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

Using Oracle 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 the Oracle Help Center to find guides and videos.

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

You can also read about it instead.

Additional Resources

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

• 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>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</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.

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1 Oracle HCM Cloud Introduction

About This Guide

This guide gives an overview of implementing Oracle Human Resources, a key part of the Oracle Human Capital Management (HCM) Cloud product group. It covers what you need to create a pilot implementation, but doesn’t list all the setup and security tasks for a complete implementation. For an implementation in the fastest time possible, you should work with a system integrator or consultant.

Overview of HCM Deployment Options

You can deploy Oracle Human Resources in many ways:

- Public Cloud - You subscribe to Oracle Human Resources Cloud with no requirements to buy additional licenses or support. Oracle or our business partners host the services over the Internet.
- Private Cloud - Oracle or our business partners host the application internally behind a firewall. Oracle provides management, monitoring, patching, security, and upgrade services.
- Hybrid - You can choose to maintain your existing legacy applications on premise and buy products that are hosted in the private or public cloud, or any combination of these options.

Overview of Oracle HCM Cloud Service

Oracle HCM delivers a complete solution that includes human resources, talent and workforce management. With Oracle HCM you can create better resource plans, drive employee alignment, and work on the go with mobile access. Here’s a partial list of products and features.

- Human Resources (HR)
  - Human Resources
  - Workforce Directory
  - Workforce Predictions
  - Workforce Modeling
  - HR Help Desk
  - Workforce Health and Safety Incidents
  - Benefits
  - Payroll
  - Work Life Solutions
• Talent Management
  ◦ Recruiting (Talent Acquisition)
  ◦ Goal and Performance Management
  ◦ Compensation
  ◦ Career Development
  ◦ Talent Review and Succession
  ◦ Learning

• Workforce Management
  ◦ Time and Labor
  ◦ Absence Management

Overview of Application Page Components and Analytics

Application pages contain some or all of these sections:
• Navigation tools in the global area at the top of the page, including a Navigator, Search field, Notifications, and Settings and Actions
• Work area with links or icons you can click
• Quick Actions
• Things to Finish list
• News area
• Analytics

Embedded Analytics
Embedded analytics can help you decide what to do based on application data.

Real-Time Reporting
Real-time reporting gives you relevant reports and analytics for each work area. You can use the predefined analyses or create your own analyses.

Interactive Dashboards
Here are some things you can see from interactive dashboards:
• Summaries that show a view of the big picture
• Information monitoring that offers quick actions and areas to explore
Overview of Working with Your System Integrator

Your system integrator or Oracle consultant can help you with a smooth transition to the Oracle HCM Cloud Service. They will get you up and running in the fastest time possible.

After you decide the offerings you want, implement Human Resources first. Other offerings, such as Talent Management, depend on Human Resources being implemented.
2 Get Started with Oracle HCM Cloud

Purchase and Activation of Oracle Cloud Application Services

The process involves:

- 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

Service Purchase and Activation

- 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: Buy an Oracle Cloud Subscription

- 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: Activate Your Order from Your Welcome Email

Service Verification

- 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 Your Services Are Ready

- Manages and monitors the service. Refer to the Oracle Cloud: Managing and Monitoring Oracle Cloud guide.

See: My Account Administration

See: Performing Service-Specific Tasks

- 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

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 Preferences</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>Import Users and Roles into Application Security</td>
<td>Runs a process that initializes and maintains the Oracle Fusion Applications Security tables.</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.

Generate the Setup Task List for HCM

To start an implementation of Oracle HCM Cloud Service, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. See the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.
About the HCM Feature Offerings
This figure shows the offering in which each HCM feature is located. Note that this is a partial list of features.

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

This procedure identifies how to access 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 in the Navigator to go to the Setup and Maintenance work area.
   - See: Overview chapter - Manage Application Implementation: Overview

3. In the Setup page, select the offering you want to implement.
   You can enable only the functional areas you are implementing now and add more later, if required. The primary functional areas of this offering are:
   - Workforce Deployment
   - Workforce Development
   - Compensation Management
   - Recruiting and Candidate Experience
See: Managing Setup Using Offering Functional Areas: Procedure

For more information, see:

- See: Gathering Your Implementation Requirements chapter
- See: Gathering Your Implementation Requirements chapter - Offerings Explained
- See: Managing an Application Implementation chapter - Implementation Project Task Lists: Explained
- Entering Setup Data Using Assigned Tasks: Procedure

Related Topics

- Update Existing Setup Data
- Configure Offerings
- Enter Setup Data Using Assigned Tasks
Implement Human Resources

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 aren’t 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 don’t 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’re 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’re 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’s an additional option to print a paper 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
How You Implement Benefits

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 Benefits Administrator job role perform each Benefits setup task. The following table describes the basic setup tasks that you must perform. Relevant chapters included in this guide cover the details of these tasks.
<table>
<thead>
<tr>
<th>Sequence</th>
<th>Task</th>
<th>Description</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 aren't required, but they're recommended.</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>
</tr>
<tr>
<td>3</td>
<td>Manage Year Periods</td>
<td>Define the time periods that programs or plans are in effect.</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>
</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 aren't required in all cases, and it's entirely possible to have a freestanding plan with no options beneath it.</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>
</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 aren't required, but are helpful because they enable you to group many plans and plan types together for easier administration.</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>
</tr>
<tr>
<td>9</td>
<td>Manage Elements</td>
<td>Define benefit elements.</td>
</tr>
</tbody>
</table>
Implement Global Payroll

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.

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 which 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 don’t 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 configure 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.
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

Implement Payroll Interface

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.

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>
</tbody>
</table>
Create 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
- Create Legal Entities, Registrations, and Reporting Units

Overview of Implementing Absence Management

Configure absence plans, types, categories, certifications, and reasons for employees, including formulas, eligibility profiles, and rates. These tasks in the Setup and Maintenance work area are part of the Workforce Deployment offering in the Absence Management functional area.

Getting Started

Before you begin, review the following documents available in the Absence Management functional area:

- 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

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.

<table>
<thead>
<tr>
<th></th>
<th>Lookups</th>
<th>Value Sets</th>
<th>Flexfields</th>
<th>Fast Formulas</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Eligibility Profiles</td>
<td>Rate Definitions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Absence Plans</th>
<th>Absence Certifications</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Absence Types</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Absence Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

**Implement Compensation**

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.
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 don’t 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.
   - See: Individual Compensation Plans chapter
     - Individual Compensation Plans: Explained
3. Manage workforce compensation plans.
   - Perform the task Manage Compensation Plans to create and manage workforce compensation plans and associated budget details.
   - 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.
   - Perform the Manage Statement Definitions task to set up templates that determine the layout and content of the generated total compensation statements.
   - Perform the Manage Compensation Categories task to create categories that group similar or related compensation items, for example, Cash Compensation, Benefits, Time Off, or Stock History.
   - Perform the Manage Compensation Items task to define items that represent, for example, the actual amounts paid to workers, costs incurred by the company, or value of accrued time off.
   - 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

**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.

Implement Profiles

Profile Management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. You use Talent Profiles to summarize the qualifications and skills of a person or a workforce structure, such as a job. Talent Profiles can help you track employee skills, competencies, and
accomplishments. You may find this useful in career planning, identifying training needs, performance management, goal management, and the recruiting process.

Talent profiles was enhanced in release 19C and customers must upgrade to enhanced talent profiles before HCM Cloud release 20B. For more information, see My Oracle Support: Upgrading Oracle Fusion Profile Management (Doc ID 2421964.1).

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 don’t 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

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

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
     - Content Type Properties
     - 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
     - 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

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

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
- Content Section Properties
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 don't 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're 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.
Implement Career Development

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 have 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 don't 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're 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
Implement Performance Management

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.
   - 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
Implement Talent Review

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 don’t 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

Implement Succession Management

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. In this topic, you will get an overview of how you can implement the Succession Management feature. For more information, see the Oracle Talent Management Cloud Implementing Talent Review and Succession Management and Oracle Human Capital Management Cloud Securing HCM guides.

Setting Up Succession Management

You must be an Application Implementation Consultant to set up Succession Management.
To implement Succession Management, do these steps:

1. Enable the Workforce Development offering if not already enabled.
2. Enable the Succession Management feature.
3. Identify the users who will be succession plan owners and ensure that they inherit the Succession Plan Management duty role. The HR specialist job role inherits this duty role by default.
4. Identify users who you want to manage all succession plans. Create a super user job role and provision the job role directly to these users. Enable users with this super user job role to access Oracle Transactional Business Intelligence (OTBI) subject areas.
5. Configure access to lists of succession plan incumbents and candidates if you want to present different lists of workers to HR specialists and line managers when they're selecting incumbents and candidates.
6. Use the Manage Succession Management Lookups task in the Setup and Maintenance work area to manage the succession management lookups.
   - Review the HRM_SUCCE_PLAN_TYPE lookup. Set the Display Sequence value of the Plan Type option that you want to be the default to 1.
   - Review and maintain HRM_READINESSCATEGORY lookup values that are assigned to succession plan incumbents and succession plan candidates to categorize their readiness to succeed to positions.
7. Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for the succession management business process.
8. Ensure that talent pool owners have the security privilege to access the Succession Plans work area.
9. Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for talent pools.

**Related Topics**

- Configure Offerings
- Duty Role Components
- Overview of How To Secure Access to Succession Plans, Incumbents, and Candidates
- Succession Management Lookups
- Descriptive Flexfields for Talent Pools
4 Application Users

Application Users for Oracle HCM Cloud Service

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

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 nonworkers
- 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, Person Management, Mass Updates, Document Records</td>
</tr>
<tr>
<td>Human Resources Specialist</td>
<td>Data Exchange, Workforce Structures, Human Resources Dashboard, New Person, Person Management, Mass Updates, 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

You can perform tasks in several work areas depending on your role. If you're someone who's setting up benefits, such as programs and plans, you use the Plan Configuration work area. If you're managing benefits enrollments for individual
employees, use the Enrollment work area. If you're in the business of managing benefits processes that affect all or specific groups of employees, you use the Evaluation and Reporting work area.

### Compensation User Roles and Task Types

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Task Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Administrator</td>
<td>Plan Configuration</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>Manage Worker Compensation</td>
</tr>
<tr>
<td>Compensation Analyst</td>
<td>Analyze Compensation Management</td>
</tr>
</tbody>
</table>

Global Payroll Work Areas

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Manager (Global Payroll)</td>
<td><img src="image1" alt="Diagram" /></td>
</tr>
<tr>
<td>Payroll Administrator (Global Payroll)</td>
<td><img src="image2" alt="Diagram" /></td>
</tr>
<tr>
<td>Payroll Coordinator (Global Payroll)</td>
<td><img src="image3" alt="Diagram" /></td>
</tr>
</tbody>
</table>
Time and Labor Work Areas

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

Absence Management user roles perform tasks in these work areas:
- **Setup and Maintenance**: Implementors 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.
- **Time**: Employees schedule absences.
- **Manager Dashboard**: Managers review absence analytics, such as absence trends in direct reports and absence totals.

Talent Management Work Areas

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.
- **Hiring**: includes tasks to source and screen candidates and create job requisitions and job offers.
- **Learning**: includes tasks to manage your own learning and learning for your team, including publishing or recommending videos, and assembling tutorials.
6 Data Upload

Ways to Upload Data for Oracle Human Capital Management Cloud

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

With HCM Data Loader, you can load data in bulk from any source to Oracle HCM Cloud. You can load:

- 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

Here are several useful features of HCM Data Loader:

- 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

Another tool you can use to load data is HCM Spreadsheet Data Loader, which imports 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. So 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 spreadsheet uploads with 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.

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.

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.