Oracle Fusion Cloud Human Resources

How do I configure business rules for Redwood individual compensation pages?

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Contents

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1 How do I configure business rules for Redwood individual compensation pages?

Individual Compensation Business Rules Introduction

You can extend the Redwood individual compensation pages by configuring fields and regions, changing the page properties using business rules, and creating field-level validations and tailored messages to meet your business requirements.

Business rules let you to control the display of regions and fields on Redwood pages. You can configure business rules in Oracle Visual Builder Studio Express mode to personalize Redwood pages, including defaulting and validating field values.

You can either use delivered rules built for best practices or create your own rules.

Getting Started

You need to set up Visual Builder Studio before you can start configuring business rules. For details, see *Set Up VB Studio to Extend Oracle Cloud Applications*.

You need the Human Capital Management Application Administrator role to work in Visual Builder

Access Requirement

You need the Human Capital Management Application Administrator role to work in an Oracle Fusion apps sandbox. For details, see the *Securing HCM* guide.

Implementation Considerations for Individual Compensation Processes

Here are the considerations for Administer Compensation, Individual Compensation, and Personal Compensation processes.

You can typically use field value defaulting and validation in these cases.

- Default when date such that awards can be created after 1st of next quarter by employees only.
- Validate that awards can be created after 1st of next quarter by employees only.
- Validate that certain plans are excluded for line managers.

- Validate when date such that it's in the current fiscal year (1 Apr to 31 Mar).
- Validate spot bonus is effective either on 01 Apr 2024 or 01 Oct 2024.
- Validate new hire bonus doesn't exceed $3000.
- Validate car allowance increase is below or equal to 10%.
- Validates new awards starts on or before 17th of a month.
- Validate that only one award proposal is submitted at a time.
- Validate bus and taxi reimbursement aren't claimed together.
- Validate that bonus can be allocated once in 6 months only.
- Advanced expressions working on Global HR and Recruiting pages need to be updated somewhat to work on the Administer Compensation, Individual Compensation, and Personal Compensation pages.

This table lists the supported attributes, exceptions, and the implementation recommendations for these pages:

- **My Client Groups** > **Administer Compensation**
- **My Client Groups** > **Individual Compensation**
- **My Team** > **Individual Compensation**
- **Me** > **Personal Contribution**

In the Conditions to Default Values	To Default Field Values	In the Condition to Validate Values	To Validate Field Values	Implementation Guidelines
• User Roles • Legal Employer • Business Unit • Country • Assignmen attributes including o Assignmen Status o Bargaining Unit o Business Unit o Departmen o FTE o Grade o Grade Code o Grade Ladder o Hire Date o Hourly or Salaried o Job*	• Action Date • Exclude Plans • Exclude Options	For When Section • User Roles • Legal Employer • Business Unit • Country • Action Date For Compensation Section • User Roles • Legal Employer • Business Unit • Country • Plan • Option • Start Date • End Date	NA	• Can default Action Date only and validate individual compensation section data. • You can validate at the record or section level. o Record level validations are triggered on clicking Save in the edit panel drawer. o Section Level validation are triggered on clicking Continue in the process o All the current allocation records will be available in the Current Allocations attribute o You can iterate through the records and create rule on the above mentioned record level fields o Section level rules can be written only using Advanced Expression Mode • Plan LOV and Plan – Option LOV in Business Rules is secured by the Individual Compensation Plan functional privilege: Define Variable Compensation Plan for Individual Compensation (CMP_ DEFINE_VARIABLE_COMPENSATION_PLAN_FOR_ INDIVIDUAL_ COMPENSATION). This is required for business rule design time users to view the values in Plan LOV, Plan – Option LOV. If you don't have this security, you won't see the values in the LOV. • Initial Value is available for individual compensation fields to compare old and new values. • Current Allocations can be accessed while creating validation using Advanced Expression only. • When the flow is launched, the assignment data is fetched based on the effective date selected in Person Search. If effective date isn't selected, data will be fetched as of application date.

In the Conditions to Default Values	To Default Field Values	In the Condition to Validate Values	To Validate Field Values	Implementation Guidelines
○ Job Code ○ Job Family* ○ Job Function* ○ LDG* ○ Legal Employer ○ Location ○ Next Payroll Start Date ○ Payroll Start Date ○ Person Type* ○ Position* ○ Position Budget Value* ○ Position Code ○ Position Standard Working Hours* ○ Primary Work Relationshi ○ Terminatio Date ○ Working Hours ○ Working Hours Frequency *Can affect performance		• Value • Currency • Legal Entity • Create or Edit • Current Allocations • Prior Allocations		• Rules written for When section will always be evaluated on the effective date selected in Person Search / application date. • If Action Date is changed in When section, rules written for Compensation section will be evaluated based on the assignment data effective as of action date. • Prior Allocations: a. Similar to Current Allocations, prior allocations field is an array and user can iterate through the prior allocation records to write rule conditions. b. Because prior allocation data is constant, it will be available at both section and record level validations. c. Only when rules are written on Prior Allocations, the fragment loads prior allocation data and makes it available to the BR engine. d. Rules on Prior Allocations can be written only in Advanced Expression mode.

Field Details

Field	Field Accessor	Type	Comments
Action Date	`$fields.individualCompensat $value()`		
Record Level Attributes			

Field	Field Accessor	Type	Comments
Plan	`$fields.individualCompensat $value()`	Number	PlanId selected using Plan LOV which shows Plan Name
Plan Option	`$fields.individualCompensat $value()`	Number	OptionId selected using Option LOV which shows values in the format <Plan Name> - <Option Name>
Start Date	`$fields.individualCompensat $value()`	String	Allocation start date as string **(Format: yyyy-MM-dd)** Requires Advanced Expression mode for date comparison.
End Date	`$fields.individualCompensat $value()`	String	Allocation end date as string **(Format: yyyy-MM-dd)** Requires Advanced Expression mode for date comparison.
Value	`$fields.individualCompensat $value()`	String	Primary input value as string. Requires Advanced Expression mode for nonstring primary input value. For numeric field, the value should be type-casted to Number for arithmetic operations. Similarly, for date field, the value should be type-casted to Date for date comparisons.
Currency	`$fields.individualCompensat $value()`	String	Currency for monetary primary input value
Legal Entity	`$fields.individualCompensat $value()`	Number	LegalEntityId selected using Legal Entity LOV which shows LE Name
Create or Edit	`$fields.individualCompensat $value()`	String	Mode attribute is to identify whether the record is newly created or an existing record.
Section Level Attributes			
Current Allocations	`$fields.individualCompensat $value()`	Array	Object Structure `[ { "PlanId": "string", "ComponentId": "string", "EffectiveStartDate": "string", "EffectiveEndDate": "string", "ValueString": "string", "DisplayCurrency": "string", "LegalEntityId": "string", "Mode": "string" }`

Field	Field Accessor	Type	Comments
			]

Prior Allocations	`$fields.individualCompensat $value()`	Array	Object Structure
			[
			{
			"PlanId": "string",
			"ComponentId": "string",
			"EffectiveStartDate": "string",
			"EffectiveEndDate": "string",
			"ValueString": "string",
			"DisplayCurrency": "string",
			"LegalEntityId": "string",
			"Mode": "string"
			}
			]

Configure Business Rules for Individual Compensation Processes

Use the following list to quickly identify the appropriate template rule for your defaulting and validation needs, and then configure it to match your organization's requirements.

Defaulting Rules

Template Rule Name for Defaulting	Rule Description
Default Action Date to Next Payroll Period Start Date	This sample rule defaults the Action Date with the Next Payroll Period Start Date and marks the field as read-only.
Default Exclude Plans Based on Grade	This sample rule restricts a set of plans based on the employee's Grade. The Exclude Plans and Exclude Options value expects a JSON array of Plan IDs and Option IDs, respectively, as strings. To exclude a plan with ID 12345, the value for Exclude Plans should be ["12345"]
Set Add, Edit and Delete as Hidden based on role	This sample rule hides the Edit and Delete actions based on the logged-in user's role
Default Input Values by Individual Compensation Plan Option and Legislative Data Group	This sample rule defaults element input values for a specific individual compensation plan, option and legislative data group.
Default Input Values by Element	This sample rule defaults element input values for a specific element associated with the individual compensation plan option. Note that this method is more performant.
Default Input Values Based on Business Unit	This sample rule defaults element input values based on the business unit. The rule condition identifies the target element, and the business unit logic is defined as an advanced expression in the defaulting step.
Default Plan Start Date Based on Next Payroll Period Start Date and Country	This sample rule defaults the plan start date to the next payroll period start date. If the payroll period start date is unavailable, the start date is defaulted to next Monday for US legislation, or to the first day

Template Rule Name for Defaulting	Rule Description
	of the following month for all other legislations. Additionally, the field is marked read-only. The date computation is based on the effective date of the flow.
Default Plan End Date to the End of the Year	This sample rule defaults the plan end date to the end of the year. The date computation is based on the effective date of the flow.

Validation Rules

Template Rule Name for Validating	Rule Description
Validate Action Date within given date range	This sample rule validates the Action Date is within the given range. If the When section is enabled, this rule will be triggered on changing the value in the Action Date field. If the When section is hidden, the action date is same as the effective date and this validation rule will trigger on selecting Continue or Submit from the Compensation section. The rule trigger can be restricted to the When section by selecting Action Date in Message Target Fields.
Validate Start Date of a new claim	This sample rule validates the Plan Start Date value of a new allocation. This is a record level validation and is triggered on selecting Save in the allocation drawer. The Start and End Date fields are available as string in ISO date format (YYYY-MM-DD). For date operations, the value should be converted to date object using Advanced Expressions.
Validate Plan End Date with payroll period end date	This sample rule validates the Plan End Date of an allocation during edit operation. This is a record level validation and is triggered on selecting Save in the allocation drawer. The Start Date, End Date and Payroll Period Start Date fields are available as string in ISO date format (YYYY-MM-DD). For date operations, the value should be converted to date object using Advanced Expressions.
Validate Primary Input Value of a new allocation	This sample rule validates the Amount (the primary input value) of a new allocation. This is a record level validation and is triggered on selecting Save in the allocation drawer. The value field of individualCompensationDetails object holds the value of the primary input field in string format. For arithmetic operations, the value should be converted to number using Advanced Expressions.
Validate new allocation by Grade	This sample rule validates the allocation of car allowance based on employee's Grade. This is a record level validation and is triggered on selecting Save in the allocation drawer.
Validate Primary Input Value of an allocation during update	This sample rule validates the Amount (the primary input value) of an allocation against the initial value during update operation. This is a record level validation and is triggered on selecting Save in the allocation drawer. The value field of the individualCompensationDetails object holds the primary input field in string format. For arithmetic operations, the value should be converted to number using Advanced Expressions. Note: During date effective update, the record object will have Operation value as SPLIT, and and the initial value (which is the end-dated reocord) will have Operation value as PRE_SPLIT.
Validate Start Date of a new allocation against prior allocations	This sample rule validates that the start date of a new allocation is not within 6 months of the last allocation of the same plan. This is a record level validation and is triggered on selecting Save in the allocation drawer. The Prior Allocations field holds the information of all the inactive allocations as of the effective date. This field is an array of objects where each object is a allocation record. To access the details of each allocation, iterate the Prior Allocations field using Advanced Expressions.
Validate more than one new allocation in a transaction	This sample rule validates the presence of multiple new allocations in a transaction. This is a section level validation and is triggered on selecting Continue or Submit or the flow level Save button. The Current Allocations field holds the information of all the active allocations as of the effective date. This field is an array of objects where each object is an allocation record. To access the details of each allocation, iterate the Current Allocations field using Advanced Expressions.
Validate viability of multiple allocations	This sample rule validates the viability of multiple allocations. In this example, allocation of both car allowance and taxi allowance is restricted. This is a section level validation and is triggered on selecting Continue or Submit or the flow level Save button. The Current Allocations field holds the information of all the active allocations as of the effective date. This field is an array of objects where each object is an allocation record. To access the details of each allocation, iterate the Current Allocations field using Advanced Expressions.

Template Rule Name for Validating	Rule Description
Validate absence of a plan by Job	This sample rule validates the absence of a plan by employee's Job. This is a section level validation and is triggered on sleceting continue or submit or flow level save button. The Current Allocations field holds the information of all the active allocations as of the effective date. This field is an array of objects where each object is a allocation record. To access the details of each allocation, iterate the Current Allocations field using Advanced Expressions.
Validate Input Values	This sample rule validates the input values for an ICP award. It runs as a record-level validation when the user clicks Save in the allocation drawer. The Input Values field contains an array of BaseName and ScreenEntryValue pairs that you can reference in conditions, and you can combine them with other fields and contexts for more advanced conditions.

Troubleshooting Individual Compensation Business Rules

To print all the attributes for an Individual Compensation object, create a validation rule without any condition.

1. Add a message to show the proposed value by completing the fields shown here:

Field	Value
Summary	Value
Severity	Warning
Detail	`[[ JSON.stringify($fields.individualCompensationDetails.$value(), null, 2) ]]`

2. Add another messages to show the initial value (the database value of the record, for EDIT case) by completing the fields shown here:

Field	Value
Summary	Initial Value
Severity	Warning To review the value of the CurrentAllocations array, set the message severity to error. Other severities let people submit or go to the next section.
Detail	`[[ JSON.stringify($fields.individualCompensationDetails.$initialValue(), null, 2) ]]`

> **Note:** For a new allocation, initialValue will be null because it doesn't exist in the database. The same applies for section-level validation, which runs on Continue or Submit actions.

Here's an example personal contribution showing the results both messages: