, ChangeObjectApproval, Evidence, and Certificate. Or creating similar names for the item class and flexfield attribute groups. Distinct names help ensure that rules run without error.
- There's no limitation on the number of item classes that can be defined. However, it is recommended that you don't create more than 1000 item classes and make sure that the maximum depth of the item class hierarchy is 15. Most classifications don't require more than five levels.
- If you plan to add BPM rules in your workflow approvals for changes and new item requests, it's recommended that you limit the number of item classes to 300.

If you need to create large number of item classes, then:

- Deploy EFFs incrementally as you set up your item classes. Don't wait till you have set up all the classes to deploy.
- Before creating the lower-level classes, ensure that you have identified and associated the attribute groups and attributes to the higher-level classes. This is because any changes made to the higher-level classes automatically results in the re-deployment of the lower-level classes due to inheritance.

For example, the following figure illustrates the Desktop item class as a child of the Computers item class and both are set to not allow item creation.



The Green Desktop and the Gaming Desktop item classes are children of the Desktop item class and are set to allow item creation. Optionally, you can specify a date on which an item class becomes inactive. The inactive date of a child item class must not be a past date and must be earlier than the inactive date of a parent item class. Also, all children of a parent item class with an inactive date must be made inactive at the same time or earlier.

**Note:** Product Development doesn't support the versioning of item classes.

When setting up definition steps for a new item request at the item class, you can identify various item details as required, at each step. The definition of the entire entity or just specific attributes can set as required. This ensures that the item information required for a downstream step is defined and available for use.

You can define data security on an item class. All child items and item classes of the item class inherit the data security specified. Consider the following while creating and managing data security for item classes:

- Item classes have a **Public** check box, which when selected indicates that all items in the item class are public. All new item classes, including its child items and child item classes, are public by default, and don't require data security to be set. To make a child item private, you must deselect the Public check box in the Data Security dialog box.

Data security is not enabled for public item classes. When editing an item class, on the **Security** tab, in the **Actions** section, click **Actions: Select and Add**. Data Security won't be available in the Basic or Advanced search for any of the predefined attributes except for user-defined attributes.

- Depending on your settings for the Public check box, if a parent item class or a parent root item class is public, all new item classes created within it are public by default. Similarly, item classes created within a private item class or a private root item class are private.
- When a parent item class is made public or private, the child items and child item classes inherit the updated data security setting of the parent.
- Private item classes can't have child item classes that are public.
- Public item classes can have child item classes that are private or public.
- In the case of private items, you can search for and view only the items you have access to.
- For extensible flexfield attribute groups, you must set the data security for public and private item classes. The data security controls which EFF attribute groups are visible to specific users, user groups, or organizations.
- You must set data security at the item class level to restrict access to user-defined attributes, and to values for public and private items.

You can control the creation, view, and update of items by associating a role with the item class and assigning it to a principal or group of users. Security allows a person or a group to have privileges to an item of an item class in each organization. This role is inherited. Therefore, if you have the privilege in a parent item class, you will automatically have the same privilege in the child item classes.

## Attachment Categories

The basic tab of the Manage Item Class task is used to associate attachment categories to specific item classes.

The Attachment Categories region allows for the creation and management of attachment categories for the items created within the item class. To classify item attachments, associate attachment categories with item classes. Associated attachment categories are inherited down through the item class hierarchy.

### *Related Topics*

- [Attachments](#)
- [Attachment Entities](#)
- [How Attachment Entities and Attachment Categories Work Together](#)
- [What's an attachment category?](#)

## Related Item Subtypes

A related item is an item relationship between two existing items. How the two items are related is defined by a subtype.

Multiple subtypes for related items are predefined, and you can define additional subtypes using the **Manage Related Item Subtypes** task.

Predefined values are:

- Accessories
- Collateral
- Complimentary
- Conflict
- Cross-Sell
- Fulfillment
- Impact
- Mandatory Change
- Merge
- Migration
- Optional Change
- Option charge
- Prerequisite
- Promotional upgrade
- Repair to
- Service
- Split
- Substitute Supersede
- Upsell
- Warranty

## Operational Attributes Controls

Operational attributes determine the behavior of the item with respect to various applications outside of Oracle Product Hub, such as Oracle Fusion Cloud Purchasing or Oracle Fusion Cloud Inventory Management. Operational attributes are stored in the Items data table.

In the Setup and Maintenance work area, use this navigation to specify the control level for operational attributes:

- Offering: Product Management

- Functional Area: Items
- Task: Manage Operational Attributes Groups

For each listed operational attribute group, you select the control level for each of the group's attributes. You can control the operational attributes at the master organization level or at the organization level. You can define operational attributes as part of a new item request.

You can also control the decimal precision of all numeric operational attribute values. All numeric item-operational attributes have the maximum decimal digits precision value of three by default. You can specify the precision up to three digits after the decimal point. For example, 8.724 is a valid item operational value, but 8.7241 is an invalid value.

**Note:** You can't change the default value for the decimal precision in the Mass Updates page.

You can define some item operational attributes as key flexfields. Key flexfields allow you to capture a structured value for an attribute. Some examples of key flexfields are part number, job code, and account code.

Examples of operational attributes with the attribute groups they belong to:

- Inventory = Shelf Life Days
- Order Management = Shippable
- Purchasing = Negotiation Required
- Receiving = Allow Substitute Receipts

## Item Attribute Groups and Attributes

Attribute groups are a logical group of attributes that are displayed in their own subregion of the user interface page at runtime.

Attribute groups can be either single-row or multiple-row. The selected behavior determines how the attributes appear in the user interface, as well as how they are used. Each attribute group is associated with one or more item classes.

To create an attribute group and attribute, you use **Manage Item Attribute Groups and Attributes** task from the Product Management offering in the Setup and Maintenance work area.

**Note:** Avoid using a comma (,) in the **Internal Name** field on the **Create Attribute Group** page.

Create an attribute group and specify its context usage as item. You can provide the attribute group with view or edit privileges, or both. Choose the behavior of attribute as either single-row or multiple-row:

- **Single-row attribute group:** Contains a collection of attributes that appear as separate fields in a region named for the attribute group. For example, a single-row attribute group named Processor contains the attributes appropriate for a processor. When these attribute groups are displayed in the user interface, the attribute fields for each group are arranged compactly within a region titled with the name of the attribute group. Attributes can be multiple data types.
- **Multiple-row attribute group:** Attributes appear as columns in a table that represents the attribute group. Each row in the table is considered an attributes group. The attributes is collection of values specified by the columns in the table. The table appears in the user interface within a region titled with the attribute group name, such as MSRP Price. No other fields appear in the table. For example, a multiple-row attribute group named MSRP Price contains the attributes Country, MSRP, and Currency. Each row of the table describes an MSRP price, and is a value of the MSRP Price attribute group.

When you configure an attribute group, you can assign privileges. Using these privileges you control the user's ability to view or edit attributes in the following: view or edit Item tasks, change order impact analysis, and item structure report. To do this, select the view and edit privileges for the attribute group in Context Usage.

Within the attribute group, create an attribute and a value set. For example, create an attribute group named Cost and Compliance and within that add attribute named Material Cost. Using value sets, define the set of currencies applicable to item cost. After you create attribute groups and attributes, complete these tasks:

- Associate the attribute to the item class by using the Manage Item Class task
- Deploy the attribute by using the Deploy Item Flexfields task

#### *Related Topics*

- [Overview of Descriptive Flexfields](#)
- [Product Value Sets: Explained](#)

## Deploy Item Flexfields

After you associate attribute groups and pages with an item class, you must deploy flexfields in order to view the pages or attribute groups at runtime.

The metadata that was created for the attribute group isn't synchronized with the production data in Product Hub until the flexfield is deployed.

To deploy item flexfields:

1. In the Setup and Maintenance work area, use the Deploy Item Extensible Flexfields task:

- Offering: Product Management
- Functional Area: Items
- Task: Deploy Item Extensible Flexfields

2. Search for the **Flexfield Code** value `EGO_ITEM_EFF`.

All flexfields for Product Hub are created within the flexfield code `EGO_ITEM_EFF`.

3. Select the desired flexfield in the search result and choose a deployment option from the **Actions** menu:

- **Deploy Flexfield:** Online incremental deployment. The deployment process begins immediately. Only the flexfield setup that changed is deployed.
- **Deploy Offline:** Allows the deployment to be scheduled. The flexfields are deployed, one at a time, in the order that you deploy them to the queue. Because all Product Hub flexfields use the same flexfield code, the process deploys all of the attribute groups and attributes for all of the context usages at the same time. You can't select individual attribute groups or item classes for deployment. You should deploy offline if the flexfield changes impact 30 or more item classes.
- **Refresh and Deploy Offline:** Use this option if the first two options result in errors.

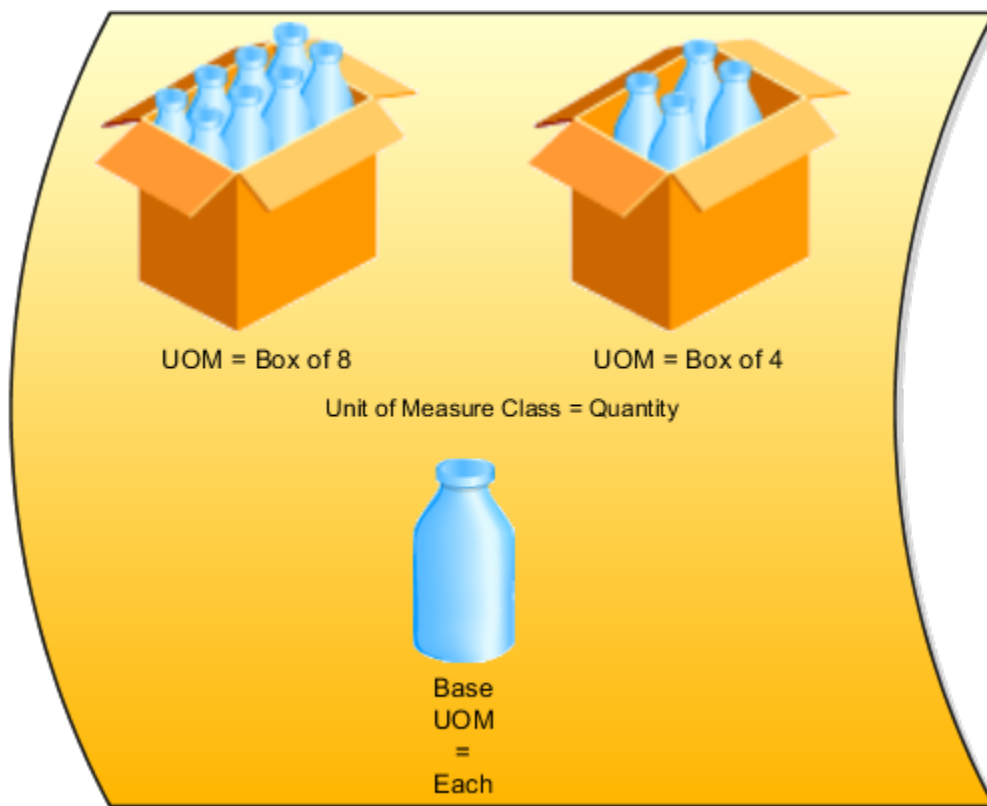
**Note:** You should only run this option if it's specifically recommended by Oracle support.

To see the effects of these deployment options, you must sign out and sign back in.

# 36 Units of Measure

## How Units of Measure, Unit of Measure Classes, and Base Units of Measure Relate to Each Other

Units of measure, unit of measure classes, and base units of measure are used for tracking, moving, storing, and counting items.



### Units of Measure Classes

Units of measure classes represent groups of units of measure with similar characteristics such as area, weight, or volume. For example, Ounces, Grams, and Milligrams could all be units of measure for a class called Weight.

### Units of Measure

Units of measure are used by a variety of functions and transactions to express the quantity of items. Each unit of measure you define must belong to a unit of measure class.

## Base Units of Measure

Each unit of measure class has a base unit of measure. The base unit of measure is used to perform conversions between units of measure in the class. The base unit of measure should be representative of the other units of measure in the class, and must be the smallest unit. For example, you could use cubic inches as the base unit of measure for a unit of measure class called volume.

## Primary Units of Measure

Primary units of measure represent the UOM that is most often used for an item. The primary UOM of the item may or may not be the base unit of measure. It also may not be the smallest UOM of the item class. For example, your business sells boxes of surgical gloves. While each glove may be the smallest unit, your company is concerned with the number of boxes ordered.

### Related Topics

- [How to Assign Base Units of Measure to Unit of Measure Classes](#)

## How to Assign Base Units of Measure to Unit of Measure Classes

A unit of measure class is a grouping of different UOMs with certain similarities.

For example, the unit of measure class Quantity might have several associated units of measure such as, dozen, box, or each. Each unit of measure class must have a base unit of measure.

## Scenario

This table lists examples of unit of measure classes, the units of measure in each unit of measure class, and base unit of measure. Note that the base unit of measure is the smallest unit of measure in its unit of measure class.

Unit of Measure Class	Units of Measure	Base Unit of Measure
Quantity	Dozen Box Each	Each
Weight	Pound Kilogram Gram	Gram
Time	Hour Minute Second	Second



Unit of Measure Class	Units of Measure	Base Unit of Measure
Volume	Cubic feet Cubic centimeters Cubic inches	Cubic inches

## Standard Conversions for Units of Measure

A unit of measure standard conversion specifies the conversion factor by which the unit of measure is equivalent to the base unit of measure.

Defining a unit of measure standard conversion lets you perform transactions in units other than the primary unit of measure of the item being transacted. A standard conversion is needed on any unit of measure that you want to use as a primary UOM for any item. The standard unit of measure conversion is used for an item if an item-specific unit of measure conversion hasn't been defined.

### Scenario

This table lists examples of unit of measure classes, one unit of measure included in each class, the base unit of measure for the unit of measure class, and the conversion factor defined for the unit of measure.

Unit of Measure Class	Unit of Measure	Base Unit of Measure	Conversion Factor
Quantity	Dozen	Each	12 (One dozen = 12 each)
Weight	Pound	Gram	454 (One pound = 454 grams)
Time	Minute	Second	60 (One minute = 60 seconds)

In the first example, you're converting a unit of measure called dozen into a base unit of measure called each. The conversion factor tells the application that for each dozen, there are 12 of the base unit each. For example, if you had 4 dozen eggs, with a conversion factor of 12, you would get 48 each eggs.

## Overview of Packaging Strings

A packaging string shows the hierarchy of units that represent how an item is packaged when shipped or used by an enterprise.

A packaging string represents the UOMs involved with transactions for an item. For example, the string EA 10/BX 25/CS 40/PLT would mean 10 each in a box, 25 boxes in a case, 40 cases in a pallet. It is possible for one or more items to share the same packaging string. Packaging strings are defined and edited using the Product Information Management work area and either the Create Item or Manage Items task. To define packaging strings, you select units to use in the string and define the multipliers between the packaging elements.

Defining packaging strings consists of these steps:

- Selecting UOMs
- Defining Multipliers

### Select UOMs

Each packaging string must begin with a base unit and must also contain the primary UOM of the item, if the primary UOM is not the base unit of the parent UOM class. Selected units must be ordered in the appropriate sequence in the shuttle control before the next step of specifying the multipliers. A packaging string can have no more than 10 elements. The only units displayed are units of the same UOM class.

### Define Multipliers

Multipliers show how many of the smaller packaging unit are in the current row for the next unit in the string. The standard conversion values, and item specific overrides, are used to show the default quantity of each row. The multiplier is calculated for you, but you can modify, if needed. If you make any changes to any multiplier, you must click the Recalculate button before you can save your changes.

This table shows how the packaging string EA 10/BX 25/CS 40/PLT would appear on the Define Multipliers step:

Multiplier	Content UOM	Package UOM	Base UOM Quantity
10	Each	Box	10
25	Box	Case	250
40	Case	Pallet	10000

Using our example above, since your item has 10 Each in a Box, you would set the multiplier to a value of 10 Each equals a Box. Next, you would enter how many Box are in the next UOM, 25 Case in our example. Continue entering multipliers for each row in your string.

#### Related Topics

- [Add Packaging Strings to Items](#)

## Inventory Transactions Verified When a UOM Conversion is Updated

When you try to change a UOM conversion value, the application will verify if the conversion affects any open transactions.

For intraclass conversions, no transactions can be present using the non-base UOM. For example, when trying to change a conversion between Box and Each for an item that has Each as the primary UOM, no transactions for this item can exist with Box as the transactional UOM.

For interclass conversions, no transactions can exist that use any of the units in the second class because the conversion is between the base units of two classes. It's valid for every unit in the second class. For example, you have Each and Box in the Quantity class, and Milliliter, Liter, and Gallon in the Volume class. The transactional UOM is often the primary UOM for the item. So let's make that Each. If you have a conversion between Each and Milliliter, and you want to change the conversion, you can't have any transactions where the transactional UOM is Milliliter, Liter, or Gallon. The conversion is only between Milliliter and Each, but since Milliliter already has its own conversions between itself and Liter, and itself and Gallon, updating the interclass means every element of that class can't be in used in a transaction.

If the item is found in any transactions as described above, you won't be able to make changes to the conversion. The application will display a message listing the components impacted. This is a list of the inventory transactions that are checked against when a UOM conversion value is updated:

Components Checked	Description	Where Visible	Suggested Action
Existing on hand Stock	Items with on-hand balances in Inventory.	These are visible for the items in the Manage Item Quantities task.	You must issue out on-hand balances for the item prior to updating the UOM conversion.
Pending inventory transactions that aren't processed	Pending unprocessed inventory transactions that exist in the inventory interface.	These are visible in the Manage Pending Transactions page. These transactions are processed by the Manage Inventory Transactions schedule process.	You must process pending inventory transactions and run the Transfer Transactions from Inventory to Costing scheduled process.
Completed inventory transactions that aren't yet costed	Inventory transactions that have been successfully processed in Inventory but haven't yet interfaced to Oracle Fusion Cost Management.	These are visible in the Review Completed Transactions task with the Costed attribute in a Pending status.	You must process pending inventory transactions and run the Transfer Transactions from Inventory to Costing scheduled process.
Inbound shipment lines sent by supplier (ASN) or another inventory org that are yet to be received	These are inbound shipments sent by either a supplier on an PO ASN or a pending receipt from another inventory organization (intra-org transfer, in transit inter-org, or drop ships) and haven't yet been received.	These can be viewed in the Manage Inbound Shipments task.	You must process expected inventory supply prior to updating the UOM conversion.
Received lines yet to be put away	Inbound receipt lines that have been received but haven't been	Lines that are pending inspection can be viewed in the Inspect Receipts task.	You must process receipt lines awaiting put away prior to updating the UOM conversion.

Components Checked	Description	Where Visible	Suggested Action
	inspected, if applicable, or put away.	Lines that are pending put away can be viewed in the Put Away Receipts task.	
Outbound shipment lines for a sales order or transfer order that aren't yet shipped	These include outbound shipment lines that are unshipped or shipped but pending inventory interface.	These lines can be viewed in the Manage Shipment Lines task.	You must process open shipment lines prior to updating the UOM conversion.
Pending inventory balance adjustment transactions	These are inventory balance adjustment transactions posted by external systems that aren't yet processed by Oracle Inventory Management Cloud.	These adjustment records exist in the table INV_BALANCE_TXNS_INT.	You must process open inventory balance reconciliation transactions prior to updating the UOM conversion.
Open recall count transactions	If a product is marked for recall, cycle count tasks are created by Supply Chain Health Care for all of the subinventories containing stock for this item. An inventory user needs to perform the count and issue out the material.	These can be viewed in the Manage count task.	You must process open recall count transactions prior to updating the UOM conversion.
Pending cycle count adjustments	After running a cycle count, these adjustments are material transactions that increment or decrement the on-hand quantity of an item based on the physical count entered on the count sequence for that item location.	These are visible on the Approve Count Sequences task.	You must process open cycle count sequences prior to updating the UOM conversion.
Pending physical inventory transactions	After initiating a physical inventory, these are material transactions that adjust the on-hand quantity of an item based on the physical count entered on the physical inventory tag for that item location.	These are visible on the Approve Physical Adjustments task.	You must process open physical inventory adjustments prior to updating the UOM conversion.

## FAQs for Units of Measure

### What's a unit of measure standard conversion?

A unit of measure standard conversion defines the factor by which the unit of measure is equivalent to the base unit of measure, that you defined for the unit of measure class.

Defining a unit of measure standard conversion lets you perform transactions in units other than the primary unit of measure of the item being transacted. The standard unit of measure conversion is used for an item if an item-specific unit of measure conversion hasn't been defined.

#### Related Topics

- [Standard Conversions for Units of Measure](#)

## What's a UOM interclass conversion?

A UOM interclass conversion defines the conversion between the source base UOM in one UOM class, and the destination base UOM, in a different UOM class.

For example, suppose the item is gasoline. The **From Base UOM** (of the **From Class** called volume) is liters. The **To Base UOM** (of the **To Class** called quantity) is Barrels. The conversion is 158.76 liters (volume) to 1 barrel of oil (quantity).

You cannot create the interclass and intraclass conversions when building the standard conversions. The UOM must be defined prior to creating Items. Items must be defined prior to creating interclass or intraclass conversions.

## What's a UOM intraclass conversion?

A UOM intraclass conversion specifies the conversion between a unit of measure, the From UOM, and the base unit of measure of the same class.

For example, suppose you're considering converting cases of water into a base unit of each bottle of water. The unit of measure class is Quantity. The **From UOM** is case (CS). The base unit of measure is each (EA). The conversion is 24, to specify that 1 CS = 24 EA.

## What profile option do I use for defining decimal precision for supply chain transactions?

You use the INV\_QUANTITY\_DECIMAL\_PRECISION profile option.

This option lets you to set the number of numerals to retain after the decimal when converting between units of measure. For example if you set the profile option to 4, the number 234.345636 would be rounded to 234.3456.

## Can I make changes or delete the UOM code after creation?

After creating a unit of measure, if it is determined that the original data is incorrect, deletion or changes to the code of the unit are allowed if the UOM is not used by any item in Product Management.

The application will validate if the code is used in any Oracle Product Management item. If it is, you will not be able to make changes or delete the code.

## Can I make changes or delete a UOM conversion after creation?

You can make changes to a UOM conversion if it doesn't impact open transactions in Oracle Fusion Materials Management or Oracle Fusion Costing. However, you can't delete the UOM conversion.

The application will validate if the conversion is used in any open transaction. If so, you won't be able to make changes to the conversions. If it isn't used in any open Oracle Materials Management or Oracle Costing transaction, you'll be warned that there could be possible impacts in other applications that aren't a part of the validation but won't be prevented from making the change.

# 37 Catalogs

## Setup Tasks to Manage Catalogs

Before you create functional area catalogs and associate items with them, you must complete several tasks in the Setup and Maintenance work area> Product Management offering> Catalogs functional area.

**Note:** Catalogs functional area is shared with other offerings as well. For example, the Manufacturing and Supply Chain Materials Management offering also uses the Catalogs functional area. If you have enabled multiple offerings, then any change in the setup tasks within the Catalogs functional area will reflect across all other offerings that use this task.

Task	Description
Manage Catalog Descriptive Flexfields (optional)	Descriptive flexfields can only have one context available at a single time.
Manage Category Descriptive Flexfields (optional)	Descriptive flexfields can only have one context available at a single time.
Manage Functional Area Catalogs	Each functional area can have a set of rules to define how a catalog should be configured to support the functional area. When a catalog is created and assigned to the functional area, it is validated against the functional area rules. For example, many of the Supply Chain Management applications participate in a process that automatically assigns an item being created to the default category in a functional catalog. Also, if no catalog is assigned to the functional area, the functional area is skipped in the automatic assignment process. This task is only necessary if catalogs are to be used with other SCM products such as procurement or inventory.

## Catalog Descriptive Flexfields

Descriptive flexfields are available at the catalog level to allow the user to define attributes for catalogs.

For example, a customer wants to add attributes to the catalog to identify the usage of the catalog in their business process. An attribute called Usage is created as a descriptive flexfield for the catalog. The values are defined indicating what processes the catalog data is used in, such as new product development.

You create descriptive flexfields using the Manage Catalog Descriptive Flexfields task in the Setup and Maintenance work area> Product Management offering> Catalogs functional area.

**Note:** The Catalogs functional area is shared with other offerings as well. For example, the Manufacturing and Supply Chain Materials Management offering also uses the Catalogs functional area. If you have enabled multiple offerings, then any change in the setup tasks within the Catalogs functional area will reflect across all other offerings that use this task.

## Category Descriptive Flexfields

Descriptive flexfields are available at the category level. You can define category attributes in all those catalogs that use attributes.

For example, a customer wants to add attributes to the category to identify the packaging types for the items assigned to the category. An attribute called Packaging Type is created as a descriptive flexfield for the catalog. The values for this flexfield indicate what the packaging type is, such as a box or a case.

You create descriptive flexfields using the **Manage Category Descriptive Flexfields** task in the Setup and Maintenance work area> Product Management offering> Catalogs functional area.

**Note:** The Catalogs functional area is shared with other offerings as well. For example, the Manufacturing and Supply Chain Materials Management offering also uses the Catalogs functional area. If you have enabled multiple offerings, then any change in the setup tasks within the Catalogs functional area will reflect across all other offerings that use this task.

## Create Catalogs

Item catalogs provide a mechanism to classify or group a set of items together based on a common meaning. Catalogs can have a flat or single-level structure of categories or have hierarchical structure categories.

For example, the item catalog Engine describes a group of categories that make up an engine such as engine block, carburetor, or ignition.

The items are assigned to the categories and represent components that make up the part of the engine. For example, spark plugs are a component of the ignition category.

Catalogs can be hierarchical and can contain a hierarchy where parent and child relationships between the category are used for classification. A catalog can also contain only one level without any hierarchy where the catalog is a list of categories.

You can create a browsing category by selecting the **Restrict category to item assignment only** check box. In addition, you can configure the category to allow both categories to be associated to it in a hierarchy and items can be assigned to it.

You can assign any catalog to a functional area. The functional area rules automatically validate the catalog assignment. If the catalog assignment do not conform to the functional area rules, then the assignment fails and you receive an error message.



Functional area catalogs are primarily used to support Oracle Fusion applications, specifically the applications that require integration between the functional area catalog and the process within the application. For example the Purchasing functional area catalog is integrated with the Procurement processes to allow the items assigned to the categories in this catalog to be used to support the purchasing processes.

Product catalogs are used to support additional processes and integration with external applications.

Create functional area catalogs using the **Manage Functional Area Catalogs** task in the Setup and Maintenance work area or the **Manage Catalogs** task in the Product Information Management work area.

1. Open the **Manage Catalogs** or **Manage Functional Area Catalogs** task.
2. Click the **Create** button. The Create Catalog dialog box opens.
3. Select a value for the **Functional Area** field. The Functional Area Parameters and Rules region expands. If the catalog requires a default category, the Default Category region opens as well.
4. Fill in the mandatory fields for the catalog.
5. Click Save and Continue to save your settings. The Edit Catalog page opens.

Create product catalogs using the Manage Functional Area Catalogs task in the Setup and Maintenance work area or the Manage Catalogs task in the Product Information Management work area:

1. Open the **Manage Catalogs** or **Manage Functional Area Catalogs** task.
2. Click the **Create** button. The Create Catalog dialog box opens.
3. Do not select any value for the **Functional Area** field. The Functional Area Parameters and Rules region expands. If the catalog requires a default category, the Default Category region opens as well.
4. Fill in the mandatory fields for the catalog.
5. Click Save and Continue to save your settings. The Edit Catalog page opens.

## Functional Area Catalogs

Functional areas represent products or functionality of the product.

Each functional area can have a set of rules to define how a catalog should be configured to support the functional area. When a catalog is created and assigned to the functional area, it's validated against the functional area rules. For example, many of the Supply Chain Management applications participate in a new item process which automatically assigns an item being created to the default category in a functional catalog. Also, if no catalog is assigned to the functional area, the functional area is skipped in the automatic assignment process.



# 38 Other Common Setup and Maintenance Tasks

## Guidelines for Setting Up General Troubleshooting

To share application-related issues with the help desk, users can record the on-screen activity while they reproduce the issues. The help desk can then view those recordings for troubleshooting the issues.

Some advanced users might also need detailed information present on the About This Page dialog box. Therefore, to set up your application for troubleshooting, make sure that your users have the required access to record and view issues. It's also important to determine 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?](#)

## Home Page Setup

### Configure Infolet Display

Use the Home Configuration page in the Structure work area (**Navigators > 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](#)
- [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 might vary.

Let's see how to define the home page appearance.

1. Activate a sandbox that has the Appearance tool in it. Don't include spaces or special characters in the sandbox name.
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. Don't include spaces or special characters in the sandbox name.
2. Click **Navigator > Configuration > Appearance**.
3. Click the Home Page Display tab.
4. Select one of these options to display on the home page:
  - **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 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 more details.
5. Select any of these options to upload an image. Make sure your image width is 950 to 975 px and height is 650 to 765 px 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've 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'll 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](#)

### 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 Translation 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](#)

# Deep Links

## 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.	SupplierNumber
action	<p>The action that users can do on the page that the URL opens up, for example to edit something.</p> <p>Here are a few things to know:</p> <ul style="list-style-type: none"> <li>If you don't add any value for the action parameter, this value is considered as <b>NONE</b> by default. So users will be taken to a high-level page, such as an overview page or a search page.</li> </ul>	<p><b>NONE</b></p> <p><b>VIEW</b></p> <p><b>CREATE</b></p> <p><b>EDIT</b></p>



Parameter	Description	Example of Parameter Values
	<ul style="list-style-type: none"> <li>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.</li> </ul>	
<b>returnAppURL</b>	<p>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.</p> <p>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.</p>	MyOracle
<b>returnAppParams</b>	Parameters for the return application URL.	type=photo

## Where to Find Information About Product-Specific Deep Links

Here's some information about specific deep links depending on the products you're using. This isn't a comprehensive list of all available deep links.

- Oracle Fusion Cloud Supply Chain & Manufacturing  
See: [Deep Links for SCM](#)
- Oracle Fusion Cloud Procurement  
See: [Deep Links for Procurement](#)
- Oracle Fusion Cloud Succession Planning  
See: [Overview of Succession Plan Deep Links](#)
- Oracle Fusion Cloud Financial Reporting Compliance  
See: [Deep-Link URLs](#)

### Related Topics

- [Manage Integration of Additional Applications](#)

## Deep Links for SCM

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.

### SCM Deep Links

This table lists the deep links you can add to SCM application pages.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Channel Revenue Management	Deductions (CUSTOMER_CLAIM, NONE)	Opens the Claims page to review customer claims.	None	None	None
Channel Revenue Management	Create Customer Claim (CUSTOMER_CLAIM,CREATE)	Create a manual customer claim.	None	None	None
Channel Revenue Management	Customer Claim (CUSTOMER_CLAIM, EDIT)	Opens a specific customer claim on the Claim details page.	ClaimId: Unique identifier for the customer claim.  ClaimNumber: Unique identifier for the customer claim that is available in the UI.	ClaimId and ClaimNumber are available from Channel Customer Claims REST.  ClaimNumber is available in the Claims UI and Claim detail UI in Deductions and Settlement.  Query CLAIM_ID, CLAIM_NUMBER columns from CJM_CLAIMS_ALL table.	None
Channel Revenue Management	Customer Checkbook (CUSTOMER_CHECKBOOK,NONE)	Opens the customer checkbook.	None	None	None
Channel Revenue Management	Customer Programs (CUSTOMER_PROGRAM,NONE)	Opens the Programs page to review customer programs.	None	None	None
Channel Revenue Management	Create Customer Program (CUSTOMER_PROGRAM,CREATE)	Create a customer program.	None	None	None
Channel Revenue Management	Customer Program (CUSTOMER_PROGRAM,EDIT)	Opens a specific customer program on the Program details page.	ProgramId: Unique identifier for the customer program.  PromotionCode: Unique identifier for the customer program that is available in the UI.	ProgramId and PromotionCode are available from Channel Customer Programs REST.  PromotionCode is available in the Programs UI and Program detail UI in Customer Channel Management.  Query PROGRAM_HEADER_ID, PROGRAM_CODE columns from CJM_PROGRAMS_ALL_B table.	None
Channel Revenue Management	Manage Supplier Claims (SUPPLIER_CLAIM,NONE)	Opens the Manage Claims page.	Not Needed	N/A	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Channel Revenue Management	Supplier Claim (SUPPLIER_CLAIM, EDIT)	Opens a specific supplier claim on the Claim details page.	ClaimId or ClaimNumber ClaimId: Unique identifier of the channel claim.  ClaimNumber: Unique identifier of the channel claim that can be viewed in the UI.	ClaimId and ClaimNumber are available from Channel Claims REST  ClaimNumber is available in the Manage Claims UI and  Claim detail UI in Supplier Channel Management.  Query CLAIM_ID, CLAIM_NUMBER columns from CJM_CLAIMS_ALL table	None
Collaboration Messaging Framework	Collaboration Message: {MESSAGEGUID} (B2B_MESSAGE_TRANSACTIONS, VIEW)	Opens a specific message on the View Details page.	MessageGUID	Message ID column in Manage Collaboration Messaging History page in Collaboration Messaging Work Area or MessageGUID in the b2bMessageTransaction REST Service.	None
Configurator	Workspace (CONFIGURATOR, EDIT)	Opens a specific configurator workspace on the Edit Workspace page.	workspaceId: Unique identifies of the workspace.  Name: Unique name of the workspace.	Retrieve the workspace name value from the Name column on the Manage Workspaces page in the Configurator Models work area.  WorkspaceId retrieved from the configurator Workspaces REST API that uniquely identifies a configurator workspace.	If both the workspaceId and name parameters are passed, workspaceId is used.
Configurator	Overview (CONFIGURATOR, OVERVIEW)	Opens the Configurator Overview page.	Not needed	N/A	None
Configurator	Overview (CONFIGURATOR, NONE)	Opens the Configurator Overview page.	Not needed	N/A	None
Costing	Fiscal Document (INBOUND_FISCAL_DOCUMENT, VIEW)	Opens a specific fiscal document on the Inbound Fiscal	pDocHeaderId: Unique identifier of the fiscal document header.	<ul style="list-style-type: none"> <li>REST</li> <li>OTBI</li> </ul>	You should pass any one of the two parameters. If both

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		Documents details page.	pAccessKeyNum: Indicates the access key number generated by issuer for each electronic fiscal document.	<ul style="list-style-type: none"> <li>CMF_FISCAL_DOC_HEADERS.DOCUM_HEADER_ID</li> <li>CMF_FISCAL_DOC_HEEADRS.ACCESS_KEY_NUMBER</li> </ul>	the parameters are passed, the deep link would be displayed using pDocHeaderId.
Costing	Review Work Order Costs (WORK_ORDER_COST, VIEW)	Opens a specific work order on the Review Work Order Costs page.	<p>pCostOrgId: Unique identifier of the cost organization.</p> <p>pCostBookId: Unique identifier of the cost book.</p> <p>pCostBook: Code associated with the cost book.</p> <p>pCstWorkOrderId: Unique identifier of the work order in costing.</p> <p>pWorkMethodCode: Code indicating the work method.</p> <p>pWorkOrderNumber: User-facing identifier of the work order.</p> <p>pOrgCode: Code indicating the manufacturing organization.</p> <p>pWorkOrderId: Unique identifier of the work order in manufacturing.</p>	<ul style="list-style-type: none"> <li>SOAP services. .</li> <li>CST_COST_ORGS_V.COST_ORG_ID.</li> <li>CST_COST_BOOKS_B.COST_BOOK_ID</li> <li>CST_COST_BOOKS_B.COST_BOOK_CODE</li> <li>CST_WORK_ORDERS.CST_WORK_ORDER_ID</li> <li>WIE_WORK_ORDERS_B.WORK_ORDER_ID</li> <li>WIE_WORK_ORDERS_B.WORK_ORDER_NUMBER</li> <li>INV_ORG_PARAMETERS.ORG_CODE</li> <li>WIS_WORK_METHODS_B.WORK_METHOD_CODE</li> </ul>	<p>Mandatory parameters for deep links:</p> <ul style="list-style-type: none"> <li>pWorkOrderId or</li> <li>pCstWorkOrderId or</li> <li>pWorkOrderNumber and pOrgCode</li> </ul> <p>Optional parameters:</p> <ul style="list-style-type: none"> <li>pCostOrgId: If not passed, then this is derived internally using manufacturing organization linked to the work order.</li> <li>pCostBookId/ pCostBook: If none among these two are passed, then pCostBookId is set internally to primary cost book of the cost organization.</li> <li>pWorkMethodCode: If not passed, then this is derived internally using the work order details.</li> </ul>
Costing	Review Item Costs (ITEM_COSTS,VIEW)	Opens a specific item cost on the Review Item Costs page.	<p>pCostOrgId: Unique identifier of the cost organization.</p> <p>pCostBookId: Unique identifier of the cost book.</p> <p>pCostBook: Code associated with the cost book.</p>	<p>SOAP Services.</p> <p>CST_COST_ORGS_V.COST_ORG_ID</p> <p>CST_COST_BOOKS_B.COST_BOOK_ID</p> <p>EGP_SYSTEM_ITEMS_V.INVENTORY_ITEM_ID</p>	<p>Mandatory parameters for deep link:</p> <ul style="list-style-type: none"> <li>pInventoryItemId</li> <li>pValUnitId</li> </ul> <p>Optional parameters:</p> <ul style="list-style-type: none"> <li>pCostOrgId: If not passed, then this is derived</li> </ul>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>pInventoryItemId: The unique identifier of the inventory item.</p> <p>pValUnitId: Unique identifier of the valuation unit.</p> <p>pAsOfDate: The point in time of the item cost. Supported format is <b>yyyy-mm-dd hh:mm:ss</b>.</p>	CST_VAL_UNITS_B.VAL_UNIT_ID	<p>internally using pValUnitId.</p> <ul style="list-style-type: none"> <li>pCostBookId/ pCostBook: If none among these two are passed, then pCostBookId is derived internally using pValUnitId.</li> <li>pAsOfDate: If not passed, then current date time or if you have enabled LE time zone, current legal entity date time will be used.</li> </ul>
Costing	Review Cost Accounting Distributions (COST_ACCOUNTING_DISTRIBUTIONS, VIEW)	Opens a specific cost accounting distributions on the Review Cost Accounting Distributions page.	<p>pTransactionId: Unique identifier of the transaction in costing.</p> <p>pDistributionId: Unique identifier of the cost distribution header.</p> <p>pEventId: Unique identifier of the SLA event generated for a distribution.</p> <p>pSourceTransactionId: Unique identifier of the transaction in source system (inventory transactions only).</p> <p>pTxnSourceType: Source transaction type (inventory transactions only).</p>	<p>Transaction Identification column on Review Cost Accounting Distributions Page.</p> <p>CST_ALL_COST_TRANSACTIONS_V.TRANSACTION_ID</p> <p>CST_COST_DISTRIBUTIONS.DISTRIBUTION_ID CST_COST_DISTRIBUTIONS.EVENT_ID</p> <p>INV_MATERIAL_TXNS.TRANSACTION_ID (pSourceTransactionId)</p>	<p>You should pass either pTransactionId or pDistributionId or pEventId or pSourceTransactionId.</p> <p>pTxnSourceType (inventory) is optional to pass when pSourceTransactionId is passed. Order of precedence if multiple parameters are passed is pTransactionId or pDistributionId or pEventId or pSourceTransactionId.</p>
Costing	Receipt Accounting Distributions (RECEIPT_ACCTG_DISTRIBUTIONS, VIEW)	Opens a specific receipt accounting distribution on the Review Receipt Accounting Distributions page.	<p>pAccountingEventId: Unique identifier for the accounting event</p> <p>pEventId: Unique identifier for the CMR event</p>	<p>CMR_RCV_EVENTS.ACCOUNTING_EVENT_ID</p> <p>CMR_RCV_EVENTS.EVENT_ID</p>	<p>You should pass any one of the two parameters. If both the parameters are passed, the deep link will be displayed using pAccountingEventId.</p>
Inventory	Review Completed Transactions	Opens a specific transaction on the Review Completed transactions page.	OrganizationCode: Unique identifier for the inventory organization	Organization column on the search results of review completed transactions page.	When OrganizationCode and ItemNumber are passed, all the completed

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>ItemNumber: Unique identifier for the item name</p> <p>TransactionID: Unique identifier for the inventory completed transaction</p>	<p>Item Number column on the search results of review completed transactions page.</p> <p>Transaction ID column in the search results.</p>	<p>transactions are fetched for the combination of organization and item parameter value and using the transaction date as the current date. The results are displayed in the search results table.</p> <p>When TransactionId is passed, the Transaction Details page is displayed to show all the attributes for this transaction.</p>
Inventory	Manage Pending Transactions	Opens a specific transaction on the Manage Pending Transactions page.	<p>OrganizationCode: Unique identifier for the inventory organization</p> <p>TransactionID: Unique identifier for the inventory completed transaction</p>	<p>Organization column on the View Pending Transactions page.</p> <p>Transaction ID column in the search results.</p>	<p>When OrganizationCode is passed, all pending transactions with the processing status as Error for that organization are fetched. The results are displayed in the search results table.</p> <p>When TransactionId is passed, the Transaction Details page is displayed to show all the attributes for this transaction.</p>
Inventory	SSP Manage Receipts	Opens a specific receipt on the Self Service Manage Receipts page.	ReceiptNumber: Unique identifier for the receipt	Receipt column on the search results of the self service Manage Receipts page.	None
Inventory	View Receipts	Opens a specific receipt on the View Receipts page.	<p>ReceiptNumber: Unique identifier for the receipt</p> <p>ShipmentHeaderId: Unique identifier for the shipment</p>	<p>Receipt column on the search results on the Manage All Lines page.</p> <p>ShipmentHeaderId attribute on the output response of receivingTransactionsH REST. Also, the attribute Receipt Header ID on Receiving - Receipts Real Time OTBI report.</p>	None
Inventory	Manage Lots	Opens a specific lot on the Manage Lots page	LotNumber: Uniquely identifier for the lot	Object Keys can be found using the	LotNumber must be provided.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p> <p>ItemNumber: Unique identifier for the item name</p> <p>InventoryItemId: Unique identifier for the inventory item</p>	Inventory Item Lots REST.	
Inventory	Manage Serial Numbers	Opens a specific serial number on the Manage Serial Numbers page.	<p>SerialNumber: Unique identifier for the inventory item</p> <p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p> <p>InventoryItemId: Unique identifier for the inventory item</p>	Object keys can be found using the Inventory Item Serial Numbers REST.	SerialNumber must be provided.
Inventory	Create ASN	Queries purchase order schedules eligible for creating ASN on the Create ASN page.	<p>PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to supply a product or a service in return for payment.</p> <p>POHeaderId: Unique identifier for the purchase order header.</p> <p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p>	<p>Purchase Order column on the search results table of the Create ASN page.</p> <p>Other object keys can be found using the Purchase Orders for Receiving REST resource.</p>	This deep link will work only for warehouse receiving users and will not work for supplier portal users.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Inventory	Manage Movement Requests	Opens a specific movement request on the Manage Movement Request page.	<p>MovementRequestNum: Unique identifier for the movement request.</p> <p>MovementRequestHeader: Unique identifier for the movement request header.</p> <p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p>	<p>MovementRequestNum: is the value in the Movement Request field of the search results on the page Manage Movement Requests.</p> <p>Other fields can be seen using the Inventory Movement Requests REST resource.</p>	None
Inventory	Create ASBMN	Queries purchase order schedules eligible for creating ASBN using organization code and purchase order on the Create ASBN page.	<p>PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to supply a product or a service in return for payment.</p> <p>POHeaderId: Unique identifier for the purchase order header.</p> <p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p>	<p>Purchase Order column on the search results table of the Create ASBN page.</p> <p>Other object keys can be found using Purchase Orders for Receiving REST resource.</p>	This deep link will work only for warehouse receiving users and will not work for supplier portal users.
Inventory	Manage Inbound Shipments - Shipment	Opens a specific inbound shipment using the shipment and organization code on the Manage Inbound Shipments page.	<p>OrganizationCode: Unique identifier for the inventory organization</p> <p>OrganizationID: Unique identifier for the organization</p>	<p>Shipment column on the search results table of the Manage Inbound Shipments page.</p> <p>Other object keys can be seen from Inbound Shipments REST resource.</p>	Brazil related organizations are not supported for this deep link.
Inventory	Manage Inbound Shipments - Purchase Order	Opens a specific inbound shipment using the purchase order and organization	<p>PurchaseOrder: Unique identifier for the purchase order, which is a commercial</p>	<p>Purchase Order list of values on the Manage Inbound Shipments page or from the</p>	Brazil related organizations are not supported for this deep link.



Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		code on the Manage Inbound Shipments page.	document that you can use to send a request to a seller to supply a product or a service in return for payment.  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	search results column of the Edit Shipment page.  Other object keys can be seen from Inbound Shipments REST resource.	
Inventory	Receive Expected Shipments - Purchase Order	Queries expected shipment lines that can be received using Purchase Order and its related header ID on the Receive Expected Shipments page.	PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to supply a product or a service in return for payment.  POHeaderId: Unique identifier for the purchase order header.	Document number corresponding to the document type as purchase order in the search results of the Receive Expected Shipments page.  Document number corresponding to the document type as purchase order in the search results of the Receive Expected Shipments page.	With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The purchase order number will not be copied on the Purchase Order field on the Receive Expected Shipments page in the search panel.
Inventory	Receive Expected Shipments - ASN	Queries expected shipment lines that can be received using ASN and its related header ID on the Receive Expected Shipments page.	ASN: Unique identifies for the advanced shipment notice for the shipment from the supplier.  ASNHeaderId: Unique identifier for the shipment header.	ASN column in the search results of the page Receive Expected Shipments.  Other object keys can be seen in the response payload for REST resource asnsForReceiving.	With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The ASN will not be copied to the ASN field on the Receive Expected Shipments page in the search panel.
Inventory	Receive Expected Shipments - Transfer Order	Queries expected shipment lines that can be received using Transfer Order and its related header ID on the Receive Expected Shipments page.	TransferOrder: Unique identifier for the transfer order.  TransferOrderHeaderId: Unique identifier for the transfer order header. Each transfer order can request to move items from one location to another location.	Document number corresponding to the document type as transfer order in the search results of the page Receive Expected Shipments.  Other object keys can be seen in the response payload for REST resource transferOrdersForReceiving.	With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The transfer order will not be copied to the Transfer Order field on the Receive Expected Shipments page in the search panel.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Inventory	Receive Expected Shipments - In transit Shipment	Queries expected shipment lines that can be received using an in transit shipment and its related header ID on the Receive Expected Shipments page.	InTransitShipment: Unique identifier for the shipment of the item that is in transit.  ShipmentHeaderId: Unique identifier for the shipment header.	Document Number corresponding to the document type as an In-transit shipment in the search results of the Receive Expected Shipments.  Other object keys can be seen in the response payload for REST resource inTransitShipments.	With All organization context the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The in-transit shipment will not be copied to the In-transit Shipment field on the Receive Expected Shipments page in the search panel.
Inventory	Receive Expected Shipments - RMA	Queries expected shipment lines that can be received using RMA and its related header ID on the Receive Expected Shipments page.	RMANumber: Unique identifier for the return material authorization.  RMAHeaderId: Unique identifier for the return material authorization that it received from the customer.	Document number corresponding to the document type as a Return material authorizations order in the search results of the Receive Expected Shipments page.  Other object keys can be seen in the response payload for REST resource rmasForReceiving.	With All organization context the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The RMA number will not be copied to the RMA field on the Receive Expected Shipments page in the search panel.
Inventory	Manage Transfer Order	Opens a specific transfer order on the Manage Transfer Orders page.	TransferOrder: Unique identifier for the transfer order.  TransferOrderHeaderId: Unique identifier for the transfer order header. Each transfer order can request to move items from one location to another location.	Transfer Order column on the search results table of the Manage Transfer Orders page.  Other object keys can be found using the Inventory Transfer Orders REST resource.	You must have access to either the source organization or the destination organization to be able to view the transfer order.
Inventory	Manage Shipment Lines	Opens a specific outbound shipment line on the Manage Shipment Lines page.	Order: Order number from the order capture application.	Order column on the search results table of the Manage Shipment Lines page.	If an order has multiple lines then the Manage Shipment Lines page will open. If order has only one line then Edit Shipment Line page will open. You must have access to the ship-from organization to be able to see the data.
Inventory	Edit Shipment	Opens a specific outbound shipment	Shipment: Name of the material shipment.	Shipment field on the Edit Shipment page.	Using the deep link You will land on the Edit Shipment

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		on the Edit Shipment page.	DeliveryId: Unique identifier for the shipment.	Other object keys can be seen using the output response of the Shipments REST resource.	page. For an invalid shipment value you will land on the Manage Shipments page.
Logistics	Receive Items (SSP_RCV_PO,NONE)	Navigate to the Receive Items page.	poNumber : Purchase Order Number  poHeaderId: Unique identifier for the purchase order header	REST  OTBI Subject Areas (for receiving and procurement)	None
Maintenance	Enterprise Asset (ORA_MNT_ASSET, EDIT)	Opens a specific Enterprise Asset on the Edit Asset Details page.  If you only have the View Asset privilege, then you will be presented the Edit Asset Details page in View mode.	assetNumber: Unique number for an installed base asset	<ul style="list-style-type: none"> <li>REST &lt;AssetNumber&gt;</li> <li>OTBI</li> <li>cse_assets_b table</li> </ul> <p>Work Order dimension in the following subject areas:</p> <ul style="list-style-type: none"> <li>Maintenance Management - Asset Real Time</li> <li>Maintenance Management - Forecast Real Time</li> <li>Installed Base - Meter Based Asset Usage Real Time</li> <li>Maintenance Management - Work Requirement Real Time</li> </ul> <p>Opens a specific Enterprise Asset on the Edit Asset Details page.</p>	None
Maintenance	Customer Asset (ORA_CSE_ASSET,EDIT)	Opens a specific Customer Asset on the Edit Asset Details page.  If you only have the View Asset privilege, then you will be presented the Edit Asset Details page in View mode.	assetNumber: Unique number for an installed base asset	<ul style="list-style-type: none"> <li>REST &lt;AssetNumber&gt;</li> <li>OTBI</li> <li>cse_assets_b table</li> </ul> <p>Work Order dimension in the following subject areas:</p>	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
				<ul style="list-style-type: none"> <li>Installed Base - Customer Asset Real Time</li> <li>Installed Base - Customer Asset Structure Real Time</li> <li>Installed Base - Meter Based Asset Usage Real Time</li> </ul>	
Maintenance	Work Order (ORA_MNT_WORK_ORDER)	Opens the Manage Maintenance Work Orders page.	None	None	None
Maintenance	Work Order (ORA_MNT_WORK_ORDER, EDIT)	Opens a specific work order on the Edit Work Order page.	workOrderId: Unique identifier of a maintenance work order.	<ul style="list-style-type: none"> <li>REST &lt;WorkOrderNumber&gt;</li> <li>OTBI</li> <li>wie_work_orders_b table</li> </ul> <p>Work Order dimension in the following subject areas:</p> <ul style="list-style-type: none"> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Material Usage Real Time</li> <li>Maintenance Management - Resource Usage Real Time</li> <li>Maintenance Management - Purchased Item Usage Real Time</li> </ul>	None
Maintenance	Work Order (ORA_MNT_WORK_ORDER, VIEW)	Opens a specific work order on the View Work Order page.	workOrderId: Unique identifier of a maintenance work order.	<ul style="list-style-type: none"> <li>REST &lt;WorkOrderNumber&gt;</li> <li>OTBI</li> <li>wie_work_orders_b table</li> </ul> <p>Work Order dimension in the following subject areas:</p>	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
				<ul style="list-style-type: none"> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Resource Usage Real Time</li> <li>Maintenance Management - Purchased Item Usage Real Time</li> </ul>	
Maintenance	Installed Base Asset (ORA_MNT_ASSET)	Opens the Manage Assets page.	None	None	None
Manufacturing	Work Order (WIE_WORK_ORDER,EDIT) Work Order (WIE_WORK_ORDER, VIEW)	Opens a specific work order on either the Edit Work Order or View Work page based on the context.	<p>workOrderId: Unique identifier for a manufacturing work order.</p> <p>organizationCode: Abbreviation that identifies the manufacturing plant.</p> <p>workOrderNumber: Functional value that uniquely identifies a manufacturing work order number within a plant.</p>	<p>The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIE_WORK_ORDERS_B table.</p> <p>In OTBI, ObjKey parameters can be obtained from Work Order dimension in all manufacturing subject areas.</p>	<p>If both ID value and functional keys are sent, the ID value is considered for deep linking.</p> <p>When navigating using functional ObjKeys, both organization code and work order number are required.</p>
Manufacturing	Exception (WIE_PRODUCTION_EXCEPTION,EDIT)	Opens a specific exception in either edit or view mode on the Report Production Exceptions page.	<p>exceptionId: Unique identifier of a production exception.</p> <p>exceptionNumber: Functional value that uniquely identifies a production exception.</p>	<p>The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or ENQ_ISSUES_B table.</p> <p>In OTBI, ObjKey parameters can be obtained from Exception Details dimension of Production Exceptions Real Time subject area.</p>	<p>If both ID value and functional keys are sent, the ID value is considered for deep linking.</p> <p>The Report Production exceptions page is automatically rendered in either view or edit mode depending on the privileges and exception status.</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Manufacturing	Work Definition (WIS_WORK_DEFINITION, EDIT)	Opens a specific work definition in either edit or view mode on the Work Definition page.	<p>WorkDefinitionId: Unique identifier of a manufacturing work definition</p> <p>.VersionNumber: Unique version number of the work definition.</p> <p>organizationCode: Abbreviation that identifies the manufacturing plant.</p> <p>WorkDefinitionCode: Abbreviation that identifies the work definition.</p> <p>ItemNumber: Functional value that uniquely identifies the product item of the work definition.</p> <p>ProcessName: Functional value that uniquely identifies the process name of a process manufacturing work definition.</p>	<p>The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIS_WORK_DEFINITIONS, WIS_WD_VERSIONS tables.</p> <p>In OTBI, ObjKey parameters can be obtained from Work Definition dimension in all manufacturing subject areas.</p>	<p>The Edit Work Definitions page is automatically rendered in either view or edit mode depending on the privileges, status and whether an active version is called..</p> <p>You can navigate to work definition page using the following combinations of ObjKeys:</p> <ul style="list-style-type: none"> <li>WorkDefinitionId and VersionNumber</li> <li>OrganizationCode and ProcessName and VersionNumber</li> <li>OrganizationCode and WorkDefinitionCode and ItemNumber and VersionNumber</li> </ul> <p>If both ID values and functional keys are sent, the ID values are considered for deep linking.</p> <p>If both work definition code and process name are sent, the process name is considered.</p>
Manufacturing	Edit Resource (WIS_RESOURCE, EDIT)	Opens a specific resource in either edit or view mode on the Edit Resources page.	<p>ResourceId: Unique identifier for a production resource.</p> <p>OrganizationCode: Abbreviation that identifies the manufacturing plant.</p> <p>ResourceCode: Abbreviation that identifies the resource.</p>	<p>The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIS_RESOURCES_B tables.</p> <p>In OTBI, ObjKey parameters can be obtained from Work Definition dimension in applicable manufacturing subject areas.</p>	<p>The Edit Resources page is automatically rendered in either view or edit mode depending on the privileges.</p> <p>If both ID values and functional keys are sent, the ID values are considered for deep linking.</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Order Management	View Order (SALES_ORDER, VIEW)	Opens the View Order page from the Order Management work area in the context of a specified sales order.	<p>HeaderId: Value that uniquely identifies the sales order header.</p> <p>OrderNumber: Number that identifies the sales order.</p> <p>SourceOrderSystem: Value that references the upstream order capture system that contains the source order.</p> <p>SourceTransactionNum: Number that identifies the transaction in the source system.</p> <p>SourceTransactionId: Uniquely identifies the transaction in the source system.</p> <p>ChangeVersionNumber: Version number of the sales order.</p> <p>DraftOrderFlag: Sales Order is in Draft status.</p>	REST	<p>OrderNumber, SourceTransactionNumber and SourceTransactionId ObjKey will navigate you to the running order by default. If there isn't a running order, you will be navigated to the draft order.</p> <p>For cases when OrderNumber is not unique, SourceOrderSystem will be passed to identify the order.</p> <p>SourceOrderSystem ObjKey is mandatory when identifying an order using SourceTransactionNumber or SourceTransactionId</p> <p>ChangeVersionNumber. The ObjKey can be passed to navigate to a specific version of an order. Custom UIs can use this to navigate to a reference version.</p>
Order Management	Fulfillment View (SALES_ORDER, FULFILLMENT_VIEW)	Opens the Fulfillment View Page from the Order Management work area, in the context of a specified sales order.	<p>HeaderId: Value that uniquely identifies the sales order header.</p> <p>OrderNumber: Number that identifies the sales order.</p> <p>SourceOrderSystem: Value that references the upstream order capture system that contains the source order.</p> <p>SourceTransactionNum: Number that identifies the transaction in the source system.</p> <p>SourceTransactionId: Uniquely identifies the transaction in the source system.</p>	REST	<p>OrderNumber, SourceTransactionNumber and SourceTransactionId ObjKey will navigate you to the running order by default. If there isn't a running order, you will be navigated to the draft order.</p> <p>For cases when OrderNumber is not unique, SourceOrderSystem will be passed to identify the order.</p> <p>SourceOrderSystem ObjKey is mandatory when identifying an order using SourceTransactionNumber or SourceTransactionId</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Order Management	Order Management Dashboard (SALES_ORDER, NONE)	Opens the Order Management dashboard.	Not needed	N/A	None
Order Management	Create order (SALES_ORDER, CREATE)	Opens the Create Order Page from the Order Management work area.	Not needed	N/A	None
Product Lifecycle Management	Portfolio (PORTFOLIOS,EDIT)	Opens a specific portfolio on the Portfolio page.	PortfolioId: Unique identifier of the portfolio.	Visible in OTBI Subject Areas.	None
Product Lifecycle Management	Concept (CONCEPTS, EDIT)	Opens a specific concept on the Concepts page.	conceptId: Unique identifier of the concept.	REST  OTBI Subject Area Innovation Management- Concepts Real Time	None
Product Lifecycle Management	Proposal (PROPOSALS,EDIT)	Opens a specific proposal on the Proposals page.	productProposalId: Unique identifier of the proposal.	REST  OTBI Subject Area Innovation Management- Proposals Real Time  Innovation Management- Proposals Cash flow Real Time	None
Product Lifecycle Management	Idea (IDEAS,EDIT)	Opens a specific idea on the Idea page.	IdeaId: Unique identifier of the idea.	REST  OTBI Subject Area Innovation Management- Ideas Real Time	None
Product Lifecycle Management	Requirements Specification (REQUIREMENTS, EDIT)	Opens a specific requirements specification on the Requirement page.	requirementId: Unique identifier for the requirement.	REST  OTBI Subject Area Innovation Management- Requirements Real Time	None
Product Lifecycle Management	Changes (CHANGES, EDIT)	Opens a specific change order on the Product Change Order page.	changeObjectId: Unique identifier for the change order.	REST  OTBI Subject Area Product Management- Change Orders Real Time	None



Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
				Product Management- Change Order Approvals Real Time	
Product Lifecycle Management	Items (ITEMS,EDIT)	Opens a specific Engineering item on the Items page.	itemId: Unique identifier for the item.  orgId: Unique identifier for the organization.	REST  OTBI Subject Area Product Management- Structures and Components Real Time  Product Management- Source Systems Real Time  Product Management- Items and Revisions Real Time	None
Product Lifecycle Management	Manufacturer Part (MPN,EDIT)	Opens a specific manufacturer part on the Manufacturer part page.	tpltemId: Unique identifier for the part.	REST  OTBI Subject Area Product Management- Trading Partner Items Real Time	None
Product Lifecycle Management	Manufacturer (MFRS, EDIT)	Opens a specific manufacturer on the Manufacturer page.	partyId: Unique identifier for the party.	REST  OTBI Subject Area Product Management- Trading Partner Items Real Time	None
Product Lifecycle Management	New Item Request (NIRS,EDIT)	Opens a specific new item request on the New Item Request page.	changId: Unique identifier for the new item request.	REST  OTBI Subject Area Product Management- New Item Requests Real Time  Product Management- New Item Requests Approvals Real Time	None
Product Management	Item (PIM_ITEM,EDIT)	Opens a specific item on the Item Details page.	pltemId: Unique identifier of an item.  pltemNumber, Value that identifies a part, item, product, or service.  pOrgId, Unique identifier of an organization.	Items V2 REST API: ItemId, ItemNumber, OrganizationId and OrganizationCode.	You can give either ItemId or ItemNumber and either OrgCode or OrgId.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			pOrgCode, Code that identifies an organization.		
Product Management	Manage Items (PIM_ITEM,NONE)	Opens the Manage Items search page.	Not Needed	N/A	None
Quality Inspection Management	View Inspection Results (INSPECTION_EVENTS,VIEW)	Opens a specific event on the Inspection Results page.	inspectionEventId: Unique identifier of the inspection results.	inspectionEventId column in table qa_ip_events.	None
Quality Inspection Management	View Inspection Plan (INSPECTION_PLANS,VIEW)	Opens a specific inspection plan on the Inspection plans page.	InspectionPlanId: Unique identifier of the inspection plan.	inspectionEventId column in table qa_ip_events.	None
Supply Chain Collaboration	Manage Supply Collaboration Network (COLLABORATION_RELATIONSHIP,EDIT)	Opens a specific collaboration relationship on the Manage Supply Collaboration Network page.	RelationshipNumber: Unique identifier of the collaboration relationship.	Relationship ID column in Manage Supply Collaboration Network Page of Supply Chain Collaboration Work area.	None
Supply Chain Planning	Manage Sourcing Rules (SOURCING_RULES,NONE)	Navigate to the Manage Sourcing Rules page.	Not needed	N/A	None
Supply Chain Planning	Edit Sourcing Rule (SOURCING_RULES,EDIT)	Opens a specific sourcing rule on the Manage Sourcing Rules page.	SourcingRuleId: Unique identifier of the sourcing rule.	REST OTBI Subject Area	None
Supply Chain Planning	Manage Assignment Sets (SOURCING_ASSIGNMENTS,NONE)	Navigate to Manage Assignment Sets page.	Not needed	N/A	None
Supply Chain Planning	Edit Assignment Set (SOURCING_ASSIGNMENTS,EDIT)	Opens a specific assignment set on the Manage Assignment Sets page.	AssignmentSetId: Unique identifier of the assignment sets.	REST OTBI Subject Area	None
Supply Chain Planning	Manage ATP Rules (ATP_RULES,NONE)	Navigate to Manage ATP Rules page.	Not needed	N/A	None
Supply Chain Planning	Edit ATP Rule (ATP_RULES,EDIT)	Opens a specific ATP rule on the Manage ATP Rules page.	AtpRuleId: Unique identifier of the ATP rule.	REST OTBI Subject Area	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Supply Chain Planning	Manage Planning Allocation Rules (ATP_ALLOCATION_RULES, NONE)	Navigate to Manage Planning Allocation Rules page.	Not needed	N/A	None
Supply Chain Planning	Edit Allocation Rule (ATP_ALLOCATION_RULES, EDIT)	Opens a specific allocation rule on the Manage Planning Allocation Rules page.	AtpAllocationId: Unique identifier of allocation rule.	REST OTBI Subject Area	None

## 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?](#)

## 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 (SPF)

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.

# 39 External Integration

## Web Services

### Overview of Web Services

Use web services to integrate web-based applications into your Oracle Applications Cloud. Web services expose business objects and processes to other applications using open standards-based technologies.

Web services support development environments and clients that comply with these open standards:

- Extensible Markup Language (XML)
- Simple Object Access Protocol (SOAP)
- Business Process Execution Language (BPEL)
- Web Services Description Language (WSDL)
- XML Schema Definitions (XSD)

Oracle Applications Cloud has these two types of web services:

- Application Development Framework (ADF) services
- Composite services

Let's look at the web service types in detail.

Web Service Type	Description
ADF services	<p>ADF services usually represent business objects, such as employees or purchase orders. You can use these services to expose standard operations, such as create, update, and delete. However, for locally-persisted objects, ADF services aren't limited to these operations.</p> <p>Here are a few examples of ADF services and what they're used for:</p> <ul style="list-style-type: none"><li>• <b>Worker.changeHireDate</b> - Use to update the hire date of the worker business object.</li><li>• <b>ProjectTask.createTask</b> - Use to adds a task to the project task business object.</li></ul>
Composite services	<p>Composite services usually represent end-to-end business process flows that act on business events produced by the ADF services. You can use these services to manage multiple object-based services, rules services, and human workflows. Here are a few examples of composite services and what they're used for:</p> <ul style="list-style-type: none"><li>• <b>ProjectStatusChangeApproval.process</b> - Use to accept the change in project status.</li><li>• <b>ScheduleOrchestrationOrderFulfillmentLineService.scheduleOrders</b> - Use to schedule resources used to fulfill an order.</li></ul>

For more information about web services, see the SOAP Web Services guide for your cloud services.

# Developer Connect

## Overview of Developer Connect

The Developer Connect portal provides information about the web services deployed to your Oracle Applications Cloud instance. You can use this information to integrate with or extend Oracle Applications Cloud and develop solutions to suit your business requirements.

To use the Developer Connect portal, your job role must have the `FND_INTEGRATION_SPECIALIST_JOB`, `FND_APPLICATION_DEVELOPER_JOB`, or `ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB` privilege. Alternately, you can grant the `ATK_WEB_SERVICE_INFO_ACCESS_PRIV` entitlement to your custom role, and then grant the custom role to users who require access. For more information, see the security guide for the appropriate cloud service at Oracle Help Center (<https://docs.oracle.com>).

To open the Developer Connect portal, from the **Navigator** menu, select **Tools > Developer Connect**. This portal displays dynamic information of the web services, and the modifications done to web services to integrate with Oracle Applications Cloud. You can synchronize the Developer Connect portal with your cloud instance to retrieve the latest web service information such as service attributes, operations, business objects, security policies, and WSDL files.

Use the Developer Connect portal to:

- View the summary of the web service information such as the business object that the service defines, life cycle status, and security policy.
- Discover the operations available for the selected web service, and the request and response payloads for each operation.
- View the hierarchy of the service data objects and know information such as the data type and whether it's a required field for user-defined attributes.
- Review the sample payload XMLs for the operations of the web service. You can add or edit sample payloads, and also delete user-defined sample payloads.

### Related Topics

- [Manage Web Service Sample Payloads](#)
- [Import Value Set Values to Oracle Applications Cloud](#)

## Web Service Life Cycle

A web service goes through three phases in a life cycle:

- **Active:** A service is active when it's delivered the first time, until it's deprecated.
- **Deprecated:** A service is deprecated when it's superseded by a newer version, or if there is a planned obsolescence in a future release. A service in this state is still supported and becomes obsolete in a later release.

**Note:** You must use the active version of the service. If you were previously using a service that has been deprecated, then migrate to the new, active version.

- **Obsolete:** A service is obsolete when it's no longer shipped or supported.

#### Related Topics

- [Overview of Web Services](#)
- [Message Patterns](#)

## Message Patterns

All operations exposed on a business object service have both synchronous and asynchronous message patterns defined. For conciseness, the service documentation includes the definition for the synchronous message pattern only.

Both synchronous and asynchronous operations have the same functional behavior, and request and response payloads. Custom object services don't have corresponding asynchronous operations.

### Naming Conventions and Examples

The naming convention for the asynchronous operation is:

- Operation name: Synchronous operation name appended with `Async`
- Callback name: Synchronous operation name appended with `AsyncResponse`

Using `Help Topic Abstract Service` as an example, if the name of the synchronous operation is `getEntityList`, the asynchronous operation name and callback name would be `getEntityListAsync` and `getEntityListAsyncResponse`.

#### Related Topics

- [Web Service Life Cycle](#)
- [Overview of Developer Connect](#)

## Manage Web Service Sample Payloads

This example demonstrates how to add and edit a sample payload XML for a web service operation. It also describes how to delete a user-defined sample payload XML.

### Adding a Sample Payload XML

Follow these steps to add a sample payload XML for the `getEntityList` operation of `Help Topic Abstract Service`:

1. From the **Navigator** menu, select **Tools > Developer Connect**.
2. On the **Web Service** overview page, search for `Help Topic Abstract Service`, and click the service display name.
3. On the **Summary** page, click the **Sample Payloads** tab, and then click **Add Sample Payload**.
4. Select `getEntityList` operation from the list, and enter a brief description.
5. Enter the payload XML, and click **OK**.

### Editing a Sample Payload XML

The Developer Connect portal displays predefined and user-defined payloads of the web services. You can edit only the user-defined payloads. Follow these steps to edit a user-defined sample payload of the `getEntityList` operation of `Help Topic Abstract Service`:

1. On the **Web Service** overview page, select `Help Topic Abstract Service`.
2. On the **Summary** page of the web service, click the **Sample Payloads** tab and select `getEntityList` operation.
3. In the **Edit Sample Payload** dialog box, edit the payload XML and click **OK**.

## Deleting a Sample Payload XML

You can delete only user-defined payloads, and not predefined payloads. Follow these steps to delete a user-defined sample payload of the `getEntityList` operation of `Help Topic Abstract Service`:

1. On the **Web Service** overview page, select `Help Topic Abstract Service`.
2. On the **Summary** page of the web service, click the **Sample Payloads** tab and select `getEntityList` operation.
3. Click the delete icon for the selected operation and click **OK**.

### Related Topics

- [Overview of Developer Connect](#)
- [Import Value Set Values to Oracle Applications Cloud](#)

## Import Value Set Values to Oracle Applications Cloud

This example demonstrates how to use the information in the Developer Connect portal to import value set values to Oracle Applications Cloud.

Suppose a fictional partner application wants to extend it with certain functionality available in another application. Instead of creating the required business objects and attributes in this application, you can import them using a web service. Before you proceed with the import process, enable the access permissions for the web service and review the information in the Developer Connect portal:

- Synchronize the web services information
- Review the web service details
- Update the request payload

## Synchronizing Web Services Information

You must synchronize the Developer Connect portal with your Oracle Applications Cloud instance to get the latest web service information. Follow these steps:

1. From the Navigator menu, select **Tools > Developer Connect**.
2. Click **Synchronize**.

**Note:** The **Last Refreshed** date indicates when the Developer Connect portal was last synchronized with your cloud instance.

## Searching And Reviewing Web Service Information

On the Web Services overview page, you can enter `Manage File Import and Export` in the Find field. You can also use Advanced Search option to find web service names that contain import, and select the relevant service from the search results.

To review the information:

1. On the Web Services overview page, select `Manage File Import and Export Service`. The Summary panel shows information such as the display name, business object that the service defines, life cycle status, QName, security policy used, and a brief overview of the service.
2. Click the Operations tab to view the operations supported by the web service.
3. Click the `uploadFiletoUCM` operation and review the result parameter in the response payload. This parameter holds the file ID in the WebCenter Content repository from which the value set values are imported.



- Click the `valueSetValuesDataLoader` operation and review the `fileIdAtRepository` parameter in the request payload. This parameter holds the file ID in the WebCenter Content repository.
- Click **WSDL File** link of the service to download the web service information.

## Updating Request Payload

To add a sample payload to import the value set values:

1. Click the Sample Payloads tab and then click **Add Sample Payload**.
2. Select `uploadFiletoUCM` from the operation name list.
3. Enter a brief description of the payload in the description text box.
4. Add the payload to get the file ID from the WebCenter Content repository:

[illegible]

```
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <ns1:valueSetValuesDataLoader
xmlns:ns1="http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/types/"
    <ns1:fileIdAtRepository>1234</ns1:fileIdAtRepository>
    </ns1:valueSetValuesDataLoader>
  </soap:Body>
</soap:Envelope>
```

- Overview of Developer Connect
- Manage Web Service Sample Payloads

# Cross-Origin Resource Sharing

## CORS

Cross-Origin Resource Sharing (CORS) is a mechanism that allows cross-domain communication and lets a browser securely access resources from a different domain.

By default, browser-based programming languages, such as JavaScript, can access resources only from the same domain. But with CORS, you can overcome this limitation and manage resources across domains.

Here are the CORS headers you can configure to make that possible.

CORS Header	Purpose
Access-Control-Allow-Origin	Contains a comma-separated list of trusted origins, or domains, that a client application can get resources from.
Access-Control-Max-Age	Specifies how long to store the results of a request in the preflight result cache.

CORS Header	Purpose
Access-Control-Allow-Methods	Contains a comma-separated list of HTTP methods allowed in a request.
Access-Control-Allow-Headers	Contains a comma-separated list of HTTP headers allowed in a request.
Access-Control-Allow-Credentials	Specifies whether a client application can send user credentials with a request.

## Example

A client application retrieves resource X from server A, which is what the application runs on. The client application then makes an HTTP request to get resource Y from server B. For this cross-server request to work, you must configure the `Access-Control-Allow-Origin` header in server B. Otherwise, the request fails and we end up with an error message.

### Related Topics

- [Configure CORS Headers](#)
- [Set Profile Option Values](#)

## Configure CORS Headers

To enable CORS in Oracle Applications Cloud, configure CORS headers so that client applications in one domain can use HTTP requests to get resources from another domain. Set values for profile options that correspond to the CORS headers.

To view the profile option, go to the Setup and Maintenance work area and use the Manage Applications Core Administrator Profile Values task in the Application Extensions functional area.

## CORS Profile Options

This table lists the profile options you can set for CORS headers.

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
Access-Control-Allow-Origin	Allowed Origins for Cross-Origin Resource Sharing (ORA_CORS_ORIGINS)	<p>These are the values you can enter to indicate which origins are allowed:</p> <ul style="list-style-type: none"> <li>• URL of the specific origin. For example, <b>http://www.exampledomain.com</b>.</li> <li>• Space-separated list of origins. For example, <b>http://www.exampledomain.com http://us.example.com http://software.example.com</b></li> </ul> <p><b>CAUTION:</b> Asterisk (*) is no longer supported as a valid value to allow access to resources from all origins. If you have already set asterisk (*) as the value for the allowed origins, make sure to replace it with the allowed origins.</p>

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
		<p><b>Note:</b> These are some key points to remember while using the profile values:</p> <ul style="list-style-type: none"> <li>You must set a value for this header to enable CORS.</li> <li>Never enclose URL and asterisk in quotation marks.</li> <li>Domain names must contain only valid URL characters.</li> <li>The profile value is applicable at the Site level.</li> </ul>
Access-Control-Max-Age	CORS: Access-Control-Max-Age (CORS_ACCESS_CONTROL_MAX_AGE)	Default value for caching preflight request is 3600 seconds.
Access-Control-Allow-Methods	CORS: Access-Control-Allow-Methods (CORS_ACCESS_CONTROL_ALLOW_METHODS)	Default values for allowed methods are <b>OPTIONS, HEAD, GET, POST, PUT, PATCH,</b> and <b>DELETE</b> .
Access-Control-Allow-Headers	CORS: Access-Control-Allow-Headers (CORS_ACCESS_CONTROL_ALLOW_HEADERS)	Default values for allowed headers are <b>Accept, Accept-Encoding, Authorization, Cache-Control, Content-Encoding, Content-MD5, Content-Type, Effective-Of, If-Match, If-None-Match, Metadata-Context, Origin, Prefer, REST-Framework-Version, REST-Pretty-Print, Upsert-Mode, User-Agent, X-HTTP-Method-Override,</b> and <b>X-Requested-By</b> .
Access-Control-Allow-Credentials	CORS: Access-Control-Allow-Credentials (CORS_ACCESS_CONTROL_ALLOW_CREDENTIALS)	<p>Select <b>True</b> or <b>False</b> to allow or prevent sending user credentials with the request. The default is False.</p> <p><b>CAUTION:</b> Don't set the value to True without assessing the risk. The value shouldn't be set to True if the value for ORA_CORS_ORIGINS is set to asterisk (*). The Access-Control-Allow-Credentials header won't be set if ORA_CORS_ORIGINS value is *. Setting the value to True affects all the Fusion Applications REST endpoints.</p>

#### Related Topics

- Set Profile Option Values
- CORS

## View Details About Predefined Scheduled Processes

To use web services to run predefined scheduled processes, you require details about the processes. View job definitions that the processes are based on, for example to get information about parameters.

You might also need to find security requirements for running the scheduled process.

### Job Definitions

A job definition contains the metadata that determines how a scheduled process works and what options are available during submission.

To view job definitions:

1. Go to the Setup and Maintenance work area.
  2. From the Application Extensions functional area, open any of these tasks as appropriate:
    - 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
  3. In the Manage Job Definitions tab, select your job definition and click **Edit**.
- Note:** Predefined job definitions are marked with an asterisk.
4. Cancel after you get the information you need.

### Security

Privileges provide the access required to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or the security reference manuals for the appropriate product family.



# 40 File-Based Data Import (FBDI) and File Import and Export

## File-Based Data Import (FBDI)

### Overview of External Data Integration Services for Importing Data

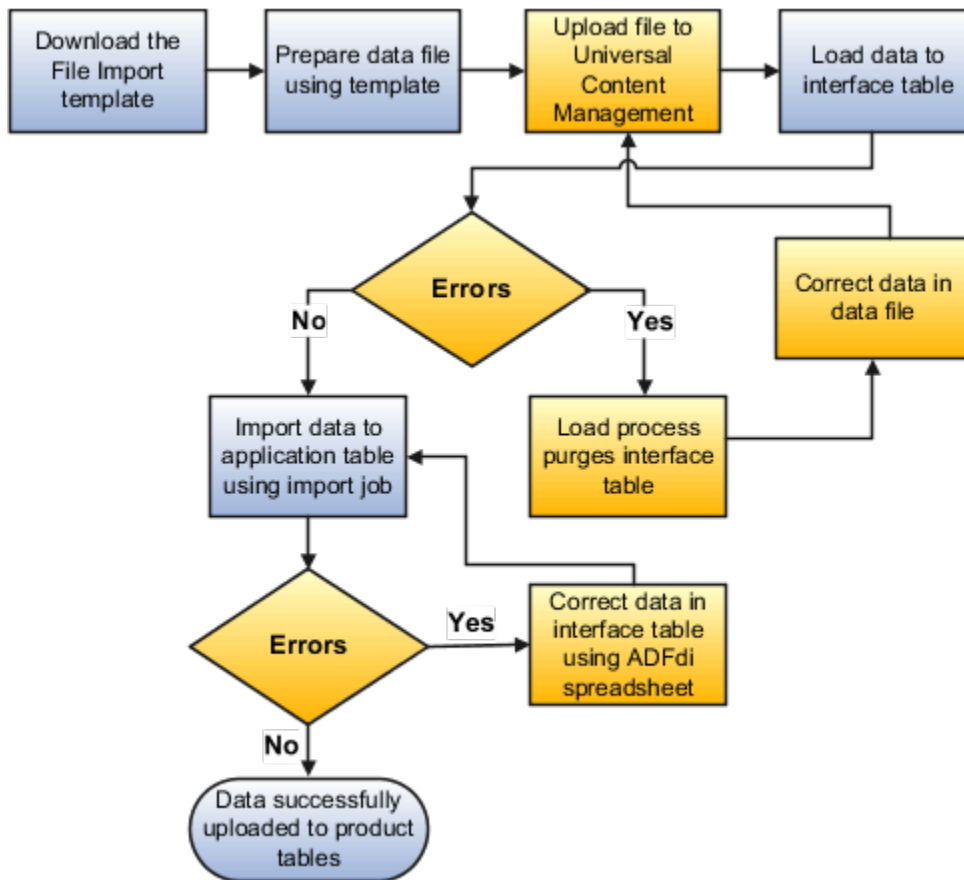
Use External Data Integration Services for Oracle Cloud to load data into the interface tables of Oracle Fusion Applications from external sources, such as legacy systems and third-party applications.

External Data Integration Services uses file-based data import (FBDI) templates and processes to import data.

The External Data Integration Services components consist of:

- Templates to structure, format, and generate the data file according to the requirements of the target application tables.
- File-based load process to load the data files into the interface tables.
- Application-specific data import processes to transfer data from interface tables to the application tables in your Oracle Fusion Applications.

The following flow diagram outlines the steps involved in loading data from external sources.



For further information, see Using External Data Integration Services for Oracle ERP Cloud (2102800.1) on My Oracle Support at <https://support.oracle.com>.

#### Related Topics

- [Using External Data Integration Services for Oracle ERP Cloud](#)

## File Import Templates

The File Based Data Import guides in the Oracle Help Center (<http://docs.oracle.com>) include integration templates to help you prepare external data for loading and importing.

Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

Preparing external data using templates involve the following tasks:

- Downloading templates
- Preparing data using the XLS template



## Downloading Templates

To download the templates:

1. Open the File Based Data Import guide for your cloud service.
2. Locate the import process.
3. View the list of files.
  - Control files describe the logical flow of the data load process.
  - XLSM templates include the worksheets and macros for structuring, formatting, and generating your data file.
4. Click the template link in the File Links table to download the file. For example, click **JournalImportTemplate.xlsm** in the Journal Import topic.

## Preparing Data Using the XLS Template

To prepare your data in a spreadsheet format:

1. Open the XLS template. The first worksheet in each file provides instructions for using the template.
  - Note:** If you don't follow the instructions, you get data load errors and data import failures.
2. Save the file.
3. Click the **Generate CSV File** button.

The macro generates a comma-separated values (CSV) file and compresses the file into a ZIP file. You must transfer the ZIP file to the content management server.

### Related Topics

- [Use Excel Integration Templates to Generate Data Files](#)
- [Document Transfer Utility](#)

## Use Excel Integration Templates to Generate Data Files

The File Based Data Import guides in the Oracle Help Center (<http://docs.oracle.com>) include integration templates to help you prepare external data for loading and importing.

Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

## Template Structure

The integration templates include the following characteristics:

- Each interface table is represented by a separate worksheet.
- Each interface table field is represented by a worksheet column with a header in the first row.
- Each column header contains bubble text or comments that include details about the column, such as the expected data type, length, and, in some cases, other instructional text.

- Columns are formatted, where applicable, to match the target field data type to eliminate data entry errors. The worksheet columns appear in the order that the control file processes the data file.

For more information on the template structure, see the Instructions and CSV Generation worksheet in the template.

## Template Requirements

To minimize the risks of an unsuccessful data load, ensure the following:

- Unused columns can be hidden, but not reordered or deleted.  
**CAUTION:** Deleting or reordering columns causes the load process to fail and results in an unsuccessful data load.
- External data must conform to the data type accepted by the control file and process for the associated database column.
- Date column values must appear in the YYYY/MM/DD format.
- Amount column values can't have separators other than a period (.) as the decimal separator.
- Negative values must be preceded by the minus (-) sign.
- Column values that require whole numbers include data validation to allow whole numbers only.
- For columns that require internal ID values, refer to the bubble text for additional guidance about finding these values.

After you finish preparing the data in the sheet, click the **Generate CSV File** button to generate a ZIP file containing one or more CSV files.

### Related Topics

- [File Import Templates](#)
- [Import Data into Application Tables](#)

## Transfer Data Files to UCM Using Manual Flow

After you generate the ZIP file that contains the CSV data import file, transfer the ZIP file to the content repository.

Use any of the following methods to transfer file:

- File Import and Export page in Oracle Fusion Applications: Manual flow
- Oracle Fusion ERP Integration web service: Automated flow

Aspects of transferring data files to content management involve the following:

- Target accounts
- Accessing transferred content

## Predefined Target UCM Accounts

You can transfer data files to predefined accounts in the Universal Content Management server that correspond to the interface table or assets.

To find the UCM account:

1. Open the File Based Data Import guide for your cloud service.
2. Locate your respective import process. For example, **Journal Import**.
3. View the UCM account in the Details section.

For more information, see the following guides in the Oracle Help Center (<https://docs.oracle.com>):

- SOAP Web Services guide for your cloud services
- File Based Data Import guide for your cloud services

#### Related Topics

- [Document Transfer Utility](#)

## Load Interface File for Import Process

Use the Load Interface File for Import scheduled process when you need to import external setup or transaction data from your CSV files into the interface tables. The process prepares the data for import into application tables.

Run this process from the Scheduled Processes page. You can run it on a recurring basis.

### When to Use

Use this scheduled process when you load data from the CSV files into the interface table that corresponds to the template that you use to prepare the data.

Before running this process, you must complete these steps:

1. Prepare your data file. For details, see [File Import Templates](#).
2. Create the import file. For details, see [Use Excel Integration Templates to Generate Data Files](#).
3. Transfer the data file to the content repository. For details, see [Transfer Data Files to UCM Using Manual Flow](#).

### Privileges Required

Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or see [Security Reference for Financials](#) and [Security Reference for Common Features](#).

### Specifications

Use these specifications when you run the scheduled process.

Specification	Description
Job Type	We recommend that you use Scheduled, but you can also run it on demand, when needed.
Frequency	There are no constraints.
Time of Day	Run it when your system isn't processing a lot of transactions.

Specification	Description
Duration	Not applicable.
Compatibility	None.

## Parameters

The Import Process parameter and the Data File parameter are required. Set the parameters, as necessary.

Parameter	Description
Import Process	Select the target import process.
Data File	<p>Do these steps.</p> <ol style="list-style-type: none"> <li>1. Click the <b>down arrow</b> in the Data File attribute.</li> <li>2. Scroll down, then click <b>Upload a New File</b>.</li> <li>3. In the Upload File dialog, click <b>Select File</b>.</li> <li>4. In your Windows Explorer window, locate and select the .zip file that you created when you used the Price List Import Template, then click <b>Open</b>.</li> <li>5. In the Upload file dialog, click <b>OK</b>.</li> <li>6. In the Process Details dialog, make sure the Data File attribute displays the name of the .zip before you continue.</li> </ol>

## Troubleshooting Information

See:

- [Correct Import Load Process Errors](#)

### Related Topics

- [File Import Templates](#)
- [Use Excel Integration Templates to Generate Data Files](#)
- [Transfer Data Files to UCM Using Manual Flow](#)
- [Correct Import Load Process Errors](#)
- [Import Data into Application Tables](#)
- [Document Transfer Utility](#)

## Import Data into Application Tables

The final destination for your external data is the application data tables of your Oracle Fusion application.

Importing data into application tables involves the following:

- Loading data into interface tables
- Finding and submitting the import process

## Loading Data into Interface Tables

Interface tables are intermediary tables that store your data temporarily while the application validates format and structure. Run the Load Interface File for Import scheduled process to load data from the data file into the interface table that corresponds to the template that you use to prepare the data.

To load your data into interface tables, submit the Load Interface File for Import scheduled process using the following steps:

1. From the Navigator, click **Tools**.
2. Click **Scheduled Processes**.
3. Click the **Schedule New Process** button.
4. Search and select the Load Interface File for Import job.
5. On the Process Details page:
  - a. Select the target import process.
  - b. Enter the data file name.
6. Submit the process.

If the process is successful, the status is SUCCEEDED and the process populates the interface tables. If the process isn't successful, the status is ERROR.

**Note:** The data file remains in the content repository after the process ends.

## Finding and Submitting the Import Process

Run the appropriate import process to import the data into the interface tables of your Oracle Fusion application.

To import your data into the application tables:

1. From the Navigator, click **Tools**.
2. Click **Scheduled Processes**.
3. Click the **Schedule New Process** button.
4. Search and select the import process for the target application tables.
5. On the Process Details page, select the process that corresponds to the data that you're importing. For example, **Journal Import**.

If you prepared your data using the spreadsheet template, select the process shown in the Overview section of the spreadsheet.

6. Submit the process.

If the process is successful, the status is SUCCEEDED. The data in the interface tables is validated and the successful records are imported into the Oracle Fusion application tables. If the process isn't successful, the status is ERROR.

**Note:** For more information on the process used for data prepared using the spreadsheet template, see the *Instructions and CSV Generation* tab of the spreadsheet template.

#### *Related Topics*

- [Use Excel Integration Templates to Generate Data Files](#)
- [Correct Import Load Process Errors](#)
- [Document Transfer Utility](#)

## Correct Import Load Process Errors

The Load Interface File for Import process ends in error if the load of the data file fails on any row. The Load File to Interface child process ends as an error or warning.

All rows that were loaded by the process are deleted and the entire batch of records is rejected.

### Correcting Data Upload Errors

To correct errors:

1. Review the error logs.
2. Change any structural or formatting anomalies in the data.
3. Generate the ZIP file containing the CSV files using the template.
4. Upload the file to the UCM server and resubmit the Load Interface File for Import process.
5. Repeat these steps until the process successfully loads all the data.

### Correcting Import Process Errors

If the import process fails with errors:

1. Review the errors in the import log.
2. Correct the error records using the ADFdi correction spreadsheets.

#### *Related Topics*

- [Import Data into Application Tables](#)
- [Load Interface File for Import Process](#)

## File Import and Export

### Overview of Files for Import and Export

You can import data into or export data out of the applications. A repository stores the content and the import and export processes handle the data movement into and out of the repository.

Integration specialists stage data for import and export. Application administrators run processes to import data in repositories of content to application transaction tables, or retrieve data exported from applications.

Aspects of managing files for import and export involve the following:

- Using the File Import and Export page

- Interacting with content management
- Uploading to facilitate import
- Downloading to facilitate export
- Determining the file size

## The File Import and Export Page

Use the File Import and Export page to upload content to or download content from the document repository of Oracle WebCenter Content. Search criteria on the page are limited to the minimum metadata of content management records needed for file import and export. To open the page, from the **Navigator** in the global header, select **Tools > File Import and Export**.

Contact the WebCenter Content Administrator for the following additional requirements:

- Information or assistance regarding general access to content management (including all metadata)
- Creating and managing accounts
- Programmatically uploading and downloading content

## Interacting with Content Management

Each user with access to the File Import and Export page is assigned to one or more accounts in Oracle WebCenter Content. Accounts organize and secure access to the content items.

## Uploading to Facilitate Import

Uploading a file creates a record in Oracle WebCenter Content. When you upload a file, you must also specify an account to which you upload the file. The account you specify determines which import process picks up that file to import it. You can upload any compatible file format, such as MIME, which the content repository can parse. However, the uploaded format must conform to the requirements of the import process. For example, the comma-separated values (CSV) file for the Load Interface File for Import process.

1. Click **Navigator > Tools > File Import and Export**.
2. In the Search Results section, click **Actions > Upload**.
3. On the Upload File window, click **Browse** and select the file to be uploaded.
4. From the Account list, select the account with which you want to associate the file.
5. Click **Save and Close**.

The details of the uploaded file appear in the Search Results section. Each uploaded file is assigned a unique Content ID.

## Downloading to Facilitate Export

Records in the search results table of the File Import and Export page provide download links to the files.

## File Size

Upload and download don't apply the following by default:

- Data compression
- File splitting

The `UPLOAD_MAX_DISK_SPACE` parameter in the `web.xml` file determines the maximum allowable file size in content management. The default maximum size is 10240000 (10 MB).

#### Related Topics

- [Overview of External Data Integration Services for Importing Data](#)
- [Guidelines for File Import and Export](#)
- [Import Data into Application Tables](#)

## Guidelines for File Import and Export

Interaction between the File Import and Export page and Oracle WebCenter Content requires securing content in an account. You can use the predefined accounts that are available in Oracle WebCenter Content.

Areas of file import and export involve the following:

- Defining security
- Searching records
- Accessing content in a new account
- Naming the account
- Deleting files

### Defining Security

You require the File Import and Export Management duty role for accessing the File Import and Export page. This duty role is included in the predefined role hierarchy for integration specialist roles and product family administrator roles. Files in Oracle WebCenter Content are associated with an account so that only users having access to that account can work with those files. Account names are unique and each account is treated as discrete by access control. You can only upload and download files to and from content repositories that are linked to the accounts you can access. The underlying integrated content management handles security tasks such as virus scanning.

### Searching Records

A record in Oracle WebCenter Content contains the metadata used for accessing the file. When a scheduled process is run on a file, the record for the file is assigned a process ID.

### Accessing Content in a New Account

After you create a new account in Oracle WebCenter Content, restart the content server. Otherwise, when you use the File Import and Export page to access content in the new account, you may experience a delay. The policy store is being updated with the new account information, which causes the delay.

### Naming the Account

If you create accounts for importing or exporting data, use the following conventions for naming the account:

- Don't include a slash (/) at the beginning or end.
- End the name with a dollar sign (\$) to avoid partial string matching.
- Use dollar sign and slash (\$/) as a separator in the hierarchical structure.

For example: `fin$/journal$/import$` The File Import and Export page transforms account names by removing the dollar sign (\$) separators. For example `fin$/journal$/import$` appears as `fin/journal/import`. The Remote Intradoc Client



(RIDC) HTTP command-line interface (CLI) transforms the account name you specify without the dollar sign (\$) to one that includes the sign. For example, `fin/journal/import` becomes `fin$/journal$/import$` in WebCenter Content.

## Deleting Files

You can delete one file at a time when you use the File Import and Export page. To delete multiple files simultaneously from the content repository, use the standard service page in Oracle WebCenter Content.

### *Related Topics*

- [Import Data into Application Tables](#)
- [Overview of Files for Import and Export](#)
- [Document Transfer Utility](#)



# 41 Migration of 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.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Message	Messages and associated tokens	<p>No parameters: All messages are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only messages belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>messageName/applicationId</b>: Only the specified message is moved.</p>
Application Taxonomy	Application taxonomy modules and components	No parameters: All taxonomy modules and components are moved.
Application Attachment Entity	Attachment entities	<p>No parameters: All attachment entities are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only attachment entities belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p>
Application Attachment Category	Attachment categories and category-to-entity mappings	<p>No parameters: All attachment categories and category-to-entity mappings are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: 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.</p>
Application Document Sequence Category	Document sequence categories	<p>No parameters: All categories are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>code/applicationId</b>: Only the specified document sequence category code is moved.</p>
Application Document Sequence	Document sequences and their assignments	<p>No parameters: All sequences are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only document sequences belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>name</b>: Only the specified document sequence is moved.</p>

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Descriptive Flexfield	Descriptive flexfield registration data and setup data	<p>No parameters: All descriptive flexfields are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only descriptive flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>descriptiveFlexfieldCode/applicationId</b>: 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.</p> <p><b>Note:</b> Sometimes, the flexfield setup data exported to an XML file may contain noneditable auto-generated content that might not exist when exported to a CSV file. You may ignore and exclude such data during the export-import process.</p>
Application Extensible Flexfield	Extensible flexfield registration data and setup data, including categories	<p>No parameters: All extensible flexfields are moved</p> <p>Parameter <b>moduleType/moduleKey</b>: Only extensible flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>extensibleFlexfieldCode/applicationId</b>: 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.</p> <p>Also, only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</p> <p><b>Note:</b> Sometimes, the flexfield setup data exported to an XML file may contain noneditable auto-generated content that might not exist when exported to a CSV file. You may ignore and exclude such data during the export-import process.</p>
Application Key Flexfield	Key flexfield registration data and setup data	<p>No parameters: All key flexfields are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only key flexfields belonging to the specified module</p>

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		<p>and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>keyFlexfieldCode/applicationId</b>: Only the specified key flexfield is moved.</p> <p>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 a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</p> <p><b>Note:</b> Sometimes, the flexfield setup data exported to an XML file may contain noneditable auto-generated content that might not exist when exported to a CSV file. You may ignore and exclude such data during the export-import process.</p>
Application Flexfield Value Set	Value set setup data	<p>No parameters: All value sets are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only value sets belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>valueSetCode</b>: Only the specified value set is moved.</p> <p>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.</p>
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.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Standard Lookup	Standard lookup types and their lookup codes	<p>No parameters: All standard lookups are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only standard lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>lookupType</b>: Only the specified common lookup is moved.</p>
Application Common Lookup	Common lookup types and their lookup codes	<p>No parameters: All common lookups are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only common lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>lookupType</b>: Only the specified common lookup is moved.</p>
Application Set-Enabled Lookup	Set-enabled lookup types and their lookup codes	<p>No parameters: All set-enabled lookups are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only set-enabled lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>lookupType</b>: Only the specified set-enabled lookup is moved.</p>
Application Profile Category	Profile categories	<p>No parameters: All profile categories are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p><b>name/applicationId</b>: Only the specified category is moved.</p>
Application Profile Option	Profile options and their values	<p>No parameters: All profile options and their values are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only profile options and their values belonging to the specified module are moved.</p> <p>Parameter <b>profileOptionName</b>: Only the specified profile option and its values are moved.</p>

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Profile Value	Profile options and their values	<p>No parameters: All profiles and their values are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only profiles and their values belonging to the specified module are moved.</p> <p>Parameter <b>categoryName/categoryApplicationId</b>: Only profiles and their values belonging to the specified category are moved.</p> <p>Parameter <b>profileOptionName</b>: Only the specified profile and its values are moved.</p>
Application Reference Data Set	Reference data sets	No parameters: All sets are moved.
Application Reference Data Set Assignment	Reference data set assignments	<p>Parameter <b>determinantType</b>: Only assignments for the specified determinant type are moved.</p> <p>Parameter <b>determinantType/referenceGroupName</b>: Only assignments for the specified determinant type and reference group are moved.</p>
Application Tree Structure	Tree structures and any labels assigned to the tree structure	<p>No parameters: All tree structures (and their labels) are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only tree structures (and their labels) belonging to the specified module are moved.</p> <p>Parameter <b>treeStructureCode</b>: Only the specified tree structure (with its labels) is moved.</p>
Application Tree	Tree codes and versions	<p>No parameters: All trees are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only trees belonging to the specified module are moved.</p> <p>Parameter <b>treeStructureCode</b>: Only trees belonging to the specified tree structure are moved.</p> <p>Parameter <b>TreeStructureCode/TreeCode</b>: Only trees belonging to the specified tree structure and tree code are moved.</p>
Application Tree Label	Tree structures and any labels assigned to the tree structure	<p>No parameters: All tree structures (and their labels) are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only tree structures (and their labels) belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p>



Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		Parameter <b>treeStructureCode</b> : Only the specified tree structure (with its labels) is moved.
Application Data Security Policy	Database resources, actions, conditions, and data security policies	<p>No parameters: All database resources/actions/conditions/policies are moved.</p> <p>Parameter <b>moduleType/moduleKey</b>: Only database resources/actions/conditions/policies belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</p> <p>Parameter <b>objName</b>: Only the specified database resource along with its actions/conditions/policies is moved.</p> <p>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.</p>

#### 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.

### 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.



# 42 Extending Redwood Pages

## Business Rules

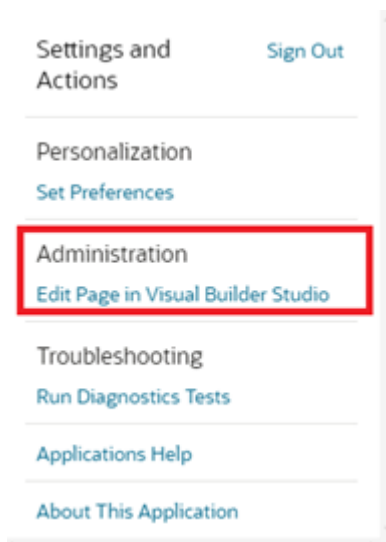
Tailor a seamless experience for the users in your enterprise using Oracle Visual Builder Studio in Express mode.

You can use business rules in Oracle Visual Builder Studio (VB Studio) Express mode to:

- Make the fields and regions on a page required or optional.
- Make the fields and regions on a page read-only or editable.
- Show or hide fields and regions depending on specific criteria.
- Configure Redwood pages to best meet your specific business needs. For example, you can control which actions are visible on the Receipt Deliveries page, or you can set the default date range that's available on the PAR Counts Overview page.

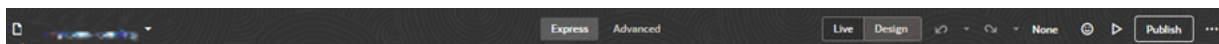
The types of changes you can make to a page depend on the page you're modifying.

To determine whether you can extend a specific page using VB Studio, go to the page and open the **Setting and Actions** menu. Look for the **Edit Page In Visual Builder Studio** task:



If you don't see the **Edit Page in Visual Builder Studio** task, then you can't use VB Studio to edit the page, either because you're not assigned the necessary privilege to edit pages in VB Studio, or because the page can't currently be edited in VB Studio.

When you open a page in VB Studio, use only the **Express** mode to extend the page. Advanced mode isn't supported. If Express mode isn't available when you open the page in VB Studio, then you can't extend the page in VB Studio. You can find the Express mode in the VB Studio header region:



See *Extending Oracle Cloud Applications in Visual Builder Studio Express Mode* for details about how to extend your application pages in Express mode.

## Steps To Enable

You can use VB Studio to extend your applications. To learn more about extending your application using Visual Builder, visit [Oracle Help Center > your apps service area of interest > Books > Configuration and Extension](#).

Before you can start working with VB Studio, a systems administrator must complete some initial setup. For instructions, see [Set Up VB Studio to Extend Oracle Cloud Applications](#).

## Tips and Considerations

Keep the **Pages** list closed while you work in VB Studio Express mode. Closing the list gives you a cleaner view of the page you're extending.

In VB Studio Express mode, you might see capabilities that support defaulting and validation of field values.

Default Field Values in Configure Fields and Regions

ExpressAdvancedLiveDesignNonePublish

Default

The default settings for fields and regions.

Conditions

The default rule doesn't have any conditions.

Regions and Fields

Filter

Expand AllCollapse AllShow only properties of this rule

	Required	Hidden	Read Only	Value
Basic details (3)				
Action Reason		Visible	Read Only	—
Action Reason	Optional	Visible	Editable	A
ActiveStatus	Required	Visible	Editable	—
departmentsOFF	Optional	Visible	Editable	—
Global data elements				
FBLDepG	Optional	Visible	Editable	—
ORG_GLOBAL	Optional	Visible	Editable	—
orgglobal1	Optional	Visible	Editable	—
ORGCON10FF15	Optional	Visible	Editable	—
ORGSEG10FF15	Optional	Visible	Editable	—
ORGCON20FF15	Optional	Visible	Editable	—
ORGSEG20FF15	Optional	Visible	Editable	—
ServicingAgency				
Agency	Optional	Visible	Editable	—
Block	Optional	Visible	Editable	—
Center Code	Optional	Visible	Editable	—
org_extra info	Optional	Visible	Editable	—

Read Only Built-in rules are always read-only.

Validate Field Values

Create

ORACLE

New Department

Basic details

Effective Start Date1/1/24Effective End Date

Department SetCommon SetName

StatusActiveLocation

ORG\_GLOBALorgglobal1

Context Value

Attachments

Drag and Drop

Select or drop files here.

URLAdd URL

Before you can start working with VB Studio, a systems administrator must complete some initial setup. For instructions, see [Set Up VB Studio to Extend Oracle Cloud Applications](#).

## Key Resources

To start extending your application pages in VB Studio, follow the instructions to [access Visual Builder Studio](#). As you're working, you can find additional information in these resources:

- [Extend Oracle Cloud Applications in Visual Builder Express Mode](#)
- [Oracle Fusion Cloud HCM and SCM: Extending Redwood Applications for HCM and SCM Using Visual Builder Studio](#)

## Access Requirements

To extend application pages using VB Studio, you must be assigned a configured job role that contains this privilege:

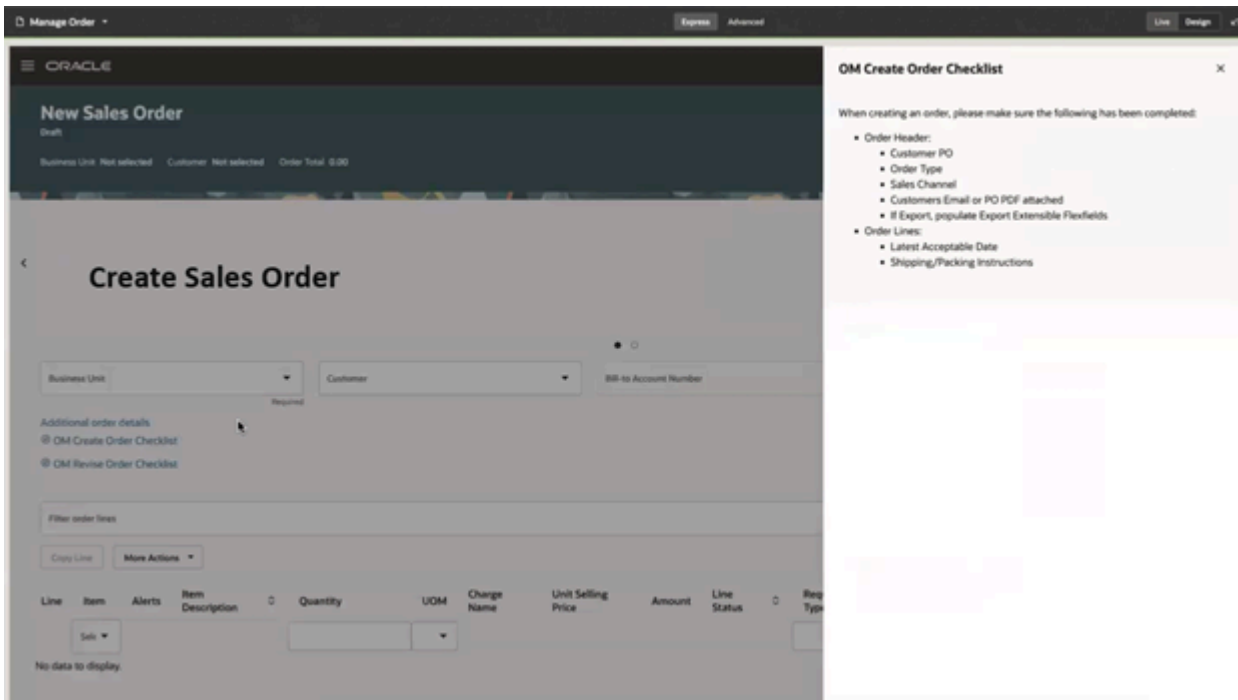
- Administer Sandbox (FND\_ADMINISTER\_SANDBOX\_PRIV)

## Guided Journeys

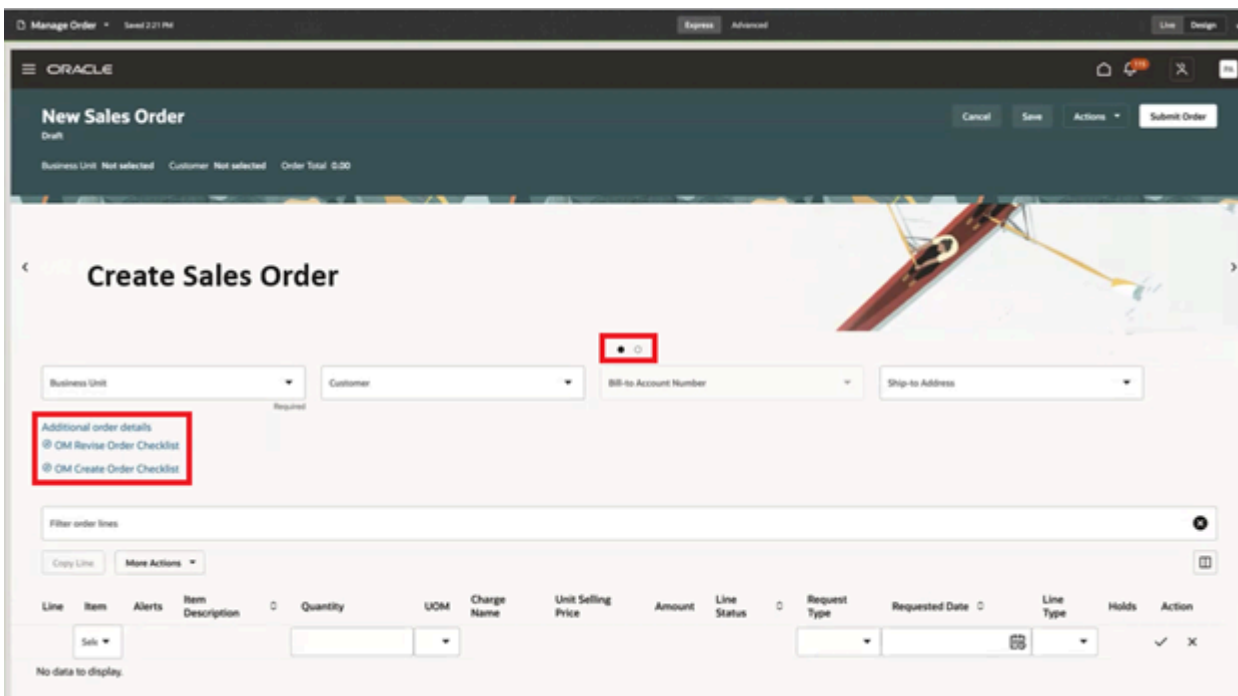
A guided journey helps users complete tasks by facilitating a business process.

Administrators can create a guided journey to embed tutorials, company policies, and best practices at the page or section level. For example, a guided journey could be created to help an employee place a sales order.

Let's take a closer look at the use-case scenario of an employee placing a sales order. For example, you could create a guided journey that provides a checklist of tasks for the employee to do before creating or revising a sales order. The text is yours to enter, tailored to the needs of your particular use case and company. In the following example, you have a checklist to complete in the panel that opens. You could also link to an external website or video for additional guidance.



In the following example, you can see guided journey tasks at the page and section level. The page-level guided journey tasks are displayed as a train stop below the Create Sales Order guided journey header, with two dots that correspond to two tasks in the journey. The section-level guided journey tasks are below the first row of fields at the left side of the page.





## Prerequisite Setup

Before you can start working with Oracle Visual Builder Studio (VB Studio), a systems administrator must complete some initial setup. For a new setup, start with *How Do I Set Up VB Studio?*. If VB Studio is already set up for your enterprise, but it's never been used to extend Oracle Cloud Applications, start with *Set Up VB Studio to Extend Oracle Cloud Applications*.

Use the **Manage Administrator Profile Values** task in the Setup and Maintenance work area to ensure the `ORA_PER_JOURNEYS_ENABLED` and `ORA_PER_GUIDED_JOURNEYS_ENABLED` profile options are set to **Y** at the site level. These profile options enable journeys.

## Create a Guided Journey

At a high level, creating a guided journey is a two-step process:

1. Create a guided journey template.
2. Associate the guided journey tasks at the page or section level using VB Studio in Express mode.

## Create a Guided Journey Template

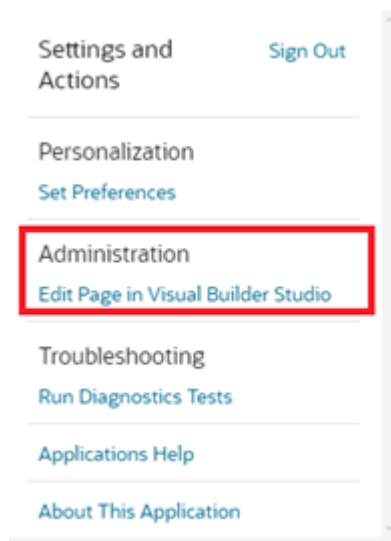
1. Navigate to **My Client Groups > Show More > Employment section > Checklist Templates**.
2. Click **Create** and complete all mandatory fields. Note the following important tips for a few of the fields:

Field	Tip
Checklist Code	When you click in the field, it autopopulates with a journey code based on the name you entered. You can change the code if desired, but it must be unique among your journeys. You will use this code later to associate a guided journey with a page using VB Studio in Express mode. Note the checklist code for later use.
Category	Select <b>Guided Journey</b> . Only guided journeys are supported currently.

3. Click the **General** tab and enter a description for the guided journey. Note that Draft is displayed in the **Status** field.
4. Click the **Tasks** tab and click **Create** to add tasks to the guided journey.
5. (Optional) Click the **Message** tab and add a title to the guided journey.
6. (Optional) Click the **Security** tab to enable data security or restrict access based on role.
7. Click **Save and Close**.
8. Activate the template by changing the status from **Draft** to **Active** in the **General** tab. The journey is ready to use.

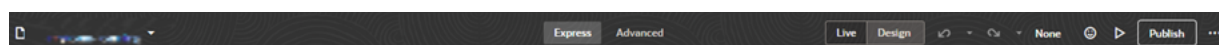
## Associate a Page

To determine whether you can extend a specific page using VB Studio, go to the page and open the **Settings and Actions** menu. Look for the **Edit Page in Visual Builder Studio** task.



If you don't see the **Edit Page in Visual Builder Studio** task, then you can't use VB Studio to edit the page, either because you're not assigned the necessary privileges to edit pages in VB Studio, or because the page can't currently be edited in VB Studio.

When you open a page in VB Studio, you can extend it only using Express mode. Advanced mode isn't supported. Express mode is displayed in the VB Studio header region.



To associate a guided journey to a page in VB Studio Express mode:

1. Navigate to the page you want to associate with the guided journey.
2. Select the **Edit Page in Visual Builder Studio** task in the **Settings and Actions** menu.
3. Navigate to the Page Properties section (formerly the Constants tab). Wait for the page to load completely before proceeding to the next step.
4. Locate the journey code property you want to modify, and enter the page- or section-level code from the guided journey into the property field in VB Studio.

Property Name in VB Studio	Field Name in the Guided Journey Template	Description
journeyCode	Checklist Code	Page-level journey code field.
sectionName.JourneyCode	Code	Section-level journey code field, where <i>sectionName</i> is the camel-case name of the section.

The following screenshots show journey code fields at the page-level (left) and section-level (right). If you don't see a journey code property for a specific page or page section, then you can't embed a guided journey into that page or section.

The image displays two side-by-side screenshots of the Oracle Visual Builder Studio configuration interface. The left screenshot shows the 'Business Rules' configuration page, which includes sections for 'Fields and Regions', 'Validations', and 'Page Properties'. The 'Page Properties' section has a red box around the 'journeyCode' property. The right screenshot shows the 'Page Properties' configuration page, which has red boxes around the 'completionDetailsJourneyCode', 'justificationJourneyCode', and 'learningItemDetailsJourneyCode' properties. Both screenshots show a list of properties with a '+' button to add new items.

1. Click **Preview** to see your guided journey before publishing it.
2. Click **Publish** when you are finished with your changes.

See the [Guided Journeys Configuration Using Page Properties](#) section of the *Extending Redwood Applications for HCM and SCM Using Visual Builder Studio* guide for a worked example.

## Tips and Considerations

You can:

- Create guided journeys at the page or section level.
- Associate guided journeys in VB Studio Express mode only. VB Studio in Advanced mode isn't supported for journeys.
- Create only guided journeys for Oracle Fusion Cloud SCM and Oracle Fusion Cloud Procurement. Other types of journeys, such as contextual and survey, aren't supported.
- Use the **Manage Administrator Profile Values** task in the Setup and Maintenance work area to see a list of the available profile options.
- Use the **Checklist Lookups** task in the Setup and Maintenance work area to see a list of the available lookups.

## Key Resources

To set up VB Studio:

- If VB Studio isn't set up for your enterprise, then start with [How Do I Set Up VB Studio?](#)
- If VB Studio is set up for your enterprise, but it's never been used to extend the Oracle Cloud Applications, then start with [Set Up VB Studio to Extend Oracle Cloud Applications](#).

To use VB Studio:

- [Extending Oracle Cloud Applications in Visual Builder Studio Express Mode](#) and [Extending Redwood Applications for HCM and SCM Using Visual Builder Studio](#) – Learn how to extend your pages with guided journeys using VB Studio in Express mode.
- [Implementing and Using Journeys](#) – Learn how to create and use journeys. Although this guide was written for Oracle Fusion Cloud HCM, the concepts apply to Oracle Fusion Cloud SCM too.

## Access Requirements

Users who are assigned a configured job role that contains these privileges can access this feature:

- Manage Journey (ORA\_PER\_MANAGE\_JOURNEY\_TEMPLATE)
- Administrator Sandbox (FND\_ADMINISTER\_SANDBOX\_PRIV)

# 43 New Features in Your Quarterly Update

## Readiness for Oracle Fusion Cloud SCM Updates

Get up to speed on the latest cloud release and make sure your update is a success with Oracle Cloud Readiness assets.

- **New Feature Summary:** Get brief descriptions of each new feature in the update.
- **What's New:** Plan your update by reviewing detailed information about new features, including capability overviews, benefits, setup considerations, and tips for using new features.
- **Release Training:** Learn more from in-depth information and demos on key features.
- **Spotlights:** View videos that provide top-level messages and product themes.

To find out what's new in each update, see [Oracle Cloud SCM Readiness](#).

