Oracle

Global Human Resources Cloud
Getting Started with Your HR Implementation

Release 13 (update 18B)
Contents

Preface i

1 Oracle HCM Cloud Introduction 1
   About This Guide 1
   HCM Deployment Options: Overview 1
   Oracle HCM Cloud Service: Overview 2
   Application Page Components and Analytics: Overview 3
   Working with Your System Integrator: Overview 4

2 Oracle HCM Cloud: Get Started 5
   Purchasing and Activating Oracle Cloud Application Services: Highlights 5
   Security in Oracle Human Capital Management Cloud: Overview 6
   Signing in and Accessing Setup Tasks: Procedure 8
   Generating the Setup Task List for HCM: Procedure 9
   Enabling Offerings: Explained 11
   Configuring Offerings: Procedure 11

3 Oracle HCM Cloud Implementation 13
   Implementing Human Resources: Procedure 13
   Implementing Benefits: Procedure 15
   Implementing Global Payroll: Procedure 18
   Implementing Payroll Interface: Procedure 22
   Implementing Absence Management: Overview 23
   Implementing Compensation: Procedure 25
   Implementing Profile Management: Procedure 27
   Implementing Goal Management: Procedure 30
   Implementing Career Development: Procedure 31
   Implementing Performance Management: Procedure 32
   Implementing Talent Review: Procedure 36
   Implementing Succession Management: Procedure 38
4 **Application Users**

Defining Application Users for Oracle HCM Cloud Service: Explained

5 **HCM Work Areas and User Roles**

Human Resources Work Areas: Explained
Benefits Work Areas: Explained
Compensation User Roles and Task Types: Explained
Global Payroll Work Areas: Explained
Time and Labor Work Areas: Explained
Absence Management Work Areas: Explained
Talent Management Work Areas: Explained

6 **Data Upload**

Uploading Data for Oracle Human Capital Management Cloud: Explained
Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Oracle HCM Cloud Introduction

About This Guide

This document provides a high-level introduction to some best practices for implementations of Oracle HCM Cloud Service. This guide covers the basic requirements needed to create an implementation project. The tasks presented in this document are intended for a quick introduction or pilot implementation. This document does not include all setup and security tasks that are appropriate for a complete implementation. References to related help accompany each of the steps. The help is available from Applications Help or from the Oracle Help Center, unless specified otherwise.

HCM Deployment Options: Overview

The following deployment options are offered:

- Public Cloud - Services are available to the general public and offered on a subscription basis, with no requirements to buy additional licenses or support. The services are hosted over the Internet by Oracle or Oracle business partners that offer business process outsourcing (BPO) solutions.
• Private Cloud - Application- and technology-managed services that are offered for Oracle software and hardware and are available internally, behind a firewall and are hosted over the Internet by Oracle or Oracle business partners that offer BPO solutions. Oracle provides management, monitoring, patching, security, and upgrade services.

On Premises - Hardware, software licenses, and support that you buy and host at one or more of your sites. You are responsible for monitoring, security, patching, and upgrades.

• Hybrid - You can choose to maintain your existing legacy applications on premise and buy products that are hosted in private or public cloud, or any combination of these options.

Oracle HCM Cloud Service: Overview

Oracle HCM Cloud Service delivers a complete HCM solution that includes global human resources, payroll, payroll interface, time and labor, absence, benefits, compensation, and talent management. This solution helps drive better resource plans,
employee alignment, and regulatory compliance with integrated enterprise social networking tools, business intelligence, and mobile data access.

### Oracle Fusion Human Capital Management

<table>
<thead>
<tr>
<th>Workforce Deployment</th>
<th>Workforce Development</th>
<th>Compensation Management</th>
<th>Span Business Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Human Resources</td>
<td>Talent Review</td>
<td>Compensation</td>
<td>Fast Formula Profile Management</td>
</tr>
<tr>
<td>Global Payroll and Localizations</td>
<td>Performance Management</td>
<td>Incentive Compensation</td>
<td>Workforce Directory Management</td>
</tr>
<tr>
<td>Global Payroll Interface</td>
<td>Goal Management</td>
<td>Benefits</td>
<td></td>
</tr>
<tr>
<td>Workforce Management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time and Labor</td>
<td>Succession Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Absence Management</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Application Page Components and Analytics: Overview

Application pages contain some or all of the following standard sections:

- Navigation tools in the global area at the top of the page
- Content and task panel drawers on the left side of the page that reveal pages with additional tasks and content
- Task and search panel drawers on the right side of the page
- Reports panel drawer on the right side of the page
- Transactions area, where most work is conducted, in the center of the page

In addition to embedded analytics, you may have access to dashboards with additional analytics as well as the Reports and Analytics work area where you can access or create additional analyses.

### Embedded Analytics

Embedded analytics enable actionable insight by providing access to information or data which will help complete a transaction.
Real-Time Reporting

Real-time reporting accesses relevant reports and analytics for each individual work area. Predefined analyses are available, but you can also create and edit analyses from the Reports panel drawer or the Reports and Analytics work area. Optionally, access the Oracle Business Intelligence (BI) Enterprise Edition through the Reports panel drawer. New objects and changes to existing objects that you make in Oracle BI Enterprise Edition are reflected and available from Oracle HCM Cloud Service.

Interactive Dashboards

Interactive dashboards provide:

- Information summaries that show a view of the big picture as well as prioritization
- Information monitoring that offers quick action and further exploration

The main dashboard within Oracle HCM Cloud Service is My Dashboard, which contains the springboard from which you can open work areas and dashboards. Two other types of dashboards are also available:

- Transaction dashboards which contain content that is core to one or more business processes
- Business intelligence (BI) dashboards which contain content that is complementary to one or more business processes

Working with Your System Integrator: Overview

After you determine the offerings you want to implement, you should implement Oracle Fusion Global Human Resources first to ensure dependencies with other offerings are met.

Your system integrator uses his or her implementation expertise to help you with a smooth transition to the Oracle HCM Cloud Service, and can use Rapid Start procedures to help you achieve a successful implementation in the fastest time possible.

Note: If you plan to continue using an Oracle Applications Unlimited HR application in coexistence with Oracle HCM Cloud Service, you will not follow this order of implementation. Contact your system integrator to determine the order to implement your offerings.
2 Oracle HCM Cloud: Get Started

Purchasing and Activating Oracle Cloud Application Services: Highlights

Purchase and activate Oracle Cloud Application Services from the Oracle Cloud web site, https://cloud.oracle.com. The whole process involves:

- Requesting and activating trial subscriptions.
- Purchasing and activating your services.
- Verifying that the services are activated, monitoring the services, and performing other administrative tasks.

Purchasing and activating any Oracle Cloud service is described in the Oracle Cloud: Getting Started with Oracle Cloud guide. Many administrative tasks are covered in the Oracle Cloud: Managing and Monitoring Oracle Cloud guide. All of the following references in this section point to one of these guides.

Note: Not everything in these guides is relevant to Oracle Cloud Application Services, for example details about Oracle Java Cloud Service and Oracle Database Cloud Service.

Terminology and User Roles

- Before you proceed, you should understand terms that are used in documentation about Oracle Cloud. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Oracle Cloud Terminology

- You should also be familiar with roles for users of the Oracle Cloud web site or of the actual service. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Oracle Cloud User Roles and Privileges

Requesting and Activating Trial Subscriptions

- Oracle Cloud Application Services are available through free trial subscriptions. After you request trial subscriptions, you activate, monitor, and manage the services for use before purchase. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Overview of Subscribing to an Oracle Cloud Service Trial

Purchasing and Activating Services

- Your buyer or an Oracle sales representative orders a cloud service and specifies information about the account administrator during the ordering process. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Ordering an Oracle Cloud Service
• The account administrator receives an e-mail with a link to activate the service. As part of activation, the account administrator provides information about the administrator who performs the functions of both the service administrator and the identity domain administrator. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

See: Activating Your Order

Next Steps
• The administrator who was identified during the activation process:
  ◦ Verifies that the service is activated. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.
    See: Verifying That a Service Is Running
  ◦ Manages and monitors the service. Refer to the Oracle Cloud: Managing and Monitoring Oracle Cloud guide.
    See: Managing and Monitoring Oracle Cloud Accounts
    See: Managing and Monitoring Oracle Cloud Services
  ◦ Optionally create initial administrator and implementation users before enterprise structures setup.
    • Alternatively, the administrator sets up enterprise structures and then creates service users, including functional implementors.
  • Functional implementors perform configuration and setup steps.
  • Developers can add features to extend the application.

Security in Oracle Human Capital Management Cloud: Overview

Users of Oracle Human Capital Management Cloud (Oracle HCM Cloud) have roles through which they gain access to functions and data. Security implementation is largely the management of:

• Roles
• Application users
• The provisioning of roles to application users

Application users typically have:

• HCM data roles, which combine a job role, such as Payroll Manager, with the data instances that users who have the job role must access. The data instances are identified in a security profile.
• Abstract roles, such as Employee and Line Manager.

This topic introduces the key security-related tasks that you perform during implementation. For more information about any of these tasks or Oracle HCM Cloud security in general, see the Securing Oracle HCM Cloud guide.
Define Implementation Users

The Oracle HCM Cloud service administrator creates one or more implementation users, who perform the implementation tasks. To create implementation users and the data roles that they need, the service administrator performs these tasks:

- Run Users and Roles Synchronization Process
  
  This task copies data from the LDAP directory to the Oracle Fusion Applications Security tables, so that existing roles are available for implementation users.

- Create Implementation Users

- Create Data Role for Implementation Users

At least one implementation user must have the IT Security Manager job role or privileges. That implementation user performs security-related implementation tasks.

Define Security Synchronization Processes and Preferences

Many security-related tasks are performed on the Security Console. The tasks in the Define Security Synchronization Processes and Preferences task list initialize the Security Console. This table introduces those tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Application Security</td>
<td>Opens the Security Console, where you perform setup tasks such as setting the enterprise password policy and defining the default format of user names.</td>
</tr>
<tr>
<td>Preferences</td>
<td></td>
</tr>
<tr>
<td>Import Users and Roles into</td>
<td>Runs a process that initializes and maintains the Oracle Fusion Applications Security tables.</td>
</tr>
<tr>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>Import User Login History</td>
<td>Runs a process that imports the history of user access to Oracle Fusion Applications. This information is required by the Inactive Users Report.</td>
</tr>
</tbody>
</table>

A user with the IT security manager job role or privileges performs these tasks.

Define Security

Oracle HCM Cloud is secure as delivered. To enable application users to access Oracle HCM Cloud functions and data, you perform the tasks in these task lists, as appropriate:

- Define Security for Human Capital Management
- Define Security for Compensation Management
- Define Security for Workforce Development

You can perform most of these tasks both during implementation and later as requirements emerge. The tasks are:

- Revoke Data Role from Implementation Users
Implementation users need unrestricted access to large amounts of data. After implementation, you must remove HCM implementation data roles from implementation users. A user with the IT Security Manager job role or privileges performs this task.

- **Manage Job Roles**
  The Oracle HCM Cloud security reference implementation provides many predefined job and abstract roles. You can perform the Manage Job Roles task to:
  - Review the role hierarchy of a job or abstract role.
  - Create job and abstract roles.
  - View the roles assigned to a user and identify the users who have a specific role.

Manage Job Roles opens the Security Console. A user with the IT Security Manager job role or privileges performs this task.

- **Manage Duties**
  You can perform the Manage Duties task to:
  - Review the duties of a job or abstract role.
  - Manage the duties of a job or abstract role that you created.
  - Create duty roles.

Manage Duties opens the Security Console. A user with the IT security manager job role or privileges performs this task.

**Define Data Security**

Tasks for the management of HCM data roles and security profiles appear in these task lists:

- Define Data Security for Human Capital Management
- Define Data Security for Compensation Management
- Define Data Security for Workforce Development

To create an HCM data role, use the Assign Security Profiles to Role task. To identify the data instances for an HCM data role, you create HCM security profiles. For example, to identify a set of person records, you use the Manage Person Security Profile task. A user with the IT security manager job role or privileges performs these tasks.

**Note:** These task lists also include the Manage Data Security Policies task. It appears here primarily to enable the migration of data security policies associated with duty roles that you created. You can ignore this task.

**Manage Role Provisioning Rules**

You create role mappings to control the provisioning of all types of roles to application users. For example, you can create a role mapping to provision the Employee abstract role automatically to all employees. A user with the IT Security Manager job role performs this task, which opens the Manage Role Mappings page.
Signing in and Accessing Setup Tasks: Procedure

When your test environment is ready, Oracle sends an e-mail to the person designated as the administrator when you signed up for the service. This e-mail includes the link to your service, a temporary password, and instructions on how to access an offering-specific Welcome Note on My Oracle Support (support.oracle.com). You must read this note and follow the instructions before signing in.

Implementation users perform the key setup tasks to start your implementation. As part of your initial setup, add an implementation user, and give them their login credentials and the url for your Oracle Applications. Before you generate task lists, implementors and application users can access setup tasks by searching for the task in the Setup and Maintenance Overview page. After task lists have been generated, users can access their assigned tasks or the task lists for the offerings included in their project. For example, the Define Common Applications Configuration task list for each offering includes the Define Implementation Users tasks.

The following procedure assumes that the administrator has not yet configured an offering and set up task lists.

1. Access your Oracle Cloud Application Services from the link provided by Oracle.
2. Sign in using the administrator user account and password provided by Oracle based on your activation request. Initial sign-in prompts you to reset your password.
3. Access tasks as follows:
   a. Go to Navigator > more... > Tools > Setup and Maintenance.
   b. On the Overview page, click the All Tasks tab.
   c. Search for the task by entering the name in the Search field.
   d. Click Search.
   e. In the search results, perform the task by clicking its Go to Task icon.

Related Topics

- Define Implementation Users Tasks: Points to Consider
- Creating Data Roles for Implementation Users: Procedure

Generating the Setup Task List for HCM: Procedure

To start an implementation of Oracle HCM Cloud Service, a user with the application implementation consultant role selects an offering to implement and generates the setup tasks needed to implement it. The Service Administrator creates this user. Instructions for how to create this user are included in the post-provisioning notification.
Generating the Setup Task List

This figure illustrates the offering in which each HCM feature is located.

The following procedure identifies how to generate the setup tasks. The documentation in this list is in the Oracle Applications Cloud Using Functional Setup Manager guide.

1. Sign in to Oracle Cloud Services.
   - Using the Oracle Cloud Services URL, sign in to Oracle Cloud Services as a user with the application implementation consultant role.
     The Welcome page appears.
2. Go to the Setup and Maintenance work area.
   - Select Setup and Maintenance under the Tools category in the Navigator to go to the Setup and Maintenance work area.
     See: Overview chapter - Manage Application Implementation: Overview
   - On the Getting Started with Oracle Fusion Applications page, view all Oracle Fusion Applications offerings.
     See: Gathering Your Implementation Requirements chapter
4. Analyze implementation requirements of the offerings.
   - Drill down on the Oracle HCM offering of your choice to view a description, documents, and reports related to the offering on the Documents page.
5. Configure offerings.

- On the Configure Offerings page, configure the offerings of your choice to fit your business requirements.

  Expand any offering to find its optional offerings, called Optional Functional Areas. Select all that apply to your organization.

  Use the Select Feature Choices page to review optional or alternative business processes. Select all that apply to your enterprise. If you select the Payroll functional area, you must select the appropriate countries as feature choices.

  **Note:** To use the Enterprise Structures Configurator to set up your basic enterprise structures, you must select the Enterprise Structures Guided Flow feature on the Configure Offerings page. It is selected by default.

- See: Gathering Your Implementation Requirements chapter - Offerings Explained
  - What's a Functional Area?
  - Feature Choices: Explained


- Create a new implementation project on the Manage Implementation Projects page to generate setup tasks for a selected offering.
- Managing an Application Implementation chapter

7. Review the generated setup task list.

- The task list includes the tasks that are relevant to the offerings and optional functional areas that you selected. The most common requirements across all offerings are listed first. Next, the common tasks across product families are shown. Next are common tasks across product offerings. Tasks that are specific to product functionality are listed last.

  You can expand the task lists to see the tasks that they contain.

- See: Managing an Application Implementation chapter - Implementation Project Task Lists: Explained

---

### Enabling Offerings: Explained

Offerings and their functional areas are presented in an expandable and collapsible hierarchy to facilitate progressive decision making regarding whether or not you want to implement them. An offering or its functional areas can either be opted into or not opted into for implementation. Implementation managers decide which offerings to enable for implementation. Although all of the functional areas that represent core functionality of an offering are automatically enabled for implementation when a parent offering is enabled for implementation, you can select which of the optional functional areas are enabled. You can identify which functionality is already opted into by looking at the check box in the Enable column.

**Related Topics**

- Configuring Offerings
Configuring Offerings: Procedure

Enable offerings to modify functionality so that it matches the services you plan to implement. You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) to enable offerings.

Enable Offerings

To enable offerings, follow these steps:

1. Click Navigator > My Enterprise > Offerings work area.
2. In the Offerings page, select the offering you want to implement.
3. Click the Opt In Features button.
4. In the Opt In page, select the Enable check box for the offering.
5. Review functional area hierarchy. Select the Enable check box to opt into functional areas as applicable to your business operations.
6. Click the Features icon in the Features column for the functional area you enabled to opt into and enable applicable features.
   - Depending on the feature type, a check box for Yes or No features or a Features icon for single and multiple choice features is displayed in the Enable column.
   - To enable a feature, select the check box for Yes or No types or click Features and select the appropriate choices for single and multiple choice features.
7. Click Done when you're finished to return to the Opt In page.
8. Click Done to return to the Offerings page.

Repeat the same steps for each offering you want to implement or if you must change the opt-in configuration of any functional areas or features of an enabled offering.

Related Topics

- Configuring Offerings
3 Oracle HCM Cloud Implementation

Implementing Human Resources: Procedure

The workforce deployment business process enables organizations to maximize employee value, manage individual and team contributions, and adhere to statutory, union, and organization labor requirements.

The enterprise structures interview process guides you through a series of questions and prompts you for information about how your business is organized. This interview enables you to create the divisions, legal entities, departments, business units and reference data sets within the scope of your enterprise. The actual organization entities are not created until you load the configuration.
Setting Up Basic Enterprise Structures with the Enterprise Structures Configurator

The tasks in the following list relate to setup of the basic enterprise structures; these are the structures that need to exist before you can create application users. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can create application users.

For setting up Human Resources, each task is performed by the Application Implementation Consultant, unless specified differently. All documentation references are from the Oracle Global Human Resources Cloud Implementing Global Human Resources guide unless specified differently.

1. Assign implementation tasks to users.
   - Performer: Application Implementation Manager
     - On the Manage Implementation Projects page, assign tasks related to the setup of enterprise structures to implementation users who have the Application Implementation Consultant job role.
     - See: Managing an Application Implementation chapter, Oracle Applications Cloud Using Functional Setup Manager guide

2. Sign in as the assigned user and find your assigned tasks.
   - Sign in using the Oracle Fusion Applications URL and the user account and password associated with your implementation user role.
     - Navigate to the Assigned Implementation Tasks tab to find assigned tasks.

3. Load geographies.
   - Perform the task Load US Geographies if you are using US Payroll. For Chinese locations and China Payroll, perform the task Load Chinese Geographies.
     - Geography information is used in Oracle Fusion Applications for address entry and geography-based business processes, for example, territory management and shipping.
     - You may have been given a geographies file to load. Alternatively, Vertex files may be available.
     - See: Geographies for HCM chapter

4. Manage geographies.
   - Perform the task Manage Geographies to enable the list of values for address fields in user interfaces.
     - See: Geographies for HCM chapter

5. Establish enterprise structures.
   - Perform the task Establish Enterprise Structures to determine the high-level structures of the enterprise using an interview style process.

   - **Note:** If you are also implementing Global Payroll, you must define the Cost Allocation Key Flexfield prior to defining the legislative data group. See: Setting Up Global Payroll, Task 8 Manage Cost Allocation Key Flexfield.

   - See: Enterprise Structures: Initial Configuration chapter
6. Establish job and position structures.
   - Perform the task Establish Job and Position Structures to determine an approach for jobs or jobs and positions that match your operational needs for workforce deployment, management reporting, and approvals.
   - See: Enterprise Structures: Initial Configuration chapter

7. Review enterprise configuration.
   - Perform the task Review Enterprise Configuration to review a high-level functional summary, as well as a detailed technical inventory of all objects that will be created. There is an additional option to print a hard copy of the information.
   - See: Enterprise Structures: Initial Configuration chapter

8. Load enterprise configuration.
   - Perform the task Load Enterprise Configuration to generate the structures for your enterprise and workforce deployment. This process creates the physical entities you define in the enterprise, and jobs and positions interviews.
   - See: Enterprise Structures: Initial Configuration chapter
Implementing Benefits: Procedure

A benefits hierarchy organizes the objects of a benefits program, plan types, benefit plans, and options. Depending on the outcome of your planning decisions, you have the flexibility to configure most aspects of a benefits package at more than one level.

Setting Up Benefits

Users with the Application Implementation Consultant job role perform each Benefits setup task. All documentation references are from the Oracle Global Human Resources Cloud Implementing Benefits guide. The following table describes the basic setup tasks that you must perform and identifies the relevant guide chapters.
<table>
<thead>
<tr>
<th>Sequence</th>
<th>Task</th>
<th>Description</th>
<th>Relevant Guide Chapters</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Manage Eligibility Profiles</td>
<td>Create and edit combinations of required and optional criteria to evaluate eligibility for benefit objects, Eligibility profiles are not required, but they are recommended.</td>
<td>Eligibility Profiles for Benefits and Other Objects</td>
</tr>
<tr>
<td>2</td>
<td>Manage Benefit Life Events</td>
<td>Configure employment, personal, and family changes for eligibility evaluation, enrollment, and disenrollment.</td>
<td>Life Events for Enrollment Opportunities Collapsing Life Events to Filter Enrollment Opportunities</td>
</tr>
<tr>
<td>3</td>
<td>Manage Year Periods</td>
<td>Define the time periods that programs or plans are in effect.</td>
<td>Program and Plan Creation and Validation</td>
</tr>
<tr>
<td>4</td>
<td>Manage Benefit Plan Types</td>
<td>Define and edit plan types to group benefit plans according to the type of benefit provided, such as medical, dental, or life insurance.</td>
<td>Benefits Object Hierarchy for Creating Offerings</td>
</tr>
<tr>
<td>5</td>
<td>Manage Benefit Options</td>
<td>Create reusable plan options, associate the allowable plan types with each option, and specify dependent and beneficiary designation requirements. Benefit options are not required in all cases, and it’s entirely possible to have a freestanding plan with no options beneath it.</td>
<td>Benefits Object Hierarchy for Creating Offerings</td>
</tr>
<tr>
<td>6</td>
<td>Manage Benefit Plans</td>
<td>Create and edit packages of benefit plan offerings and establish administrative procedures and rules for the plans.</td>
<td>Benefits Object Hierarchy for Creating Offerings Program and Plan Creation and Validation Program and Plan Basic Details Program and Plan Eligibility Program and Plan Enrollment Designation Requirements Plan Certifications Flex Credit Configuration Integrated Workbooks for Loading Data</td>
</tr>
<tr>
<td>Sequence</td>
<td>Task</td>
<td>Description</td>
<td>Relevant Guide Chapters</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>7</td>
<td>Manage Benefit Programs</td>
<td>Create and edit packages of benefit program offerings and establish administrative procedures and rules for the programs. Benefit programs are not required, but are helpful because they enable you to group many plans and plan types together for easier administration.</td>
<td>Benefits Object Hierarchy for Creating Offerings, Program and Plan Creation and Validation, Program and Plan Basic Details, Program and Plan Eligibility, Program and Plan Enrollment, Designation Requirements, Flex Credit Configuration, Integrated Workbooks for Loading Data.</td>
</tr>
<tr>
<td>8</td>
<td>Manage Rates</td>
<td>Create and edit rules for administering a periodic fixed or variable rate amount to be distributed to, or contributed by, participants.</td>
<td>Rate Creation and Calculation, Variable Rate Profile Creation, Benefit Coverages.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Program Creation Methods: Points to Consider
- Plan Creation Methods: Points to Consider
- Managing Benefits Objects in Integrated Workbooks: Overview
Implementing Global Payroll: Procedure

Oracle Fusion Global Payroll is a rules-based payroll management system enabling workforce cost controls that ensure the entire workforce is paid on time and according to compensation rules.

All documentation references are from the Oracle Global Human Resources Cloud Implementing Global Payroll guide, unless otherwise noted.
Prerequisite Tasks for Setting Up Global Payroll

The Define Payroll task list in the Setup and Maintenance work area contains most of the setup tasks required for payroll processing. However, you must first create any additional geographies and enterprise structures required for managing and reporting payroll information as follows:

1. Use the Define Geographies for HCM task list to verify predefined geographies and load any additionally required local geographies.
2. Use the Define Legal Entities for HCM task list to create a legislative data group for each country you operate in. Also create at least one legal entity designated as a payroll statutory unit for each legislative data group.
3. Use the Define Legal Reporting Units for HCM task list to create any additional tax reporting units that you need.
4. Use the Define Chart of Accounts for Enterprise Structures, and Define Accounting Configurations for HCM task lists to create charts of accounts, ledgers, and accounting calendars. When you create a bank for a payment source, you must select a legal entity that is assigned to a ledger for the associated legislative data group. These financial components are also required for payroll costing.

   - See: Payroll Task Lists chapter
     - Prerequisite Tasks for Payroll Setup: Overview
   - See: Key Payroll Concepts and Country Extensions chapters
     - Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together
     - Payroll Setup Tasks for Financials: Explained

Setting Up Global Payroll

The tasks in the following list relate to setup of the global payroll offering. These are the basic steps that must be set up to process payroll. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can run a payroll. Although the element template will create the formulas and balances needed to process that earning or deduction, you may want to create additional formulas or balances to customize your processing, therefore these tasks are included.

For setting up Global Payroll, each task is performed by the Application Implementation Consultant.

1. Manage country extensions.
   - Perform the Manage Features by County or Territory task to select the correct payroll product for each of your legislations to ensure that payroll-related features work correctly in your implementation.
   - See: Country Extensions chapter
     - Selecting Country Extensions: Critical Choices
     - Selecting Country Extensions: Worked Example

2. Manage consolidation groups.
   - Perform the Manage Consolidation Groups task to process the results from more than one payroll run in a single action or to process the results for one payroll in separate actions.
   - See: Pay Frequency chapter
     - Define Pay Frequency
     - Consolidation Group Usage: Examples
3. Manage payroll definitions.
   - Perform the Manage Payroll Definitions task to specify payroll processing parameters, such as payment frequency, payroll schedule and costing accounts.
   - See: Pay Frequency chapter
   - Payroll Definitions: Explained
   - Managing Payroll Definitions: Points to Consider
   - Creating Payroll Definitions: Worked Example

4. Manage elements.
   - Perform the Manage Elements task to define earnings and deductions.
   - See: Elements chapter
   - Elements: Explained
   - Element Eligibility: Explained
   - Element Classification Components: How They Work Together
   - See: Earnings chapter
   - Creating Earnings Elements for Payroll: Worked Example

5. Manage formulas (optional).
   - Perform the Manage Fast Formulas task to define generic expressions of calculations or comparisons to repeat with different input values.
   - See: Fast Formulas chapter
   - Using Formulas: Explained
   - Writing a Fast Formula using Text Editor: Worked Example
   - See: Oracle Global Human Resources Cloud Using Fast Formula guide

6. Manage balance definitions (optional).
   - Perform the Manage Balance Definitions task to define accumulations of numeric values over a period of time.
   - See: Balance Definitions chapter
   - Balance Definitions: Explained
   - Initial Balance Loading: Explained
   - See: Integrating with Oracle HCM Cloud guide

7. Manage payment methods.
   - Perform the Manage Payment Methods task to define the payment methods for employee and third-party payments.
   - See: Payment Methods chapter
   - Bank, Branch, and Account Components: How They Work Together
   - Organization Payment Methods: Explained
   - Creating Third-Party Payment Methods: Points to Consider
   - Entering Bank Information for Personal Payment Methods: Critical Choices

8. Manage cost allocation key flexfields.
   - Perform the Manage Cost Allocation Key Flexfield Setup task to configure cost, offset, default, suspense, and priority account key flexfield structures for each legislative data group.
See: Oracle Global Human Resources Cloud Implementing Payroll Costing guide

- Payroll Costing Components: How They Work Together
- Payroll Cost Allocation Key Flexfield Setup: Critical Choices

Implementing Payroll Interface: Procedure

Use predefined payroll interface extract definitions to send payroll-related employee information to a third-party payroll provider. The setup steps required for payroll interface vary depending on your business requirements.

From the Setup and Maintenance work area, you can set up and manage various features required for your implementation:

<table>
<thead>
<tr>
<th>Task Area</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Enterprise Structures</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Define Features by Country or Territory</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Manage Currencies</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Define Elements, Balances and Formulas</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Manage Data Security Policy</td>
<td>IT Security Manager</td>
</tr>
<tr>
<td>HCM Extract Definition</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Manage Payroll Process Configuration</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Manage Payroll Interface Extensible Flexfields</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td>Manage Payroll Interface Lookups</td>
<td>Application Implementation Consultant</td>
</tr>
</tbody>
</table>

Creating an Extract Definition

Use the Manage HCM Extract Definitions task to create the extract definition and process that extracts data from HCM for your third-party payroll provider. The requirements of your third-party provider determine which data to extract, and how to structure and deliver it.

Related Topics

- Creating Legal Entities, Registrations, and Reporting Units: Examples
- Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together
- Defining Payroll Elements for Payroll Interface: Worked Example
Implementing Absence Management: Overview

Use the Define Absences task list available in the Setup and Maintenance work area to set up absence management for your enterprise.

Getting Started

You implement Absence Management using the Absence Management functional area in the Workforce Deployment offering. Before you begin, use the Workforce Deployment section of the Setup and Maintenance work area to access reports for this offering. These reports include:

- Lists of setup tasks
- Descriptions of the functional areas and features you can select when you configure the offering
- Lists of business objects and enterprise applications associated with the offering

Absence Management Task Lists

You can access Absence Management setup tasks in the Setup and Maintenance work area by completing the following steps:

1. In the Offerings section, select Workforce Deployment.
2. In the Administration section, click Setup to open the Setup: Workforce Deployment page.
3. In the Functional Areas section, select Absence Management.
4. On the Absence Management section toolbar, show All Tasks.

If you already implemented Oracle Fusion Global Human Resources, which is required for Absence Management processing, you completed many prerequisite tasks. The following table describes the task lists for the Absence Management functional area:

<table>
<thead>
<tr>
<th>Task List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define General Absence</td>
<td>Use the tasks in this task list to review predefined lookups, value sets, and flexfields. You might want to add new values or update existing values before you set up the main absence components, such as absence types. The tasks in this task list are independent of specific absence components, and are not required to set up absences.</td>
</tr>
<tr>
<td>Define Absence Structures</td>
<td>Use the tasks in this task list to create these absence components:</td>
</tr>
</tbody>
</table>
|                          | • Absence Certifications  
|                          | • Absence Reasons  
|                          | • Absence Plans  
|                          | • Absence Types  
|                          | • Absence Categories       |
Task List | Description
--- | ---
Define Absence Formulas and Rates | The tasks in the Define Absence Structures task list already contain predefined rules that you can use to define your absence policies. However, to set up additional rules, use the Manage Fast Formulas task to write your own formulas and associate them with the absence components. Use the Manage Rate Definitions task if you want to define the rate of payment during absence periods that pertain to specific absence plans.

Define Absence Time Periods | Use the Manage Repeating Time Periods task if you want to create repeating periods to determine how often a worker accrues leave in an accrual term.

Define Eligibility | Use the Manage Eligibility Profiles task in this task list to determine the set of eligible workers who can use specific absence plans and absence types.

Setup Sequence
The following figure illustrates the sequence for setting up absence management:

1. Add new values to lookups, value sets, and flexfields based on your requirement. Write fast formulas to include rules in the absence objects in addition to the predefined ones. Create rate definitions to define payment rates for absence plans.

2. Create absence plans to define rules for time accruals and entitlements. Create certification requests that you want workers to complete to continue receiving entitlements during absence periods. Create absence reasons that you want workers to select while recording absences.

3. Create absence types, such as sickness leave or vacation, and associate each type with the relevant plans, reasons, and certifications.
4. Create absence categories, such as personal leave or medical leave, and associate them with the relevant absence types for reporting purposes.

### Related Topics
- Absence Management Components: How They Work Together
- Qualification Absence Plan Rules: Points to Consider
- Accrual Absence Plan Rules: Points to Consider
- Integrating Absence Management with Global Payroll: Procedure

### Implementing Compensation: Procedure

By using Oracle Fusion Compensation, your enterprise can attract, motivate, and retain talent by strategically planning, allocating, and communicating compensation. This is done through:

- **Salary Management**: Manage an individual worker’s salary basis, adjust base pay, and view salary history.
- **Individual Rewards**: Award variable compensation to individual workers outside of the regular compensation cycle, such as a spot bonus, education reimbursement, or car allowance.
- **Personal Contributions**: Workers can manage their own enrollment and voluntary contributions in company-sponsored savings and charitable contribution plans.
- **Workforce Compensation**: Create compensation plans and cycles used for compensating a group of workers.
- Total Compensation Statement: Maintain and analyze a statement that communicates compensation, rewards, and benefits to workers.
- Compensation Analysis and Reporting: Analyze compensation awarded to workers using delivered administrative and custom ad hoc reports.

The following figure illustrates the components of Oracle Fusion Compensation.

### Setting Up Compensation

The tasks in the following list relate to setting up Oracle Fusion Compensation. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use Compensation.

When setting up Compensation, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Global Human Resources Cloud Implementing Workforce Compensation guide.

1. Manage salary basis.
   - Perform the task Manage Salary Basis to create a salary basis that identifies the payroll details used to pay base earnings.
   - See: Base Pay chapter
   - Salary Basis: Critical Choices

2. Manage individual compensation plans.
   - Perform the task Manage Individual Compensation Plans to create plans for managers to award off-cycle compensation to individuals and for individuals to manage their own charitable and savings contributions.
3. Manage workforce compensation plans.
   - See: Overview, Worksheet Display, Column Properties, and Workforce Compensation Plan Details chapters
   - Define Workforce Compensation: Overview
   - Workforce Compensation Setup: Critical Choices
   - Workforce Compensation Components, Salary Components, and Action Reasons: Explained
   - Workforce Compensation Hierarchy Types: Points to Consider
   - Worksheet Tab Types: Explained
   - Configuring Column Properties: Points to Consider
   - Allocating Compensation by Percentage of Budget Amount: Points to Consider

4. Manage total compensation statements.
   - See: Total Compensation Statements chapter
   - Define Total Compensation Statements: Overview
   - Total Compensation Statement Building Blocks: How They Work Together
   - Compensation Items and Sources: Explained
   - Total Compensation Item Formula Type
   - Compensation Category Types: Explained
   - Total Compensation Categories and Subcategories: Critical Choices
   - Total Compensation Statement Definitions: Critical Choices
   - Total Compensation Statement Display Options: Points to Consider
   - Worked Examples for Total Compensation Statements

\[\textbf{Note:}\] You can create statement definitions using either of the following methods:
   - Create the item and category components as you the build statement hierarchy.
   - Define these building block components first, then associate them to a statement definition.
Implementing Profile Management: Procedure

An additional feature within the Human Resources implementation is Oracle Fusion Profile Management. Profile Management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements.

Setting Up Profile Management

The tasks in the following list relate to the setup of profile management. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use profile management.

For setting up Profile Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Global Human Resources Cloud Implementing Global Human Resources guide, Workforce
Profiles chapter. You can also view the Workforce Profiles chapter in the Oracle Talent Management Cloud Implementing Talent Management Base guide.

1. Manage content subscribers.
   - Perform the task Manage Content Subscribers to review subscriber codes for functional areas that use the content library and the specified content types for each functional area.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together
     - Content Subscribers: Explained

2. Manage profile rating models.
   - Perform the task Manage Profile Rating Models to create and update models for rating the performance, potential, and proficiency level of workers.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together
     - Rating Models: Explained

3. Manage educational establishments.
   - Perform the task Manage Educational Establishments to create and update a list of educational establishments that your workers have attended.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together

4. Manage profile content types.
   - Perform the task Manage Profile Content Types to create and update the different types of information to track in profiles.
   - See:
     - Content Types: Explained
     - Content Type Properties: Explained
     - Creating Content Types and Content Items: Worked Example

5. Manage profile content items.
   - Perform the task Manage Profile Content Items to create and update items for content types.
   - See:
     - Content Items: Explained
     - Creating Content Types and Content Items: Worked Example

6. Manage instance qualifiers.
   - Perform the task Manage Instance Qualifiers to create and update the qualifiers that identify unique occurrences of the same profile item.
   - See:
     - Instance Qualifier Sets: Explained

7. Manage profile types.
   - Perform the task Manage Profile Types to create and update templates for creating person and job profiles.
Implementing Goal Management: Procedure

In Goal Management, you can transform business objectives into goals across various organization levels, providing a clear line of sight from managers to employees. As a business leader, you can communicate high-level initiatives that managers can translate into goals for their subordinates.

See:
- Profile Types: Explained
- Content Section Properties: Explained
Setting Up Goal Management

The tasks in the following list relate to the setup of goal management. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use goal management.

For setting up Goal Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Goal Management guide.

1. Manage worker goal setting profile option values.
   - Perform the task Manage Worker Goal Setting Profile Option Values to define profile option settings and values to control behavior for goal management.
   - See Profile Options chapter
     - Goal Management Profile Options

2. Manage goal library.
   - Perform the task Manage Goal Library to create and update performance goals in a central library so that they are available for use in goal plans, performance documents, and talent reviews.
   - See Overview and Integrations and Goal Library chapters
     - Goals: How They Work with Profiles
     - Goal Library: Explained

3. Manage review periods.
   - Perform the task Manage Review Periods to create and manage review periods so that you can use them to organize your processes around goal management and performance evaluations into time bound business cycles.
   - See Review Periods chapter
     - Review Periods in Talent Management: Explained

4. Manage goal plans.
   - Perform the task Manage Goal Plans to manage and update goal plans.
   - See Goal Plans chapter
     - Goal Management: Explained
     - Goal Plans: Explained
     - Creating Goal Plans: Points to Consider

5. Manage goal eligibility profiles.
   - Perform the task Manage Eligibility Profiles to restrict goals to individuals.
   - See Eligibility Profiles chapter
     - Using Eligibility Profiles for Performance Goals Assignment: Explained
   - Manage goal management notifications.
     - Perform the task Manage Talent Notifications to enable or disable goal management notifications.
Implementing Career Development: Procedure

Workers and managers can use the Career Development work area to gain a comprehensive view of workers’ career information. They can see the workers’ career information and the detailed development plans they’ve established for achieving those targets. Both the worker and manager can view the worker’s career preferences and development plan in a single view.

Setting Up Career Development

The tasks in the following list relate to the setup of career development. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use career development.

For setting up Career Development, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Using Career Development guide.

1. Select feature choices
   - Select feature choices for Career Development under the Workforce Development offering to determine the behavior of career development as a product.
   - See Career Development Setup Overview chapter
     - Career Development Feature Choices: Points to Consider

2. Manage goal library.
   - Perform the task Manage Goal Library to create and update development goals in a central library so that they are available for use in development plans talent reviews, and talent pools.
   - See Goal Library and Development Goal Integrations chapters
     - Goal Library: Explained
     - Career Development: How It Works with Profiles
Implementing Performance Management: Procedure

In Performance Management, you create performance documents to evaluate workers on their competencies and performance goals.
Setting Up Performance Management

The tasks in the following list relate to the setup of the performance management offering. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use Performance Management.

For setting up Performance Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Performance Management guide.

1. Manage worker performance profile option values.
   - Perform the task Manage Worker Performance Profile Option Values to set profile options for Oracle Fusion Performance Management to define the rating model used in analytics and worker comparisons, the range of years of performance documents to display, and autosave interval.
   - See Profile Options chapter:
     - Oracle Fusion Performance Management Profile Options: Critical Choices
     - What happens when I enter the default rating model profile option?

   - Perform the task Manage Talent Performance Notifications to enable or disable Performance Management notifications.

3. Manage performance roles.
   - Perform the task Manage Performance Roles to define roles to expand the scope of the performance evaluations to include feedback from participants other than the worker and the worker’s manager.
   - See Performance Roles chapter:
     - Participant Feedback: Explained
     - Performance Roles: Explained

4. Manage eligibility profiles.
   - Perform the task Manage Eligibility Profiles to create and update combinations of criteria to determine eligibility for performance documents.
   - See Eligibility Profiles chapter:
     - Using Eligibility Profiles with Performance Documents: Explained
     - Using Eligibility Profiles with Performance Documents: Examples

5. Manage process flow definitions.
   - Perform the task Manage Process Flow Definitions to create process flows for performance evaluations to determine which tasks to include, and the order the tasks are performed.
   - See Performance Process Flows chapter:
     - Performance Process Flow Setup: Points to Consider
     - Performance Process Flows: Examples

6. Manage sections.
   - Perform the task Manage Sections to create the sections to include in the performance document template.
   - See Performance Template Sections chapter:
     - Performance Template Section: Critical Choices
   - Perform the task Manage Performance Document Types to create performance document types to differentiate types of performance evaluations, such as annual or project-specific.
   - See Performance Document Types and Overview and Integrations chapters:
     - Performance Document Types: Explained
     - Performance Document Components: How They Work Together

8. Manage questions.
   - Perform the task Manage Questions to create questions and format question types to use in questionnaires.
   - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
     - Questionnaire Question and Response Types: Explained
     - Participant Feedback: Explained
     - Performance Process Flow Setup: Points to Consider

9. Manage questionnaire templates.
   - Perform the task Manage Questionnaire Templates to define questionnaire templates from which to create questionnaires to use to solicit feedback.
   - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
     - Questionnaire Templates: Explained
     - Participant Feedback: Explained
     - Performance Process Flow Setup: Points to Consider

10. Manage questionnaires.
    - Perform the task Manage Questionnaires to define questionnaires to determine the layout, and add questions and sections to use to solicit performance feedback.
    - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
      - Questionnaires: Explained
      - Creating a Questionnaire: Procedure
      - Participant Feedback: Explained
      - Performance Process Flow Setup: Points to Consider

11. Manage performance templates.
    - Perform the task Manage Performance Templates to create templates for performance documents, including the structure, processing rules, content, and periods.
    - See Performance Templates chapter:
      - Setting Up the Performance Template: Critical Choices
      - Defining Processing Roles for Performance Template Sections: Points to Consider
      - Associating Eligibility Profiles with Performance Templates: Points to Consider
      - Creating a Performance Template: Worked Example
12. Manage target ratings distribution.
   - Perform the task Manage Target Ratings Distribution to define the target distribution of performance ratings to compare the desired and actual ratings distributions.
   - See Target Ratings Distribution and Performance and Potential Box Chart Labels chapters
     - Rating Model Distributions: Explained
     - Performance and Potential Box Chart: Explained

13. Manage eligibility batch process.
   - Perform the task Manage Eligibility Batch Process to determine which performance documents a population of workers is eligible to use for their performance evaluation.
   - See Eligibility Batch Process chapter
     - Performance Document Eligibility Batch Process: Explained
Implementing Talent Review: Procedure

Talent Review is centered on one or more talent review meetings intended to evaluate organizational trends, assess strengths, and address areas of risk for an entire organization.

Setting Up Talent Review

The tasks in the following list relate to the setup of the talent review offering. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can create a talent review.
For setting up Talent Review, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Talent Review and Succession Management guide.

1. **Manage talent review profile option values.**
   - Perform the task **Manage Talent Review Profile Option Values** to specify the folder to store analyses from which to select the review population for a meeting.
   - See **Talent Review Profile Options and Descriptive Flexfields** chapter:
     - Oracle Fusion Talent Review Profile Options

2. **Manage talent review notifications.**
   - Perform the task **Manage Talent Review Notifications** to enable or disable talent review notifications.

3. **Configure talent review dashboard options.**
   - Perform the task **Configure Talent Review Dashboard Options** to configure the options for the talent review meeting component, including the dimensions and visual attributes of the box chart analytic.
   - See **Talent Review Templates** chapter:
     - Talent Review Template: Explained
     - Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices
     - Talent Review Data Options: Points to Consider

4. **Manage talent review note types.**
   - Perform the task **Manage Talent Review Lookups for HRT_NOTES_TYPE** to categorize review notes for future reference.
   - See **Talent Review Tasks and Notes** chapter:
     - Talent Review Notes: Explained

5. **Manage potential assessment.**
   - Perform the task **Manage Potential Assessment** to configure a questionnaire that talent review meeting reviewers can use to rate the potential of workers prior to the meeting.
   - See **Potential Assessment** chapter

---

**Implementing Succession Management: Procedure**

In Succession Management, you create succession plans to determine who will eventually replace personnel currently in key positions, and create talent pools to track and manage employee development.

**Setting Up Succession Management**

The task in the following list relates to the setup of the succession management offering. This is the basic step for setup. The task appears in the setup task list that was generated in the Setup and Maintenance work area; however, this task does not need to be performed before you can use succession management.
For setting up Succession Management, the task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Talent Review and Succession Management guide.

1. Manage succession management lookups.
   - Perform the task Manage Succession Management Lookups to review and maintain HRM_READINESS_CATEGORY lookup values that are assigned to succession plan incumbents and succession plan candidates to categorize their readiness to succeed to positions.
   - See:
     - Succession Management: Explained
     - What happens if I remove a readiness category lookup?
Application Users

Defining Application Users for Oracle HCM Cloud Service: Explained

Application users are the intended users of the Oracle Human Capital Management Cloud (Oracle HCM Cloud) service. They inherit appropriate abstract roles, such as Employee and Line Manager. They also inherit job roles, such as Payroll Manager and Benefits Specialist, from locally defined data roles. These abstract and job roles enable application users to perform their tasks.

This table identifies the main predefined job roles for major components and options of Oracle HCM Cloud.

<table>
<thead>
<tr>
<th>Cloud Service or Option</th>
<th>Predefined Job Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>Benefits Administrator, Benefits Manager, Benefits Specialist</td>
</tr>
<tr>
<td>Global Payroll</td>
<td>Payroll Administrator, Payroll Manager</td>
</tr>
<tr>
<td>Payroll Interface</td>
<td>Payroll Coordinator</td>
</tr>
<tr>
<td>Talent Management</td>
<td>Human Resource Manager, Human Resource Specialist</td>
</tr>
<tr>
<td>Time and Labor</td>
<td>Time and Labor Administrator, Time and Labor Manager</td>
</tr>
<tr>
<td>Compensation Cloud</td>
<td>Compensation Administrator, Compensation Analyst, Compensation Manager, Compensation Specialist</td>
</tr>
</tbody>
</table>

For information about the roles and privileges inherited by each of these roles, see the Oracle Human Capital Management Cloud Security Reference guide.

Preparing for Application Users

Many implementation tasks concern preparing your Oracle HCM Cloud service for application users. Decisions made during this phase determine how you manage users by default. You perform these tasks:

- Manage Application Security Preferences
  - Defines the default format of user names for the enterprise
  - Sets the enterprise password policy
  - Manages the notification of user and password events, such as password expiration, to application users.

- Manage Enterprise HCM Information
Sets these options for the enterprise:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Account Creation</td>
<td>Controls whether user accounts are created automatically when a person record is created using the New Person task flows</td>
</tr>
<tr>
<td>User Account Role Provisioning</td>
<td>Controls whether role provisioning and deprovisioning requests are processed by default</td>
</tr>
<tr>
<td>User Account Maintenance</td>
<td>Controls whether requests to suspend and reactivate user accounts are processed by default</td>
</tr>
</tbody>
</table>

**Tip:** Some enterprises use applications other than Oracle HCM Cloud to manage user and role provisioning. In this case, you set the User and Role Provisioning options to prevent automatic creation and management of user accounts.

### Setting Up Default Role Provisioning

Role provisioning rules, also known as role mappings, determine which data and abstract roles users can have and how they acquire them. During implementation, you create role mappings to provision standard roles, such as Employee and Line Manager, automatically to application users. You may also create some HCM data roles and create appropriate role mappings for them. Perform the Manage Role Provisioning Rules task to create role mappings.

### Creating Application Users

During implementation, you can create test application users:

- Using the Create User task
- On the Security Console, if you have the IT Security Manager job role or privileges

Once the implementation is complete, application users can be created automatically:

- When a person record is created using a New Person task flow, such as Hire an Employee or Add a Contingent Worker. By default, human resource specialists and line managers can perform the New Person tasks. Whether user accounts are created for new person records is controlled by the **User Account Creation** enterprise option.
- When person records are loaded in bulk using HCM Data Loader. For these person records, you set the **GenerateUserAccount** attribute to Y to request a user account.

When user accounts are created, roles are provisioned to them automatically, as specified by current role mappings.

For more information about application users, roles, and role mappings, see the Securing Oracle HCM Cloud guide. For more information about loading person records in bulk using HCM Data Loader, see the Integrating with Oracle HCM Cloud guide.
5 HCM Work Areas and User Roles

Human Resources Work Areas: Explained

The Human Resources user roles include Human Resources Manager, Human Resources Specialist, and Human Resources Analyst. They perform tasks in some or all of these work areas:

- **Data Exchange** - Extract or load data, purges batches, transfers batches, views batch status analytics
- **Workforce Structures** - Manage positions, locations, jobs, grades, and HR organizations
- **Human Resources Dashboard** - Provide real-time information regarding human resources flows
- **New Person** - Hire employees and adds contingent workers and non-workers
- **Person Management** - Manage person related data such as name, address, communications, and documentation
- **Mass Updates** - Manage mass updates
- **Document Records** - Manage and reports on documents
- **Workforce Modeling** - Manage reorganization proposals and assess their impact
- Reputation Administration - Manage monitoring of employees' social networks

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources Manager</td>
<td>Data Exchange → Workforce Structures → New Person</td>
</tr>
<tr>
<td></td>
<td>Person Management → Mass Updates → Document Records</td>
</tr>
<tr>
<td>Human Resources Specialist</td>
<td>Data Exchange → Workforce Structures → Human Resources Dashboard</td>
</tr>
<tr>
<td></td>
<td>New Person → Person Management → Mass Updates</td>
</tr>
<tr>
<td></td>
<td>Workforce Processes → Reputation Administration</td>
</tr>
<tr>
<td>Human Resources Analyst</td>
<td>Data Exchange → Workforce Structures → Workforce Modeling</td>
</tr>
</tbody>
</table>

**Benefits Work Areas: Explained**

The Benefits user roles perform tasks in several work areas:

- Plan Configuration - Manage benefits setup
- Enrollment - Manage administration of employee population benefits
- Evaluation and Reporting - Manage benefits processes and reports

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Administrator</td>
<td>Plan Configuration</td>
</tr>
<tr>
<td>Benefits Manager</td>
<td>Enrollment</td>
</tr>
<tr>
<td>Benefits Specialist</td>
<td></td>
</tr>
<tr>
<td>Benefits Administrator</td>
<td>Evaluation and Reporting</td>
</tr>
<tr>
<td>Benefits Manager</td>
<td></td>
</tr>
<tr>
<td>Benefits Specialist</td>
<td></td>
</tr>
</tbody>
</table>

**Compensation User Roles and Task Types: Explained**

The Compensation Cloud user roles perform several types of tasks:

- **Plan Configuration** - Configure and manage compensation plan design, salary bases and total compensation statement design.
- **Manage Worker Compensation** - View and manage worker compensation information such as adjusting salaries, managing workforce compensation cycles, and allocating individual compensation awards.
- **Analyze Compensation** - Analyze, model, budget and allocate compensation across borders and boundaries.
• Compensation Specialist - Manage salary and individual compensation in a help desk role
• Compensation Approver - Authorized to approve a workforce compensation worksheet, but isn’t necessarily a line manager who has access to the Workforce Compensation work area

### Global Payroll Work Areas: Explained

The Global Payroll user roles perform tasks in several work areas:

- Data Exchange: Manage extract definitions for payroll reports
- Payroll Administration: Create and load batches, maintain personal payroll information, and manage elements and related items
• Payroll Dashboard: Monitor real-time information regarding payroll flows
• Payroll Calculation: Calculate, validate, and balance payroll, maintain personal payroll information, and confirm payroll readiness
• Payroll Checklist (appears as Checklists in the Navigator menu): Confirm payroll readiness and calculate, validate, and balance payroll
• Payment Distribution: Calculate payment distributions and distribute payroll payments
• Accounting Distribution: Distribute payroll accounting information and calculate cost distributions
• Regulatory and Tax Reporting: Manage regulatory and tax reporting information
Time and Labor Work Areas: Explained

Time and Labor user roles perform tasks in these work areas:

- **Setup and Maintenance**: Time and labor administrators and implementors set up and maintain time entry configuration, rules, and setup profiles.
- **Time Management**: Time and labor managers and administrators resolve time cards with transfer failures and review incomplete time transfer processes.
- **Time**: Workers create and edit time cards and enter time in a calendar.

Absence Management Work Areas: Explained

Absence Management user roles perform tasks in these work areas:

- **Setup and Maintenance**: Implementers set up absence management components, such as absence plans, absence types, absence reasons, absence categories, and certifications.
- **Absence Administration**: HR specialists perform ongoing maintenance tasks related to absence components. HR specialists run batch processes to enroll employees in absence plans, calculate accrual balances and entitlements, and review certification due dates.
- **Maintain Absence Records and Entitlements**: HR specialists schedule absences for employees, enroll employees in absence plans, review plan balances and entitlements, calculate accruals, and perform adjustments on plan balances.
- **My Portrait**: Employees schedule absences.
- **Manager Dashboard**: Managers review absence analytics, such as absence trends in direct reports and absence totals.

Talent Management Work Areas: Explained

Talent Management includes the following work areas:

- **Goals**: includes tasks such as managing the goal library and goal plans, assigning goals, and managing your own performance goals and those of your organization and your direct reports.
- **Career Development**: includes tasks to manage worker development goals, establish targets for achieving the goals and career growth, and view comprehensive worker career information.
- **Performance**: includes tasks that facilitate setting up, monitoring, and administering performance documents.
- **Talent Review**: includes access to the Overview pages for talent review meetings, where you can access meetings, prepare review content, and so on.
- **Profiles**: includes tasks for searching model and person profiles, and for managing model profiles.
- **Succession Plans**: includes tasks to create and manage succession plans and talent pools.
- **Learning**: includes tasks to manage your own learning and learning for your team, including publishing or recommending videos, and assembling tutorials.
6 Data Upload

Uploading Data for Oracle Human Capital Management Cloud: Explained

You can upload business-object data in bulk to Oracle Human Capital Management Cloud (Oracle HCM Cloud) using a variety of tools. This topic introduces the main ways of uploading data. For more information about any of these data-loading tools, see the Integrating with Oracle HCM Cloud guide.

HCM Data Loader
Use HCM Data Loader to load data in bulk from any source to Oracle HCM Cloud. HCM Data Loader loads:

- Complex, hierarchical data
- Large volumes of data, such as complete system extracts
- Object history

You can use HCM Data Loader for both data migration and ongoing data maintenance. Major benefits of HCM Data Loader include support for:

- Most HCM business objects
- Incremental or partial data loading
- Four types of keys to identify records uniquely
- Configured descriptive flexfields and extensible flexfields, translation data, tree hierarchies, person images, and document-record attachments

HCM Data Loader provides:

- A comprehensive user interface for initiating data upload, monitoring progress, and reviewing errors
- Support for loading data from delimited data files (.dat files)
- A template file for each supported business-object hierarchy, which you can use as the basis for your own data files
- A user interface for reviewing the structure and attributes of every supported business-object hierarchy
- A web service that you can use to automate data upload

You access HCM Data Loader tasks in the Data Exchange work area. You must have the Human Capital Management Integration Specialist job role or privileges.

HCM Spreadsheet Data Loader
Use HCM Spreadsheet Data Loader to import data to the HCM Data Loader stage tables from spreadsheets. HCM Spreadsheet Data Loader supports most of the business objects that HCM Data Loader supports. Spreadsheets offer many advantages. For example:

- Spreadsheets are easy to use.
- You can create custom spreadsheet templates and generate spreadsheets tailored to your business case. For example, you can omit attributes, change attribute order, change attribute labels, and add help text.
You can save data periodically from a spreadsheet to the stage tables. Therefore, you can load large volumes of records without being prevented by limits on spreadsheet size.

- Errors are reported in the spreadsheet and you can correct them there.
- You can mix your use of spreadsheets with use of HCM Data Loader .dat files. For example, you can load data from a spreadsheet but maintain it using .dat files.

You can use HCM Spreadsheet Data Loader as described here only if the HCM Data Loader Scope parameter is set to **Full**. This parameter has been set to **Full** by default for all new customers since Release 10 and can’t be changed.

All users must set up desktop integration for Microsoft Excel to use any spreadsheet loader, including HCM Spreadsheet Data Loader.

You access HCM Spreadsheet Data Loader tasks in the Data Exchange work area. You must have the Human Capital Management Application Administrator job role or privileges.

**Payroll Batch Loader**

You can load payroll data for initial migration or ongoing maintenance using the payroll batch loader. You can load the data from either a spreadsheet or a file.

Use the Batch Loader task in the Payroll Administration, Data Exchange, or Checklist work area to perform the following actions:

1. Enter the data in a workbook format that’s specific to the object type, or create a batch from a file using a transformation formula.
2. Import your data to the payroll batch loader stage tables.
3. Validate the data in the stage tables.
4. Submit the Transfer Batch flow to load the data to the application tables.

You can use the payroll batch loader and predefined batch processes to load element entries and other payroll data on an ongoing basis. You can automate the submission of the flows using the Flow Actions web service.

**Object-Specific Spreadsheet Loaders**

Oracle HCM Cloud provides many spreadsheet loaders for specific object types. For example:

- On the Manage Jobs page, you can select the **Create in Spreadsheet** option.
- On the Manage Goal Library page, you can click **Upload** to generate a spreadsheet to upload goals.
- On the Plans subtab in the Plan Configuration work area, you can click **Prepare in Workbook** to generate a spreadsheet to upload benefit plans.

Object-specific spreadsheet loaders are available for many global HR, talent, compensation, and benefits objects. In most cases, you:

- Create the spreadsheet on the page where you manage the object.
- Load the objects directly to the application tables.
- Correct any errors in the spreadsheet and load the corrected objects again.

In many cases, you can both create and update the object in a spreadsheet.

Single-object spreadsheets are most useful for users, such as human resource specialists and benefits specialists, who are creating objects of a specific type in bulk. For example, they may be loading such objects from third-party suppliers. You’re less likely to use these types of spreadsheet loaders for ongoing integrations. Users with access to tasks such as Manage Jobs or Manage Goal Library can also load objects from relevant spreadsheets.
Glossary

descriptive flexfield
Expandable fields used for capturing additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

development plan
Plan that contains a worker’s active development goals including goal details such as their due date, completion percentage, and development intent.

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

extensible flexfield
Expandable fields that you can use to capture multiple sets of information in a context or in multiple contexts. Some extensible flexfields let you group contexts into categories.

job role
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

stage table
An intermediate table to which records are loaded from a spreadsheet or file and where some validation occurs.