

Oracle Fusion Cloud Human Resources

Implementing Global Human Resources

23C



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Get Help

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

Get Help in the Applications

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.

Get Support

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

Get Training

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

Join Our Community

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

Learn About Accessibility

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

Share Your Feedback

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You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Overview

Overview of Global Human Resources

To start an implementation of Global Human Resources, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements.

Refer to the Oracle Fusion Cloud Applications Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

Workforce Deployment Offering

Use this offering to align resources and people with business objectives, and enter and maintain information related to people, employment, and work structures.

The following table specifies the primary functional areas of this offering. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

Functional Area	Description
Enterprise Profile	Manage geographies, file import, reference data, and data access for users.
Legal Structures	Manage information related to legal entities - jurisdictions, authorities, addresses, registration, and tax profile.
Organization Structures	Manage business units and business unit set assignment.
Workforce Structures	Manage work structures including legislative data groups, enterprise information, locations, departments, divisions, reporting establishments, department, position, and organization trees, disability organizations, grades, grade rates, grade ladders, jobs, and positions. You can also define seniority dates, collective agreements, and worker unions.
HCM Data Loader	Configure HCM Data Loader and HCM Spreadsheet Data Loader for bulk data loading. Import and load data using HCM Data Loader. Manage access to spreadsheet templates, and configure spreadsheets to suit business needs.
Workforce Information	Manage your workforce information including banks, actions, assignment statuses, checklist templates, document types, and eligibility profiles.
Elements and Formulas	Define elements for base pay, absences, benefits, time and labor, and payroll. You can also define formulas for specific areas such as payroll calculation.
Payroll	Manage payroll legislations, payroll and time definitions, fast formulas, and rate definitions.

Functional Area	Description
Benefits	Configure eligibility profiles for checklists.
Absence Management	Configure absence plans, types, categories, certifications, and reasons for employees, including formulas, eligibility profiles, and rates.
HCM Data Extract	Define extract definitions for HCM.
Time and Labor	Define time entry, processing, and device processing configurations, including entry field and layouts, time categories and consumers, validation and calculation rules, groups and profiles.
Workforce Health and Safety Incidents	Define settings for environment, health, and safety.

Related Topics

- [Plan Your Implementation](#)

Overview of Implementing Global Human Resources

This guide describes how to use the task lists and tasks in the Workforce Deployment offering to implement Oracle Fusion Cloud Global Human Resources. This topic explains the scope of this guide and summarizes the setup tasks.

The following table lists the task lists within Workforce Deployment that are covered in other guides:

Task List	Guide
Define Batch Data Loads Define Extracts	Oracle Fusion Cloud HCM HCM Data Loading Business Objects Note: This guide also covers Oracle Taleo Recruiting Cloud Service Integration. Oracle Fusion Cloud HCM HCM Extracts
Define Security for Human Capital Management	Oracle Fusion Cloud HCM Securing HCM
Define Payroll Define Payroll Legislations	Oracle Fusion Cloud Human Resources Implementing Global Payroll
Define Absences	Oracle Fusion Cloud Human Resources Implementing Absence Management
Define Transactional Business Intelligence Configuration	Oracle Fusion Cloud HCM Administering Analytics and Reports for HCM

Task List	Guide

Setup Tasks for Implementing Oracle Global Human Resources

To implement Oracle Global Human Resources, sign-in as a user with Application Implementation Consultant role and opt into the offerings applicable to your business requirements. Other users must include the Functional Setup User role in addition to other roles or privileges needed to perform specific setup activities.

Before you begin implementing Oracle Global Human Resources, you must complete the initial application setup.

This table lists the setup tasks required to implement the Oracle Global Human Resources. You can do the task configurations using the Setup and Maintenance work area on the **My Enterprise** tab on the Home page.

Implementation Tasks List	Task Name	What You Must Do	Where to Find Information (Search on the Oracle Help Center for titles listed in this column)
Prerequisite Tasks for Oracle Global Human Resources Setup			
Define Common Applications Configuration for Human Capital Management or Define Geographies for HCM	Manage Geographies	Use the territory code to verify predefined geographies and load any additionally required local geographies. You can import Oracle-licensed data from Loqate, for those countries where the data is available.	<ul style="list-style-type: none"> Overview of Geographies
	Select Address Style and Address Validation	Check the address style and address validation for your country.	<ul style="list-style-type: none"> Change Address Style and Address Validation Settings
Define Common Applications Configuration for Human Capital Management	Manage Currencies	Create or enable any currency for displaying monetary amounts, assigning currency to ledgers, entering transactions, recording balances, or for any reporting purposes.	<ul style="list-style-type: none"> When do I create or enable currencies?
Set Up Enterprise Structures			
Define Enterprise Structures for Human Capital Management	Manage Enterprise HCM Information	Manage enterprise HCM information to specify work day information, person, worker, and assignment number generation, person name languages, user and role provisioning, position management, and so on.	<ul style="list-style-type: none"> Enterprise Structures
	Manage Legal Addresses	Create legal addresses for all organizational units of the enterprise before you create legal entities.	<ul style="list-style-type: none"> What's a legal address?
	Manage Legislative Data Groups	Define at least one legislative data group for each country your enterprise operates in.	<ul style="list-style-type: none"> Legislative Data Groups

Implementation Tasks List	Task Name	What You Must Do	Where to Find Information (Search on the Oracle Help Center for titles listed in this column)
	Manage Legal Entity	Create all legal entities that apply to your enterprise. Designate the legal entity as a legal employer and as a payroll statutory unit (PSU) for payroll.	<ul style="list-style-type: none"> Legal Entities, Business Units, and Reference Data Sets How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units
	Manage Legal Entity HCM Information	Manage legal entity HCM information to include statutory components as required.	<ul style="list-style-type: none"> Legal Entities Legal Entities, Business Units, and Reference Data Sets
	Manage Legal Jurisdictions	Review the predefined jurisdictions for your country and create any jurisdictions you require for specific local taxes.	<ul style="list-style-type: none"> Overview of Legal Jurisdiction and Authorities Create Legal Jurisdictions, Addresses and Authorities
	Manage Legal Reporting Units	Define legal reporting units (LRU) also known as tax reporting units, to group employee records for tax and social reporting.	Create Legal Entities, Registrations, and Reporting Units
Create Reference Data Sets and Business Units			
Define Reference Data Sharing for Human Capital Management	Manage Reference Data Sets	Identifier for sets of rows in control tables (set IDs)	<ul style="list-style-type: none"> How Business Units Work with Reference Data Sets
Define Business Units for Human Capital Management	Manage Business Units	Define a logical entity for your company's structure that uses the business unit classification to group sets of data.	<ul style="list-style-type: none"> Business Units
	Manage Business Unit SetAssignment	Map set IDs to a business unit for each record data object such as locations, departments, jobs, and grades.	<ul style="list-style-type: none"> How Business Units Work with Reference Data Sets
Set Up Workforce Structures			
Define Workforce Structures	Manage Location	Create locations where business is conducted, including physical location of a workforce structure and workers' physical work locations.	<ul style="list-style-type: none"> Locations
	Manage Departments	Create organizational units assigned to an employee, cost center, or for data security	<ul style="list-style-type: none"> Departments Departments and Cost Centers
	Manage Jobs	Define a job and its attributes.	<ul style="list-style-type: none"> Jobs
	Manage Actions	Define actions to track changes to Human Capital Management (HCM) records, such as change to employment and assignment records, for example, assignment	<ul style="list-style-type: none"> How Action Components Work Together

Implementation Tasks List	Task Name	What You Must Do	Where to Find Information (Search on the Oracle Help Center for titles listed in this column)
		change, transfer, termination, and so on.	
	Manage Action Reasons	Configure the reason for HCM actions such as reorganization or performance for the promote action.	
Define Person Record and Employment Record Values			
<ul style="list-style-type: none"> • Offering: Workforce Deployment • Functional Area: Workforce Information 	Manage Person Types	Define person types to maintain information for a group of people in your enterprise.	<ul style="list-style-type: none"> • Person Types
	Manage Person Name Formats	Configure the predefined person name format types according to your choice.	<ul style="list-style-type: none"> • Person Name Formats
	Managing Person Name Styles	Define the person name components for a country	<ul style="list-style-type: none"> • Person Name Styles
	Assignment Statuses	Define assignment status that changes according to changes in HR and payroll statuses.	<ul style="list-style-type: none"> • How You Set Up Assignment Statuses
	Manage Common Lookups	Review common lookups that are employment-related and have user or extensible configuration levels, and update them as appropriate to suit enterprise requirements	

Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Securing Reference for HCM](#)

2 Enterprise Structures

Overview of Enterprise Structures

Oracle Fusion Applications have been designed to ensure your enterprise can be modeled to meet legal and management objectives.

The decisions about your implementation of Oracle Fusion Applications are affected by your:

- Industry
- Business unit requirements for autonomy
- Business and accounting policies
- Business functions performed by business units and optionally, centralized in shared service centers
- Locations of facilities

Every enterprise has three fundamental structures that describe its operations and provide a basis for reporting.

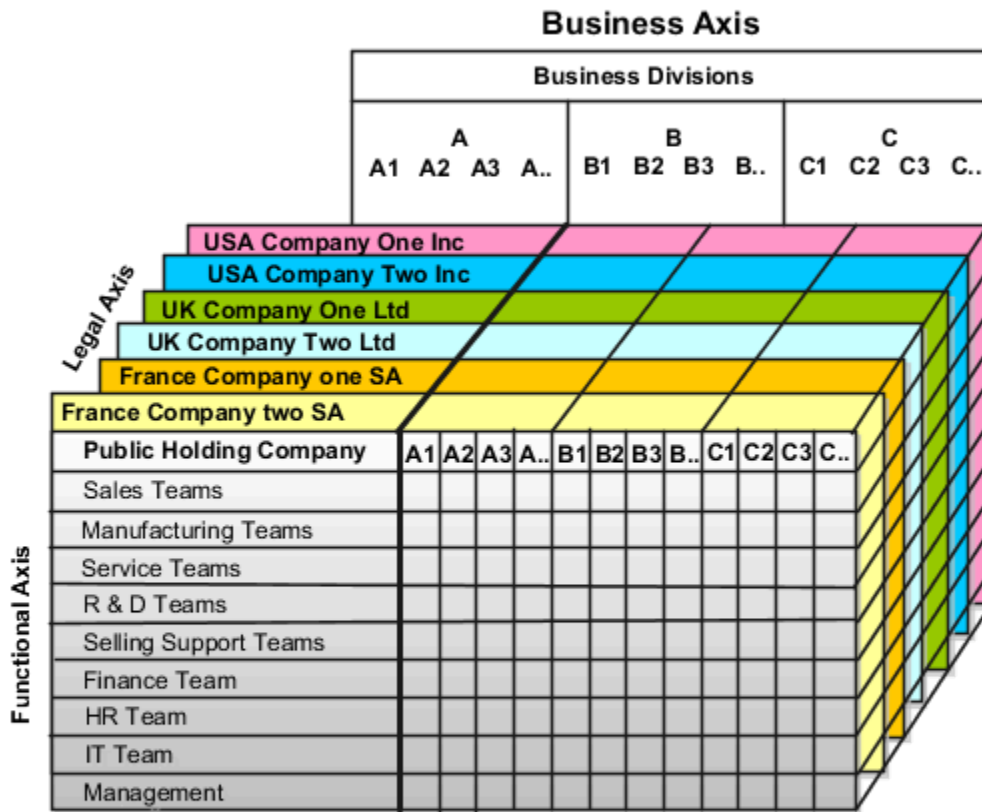
- Legal
- Managerial
- Functional

In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments

Align these structures with your strategic objectives.

This figure illustrates a grid with Business Axis, representing the enterprise division, Legal Axis representing the companies, and the Functional Axis representing the business functions.



Legal Structure

The figure illustrates a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.

Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies.

A legally recognized entity can own and trade assets and employ people in the jurisdiction in which the entity is registered. When granted these privileges, legal entities are also assigned responsibilities to:

- Account for themselves to the public through statutory and external reporting.
- Comply with legislation and regulations.
- Pay income and transaction taxes.
- Process value added tax (VAT) collection on behalf of the taxing authority.

Many large enterprises isolate risk and optimize taxes by incorporating subsidiaries. They create legal entities to facilitate legal compliance, segregate operations, optimize taxes, complete contractual relationships, and isolate risk. Enterprises use legal entities to establish their enterprise's identity within the laws of each country in which their enterprise operates.

The figure illustrates:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.
- Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

Successfully managing multiple businesses requires that you segregate them by their strategic objectives, and measure their results. Although related to your legal structure, the business organizational hierarchies don't have to be reflected directly in the legal structure of the enterprise. The management structure can include divisions, subdivisions, lines of business, strategic business units, profit, and cost centers. In the figure, the management structure is shown on the Business Axis. In Oracle Fusion Applications, the management structure is implemented using divisions and business units as well as being reflected in the chart of accounts.

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development and selling, general, and administrative expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Model Your Enterprise Management Structure

This example uses a fictitious global company to demonstrate the analysis that can occur during the enterprise structure configuration planning process.

Scenario

Your company, InFusion Corporation, is a multinational conglomerate that operates in the United States (US) and the United Kingdom (UK). InFusion has purchased an Oracle Fusion Cloud Enterprise Resource Planning (ERP) solution including Oracle General Ledger and all of the Oracle Fusion Cloud Applications subledgers. You are chairing a committee to discuss creation of a model for your global enterprise structure including both your US and UK operations.

InFusion Corporation

InFusion Corporation has 400 plus employees and revenue of 120 million US dollars. Your product line includes all the components to build and maintain air quality monitoring applications for homes and businesses. You have two distribution centers and three warehouses that share a common item master in the US and UK. Your financial services organization provides funding to your customers for the initial costs of these applications.

The following are elements you must consider in creating your model for your global enterprise structure.

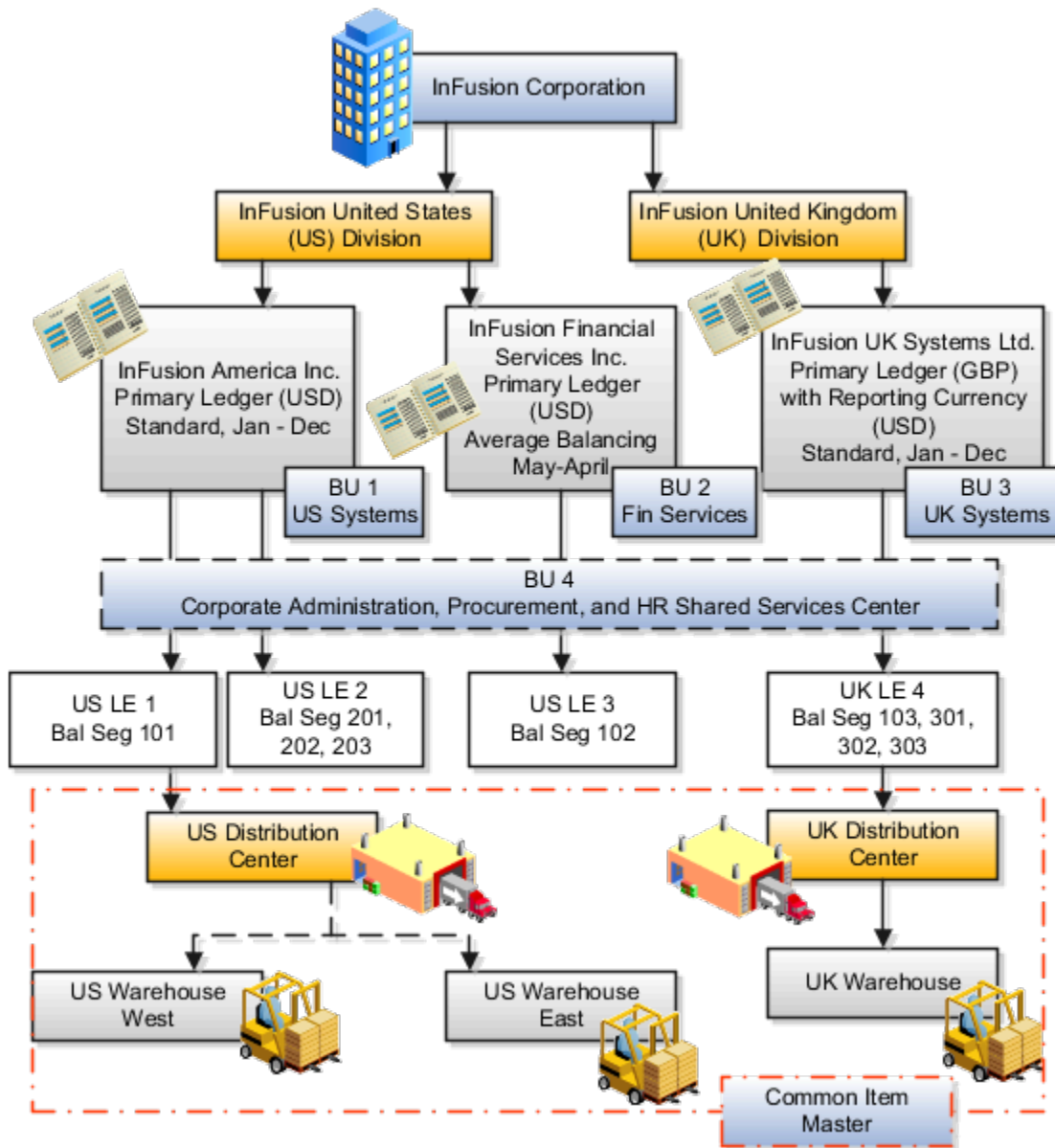
- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you want to achieve proper statutory reporting?
- Your managers need reports that show profit and loss (revenue and expenses) for their lines of business. Do you use business units and balancing segments to represent your divisions and businesses? Do you secure data by two segments in your chart of accounts which represents each department and legal entity? Or do you use one segment that represents both to produce useful, but confidential management reports?
- Your corporate management requires reports showing total organizational performance with drill-down capability to the supporting details. Do you need multiple balancing segment hierarchies to achieve proper rollup of balances for reporting requirements?
- Your company has all administrative, account payables, procurement, and Human Resources functions performed at their corporate headquarters. Do you need one or more business units in which to perform all these functions? How is your shared service center configured?

Global Enterprise Structure Model

The following figure and table summarize the model that your committee has designed and uses numeric values to provide a sample representation of your structure. The model includes the following recommendations:

- Creation of three separate ledgers representing your separate legal entities:
 - InFusion America Inc.
 - InFusion Financial Services Inc.
 - InFusion UK Services Ltd.

- Consolidation of results for application components, installations, and maintenance product lines across the enterprise
- All UK general and administrative costs processed at the UK headquarters
- US Systems' general and administrative costs processed at US Corporate headquarters
- US Financial Services maintains its own payables and receivables departments



Real World Entity	Entity Name	Enterprise	Legal Entity	BSV	Ledger	BU	Cost Center	Dept	Item Master Org	Inventory Org
Enterprise	InFusion Group	●								
Company	US LE 1		●	●	●					
Company	US LE 2		●	●	●					
Company	US LE 3		●	●	●					
Company	UK LE 4		●	●	●					
Business Unit	US Systems BU 1					●				
Business Unit	FIN Services BU 2					●				
Business Unit	UK Systems BU 3					●				
Division	InFusion UK			●			●			
Division	InFusion US			●			●			
Headquarters	BU 4					●				
Shared Service Center	BU 4					●				
Department	AP Department						●	●		
List of Items	Common Item Master								●	
Distribution Center	US Distribution Center									●
Distribution Center	UK Distribution Center									●
Warehouse	US Warehouse West									●
Warehouse	US Warehouse East									●
Warehouse	UK Warehouse									●
B SV = Balancing Segment Value										
BU = Business Unit										
Dept = Department										
Org = Organization										
● = Mandatory Setup										
● = Optional Setup										

In this chart, the green globe stands for required and gold globe stands for optional setup. The following statements expand on the data in the chart.

- The enterprise is required because it serves as an umbrella for the entire implementation. All organizations are created within an enterprise.
- Legal entities are also required. They can be optionally mapped to balancing segment values or represented by ledgers. Mapping balancing segment values to legal entities is required if you plan to use the intercompany functionality. The InFusion Corporation is a legal entity but isn't discussed in this example.
- At least one ledger is required in an implementation in which you record your accounting transactions.
- Business units are also required because financial transactions are processed in business units.
- A shared service center is optional, but if used, must be a business unit.
- Divisions are optional and can be represented with a hierarchy of cost centers or by a second balancing segment value.
- Departments are required because they track your employees.
- Optionally, add an item master organization and inventory organizations if you're tracking your inventory transactions in Oracle Fusion Applications.

Note: Some Oracle Fusion Cloud Human Capital Management implementations don't require recording accounting transactions and therefore, don't require a ledger.

Guidelines for Configuring Global Enterprises

Start your global enterprise structure configuration by discussing what your organization's reporting needs are and how to represent those needs in the Oracle Fusion Cloud Applications.

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

- Enterprise Configuration
- Business Unit Management
- Security Structure
- Compliance Requirements

Enterprise Configuration

- What is the level of configuration needed to achieve the reporting and accounting requirements?
- What components of your enterprise do you need to report on separately?
- Which components can be represented by building a hierarchy of values to provide reporting at both detail and summary levels?
- Where are you on the spectrum of centralization versus decentralization?

Business Unit Management

- What reporting do I need by business unit?
- How can you set up your departments or business unit accounts to achieve departmental hierarchies that report accurately on your lines of business?
- What reporting do you need to support the managers of your business units, and the executives who measure them?
- How often are business unit results aggregated?
- What level of reporting detail is required across business units?

Security Structure

- What level of security and access is allowed?
- Are business unit managers and the people that report to them secured to transactions within their own business unit?
- Are the transactions for their business unit largely performed by a corporate department or shared service center?

Compliance Requirements

- How do you comply with your corporate external reporting requirements and local statutory reporting requirements?
- Do you tend to prefer a corporate first or an autonomous local approach?
- Where are you on a spectrum of centralization, very centralized or decentralized?

Design an Enterprise Configuration

This example illustrates how to set up an enterprise based on a global company operating mainly in the US and the UK with a single primary industry.

Scenario

InFusion Corporation is a multinational enterprise in the high technology industry with product lines that include all the components that are required to build and maintain air quality monitoring systems for homes and businesses. Its primary locations are in the US and the UK, but it has smaller outlets in France, Saudi Arabia, and the United Arab Emirates (UAE).

Enterprise Details

In the US, InFusion employs 400 people and has company revenue of 120 million US dollars. Outside the US, InFusion employs 200 people and has revenue of 60 million US dollars.

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, to employ and pay its workers in those countries.

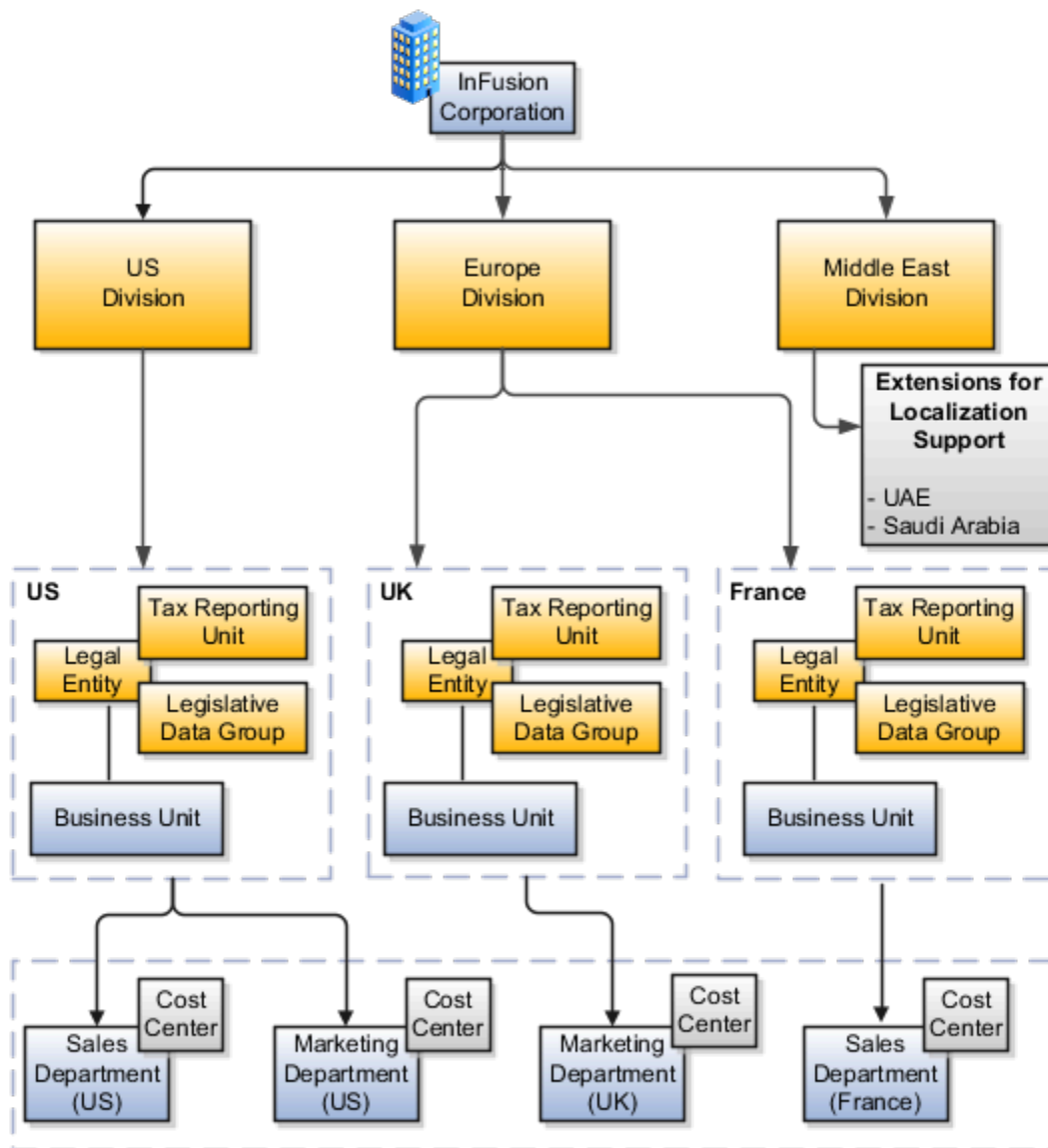
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration

Based on this analysis, InFusion requires an enterprise with multiple divisions, ledgers, legal employers, payroll statutory units, tax reporting units, legislative data groups, departments, cost centers, and business units.

This figure illustrates the enterprise configuration that results from the analysis of InFusion Corporation.



Enterprise Information for Non-HCM Users

The Manage Enterprise HCM Information task includes default settings for your enterprise such as the employment model, worker number generation, and so on.

If you're not implementing Oracle Fusion Human Capital Management (HCM), then the only action you may need to perform using this task is to change the enterprise name, if necessary. The other settings are HCM-specific and aren't relevant outside of Oracle Fusion HCM.

3 Legal Entities, Business Units, and Reference Data Sets

Overview of Legal Entities, Business Units, and Divisions

The setup tasks for legal entities, divisions, business units and other organizations are in different functional areas in the Setup and Maintenance work area.

The Legal Structures functional area covers tasks related to legal entity setup, the Organization Structures functional area includes tasks related to business unit setup, and the Workforce Structures functional area includes tasks related to department, division, trees, jobs, positions, and other organizations setup.

Overview

A legal entity is a recognized party with rights and responsibilities given by legislation.

Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
- Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

- Facilitating local compliance
- Minimizing the enterprise's tax liability
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Cloud Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:

- Own the assets of the enterprise
- Record sales and pay taxes on those sales
- Make purchases and incur expenses
- Perform other transactions

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities' operations based on different jurisdictions' requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies don't have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise's reporting requirements in different currency.

A legal entity can represent all or part of your enterprise's management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

Model Legal Entities

Oracle Fusion Cloud Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers.

These registers are part of the Oracle Trading Community Architecture.

When your legal entities are trading with each other, represent them as legal entities and as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

Several decisions you should consider when you create legal entities.

- The importance of using legal entity on transactions
- Legal entity and its relationship to business units
- Legal entity and its relationship to divisions
- Legal entity and its relationship to ledgers

- Legal entity and its relationship to balancing segments
- Legal entity and its relationship to consolidation rules
- Legal entity and its relationship to intercompany transactions
- Legal entity and its relationship to worker assignments and legal employer
- Legal entity and payroll reporting
- Legal reporting units

The Importance of Using Legal Entities on Transactions

All of the assets of the enterprise are owned by individual legal entities. Oracle Fusion Cloud Financials allow your users to enter legal entities on transactions that represent a movement in value or obligation.

For example, a sales order creates an obligation on the legal entity that books the order and promises to deliver the goods on the acknowledged date. The creation also creates an obligation on the purchaser to receive and pay for those goods. Contract law in most countries contains statutes that state damages can be sought for both:

- Actual losses, putting the injured party in the same state as if they had not entered into the contract.
- What is called loss of bargain, or the profit that would have made on a transaction.

In another example, if you revalued your inventory in a warehouse to account for raw material price increases, the revaluation and revaluation reserves must be reflected in your legal entity's accounts. In Oracle Fusion Cloud Applications, your inventory within an inventory organization is managed by a single business unit and belongs to one legal entity.

Legal Entity and Its Relationship to Business Units

A business unit can process transactions on behalf of many legal entities. Frequently, a business unit is part of a single legal entity. In most cases, the legal entity is explicit on your transactions. For example, a payables invoice has an explicit legal entity field. Your accounts payables department can process supplier invoices on behalf of one or many business units.

In some cases, your legal entity is inferred from your business unit that's processing the transaction. For example, Business Unit ACM UK has a default legal entity of InFusion UK Ltd. When a purchase order is placed in ACM UK, the legal entity InFusion UK Ltd is legally obligated to the supplier. Oracle Procurement, Oracle Fusion Cloud Project Management, and Oracle Fusion Cloud Supply Chain and Manufacturing applications rely on deriving the legal entity information from the business unit.

Legal Entity and Its Relationship to Divisions

The division is an area of management responsibility that can correspond to a collection of legal entities. If wanted, you can aggregate the results for your divisions by legal entity or by combining parts of other legal entities. Define date-effective hierarchies for your cost center or legal entity segment in your chart of accounts to facilitate the aggregation and reporting by division. Divisions and legal entities are independent concepts.

Legal Entity and Its Relationship to Ledgers

One of your major responsibilities is to file financial statements for your legal entities. Map legal entities to specific ledgers using the Oracle General Ledger Accounting Configuration Manager. Within a ledger, you can optionally map a legal entity to one or more balancing segment values.

Legal Entity and Its Relationship to Balancing Segments

General Ledger supports up to three balancing segments. Best practices recommend one segment represents your legal entity to ease your requirement to account for your operations to regulatory agencies, tax authorities, and investors. Accounting for your operations means you must produce a balanced trial balance sheet by legal entity. If you account for many legal entities in a single ledger, you must:

1. Identify the legal entities within the ledger.
2. Balance transactions that cross legal entity boundaries through intercompany transactions.
3. Decide which balancing segments correspond to each legal entity and assign them in General Ledger Accounting Configuration Manager. Once you assign one balancing segment value in a ledger, then all your balancing segment values must be assigned. This recommended best practice facilitates reporting on assets, liabilities, and income by legal entity.

Represent your legal entities by at least one balancing segment value. You may represent it by two or three balancing segment values if more granular reporting is required. For example, if your legal entity operates in multiple jurisdictions in Europe, you might define balancing segment values and map them to legal reporting units. You can represent a legal entity with more than one balancing segment value. Do not use a single balancing segment value to represent more than one legal entity.

In General Ledger, there are three balancing segments. You can use separate balancing segments to represent your divisions or strategic business units to enable management reporting at the balance sheet level for each. This solution is used to empower your business unit and divisional managers to track and assume responsibility for their asset utilization or return on investment. Using multiple balancing segments is also useful when you know at the time of implementation that you're disposing of a part of a legal entity and want to isolate the assets and liabilities for that entity.

Implementing multiple balancing segments requires every journal entry that isn't balanced by division or business unit, to generate balancing lines. You can't change to multiple balancing segments after you begin using the ledger because your historical data isn't balanced by the new balancing segments. Restating historical data must be done at that point.

If your enterprise regularly spins off businesses or holds managers accountable for utilization of assets, identify the business with a balancing segment value. If you account for each legal entity in a separate ledger, no requirement exists to identify the legal entity with a balancing segment value.

While transactions that cross balancing segments don't necessarily cross legal entity boundaries, all transactions that cross legal entity boundaries must cross balancing segments. If you make an acquisition or are preparing to dispose of a portion of your enterprise, you may want to account for that part of the enterprise in its own balancing segment even if the portion isn't a separate legal entity. If you don't map legal entities sharing the same ledger to balancing segments, you can't distinguish them using intercompany functionality or track individual equity.

Legal Entity and Its Relationship to Consolidation Rules

In Oracle Fusion Applications you can map legal entities to balancing segments and then define consolidation rules using your balancing segments. You are creating a relationship between the definition of your legal entities and their role in your consolidation.

Legal Entity and Its Relationship to Intercompany Transactions

Use Oracle Intercompany features to create intercompany entries automatically across your balancing segments. Intercompany processing updates legal ownership within the enterprise's groups of legal entities. Invoices or journals are created as needed. To limit the number of trading pairs for your enterprise, set up intercompany organizations and assign them to your authorized legal entities. Define processing options and intercompany accounts to use when creating intercompany transactions and to assist in consolidation elimination entries. These accounts are derived

and automatically entered on your intercompany transactions based on legal entities assigned to your intercompany organizations.

Intracompany trading, in which legal ownership isn't changed but other organizational responsibilities are, is also supported. For example, you can track assets and liabilities that move between your departments within your legal entities by creating departmental level intercompany organizations.

Tip: In the Oracle Fusion Supply Chain and Manufacturing applications, you can model intercompany relationships using business units, from which legal entities are derived.

Legal Entity and Its Relationship to Worker Assignments and Legal Employer

Legal entities that employ people are called legal employers in the Legal Entity Configurator. You must enter legal employers on worker assignments in Oracle Fusion Cloud HCM.

Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance for your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Overview of Legal Jurisdiction and Authorities

You are required to register your legal entities with legal authorities in the jurisdictions where you conduct business. Register your legal entities as required by local business requirements or other relevant laws.

For example, register your legal entities for tax reporting to report sales taxes or value added taxes.

Define jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll. When you create a legal entity, the Oracle Fusion Legal Entity Configurator automatically creates one legal reporting unit for that legal entity with a registration.

Jurisdictions

Jurisdiction is a physical territory such as a group of countries, country, state, county, or parish where a particular piece of legislation applies.

French Labor Law, Singapore Transactions Tax Law, and US Income Tax Laws are examples of particular legislation that apply to legal entities operating in different countries' jurisdictions. Judicial authority may be exercised within a jurisdiction.

Types of jurisdictions are:

- Identifying Jurisdiction
- Income Tax Jurisdiction
- Transaction Tax Jurisdiction

Identifying Jurisdiction

For each legal entity, select an identifying jurisdiction. An identifying jurisdiction is your first jurisdiction you must register with to be allowed to do business in a country. If there's more than one jurisdiction that a legal entity must register with to commence business, select one as the identifying jurisdiction. Typically the identifying jurisdiction is the one you use to uniquely identify your legal entity.

Income tax jurisdictions and transaction tax jurisdictions don't represent the same jurisdiction. Although in some countries, the two jurisdictions are defined at the same geopolitical level, such as a country, and share the same legal authority, they're two distinct jurisdictions.

Income Tax Jurisdiction

Create income tax jurisdictions to properly report and remit income taxes to the legal authority. Income tax jurisdictions by law impose taxes on your financial income generated by all your entities within their jurisdiction. Income tax is a key source of funding that the government uses to fund its activities and serve the public.

Transaction Tax Jurisdiction

Create transaction tax jurisdictions through Oracle Tax in a separate business flow, because of the specific needs and complexities of various taxes. Tax jurisdictions and their respective rates are provided by suppliers and require periodic maintenance. Use transaction tax jurisdiction for legal reporting of sales and value added taxes.

Legal Authorities

A legal authority is a government or legal body that's charged with powers to make laws, levy and collect fees and taxes, and remit financial appropriations for a given jurisdiction.

For example, the Internal Revenue Service is the authority for enforcing income tax laws in United States. In some countries, such as India and Brazil, you're required to print legal authority information on your tax reports. Legal authorities are defined in the Oracle Legal Entity Configurator. Tax authorities are a subset of legal authorities and are defined using the same setup flow.

Legal authorities aren't mandatory in Oracle Fusion Cloud Human Capital Management (HCM), but are recommended and are generally referenced on statutory reports.

Create Legal Jurisdictions, Addresses and Authorities

Define legal jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll.

Legal Jurisdictions

Create a legal jurisdiction by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Jurisdictions** task.
2. Select **Create**.
3. Enter a unique **Name**, United States Income Tax.
4. Select a **Territory**, United States.
5. Select a **Legislative Category**, Income tax.
6. Select **Identifying**, Yes. Identifying indicates the first jurisdiction a legal entity must register with to do business in a country.
7. Enter a **Start Date** if desired. You can also add an **End Date** to indicate a date that the jurisdiction may no longer be used.
8. Select a **Legal Entity Registration Code**, EIN or TIN.
9. Select a **Legal Reporting Unit Registration Code**, Legal Reporting Unit Registration Number.
10. Optionally enter one or more **Legal Functions**.
11. **Save and Close**.

Legal Addresses for Legal Entities and Reporting Units

Create a legal address for legal entities and reporting units by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Address** task.
2. Select **Create**.
3. Select **Country**.
4. Enter **Address Line 1**, Oracle Parkway.
5. Optionally enter **Address Line 2**, and **Address Line 3**.
6. Enter or Select the postal code, 94065.
7. Select **Geography** 94065 and **Parent Geography** Redwood Shores, San Mateo, CA.
8. Optionally enter a **Time Zone**, US Pacific Time.
9. **OK**.
10. **Save and Close**.

Legal Authorities

Create a legal authority by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Authorities** task.
2. Enter the **Name**, California Franchise Tax Board.
3. Enter the **Tax Authority Type**, Reporting.

Note: Create an address for the legal authority.

4. Select **Create**.
5. The **Site Number** is automatically assigned.
6. Optionally enter a **Mail Stop**.
7. Select **Country**, United States
8. Enter **Address Line 1**, 121 Spear Street, Suite 400.

9. Optionally enter **Address Line 2**, and **Address Line 3**.
10. Enter or Select the postal code, 94105.
11. Select **Geography** 94105 and **Parent Geography** San Francisco, San Francisco, CA.
12. **OK**.
13. Optionally enter a **Time Zone**, US Pacific Time.
14. Optionally click the **One-Time Address** check box.
15. The **From Date** displays today's date. Update if necessary.
16. Optionally enter a **To Date** to indicate the last day the address can be used.

Note: You can optionally enter **Address Purpose** details.

17. Select **Add Row**.
18. Select **Purpose**.
19. The **Purpose from Date** will default to today's date.
20. Optionally enter a **Purpose to Date**.
21. **OK**.
22. **Save and Close**.

Related Topics

- [Legal Authorities](#)
- [Overview of Legal Jurisdiction and Authorities](#)
- [Update Existing Setup Data](#)

Create Legal Entities, Registrations, and Reporting Units

Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, and income, pay transaction taxes, or perform intercompany trading.

Legal Entity

Create a legal entity by following these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Entity** task.
2. Accept the default **Country**, United States.
3. Enter **Name**, InFusion USA West.
4. Enter **Legal Entity Identifier**, US0033.
5. Optionally enter **Start Date**. When the start date is blank the legal entity is effective from the creation date.
6. Optionally enter an **End Date**.
7. Optionally, if your legal entity should be registered to report payroll tax and social insurance, select the **Payroll statutory unit** check box.
8. Optionally, if your legal entity has employees, select the **Legal employer** check box.
9. Optionally, if this legal entity isn't a payroll statutory unit, select an existing payroll statutory unit to report payroll tax and social instance on behalf of this legal entity.
10. Enter the **Registration Information**
11. Accept the default **Identifying Jurisdiction**, United States Income Tax.

12. Search for and select a **Legal Address**, 500 Oracle Parkway, Redwood Shores, CA 94065.
The legal address must have been entered previously using the **Manage Legal Address** task.
13. **OK.**
14. Optionally enter a **Place of Registration**.
15. Enter the **EIN or TIN**.
16. Enter the **Legal Reporting Unit Registration Number**.
17. **Save and Close.**
18. In the Setup and Maintenance work area, go to the **Manage Legal Entity** page and **Select** to set scope.
19. Select the **Manage Legal Entity**.
20. In the ***Legal Entity** list, select **Select and Add**.
21. Click **Apply and Go to Task**.
22. Select your legal entity.
23. **Save and Close.**
This sets the scope for your task list to the selected legal entity.
24. **Save and Close.**

Legal Entity Registrations

A legal entity registration with the same name as that of the legal entity is created by default. To verify this, locate the **Manage Legal Entity Registrations** task and then select **Go to Task**. To create another registration for the legal entity follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Entity Registrations** task. Verify that the **Legal Entity** scope value is set correctly.
2. **Go to Task.**
3. Select **Create**.
4. Enter **Jurisdiction**.
5. Enter **Registered Address**.
6. Enter **Registered Name**.
7. Optionally enter **Alternate Name**, **Registration Number**, **Place of Registration**, **Issuing Legal Authority**, and **Issuing Legal Authority Address**, **Start Date**, and **End Date**.
8. **Save and Close.**

Legal Reporting Unit

When a legal entity is created, a legal reporting unit with the same name as that of the entity is also automatically created. To create more legal reporting units or modify the settings follow these steps:

1. In the Setup and Maintenance work area, go to the **Manage Legal Reporting Unit** task. Verify that the **Legal Entity** scope value is set correctly.
2. **Go to Task**
3. Select **Create**.
4. Enter **Territory**, United States.
5. Enter **Name**.
6. Optionally enter a **Start Date**.
7. Enter **Registration Information**.
8. Search for and select **Jurisdiction**.
9. Enter **Main Legal Reporting Unit** information.

10. Select the value Yes or No for the **Main Legal Reporting Unit**. Set value to yes only if you're creating a new main (primary) legal reporting unit.
11. Enter the **Main Effective Start Date**, 1/1/11.
12. **Save and Close**.

Related Topics

- [Overview](#)
- [Model Legal Entities](#)
- [Plan Legal Reporting Units](#)
- [Update Existing Setup Data](#)

Legislative Data Groups

Legislative data groups are a means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates.

Each legislative data group is associated with one or more payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

Payroll-related information, such as elements, is organized by legislative data group. Each legislative data group:

- Marks a legislation in which payroll is processed.
- Is associated with a legislative code, currency, and its own cost allocation key flexfield structure.
- Is a boundary that can share the same set up and still comply with the local laws.
- Can span many jurisdictions as long as they're within one country.
- Can contain many legal entities that act as payroll statutory units.

How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units

You can designate legal entities as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM).

You can have only one legal entity that's also a payroll statutory unit and legal employer, or multiple legal entities, payroll statutory units and legal employers. Payroll statutory units and tax reporting units share a parent child relationship with the payroll statutory unit being a parent of a tax reporting unit

Legal Employers and Payroll Statutory Units

You can designate payroll statutory units to group legal employers to do statutory calculations at a higher level. For example, you can use payroll statutory units for court orders, or to calculate the United Kingdom (UK) statutory sick pay. A legal employer can exist independently of an enterprise or be a part of a payroll statutory unit. There can be many legal employers belonging to a payroll statutory unit, but a legal employer can belong only to one payroll statutory unit.

Legal Employers and Tax Reporting Units

Tax reporting units are indirectly associated with a legal employer through the payroll statutory unit. One or more tax reporting units can be used by a single legal employer, and a tax reporting unit can be used by one or more legal employers.

For example, if a single tax reporting unit is linked to a payroll statutory unit and two legal employers are associated with this payroll statutory unit, then both legal employers are associated with the tax reporting unit. Use the Manage Legal Reporting Unit HCM Information task to designate an existing legal reporting unit as a tax reporting unit. You need to select a parent payroll statutory unit when you create a legal reporting unit belonging to a legal employer (that isn't a payroll statutory unit as well). Next, you need to designate the legal reporting unit as a tax reporting unit and select the legal employer.

Related Topics

- [Examples of HCM Organization Models](#)
- [Overview](#)
- [What's a legal employer?](#)
- [What's a payroll statutory unit?](#)
- [What's a tax reporting unit?](#)

Examples of HCM Organization Models

You can use any of these HCM organization models.

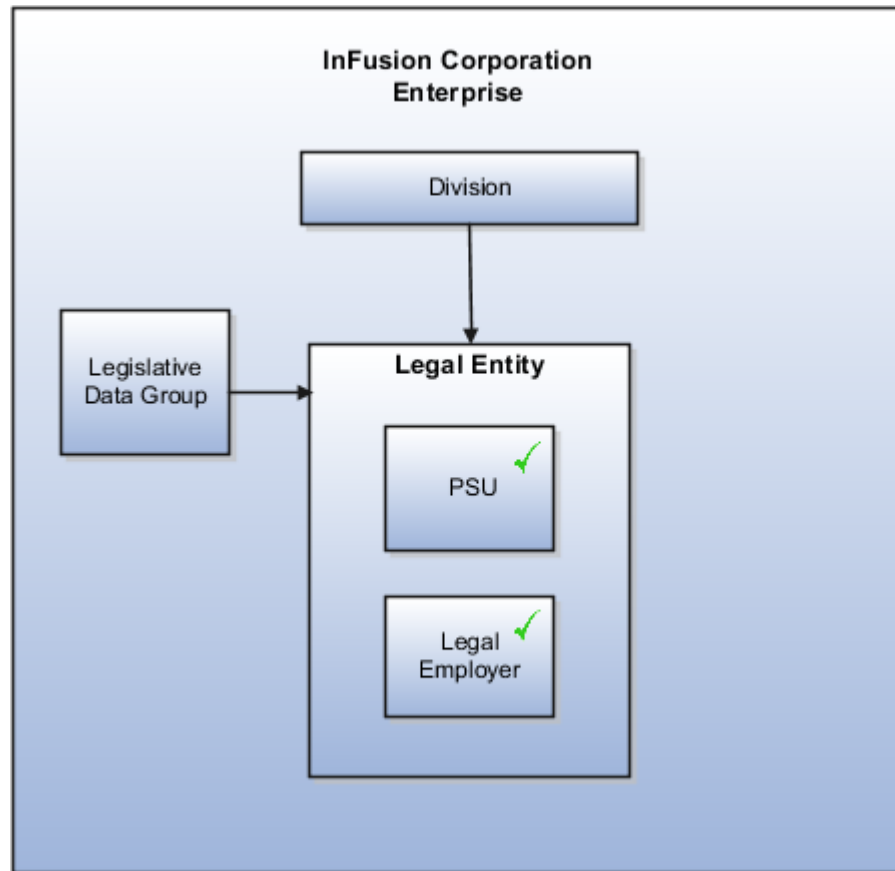
- Simple Configuration
- Multiple Legal Employers and Tax Reporting Units
- One Payroll Statutory Unit and Two Tax Reporting Units
- One Payroll Statutory Unit with Several Tax Reporting Units
- Multiple Payroll Statutory Units with Several Tax Reporting Units

These models include a legislative data group (LDG) that isn't an organization classification and show how you can partition payroll data by associating them with a payroll statutory unit

Simple Configuration

This is an example of a simple configuration without any tax reporting units. The enterprise has only one legal entity, which is both a payroll statutory unit and a legal employer, and shares the same boundaries. In this type reporting can be done only at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as these countries report at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity, which is both a payroll



statutory unit and a legal employer.

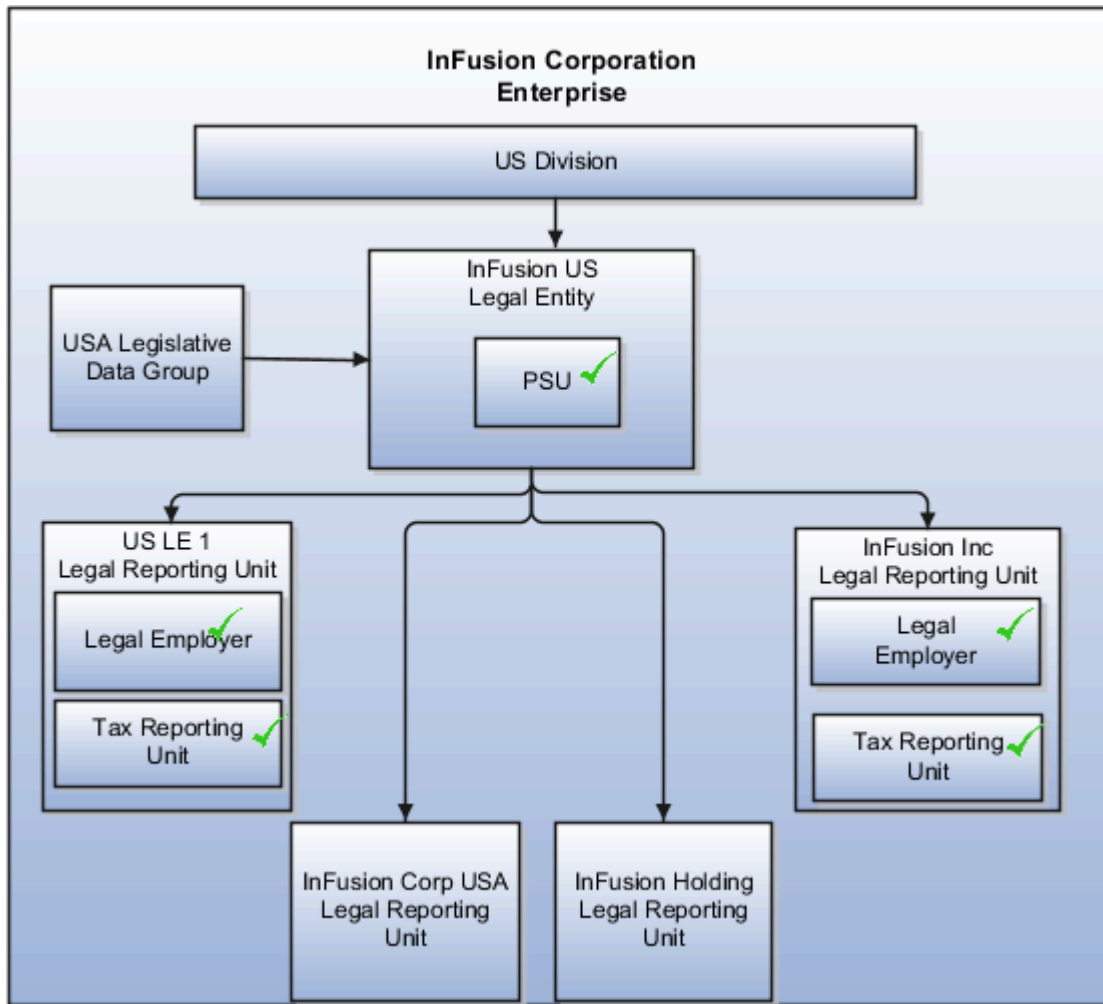
Multiple Legal Employers and Tax Reporting Units

In this configuration, you define one legal entity, InFusion US as a payroll statutory unit with two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit. Tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit.

The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately as either a payroll statutory unit, legal employer, or a tax reporting unit.

This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US

This figure illustrates an enterprise that has one payroll statutory unit and multiple legal employers and tax reporting



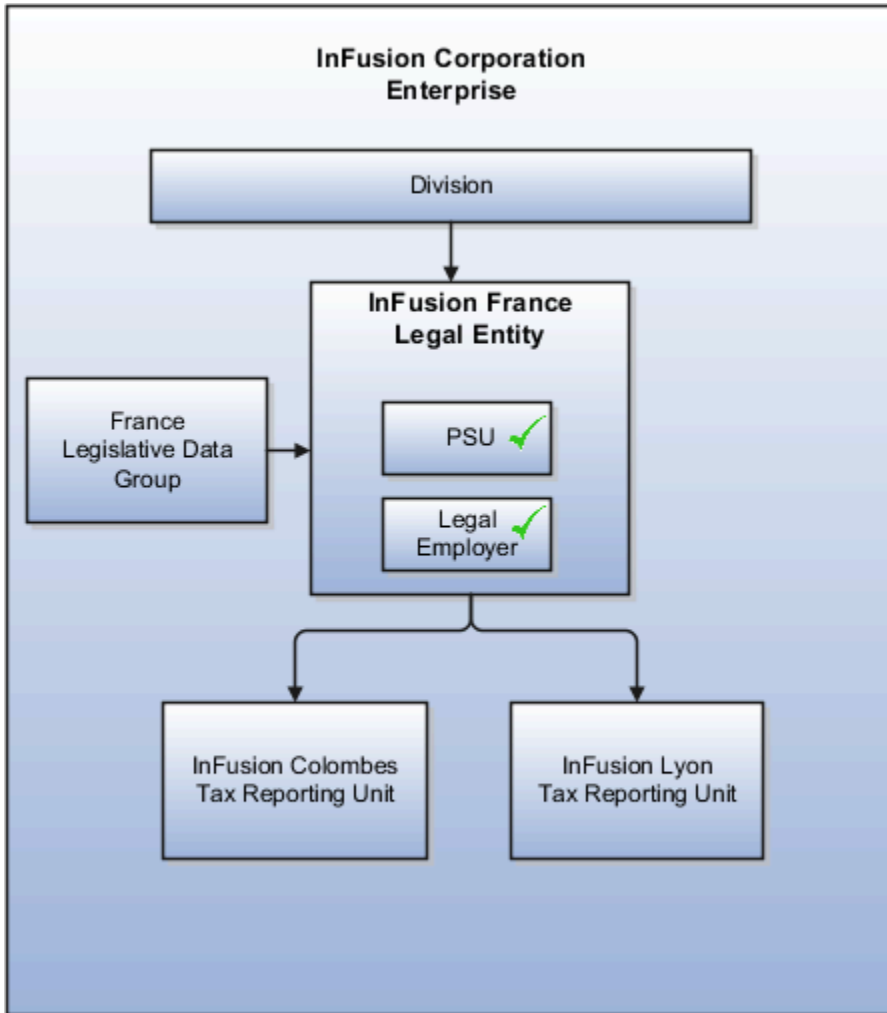
units.

One Payroll Statutory Unit and Two Tax Reporting Units

This model makes no distinction between a legal employer and a payroll statutory unit. You define tax reporting units as subsidiaries to the legal entity.

In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting. Statutory reporting boundaries are the same for both payroll and HR management. An example of a country that might use this model is France.

This figure illustrates an example of an organization with one legal entity. The legal entity is both a legal employer and a payroll statutory unit and that has two tax reporting units.

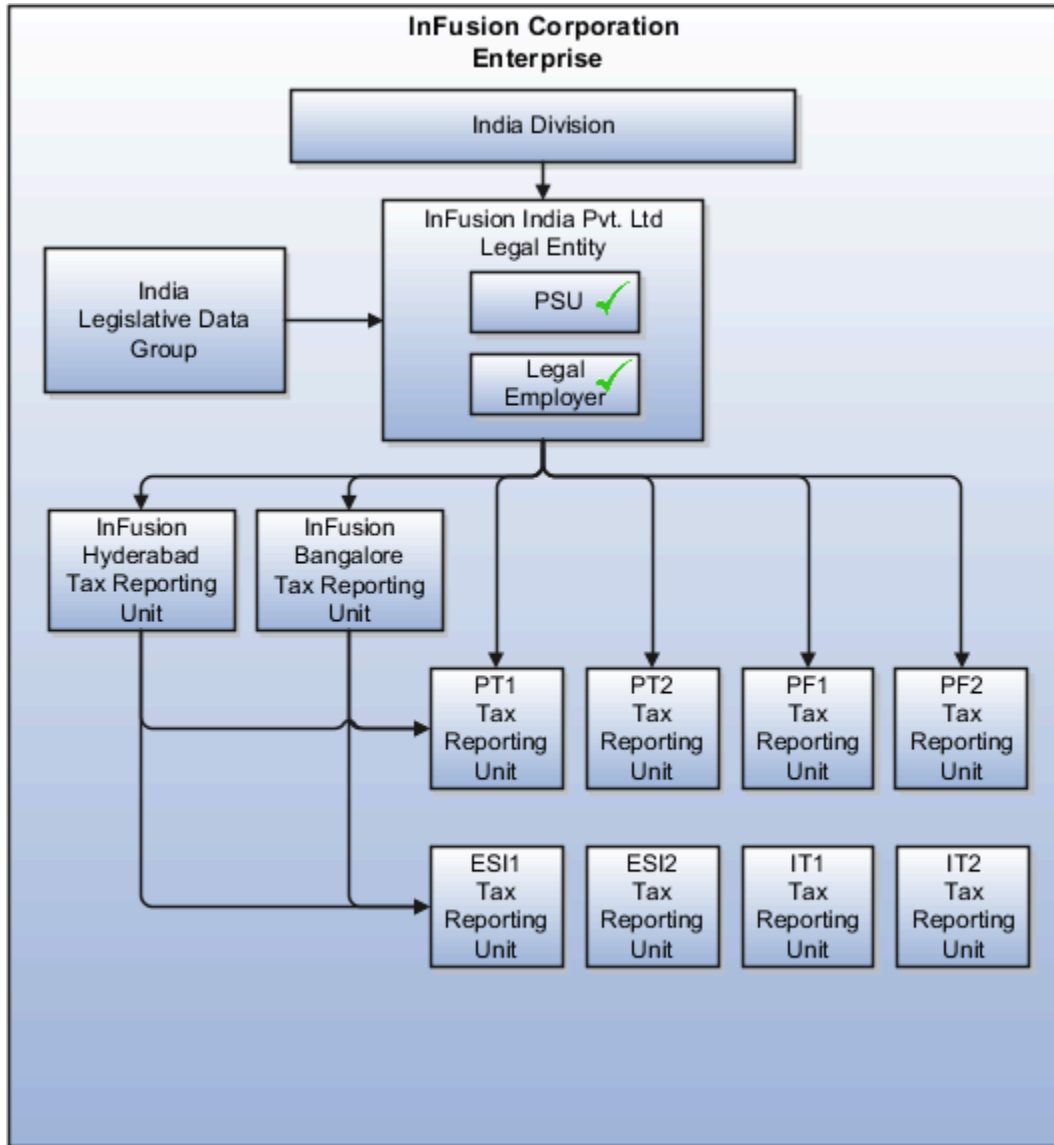


One Payroll Statutory Unit with Several Tax Reporting Units

In this model, the enterprise has one legal entity. Legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can report separately on both entities

Using this model, you can't report on tax reporting unit balances within a legal employer, and categorize balances by either or both organizations, as required. An example of a country that might use this model is India.

This figure illustrates an enterprise with one legal entity that's a payroll statutory unit and a legal employer. The tax reporting units are independent from the legal employer.

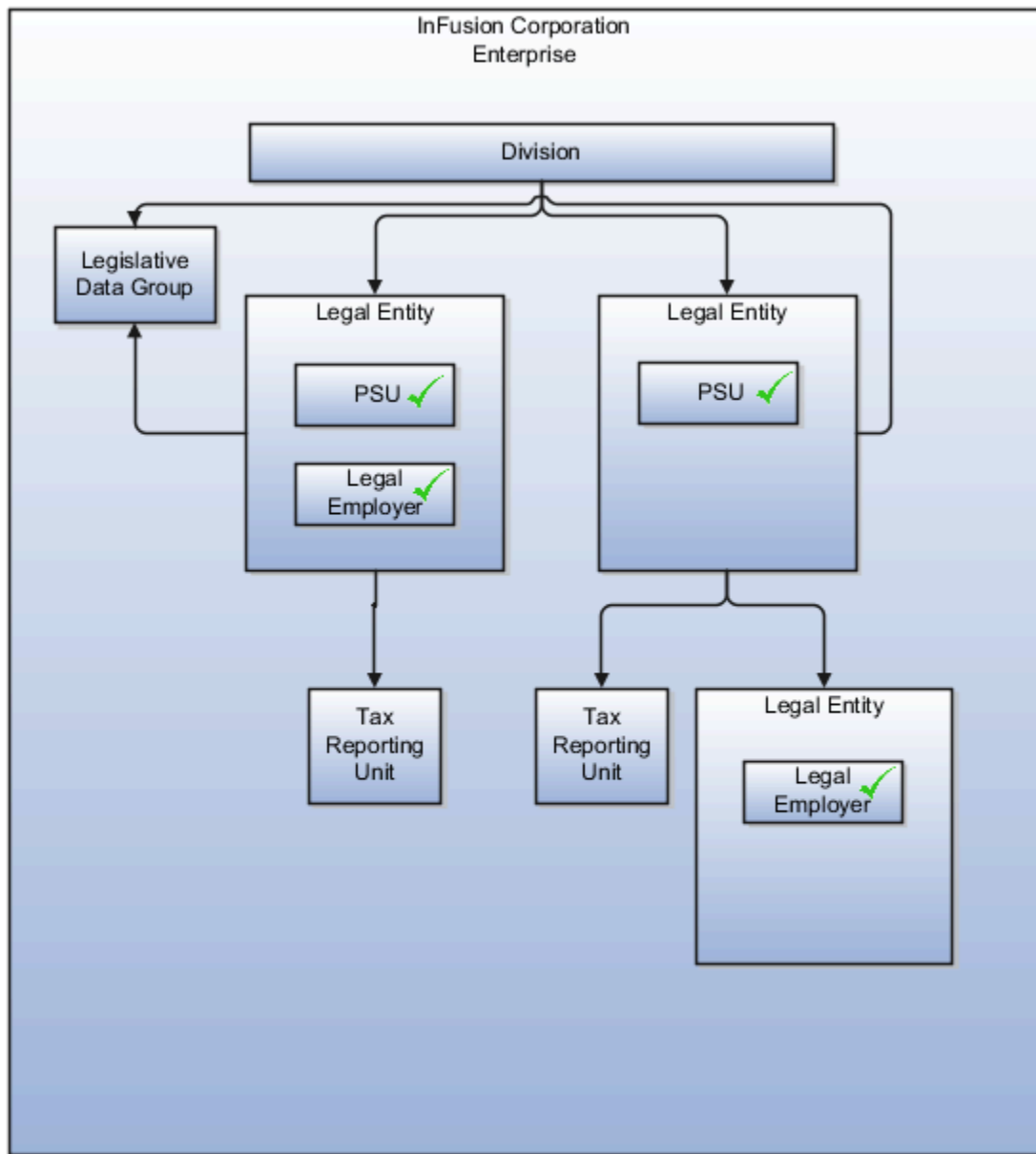


Multiple Payroll Statutory Units with Several Tax Reporting Units

In this model, the enterprise has two legal entities. The legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can report separately on both entities.

Using this model, you can't report on tax reporting unit balances within a legal employer, and categorize balances by either or both organizations, as required. An example of a country that might use this model is the United Kingdom (UK).

This figure illustrates an enterprise with two legal entities, and legal employers and tax reporting units are independent



from each other.

Related Topics

- [How Legal Employers Work with Payroll Statutory Units and Tax Reporting Units](#)
- [Legislative Data Groups](#)
- [Overview](#)

Examples of Creating Calculation Cards for Deductions at Different Levels

You can create and manage calculation cards at several different levels, from an individual person to a payroll statutory unit.

Use the cards to capture information specific to a person or organization, such as an employee's tax filing status or an employer's tax identification number. Calculation card entries override default values defined at other levels. The priority of information, from highest to lowest, is as follows:

1. Personal calculation card (payroll relationship level)
2. Tax reporting unit calculation card
3. Payroll statutory unit calculation card
4. Calculation value definitions (legislative data group level)

Note: Not all countries or territories support creating calculation cards for payroll statutory units and tax reporting units. The enterable values at each level also vary by country or territory. The basic steps to create and manage calculation cards are the same at all levels.

Use these examples to understand when you might define calculation cards at each level.

Personal Calculation Card

Scenario: An employee qualifies for a special reduced tax rate.

Task: Calculation Cards task in the Payroll section under My Client Groups.

Tax Reporting Unit Card

Scenario: The income tax exemption amount is 2000 at the legislative data group level, but a tax reporting unit in a particular state or province uses an exemption amount of 2500. Enter this default value for the tax reporting unit, which can be overridden on personal calculation cards.

Task: Manage Legal Reporting Unit Calculation Cards task in the Setup and Maintenance section.

Payroll Statutory Unit Card

Scenario: During application setup, the implementation team defines default contribution rates for the payroll statutory unit.

Task: Manage Legal Entity Calculation Cards task in the Setup and Maintenance section.

Calculation Value Definition

Scenario: You can view the predefined income tax rates for your country, but you can't edit them.

Task: Calculation Value Definitions task in the Payroll section.

If an employer qualifies for a special tax rate, enter these values on a calculation card at the appropriate level.

Business Units

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities.

Normally, it has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy.

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

In Oracle Fusion Cloud Applications you do the following:

- Assign your business units to one primary ledger. For example, if a business unit is processing payables invoices, then it must post to a particular ledger. This assignment is required for your business units with business functions that produce financial transactions.
- Use a business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, then secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.

The Oracle Fusion Applications business unit model provides the following advantages:

- Enables flexible implementation
- Provides consistent entity that controls and reports on transactions
- Shares sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can share reference data, such as payment terms and transaction types, across business units, or you can have each business unit manage its own set depending on the level at which you want to enforce common policies.

In summary, use business units for:

- Management reporting
- Transaction processing
- Transactional data security
- Reference data sharing and definition

Brief Overview of Business Unit Security

A number of Oracle Fusion Applications use business units to implement data security. You assign roles like Accounts Payable Manager to users to permit them to perform specific functions, and you assign business units for each role to users to give them access to data in those business units. For example, users who have been assigned a Payables role for a particular business unit, can perform the function of payables invoicing on the data in that business unit. Roles can be assigned to users manually using the Security Console, or automatically using provisioning rules. Business Units can be assigned to users using the Manage Data Access for Users task found in Setup and Maintenance.

Related Topics

- [Reference Data Sets and Sharing Methods](#)

How Business Units Work with Reference Data Sets

Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization.

Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

Common Set Versus Specific Sets

Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.

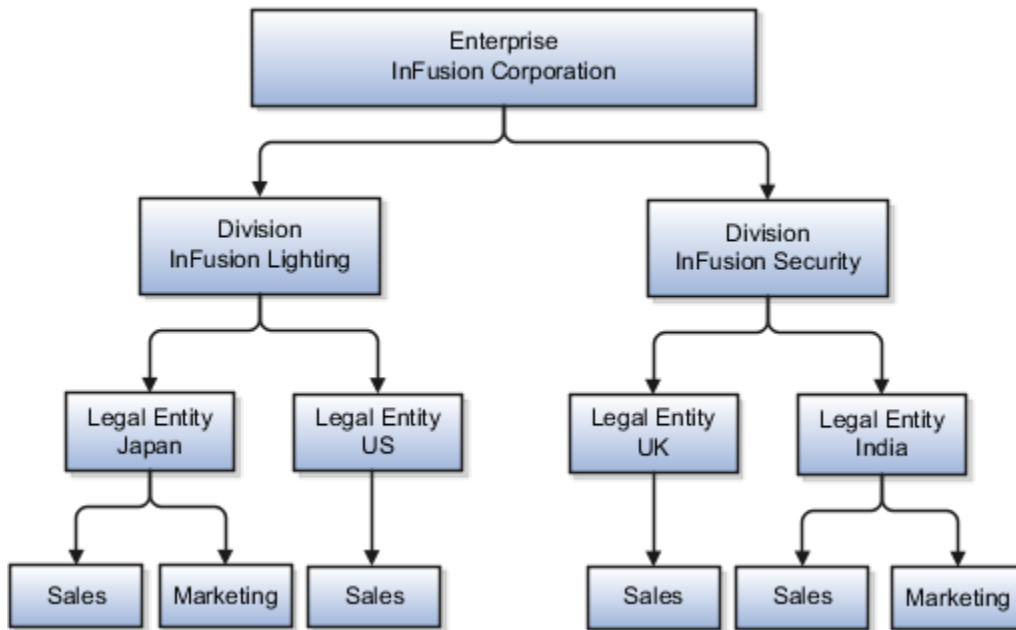
Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set to use for all reference data types for that business unit. You can override the set assignment for one or more data types.

Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.

The following figure illustrates the structure of InFusion Corporation.



When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales_Japan
- Marketing_Japan
- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs. They override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales_Japan_Set
- Mktg_Japan_Set
- Sales_US_Set
- Sales_UK_Set
- Mktg_India_Set
- Sales_India_Set
- Grades_Set

The following table describes the default set assignment and the set assignment overrides for each business unit in InFusion:

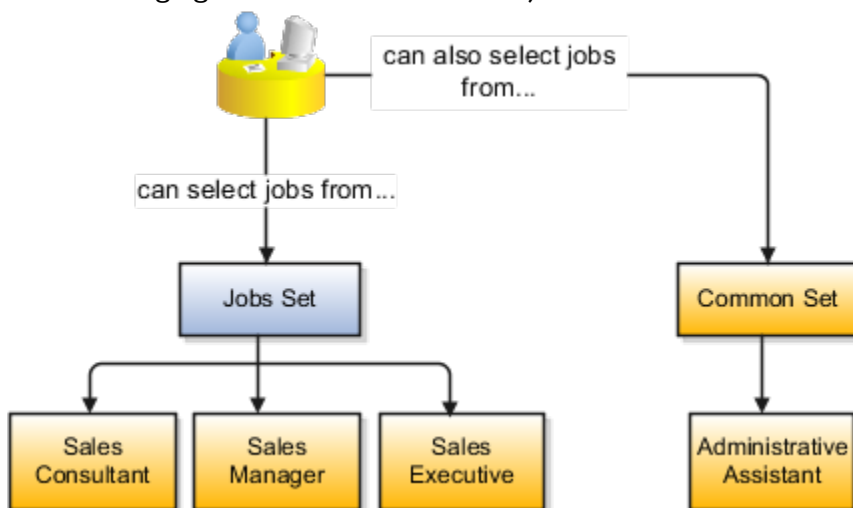
Business Unit	Default Set Assignment	Set Assignment Overrides
Sales_Japan	Sales_Japan_Set for grades, departments, and locations	Jobs set for jobs
Marketing_Japan	Mktg_Japan_Set for grades, departments, and locations	None
Sales_US	Sales_US_Set for grades, departments, and locations	Jobs set for jobs
Sales_UK	Sales_UK_Set for grades, departments, and locations	Jobs set for jobs
Marketing_India	Mktg_India_Set for grades, departments, and locations	None
Sales_India	Sales_India_Set for grades, departments, and locations	Jobs set for jobs

When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades, locations, and departments from the Mktg_Japan_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.



Associate Business Unit with Legal Employer

You can associate multiple business units with a legal employer. This enables filtering business units by legal employer, on responsive pages that have implemented this feature. You use the Associated Business Units extensible flexfield (EFF) context for the business unit - legal entity association.

These are some key points to note:

- By default, the **Associated Business Units** context isn't associated with any page. You need to configure the mapping on the Manage Extensible Flexfields page. Thereafter, you can associate multiple business units with the legal employer. Once the context is associated, it appears for all legal employers.
- A legal employer must have at least one associated business unit to filter the business unit by legal employer.
- You can associate multiple business units with a legal employer, but can't associate the same business unit twice with a legal employer.
- You can associate the same business unit with multiple legal employers.
- You can delete the legal employer - business unit association.
- You can associate business units when updating or correcting a legal employer.
- The business unit list of values displays all active and inactive business units configured. There isn't any filtering for only active business units.
- Business units are listed in the ascending order of business unit name.

In this example, Vision Enterprise has 3 legal employers in India - Vision India, Vision Corp India, and Vision India Financial Services. Each legal employer has 5 business units defined. You want to filter the business units according to the Vision India legal employer. So, you associate the business units with the legal employer using the **Associated Business Units** extensible flexfield context.

Let's look at the steps to update the key values for this association. For other fields, you can use the default values.

Add Context to Manage Legal Entity HCM Information Page

1. Go to **My Enterprise > Setup and Maintenance**.
2. Search and select the **Manage Extensible Flexfields** task.
3. Search for **Organization Information EFF** on the **Manage Extensible Flexfields** page.
4. Click **Edit**.
5. Expand the **Organization** category and select **Legal Employer**.
6. In the Legal Employer: Details section, select the **Associated Business Units** delivered context and click the **Pages** tab.
7. In the Legal Employer: Associated Contexts Details section, click the **Select and Add** icon.
8. In the Select and Add: Contexts window, enter **Associated Business Units** in the **Name** field and click **Search**.
9. Select the context.
10. Click **Apply**.
11. Click **Save and Close**.
12. Select the **Organization Information EFF** context on the **Manage Extensible Flexfields** page and click the **Deploy Flexfield** button.

Associate Business Units to Vision India

1. Go to **My Client Groups > Quick Actions > Workforce Structures**.

2. Search and click the **Manage Legal Entity HCM Information** task.
3. Search and click the **Vision India** legal entity to associate the business units.
4. Click **Edit > Update or Correct**.
5. Click the **Add Row** icon in the Associated Business Units section.
6. Search and select these business units.

Number	Business Unit
1	Legal
2	Human Resources
3	Facilities
4	Administration
5	Operations

Note: As a prerequisite, these business units should already exist.

Repeat step 5 to add more business units.

7. Click **Submit**.

Related Topics

- [Filter Business Units Based on Legal Employers](#)

FAQs for Legal Entities, Business Units, and Reference Data Sets

What's a legal employer?

A legal employer is a legal entity that employs workers. You define a legal entity as a legal employer in the Oracle Fusion Legal Entity Configurator.

The legal employer is captured at the work relationship level, and all assignments within that relationship are automatically with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

What's a legal address?

A legal address is the mailing address of a legal entity or legal authority. A legal address is also the address a legal entity uses to register with a legal authority.

You can use legal addresses to send correspondence, such as invoices, bills, reports, and so on, to a legal entity or authority.

Note:

- You must create legal addresses before creating legal entities
- You can create legal addresses for legal authorities when creating legal authorities

What's a payroll statutory unit?

Payroll statutory units are legal entities that are responsible for paying workers, including the payment of payroll tax and social insurance.

A payroll statutory unit can pay and report on payroll tax and social insurance on behalf of one or many legal entities, depending on the structure of your enterprise. For example, if you're a multinational, multiple company enterprise, then you register a payroll statutory unit in each country where you employ and pay people. You can optionally register a consolidated payroll statutory unit to pay and report on workers across multiple legal employers within the same country. You associate a legislative data group with a payroll statutory unit to provide the correct payroll information for workers.

What's a tax reporting unit?

Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications.

To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage Legal Reporting Unit HCM Information task.

If you identify a legal entity as a legal employer, and not as a payroll statutory unit, you must enter a parent payroll statutory unit. The resulting legal reporting units are transferred to Oracle Fusion HCM as tax reporting units, but as children of the parent payroll statutory unit that you entered, and not the legal entity that you identified as a legal employer.

What's an ultimate holding company?

The legal entity that represents the top level in your organization hierarchy, as defined by the legal name entered for the enterprise. This designation is used only to create an organization tree, with these levels:

- Ultimate holding company as the top level
- Divisions and country holding companies as the second level
- Legal employers as the third level

What reference data objects can be shared across business units?

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

Application Name	Reference Data Object	Method of Sharing
Trading Community Model	Customer Account Relationship	Assignment to one set only, no common values allowed
Trading Community Model	Customer Account Site	Assignment to one set only, no common values allowed
Trading Community Model	Salesperson	Assignment to one set only, no common values allowed
Opportunity Management	Sales Method Group	Assignment to one set only, with common values
Work Management	Assessment Templates	Assignment to one set only, with common values
Enterprise Contracts	Contract Types	Assignment to one set only, with common values
Sales	Sales Method	Assignment to one set only, with common values
Common Components	Activity Templates	Assignment to one set only, with common values
Payables	Payment Terms	Assignment to multiple sets, no common values allowed

Application Name	Reference Data Object	Method of Sharing
Receivables	Accounting Rules	Assignment to one set only, with common values
Receivables	Aging Buckets	Assignment to one set only, with common values
Receivables	Auto Cash Rules	Assignment to one set only, with common values
Receivables	Collectors	Assignment to one set only, with common values
Receivables	Lockbox	Assignment to one set only, with common values
Receivables	Memo Lines	Assignment to one set only, with common values
Receivables	Payment Terms	Assignment to one set only, with common values
Receivables	Remit To Address	Assignment to one set only, with common values
Receivables	Revenue Contingencies	Assignment to one set only, with common values
Receivables	Transaction Source	Assignment to one set only, with common values
Receivables	Transaction Type	Assignment to one set only, with common values
Advanced Collections	Collections Setups	Assignment to one set only, with common values
Advanced Collections	Dunning Plans	Assignment to one set only, with common values
Tax	Tax Classification Codes	Assignment to multiple sets, no common values allowed
Human Resources	Departments	Assignment to one set only, with common values
Human Resources	Jobs	Assignment to one set only, with common values

Application Name	Reference Data Object	Method of Sharing
Human Resources	Locations	Assignment to one set only, with common values
Human Resources	Grades	Assignment to one set only, with common values
Project Billing	Project and Contract Billing	Assignment to multiple sets, no common values allowed
Project Foundation	Project Accounting Definition	Assignment to one set only, no common values allowed
Project Foundation	Project Rates	Assignment to one set only, with common values
Order Management	Hold Codes	Assignment to one set only, with common values
Order Management	Orchestration Process	Assignment to one set only, with common values

What happens if I override the set assignment?

For the selected business unit, you can override the default reference data set for one or more reference data groups.

For example, assume you have three reference data groups: Vision 1 SET, Vision 2 SET, and Vision 3 SET, where Vision SET 1 is the default set for business unit United Kingdom Vision 1 BU. You can override the default so that:

- Grades are assigned to Vision 2 SET.
- Departments are assigned to Vision 3 SET.
- Jobs are assigned to the default set, Vision 3 SET.

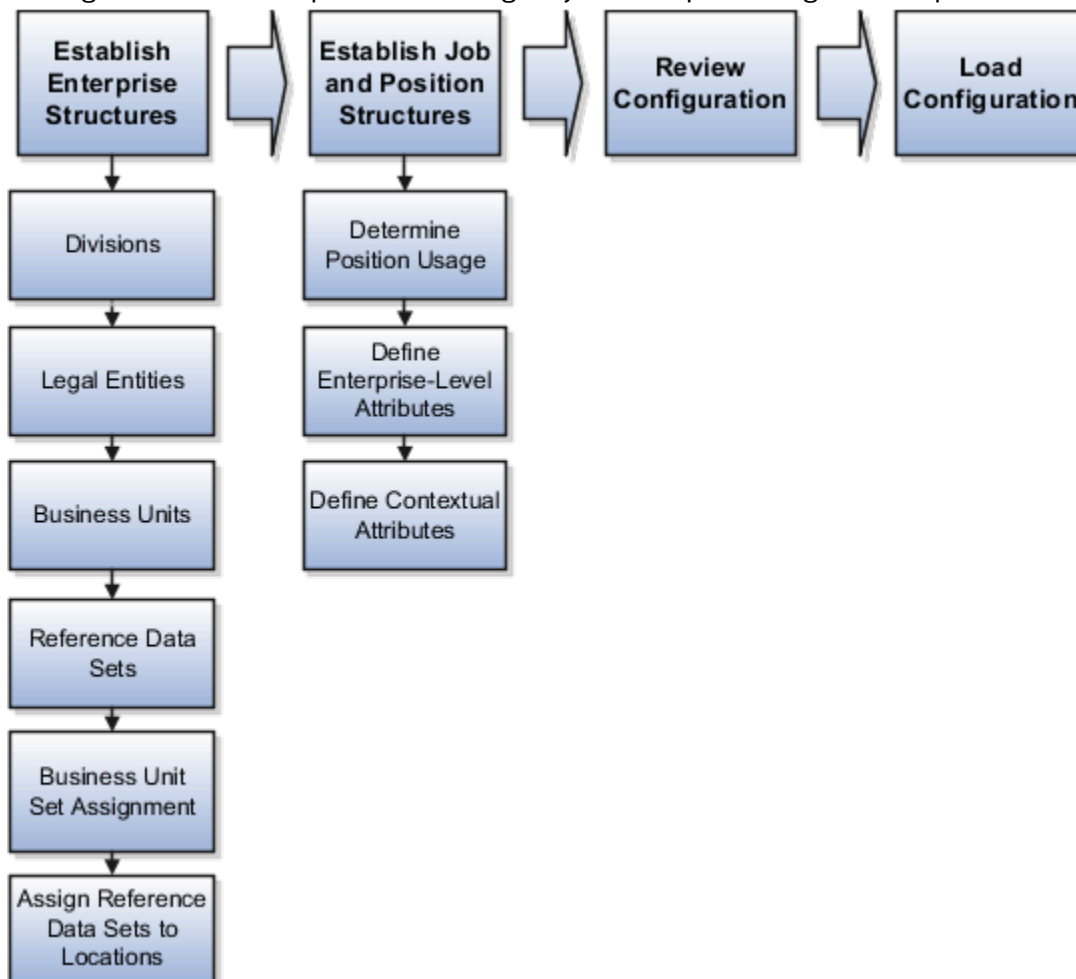
4 Enterprise Structures Configurator (ESC)

How You Establish Enterprise Structures Using the Enterprise Structures Configurator

The Enterprise Structures Configurator is an interview-based tool that guides you through the process of setting up a basic enterprise structure.

By answering questions about your enterprise, the tool creates a structure of divisions, legal entities, business units, and reference data sets that reflects your enterprise structure. After you create your enterprise structure, you also follow a guided process to determine whether to use positions, and whether to set up additional attributes for jobs and positions. After you define your enterprise structure and your job and position structures, you can review them, make any necessary changes, and then load the final configuration.

This figure illustrates the process to configure your enterprise using the Enterprise Structures Configurator.



To be able to use the Enterprise Structures Configurator, you must select the Enterprise Structures Guided Flow feature for your offerings on the Configure Offerings page in the Setup and Maintenance work area. If you don't select this

feature, then you must set up your enterprise structure using individual tasks provided elsewhere in the offerings, and you can't create multiple configurations to compare different scenarios.

Establish Enterprise Structures

To define your enterprise structures, use the guided flow within the Establish Enterprise Structures task to enter basic information about your enterprise, such as the primary industry. You then create divisions, legal entities, business units, and reference data sets. The Establish Enterprise Structures task enables you to create multiple enterprise configurations so that you can compare different scenarios. Until you load a configuration, you can continue to create and edit multiple configurations until you arrive at one that best suits your enterprise.

Establish Job and Position Structures

You also use a guided process to determine whether you want to use jobs only, or jobs and positions. The primary industry that you select in the Establish Enterprise Structures task provides the application with enough information to make an initial recommendation. You can either accept the recommendation, or you can answer additional questions about how you manage people in your enterprise, and then make a selection. After you select whether to use jobs or positions, you're prompted to set up a descriptive flexfield structure for jobs, and for positions if applicable. Descriptive flexfields enable you to get more information when you create jobs and positions.

Review Configuration

You can view a result of the interview process prior to loading the configuration. The review results, show the divisions, legal entities, business units, reference data sets, and the management reporting structure that the application will create when you load the configuration.

Load Configuration

You can load only one configuration. When you load a configuration, the application creates the divisions, legal entities, business units, and so on. After you load the configuration, you then use individual tasks to edit, add, and delete enterprise structures.

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

Business Object	Task
Location	Location Details
Division	Manage Divisions
Business Unit	Manage Business Units
Set Assignment Override	Manage Set Assignments
Legislative Data Group	Manage Legislative Data Groups
Enterprise	Manage Enterprise HCM Information
Job and Position Flexfield Definitions	Manage Descriptive Flexfields
Legal Entity	<ul style="list-style-type: none"> • Manage Legal Entities • Manage Legal Entity HCM Information

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

Configuration Workbench

The Oracle Fusion Enterprise Structures Configurator is an interview based tool to help you analyze how to represent your business in the Oracle Fusion Applications.

The interview process poses questions about the name of your enterprise, legal structure, management reporting structure, and primary organizing principle for your business. Based on your answers, the applications suggest the best practices to use to implement business units in your enterprise. You can use or modify these answers to ensure that both your reporting and administrative goals are met in your Oracle Fusion deployment.

How You Create Legal Entities in the Enterprise Structures Configurator

Use the Enterprise Structures Configurator, to create legal entities for your enterprise automatically, based on the countries in which divisions of your business operate, or you can upload a list of legal entities from a spreadsheet.

Automatically Creating Legal Entities

If you are not certain of the number of legal entities that you need, you can create them automatically. To use this option, you first identify all of the countries in which your enterprise operates. The application opens the Map Divisions by Country page, which contains a matrix of the countries that you identified, your enterprise, and the divisions that you created. You select the check boxes where your enterprise and divisions intersect with the countries to identify the legal entities that you want the application to create. The enterprise is included for situations where your enterprise operates in a country, acts on behalf of several divisions within the enterprise, and is a legal employer in a country. If you select the enterprise for a country, the application creates a country holding company.

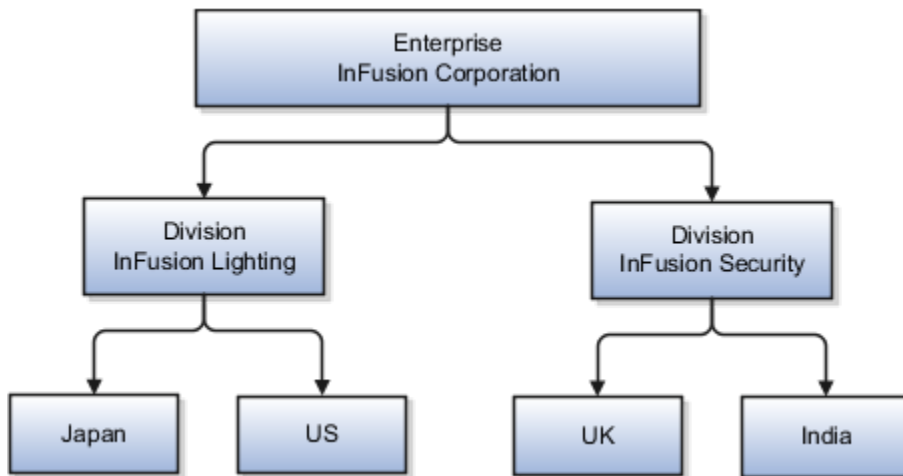
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically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

Any legal entities that you create automatically cannot be deleted from the Create Legal Entities page within the Enterprise Structures Configurator. You must return to the Map Divisions by Country page and deselect the legal entities that you no longer want.

Example: Creating Legal Entities Automatically

InFusion Corporation is using the ESC to set up its enterprise structure. The corporation has identified two divisions, one for Lighting, and one for Security. The Lighting division operates in Japan and the US, and the Security division operates in the UK and India.

This figure illustrates InFusion Corporation's enterprise structure.



This table represents the selections that InFusion Corporation makes when specifying which legal entities to create on the Map Divisions by Country page.

Country	Enterprise	InFusion Lighting	InFusion Security
Japan	No	Yes	No
US	No	Yes	No
UK	No	No	Yes
India	No	No	Yes

Based on the selections made in the preceding table, the ESC creates the following four legal entities:

- InFusion Lighting Japan LE
- InFusion Lighting US LE
- InFusion Security UK LE
- InFusion Security India LE

Creating Legal Entities Using a Spreadsheet

If you have a list of legal entities already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, then add your legal entity information to the spreadsheet, and then upload directly to your enterprise configuration. You can export and import the spreadsheet multiple times to accommodate revisions.

Related Topics

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

Considerations for Creating Business Units in the Enterprise Structures Configurator

Business units are used within Oracle Fusion applications for management reporting, processing of transactions, and security of transactional data. Using the Enterprise Structures Configurator, you create business units for your enterprise either automatically or manually.

Automatically Creating Business Units

To create business units automatically, you must specify the level at which to create business units. Business units within your enterprise may be represented at one of two levels:

- Business function level, such as Sales, Consulting, Product Development, and so on.
- A more detailed level, where a business unit exists for each combination of countries in which you operate and the functions in those countries.

You can automatically create business units at the following levels:

- Country
- Country and Division
- Country and business function
- Division
- Division and legal entity
- Division and business function
- Business function
- Legal entity
- Business function and legal entity

Select the option that best meets your business requirements, but consider the following:

- If you use Oracle Fusion Financials, the legal entity option is recommended because of the manner in which financial transactions are processed.
- The business unit level that you select determines how the application automatically creates reference data sets.

After you select a business unit level, the application generates a list of business units, and you select the ones you want the application to create. If you select a level that has two components, such as country and division, then

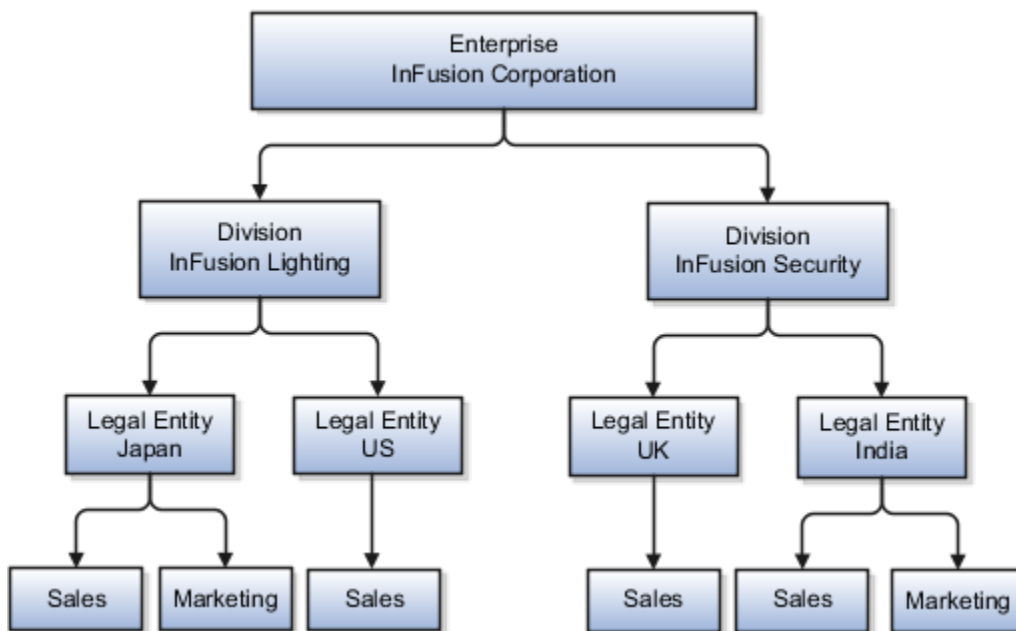
the application displays a table listing both components. You select the check boxes at the intersections of the two components.

The business units listed by the application are suggestions only, and are meant to simplify the process to create business units. You aren't required to select all of the business units suggested. When you navigate to the next page in the ESC guided flow, the Manage Business Units page, you can't delete any of the business units created automatically. You must return to the Create Business Units page and deselect any business units that you no longer want.

Example: Selecting Business Unit Levels

InFusion Corporation is using the Enterprise Structures Configurator to set up its enterprise structure. InFusion has identified two divisions, one for Lighting, and one for Security. They operate in four countries: US, UK, Japan, and India, and they have created a legal entity for each of the countries. The sales and marketing functions are based in both India and Japan, while the US and the UK have only the sales function.

This figure illustrates InFusion Corporation's enterprise structure.



The following table lists the options for business unit levels and the resulting business units that the application suggests for InFusion Corporation.

Business Unit Level	Suggested Business Units
Country	<ul style="list-style-type: none"> • US • UK • Japan • India
Country and Division	<ul style="list-style-type: none"> • InFusion Lighting: Japan • InFusion Lighting: US • InFusion Security: UK • InFusion Security: India

Business Unit Level	Suggested Business Units
Country and business function	<ul style="list-style-type: none"> • Sales: Japan • Marketing: Japan • Sales: US • Sales: UK • Marketing: India • Sales: India
Division	<ul style="list-style-type: none"> • InFusion Lighting • InFusion Security
Division and Legal Entity	<ul style="list-style-type: none"> • InFusion Lighting: Japan • InFusion Lighting: US • InFusion Security: UK • InFusion Security: India
Division and Business Function	<ul style="list-style-type: none"> • InFusion Lighting, Sales • InFusion Lighting, Marketing • InFusion Security, Sales • InFusion Security, Marketing
Business Function	<ul style="list-style-type: none"> • Sales • Marketing
Legal Entity	<ul style="list-style-type: none"> • Legal Entity: Japan • Legal Entity: US • Legal Entity: UK • Legal Entity India
Legal Entity and Business Function	<ul style="list-style-type: none"> • Legal Entity: Japan, Sales • Legal Entity: Japan, Marketing • Legal Entity: US, Sales • Legal Entity: UK, Sales • Legal Entity India, Marketing • Legal Entity India, Sales

Manually Creating Business Units

If none of the levels for creating business units meets your business needs, you can create business units manually, and you create them on the Manage Business Units page. If you create business units manually, then no reference data sets are created automatically. You must create them manually as well.

Related Topics

- [Business Units](#)
- [Reference Data Sets and Sharing Methods](#)
- [What reference data objects can be shared across asset books?](#)

How You Create Reference Data Sets in the Enterprise Structures Configurator

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit.

You can add additional sets, but you cannot delete any of the sets that were created automatically. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically. A standard set called the Enterprise set is predefined.

Common Set

The Common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment

How You Roll Back an Enterprise Structure Configuration

The Enterprise Structures Configurator provides the ability to roll back an enterprise configuration.

Roll Back a Configuration Manually

You can manually roll back an enterprise configuration after loading it, for example, because you decide you don't want to use it. Clicking the Roll Back Configuration button on the Manage Enterprise Configuration page rolls back any enterprise structures that were created as a part of loading the configuration.

Roll Back a Configuration Automatically

If an error occurs during the process of loading the configuration, then the application automatically rolls back any enterprise structures that were created before the error was encountered.

FAQs for Enterprise Structures Configurator

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

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

If you don't use the Enterprise Structures Configurator, then you must set up your enterprise structure using the individual tasks that correspond to each enterprise component. In addition, you can't set up multiple configurations and compare different scenarios. Using the Enterprise Structures Configurator is the recommended process for setting up your enterprise structures.

5 Divisions, Departments, Worker Unions, Locations, and Trees

Guidelines for Using Single or Multiple Classifications for an Organization

Organization classifications define the purpose of the organization, whether it's a department, a division, or a legal entity. In some enterprises, organization classifications overlap, which means that the same organization can be assigned multiple classifications.

For example, one organization within an enterprise might be both a project organization and a department. The classifications of organizations vary according to business objectives, legal structure, industry, company culture, size and type of growth. You can create organizations in Oracle Fusion with one or more classifications to reflect your enterprise structure.

Defining an Organization with One Classification

Define each organization in your enterprise as a separate organization with a single classification to reflect your enterprise structure and provide flexibility for expansion. The advantage of setting up separate organizations is the ability to add further organizations to expand the enterprise easily. For example, if your enterprise acquires another company which has a different line of business in a country in which you employ people, you can create a division, a legal entity, and additional departments. Classify the new legal entity as a legal employer and payroll statutory unit for the company's payroll tax and social insurance.

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, use an organization within the sales applications as a department that employs salespeople and classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, create a legal entity for each country using the Manage Legal Entity task. Then use the Manage Departments task to classify the legal entity as a department.

Related Topics

- [Model Your Financial Reporting Structure](#)

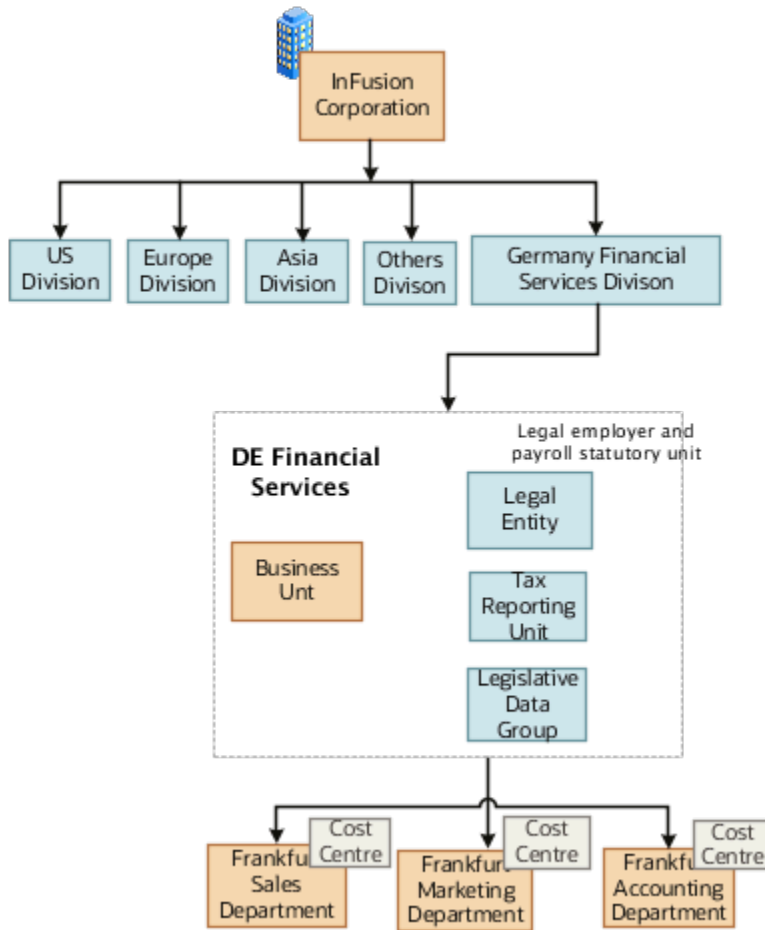
How You Configure Your Enterprise Structure After an Acquisition

The InFusion Corporation is a global company with organizations in the United States (US), the United Kingdom (UK), France, China, Saudi Arabia, and the United Arab Emirates (UAE).

Its main area of business is in the high tech industry, but it recently acquired a financial services business, based in Germany. InFusion wants to retain the financial services company as a separate business with all the costs and reporting managed by the Financial Services division.

You need to set up organizations to reflect the newly acquired company and its organizations.

The following figure illustrates how to set up the new division for Germany, and how the new division fits into the



enterprise.

The following table summarizes the key decisions for setting up the new division:

Decisions to Consider	In This Example
Create a separate division?	Yes, as you want to keep the Financial Services company as a separate line of business. By creating a separate division, you can manage the costs and reporting separately from the InFusion Corporation. Additionally, you don't have to modify any existing organizations in your enterprise setup.
How many departments?	The Financial Services company currently has three departments for sales, accounting, and marketing. As InFusion has no plans to downsize or change the company, you can create the three departments to retain the structure.
How many cost centers?	Three, to track the costs of each department.

Decisions to Consider	In This Example
How many legal entities?	You need one legal entity defined as a legal employer and payroll statutory unit. As the new division operates only from Germany, you can configure the legal entity to suit Germany's legal and statutory requirements.
Create legislative data group?	Yes, you need a legislative data group as you currently don't employ or pay people in Germany. Create one legislative data group to run payroll for your workers in Germany.
Create location?	Create a new location address for each organization located differently. The financial services company is based in Frankfurt, and the headquarters and departments are all in the same location.

You can use the following tasks to set up the enterprise structures that you need to include in the new Financial Services company:

- Creating a Location
- Creating a Division
- Creating Departments
- Creating a Legislative Data Group
- Creating Legal Entities
- Defining Legal Employer and Payroll Statutory Unit Information

Creating a Location

1. In the **Workforce Structures** work area, click the **Manage Locations** tab to open the **Manage Locations** page.
2. On the **Manage Locations** page, click **Create**, and complete the fields shown in the following table. Use the default values except where indicated.

Field	Value
Name	Germany
Code	DE
Country	Germany
Address Line 1	Hauptstrasse 85
Postal Code	6000
City	Frankfurt

3. Click **Submit**.

Creating a Division

1. In the **Workforce Structures** work area, click **Manage Divisions** to open the **Manage Divisions** page.
2. On the **Manage Divisions** page, click **Create**.
3. On the **Create Division: Division Description** page, select the **Create New** option to create a division with a single classification.
4. In the **Division Description** region, complete the fields shown in the following table. Use the default values except where indicated.

Field	Value
Name	Germany Financial Services
Location	Germany

5. Click **Next**.
6. On the **Create Division: Division Details** page, complete the fields shown in the following table. Use the default values except where indicated.
7. Click **Next**.
8. On the **Create Division: Review** page, review the division details, and click **Submit**.
9. Click **Yes**.
10. Click **OK**.

Creating Departments

1. In the **Workforce Structures** work area, click the **Manage Departments** tab to open the **Manage Department** page.
2. On the **Manage Departments** page, click **Create**.
3. On the **Create Department: Description** page, select the **Create New** option to create a department with a single classification.
4. Enter the details of the accounting department by completing the fields shown in the following table. Use the default values except where indicated.

Field	Value
Department Name	Accounting
Location	Germany

5. Click **Next**.
6. Associate a cost center in the **Create Department: Department Details** page.
7. Click **Next**.
8. On the **Create Department: Review** page, review the details of the department, and click **Submit**.

- Repeat steps 2 through 8 to create the sales and marketing departments.

Creating a Legislative Data Group

- In the **Setup and Maintenance** work area, locate the **Manage Legislative Data Groups** task. Click **Go to Task** to open the **Manage Legislative Data Group** page.
- On the **Manage Legislative Data Groups** page, click **Create**.
- On the **Create Legislative Data Groups** page, complete the fields shown in the following table. Use default values except where indicated.

Field	Value
Name	Germany Financial Services
Country	Germany
Currency	Eur

- Click **Submit**.

Creating Legal Entities

- In the **Setup and Maintenance** work area, locate the **Manage Legal Entity** task. Click **Go to Task** to open the **Manage Legal Entity** page.
- On the **Manage Legal Entity** page, click **Create**.
- On the page, complete the fields shown in the following table. Use default values except where indicated.

Field	Value
Name	Legal Entity
Legal Entity Identifier	123456
Payroll Statutory Unit	Selected
Legal Employer	Selected
Legal Address	123
EIN or TIN	123
Registration Number	123

4. Click **Save and Close**.

Defining Legal Employer and Payroll Statutory Unit Information

1. In the **Setup and Maintenance** work area, locate the **Manage Legal Entity HCM Information** task. Click **Go to Task** to open the **Manage Legal Entity** page.
2. Search for the new legal entity that you created in the "Creating Legal Entities" task.
3. Enter the payroll statutory unit and legal employer details.
4. Associate the legislative data group with the payroll statutory unit.
5. Click **Save**.

Divisions

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results.

Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies don't reflect directly the legal structure of the enterprise. The management entities and structure can include:

- Divisions and subdivisions
- Lines of business
- Other strategic business units
- Their own revenue and cost centers

These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

A division refers to a business-oriented subdivision within an enterprise, in which each division organizes itself differently to deliver products and services or address different markets. A division can operate in one or more countries, and can be many companies or parts of different companies that are represented by business units.

A division is a profit center or grouping of profit and cost centers, where the division manager is responsible for achieving business goals including profits. A division can be responsible for a share of the company's existing product lines or for a separate business. Managers of divisions may also have return on investment goals requiring tracking of the assets and liabilities of the division. The division manager generally reports to a corporate executive.

By definition a division can be represented in the chart of accounts. Companies can use product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise.

Historically, divisions were implemented as a node in a hierarchy of segment values. For example, Oracle E-Business Suite has only one balancing segment, and often the division and legal entity are combined into a single segment where each value stands for both division and legal entity.

Use of Divisions in Oracle Fusion Cloud Human Capital Management (HCM)

Divisions are used in HCM to define the management organization hierarchy, using the generic organization hierarchy. This hierarchy can be used to create organization-based security profiles.

Example of Adding a New Division After Acquiring a Company

This example describes how you can restructure your enterprise after acquiring a new division.

Scenario

You are part of a senior management team at InFusion Corporation. InFusion is a global company with organizations in the following countries:

- United States (US)
- United Kingdom (UK)
- France
- China
- Saudi Arabia
- United Arab Emirates (UAE)

The company's main area of business is in the high tech industry, and it recently acquired a new company. You must analyze the company's current enterprise structure and determine the new organizations to create in the new company.

Details of the Acquired Company

The acquired company is a Financial Services business based in Germany. The Financial Services business differs significantly from the high tech business. Therefore, you want to keep the Financial Services company as a separate business with all the costs and reporting managed by the Financial Services division.

The following table summarizes the key decisions that you must consider when determining what new organizations to set up and how to structure the enterprise.

Decision to Consider	In This Example
Create location?	The Financial Services company and its departments are based in Frankfurt. Therefore, you only have to create one location.
Create separate division?	Yes. Although the new division will exist in the current enterprise structure, you want to keep the Financial Services company as a separate line of business. By creating a separate division, you can manage the costs and reporting separately from the InFusion Corporation. Additionally, you don't have to modify any organizations in the enterprise setup.

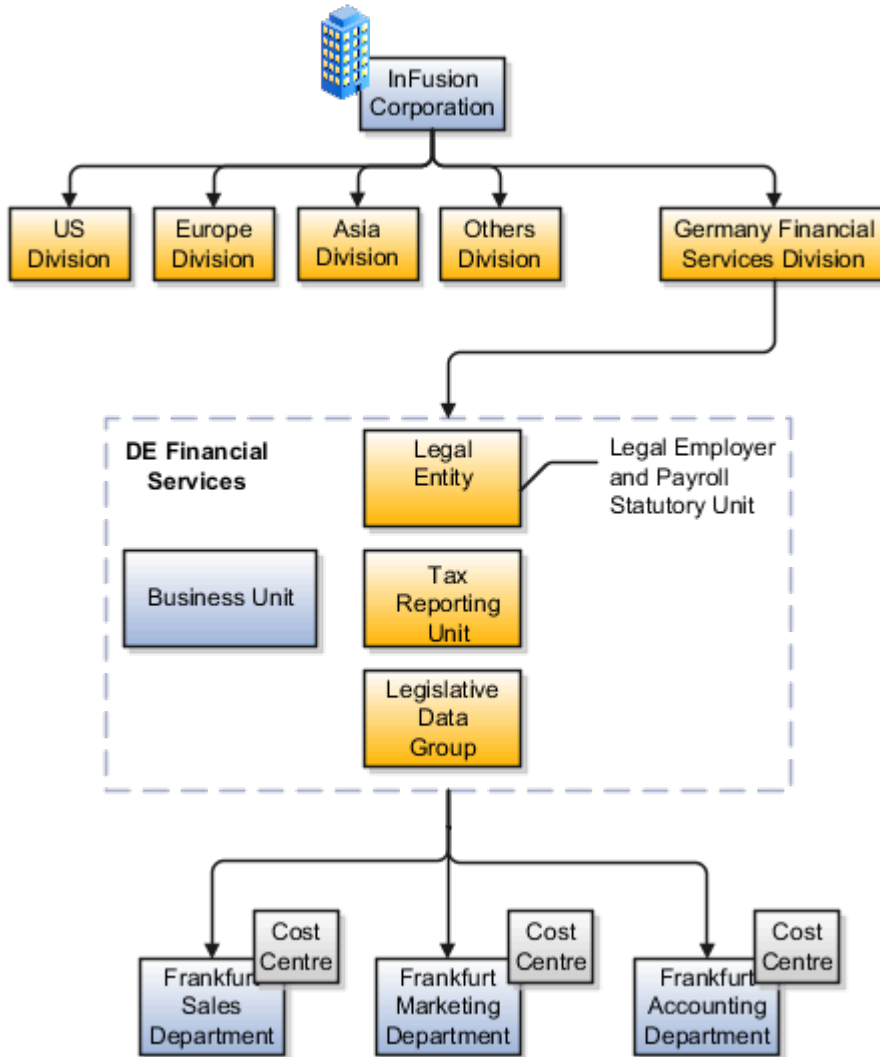
Decision to Consider	In This Example
Create business unit?	Yes. The Financial Services business requires you to create several jobs that don't exist in your high tech business. You can segregate the jobs that are specific to financial services in a new business unit.
How many departments?	The Financial Services company currently has departments for sales, accounting, and marketing. As you have no plans to downsize or change the company, you can create three departments to retain the structure.
How many cost centers?	Although you can have multiple cost centers to track the department costs, you decide to create one cost center for each department.
How many legal entities?	<p>Define a legal entity for each registered company or some other entity recognized by law. Using the legal entity, you can:</p> <ul style="list-style-type: none"> • Record assets • Record liabilities • Record income • Pay transaction taxes • Perform intercompany trading <p>In this case, you only need one legal entity.</p> <p>You must define the legal entity as a legal employer and payroll statutory unit. As the new division operates only from Germany, you can configure the legal entity to suit Germany's legal and statutory requirements.</p> <p>Note: You can identify the legal entity as a payroll statutory unit. When you do so, the application transfers the legal reporting unit associated with the legal entity to Oracle Fusion HCM as a tax reporting unit.</p>
Create legislative data group?	Yes. Because you currently don't employ or pay people in Germany, you must create one legislative data group to run payroll for the workers in Germany.

Resulting InFusion Enterprise Structure

Based on the analysis, you must create the following:

- One new division
- One new location
- Three new departments
- Three new cost centers
- One new legal entity
- One new legislative data group

The following figure illustrates the structure of InFusion Corporation after adding the new division and the other



organizations.

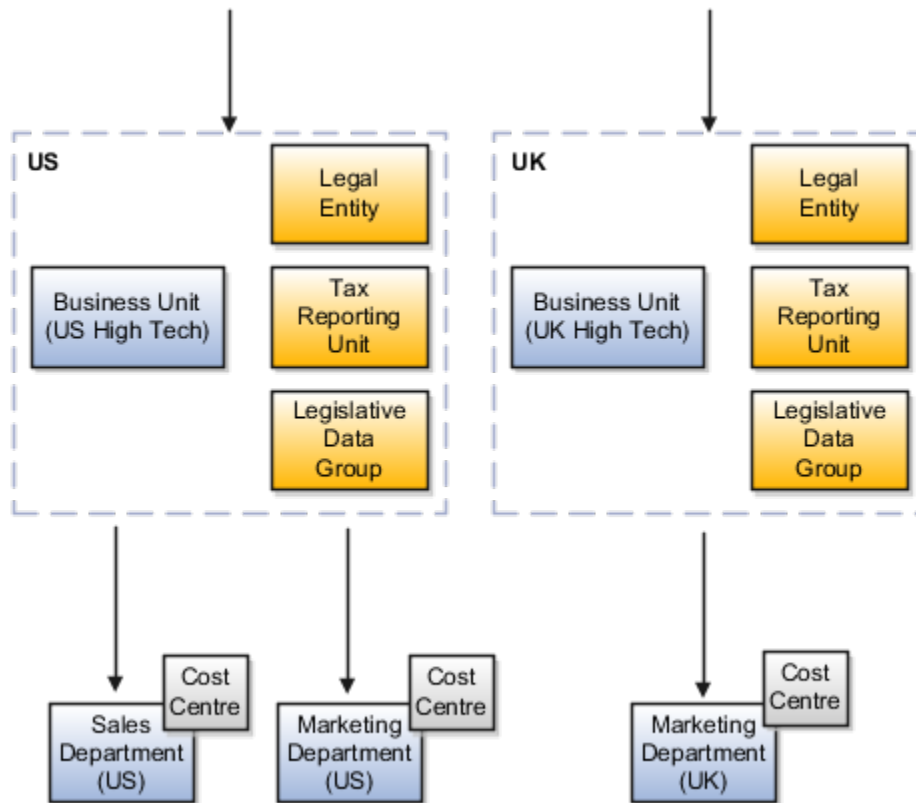
Departments

A department is an organization to which you assign workers. It is an organization with one or more operational objectives or responsibilities that exist independently of its manager.

You track the department's financial performance through one or more cost centers. For example, sales, research and development, and human resources. You can report and keep track of headcount by creating a department hierarchy using Oracle Fusion Trees.

Departments and cost centers example:

This figure illustrates how departments belong to legal entities within the enterprise structure.



Departments and Cost Centers

A cost center represents the smallest segment of an organization for which you allocate and report on costs. The manager of a department is typically responsible for cost control by meeting a budget and may be responsible for the assets used by the department. You can track the financial performance of a department through one or more cost centers.

Uploading Departments Using a Spreadsheet

If you have a list of departments already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, add your department information to the spreadsheet, and then upload directly to your enterprise configuration. You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- [Upload Workforce Structures Using a Spreadsheet](#)

How You Create a Chart of Account to Create a Department

In this example you can see how to create a chart of account for HCM implementations. You must set up a minimal chart of account to associate a company and cost center with departments.

This topic describes a simple scenario primarily intended for use within HCM. For more detailed information on setting up a chart of account, refer to the Financials product documentation.

Vision Corporation US is a US-based legal entity with cost centers in Arizona and California. In this example, we will create a Arizona cost center and associate it with the Sales Department.

The following table summarizes key decisions that you must consider when creating a chart of .

Decisions to Consider	In this Example
What should be the validation type for the value set?	Independent. Only this type is supported for creating General Ledger (GL) cost center information for departments in HCM.
What should be the segment labels for the chart of account?	The first segment is Primary Balancing Segment and the second segment is Cost Center Segment. Selecting these labels in this order is crucial in specifying the General Ledger cost center information for a department.

Summary of Tasks

In the Setup and Maintenance work area, create a chart of account and cost center value sets to create a chart of account structure and instance, and then associate it with the department.

1. Create the chart of account value set for the Vision Corporation US enterprise.
2. Specify Arizona and California as the values for the chart of account value set
3. Create the cost center value set for the Vision Corporation US enterprise.
4. Specify Arizona and California as the values for the cost center value set.
5. Create the chart of account structure by associating it with the chart of account and cost center value sets you created earlier.
6. Create the chart of account structure instance by associating it with the structure.
7. Specify the General Ledger cost center information by associating it with the chart of account and the cost center you created earlier, for creating the sales department.

Create a Chart of Account Value Set

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Chart of Accounts Value Sets
2. Click **Create**.

3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Value Set 1
Description	Vision Corporation US Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character
Value Subtype	Text
Maximum Length	5

4. Click **Save and Close**.

Specify Values for the Chart of Account Value Set

1. On the Manage Chart of Accounts Value Sets page, search and select Vision Corporation US Value Set 1 from the search results.
2. Click **Manage Values**.
3. Click Create.
4. Complete the fields as shown in this table.

Field	Value
Value	AZ
Description	Arizona
Enabled	Select the check box

5. Click **Save and Close**.

6. Create additional values for the Vision Corporation US Value Set 1 as shown in this table.

Field	Value
Value	CA
Description	California
Enabled	Select the check box

7. On the Manage Values page, click **Save and Close**.

Create a Cost Center Value Set

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Chart of Accounts Value Sets
2. Click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Cost Center Value Set 1
Description	Vision Corporation US Cost Center Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character
Value Subtype	Text
Maximum Length	5

4. Click **Save and Close**.

Create a Chart of Account Structure

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Chart of Accounts Structures
2. Search and select the **GL#** key flexfield code.
3. Click **Manage Structures**.
4. Click **Create**.
5. Complete the fields as shown in this table.

Field	Value
Structure Code	Vision Corp CoA Cost Center
Name	Vision Corp CoA Cost Center
Description	Vision Corporation Chart of Account Cost Center
Delimiter	Select any value

6. Click **Save**.
7. In the Segments section, click **Create**.
8. Complete the fields as shown in this table.

Field	Value
Segment Code	Vision_Corp_COA
API Name	visionCorpCoa
Name	Vision Corporation COA
Sequence Number	1
Prompt	Vision Corporation COA
Short Prompt	Vision
Enabled	Select the check box

Field	Value
Display Width	1
Range Type	Low
Column Name	SEGMENT1
Default Value Set Code	Vision Corporation US Value Set 1
Selected Labels	Primary Balancing Segment

9. Click **Save and Close**.
10. Create another segment with the following values

Field	Value
Segment Code	Vision_Corp_CostCenter_COA
API Name	visionCorpCostcenterCoa
Name	Vision Corporation Cost Center COA
Sequence Number	2
Prompt	Vision Corporation Cost Center COA
Short Prompt	Vision1
Enabled	Select the check box
Display Width	1
Range Type	Low
Column Name	SEGMENT2

Field	Value
Default Value Set Code	Vision Corporation US Cost Center Value Set 1
Selected Labels	Cost Center Segment

11. Click **Save and Close**.
12. On the Create Key Flexfield Structure page, click **Save and Close**.

Create a Chart of Accounts Structure Instance

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Workforce Deployment
 - o Functional Area: Financial Reporting Structures
 - o Task: Manage Chart of Accounts Structure Instances
2. Search and select the **GL#** key flexfield code.
3. Click **Manage Structure Instances**.
4. Click **Create**.
5. Complete the fields as shown in this table.

Field	Value
Structure Instance Code	Vision COA Structure Instance
API name	VisionCoaStructureInstance
Name	Vision Corporation COA Structure Instance
Structure Name	Vision Corp CoA Cost Center

6. Click **Save and Close**.

Specify the General Ledger Cost Center Information for Creating a Department

1. In the Workforce Structures work area, click the **Manage Departments** tab.
2. Click **Create**.
3. Select the **Create new** option.
4. Enter **Sales Department** in the Name field.
5. Click **Next**.

6. In the GL Cost Center Information section, complete the fields as shown in this table.

Field	Value
Record Identifier	10
Company Value Set	Vision Corporation US Value Set 1
Company	AZ
Cost Center Value Set	Vision Corporation US Cost Center Value Set 1
Cost Center	AZ

7. Click **Next** to review the specified information.
8. Click **Submit**.

Cost Centers and Departments

The two important components to be considered in designing your enterprise structure are cost centers and departments.

A cost center represents the smallest segment of an organization for which you collect and report costs. A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager and has one or more workers assigned to it.

Cost Centers

A cost center represents the destination or function of an expense rather than the nature of the expense which is represented by the natural account. For example, a sales cost center indicates that the expense goes to the sales department.

A cost center is generally attached to a single legal entity. To identify the cost centers within a chart of accounts structure use one of these two methods:

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach requires defining more cost center values.
- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values. The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies

using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

Departments

A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager. For example, although the manager may change, the objectives don't change. Departments have one or more workers assigned to them.

A manager of a department is typically responsible for:

- Controlling costs within their budget
- Tracking assets used by their department
- Managing employees, their assignments, and compensation

The manager of a sales department may also be responsible for meeting the revenue targets.

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Cloud Applications, departments are defined and classified as Department organizations. Oracle Fusion Cloud Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

The granularity of cost centers and their relationship to departments varies across implementations. Cost center and department configuration may be unrelated, identical, or consist of many cost centers tracking the costs of one department.

Department Classifications

A department can be classified as a project organization, sales and marketing organization, or cost organization.

A point to note is that a department name must be unique. This rule applies even when the department is classified as a project organization or an inventory organization. For example, if you create a department with name Vision Corp. Sales, you can't create another department with the same name. Also, if you classify this department as a project organization, you can't create another project organization as well with the same name.

Or, if you create a division with the name Vision Corp. Marketing that is classified as a department, which in turn is classified as a project organization, you can't create another division, department or project organization with the same name.

Oracle Fusion Cloud Human Capital Management (HCM) uses trees to model organization hierarchies. It provides predefined tree structures for department and other organizational hierarchies that can include organizations with any classification.

Project Organization

Classify departments as a project owning organization to enable associating them with projects or tasks. The project association is one of the key drivers for project access security.

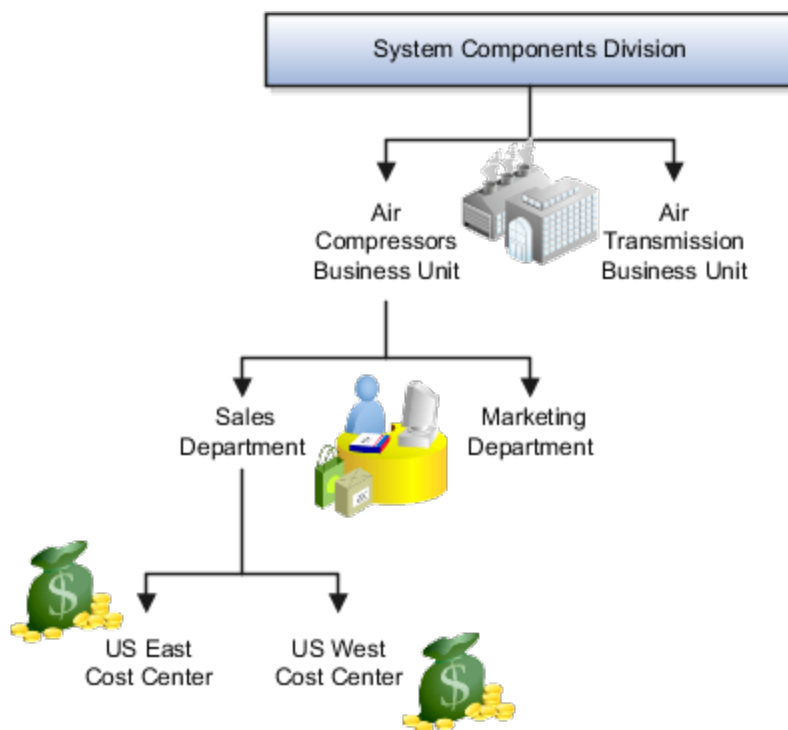
In addition, you must classify departments as project expenditure organizations to enable associating them to project expenditure items. Both project owning organizations and project expenditure organizations can be used by Oracle Subledger Accounting to derive accounts for posting Oracle Fusion Cloud Project Management accounting entries to Oracle General Ledger.

Sales and Marketing Organization

In sales applications, you can define sales and marketing organizations. Sales organization hierarchies are used to report and forecast sales results. Salespeople are defined as resources assigned to these organizations.

In some enterprises, the HCM departments and hierarchies correspond to sales organizations and hierarchies. Examining the decision on how to model sales hierarchies in relationship to department hierarchies when implementing Customer Relationship Management to eliminate any possible redundancy in the definition of the organizations is important.

The following figure illustrates a management hierarchy, in which the System Components Division tracks its expenses in two cost centers, Air Compressors and Air Transmission. At the department level, two organizations with a classification of Department are defined, the Marketing Department and Sales Department. These two departments can be also identified as a Resource Organizations, which enable assigning resources, such as salespeople, and other sales specific information to them. Each department is represented in the chart of accounts by more than one cost center, enabling granular as well as hierarchical reporting.



Cost Organization

Oracle Project Costing uses a cost organization to represent a single physical inventory facility or group of inventory storage centers, for example, inventory organizations. This cost organization can roll up to a manager with responsibility for the cost center in the financial reports.

A cost organization can represent a costing department. Consider this relationship when determining the setup of departments in HCM. No system dependencies are required for these two entities, cost organization and costing department, to be set up in the same way.

How You Configure the Department Title

The Title field for a department is hidden and optional, by default. You need to do these 2 steps to enable the field and make it mandatory.

Enable Title Field

These are the steps to set the value of the profile option ORA_PER_ENABLE_DEPARTMENT_TITLE to Y.

1. Navigate to the **Setup and Maintenance** work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for the **ORA_PER_ENABLE_DEPARTMENT_TITLE** profile option code and select the profile option in the search results.
4. In the Profile Values section, enter **Y** in the **Profile Value** field.
5. Click **Save and Close**.

Once you set the profile option value to Y, you can see the **Title** field in all the department pages, including Create, Update, Correct, and Review pages. Currently, the **Title** field appears in the Department LOV only on the responsive position pages.

Make Title Field Mandatory

Prerequisite Tasks:

1. Create a sandbox and add the **Page Composer** tool.
2. Create a department from the Workforce Structures work area on the **My Client Groups** tab.

Do these steps to make the title field mandatory:

1. Click **Edit Pages** from the **Settings and Actions** menu.
2. Click **Structure** and place your cursor in the **Title** field.
3. Click **Edit** in the Confirm Shared Component Edit window.
4. Search for **InputText:Title** in the component list and click the **Edit** icon.
5. Scroll down to the **Required** field in the Edit Properties window and click the **down arrow**.
6. Select **Expression Builder**.
7. Add the **#{pageFlowScope.makeTitleMandatory eq 'Y'}** condition in the expression editor.
8. Click **OK**.
9. Scroll down to the **Show Required** field in the Edit Properties window and click the **down arrow**.
10. Select **Expression Builder**.
11. Add the **#{pageFlowScope.makeTitleMandatory eq 'Y'}** condition in the expression editor.
12. Click **OK**.

Disability Organizations

You can set up disability organizations to identify the external organizations with which disabled employees are registered, and assess the degree of disability in the employee.

You set up disability organizations using the Manage Disability Organizations task in the Workforce Structures work area under My Client Groups.

Purpose of Disability Organizations

Disability organizations provide information and support to people with disabilities, for example, the Royal National Institute of Blind People. You can create a disability organization as a Trading Community Architecture party using the Manage Integration of Additional Applications task in the Setup and Maintenance work area. You can then select a disability organization party usage code.

For employees with disability, you can select the disability organization in their person records, identify the registration and expiration dates, and enter any other descriptive or legislative information about the disability.

Related Topics

- [Person Records](#)
- [Third Parties Overview](#)

Worker Union Management

These three components manage worker union information in Human Capital Management (HCM) Cloud:

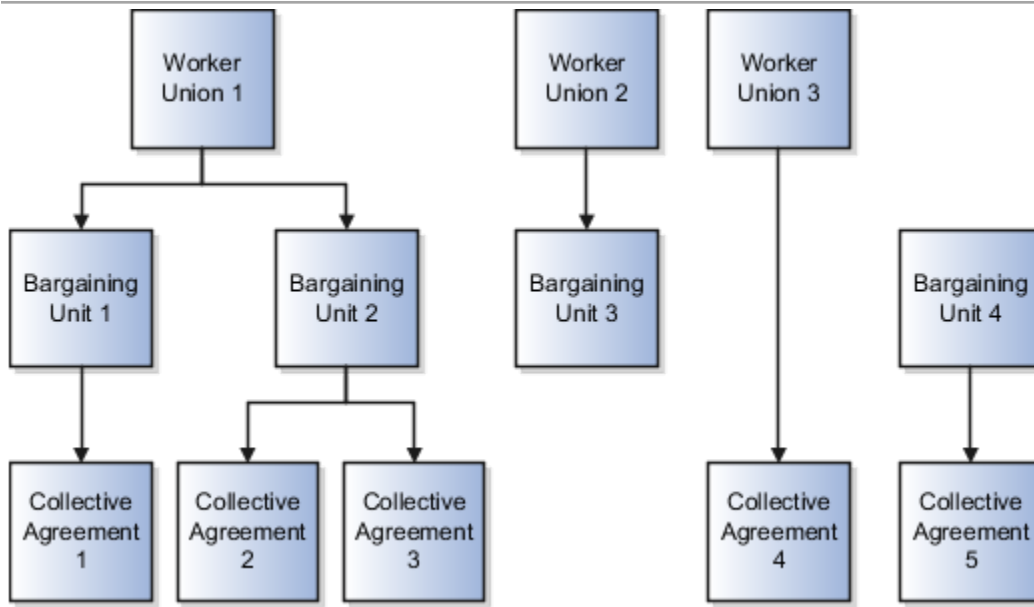
- Worker Unions
- Bargaining Units
- Collective Agreements

Worker Unions

The worker union is a HCM organization. You can create a new worker union or select an existing organization to define a worker union. The details of a worker union are country-specific and the country value is mandatory for a worker union. You can optionally attach any supporting documents for the worker union. A worker union holds date-effective attributes. Therefore, you can track the changes to the worker union over a period of time. You can also inactivate the worker union. You can configure additional attributes specific to any legislation or customer using the available descriptive flexfields and extensible flexfields.

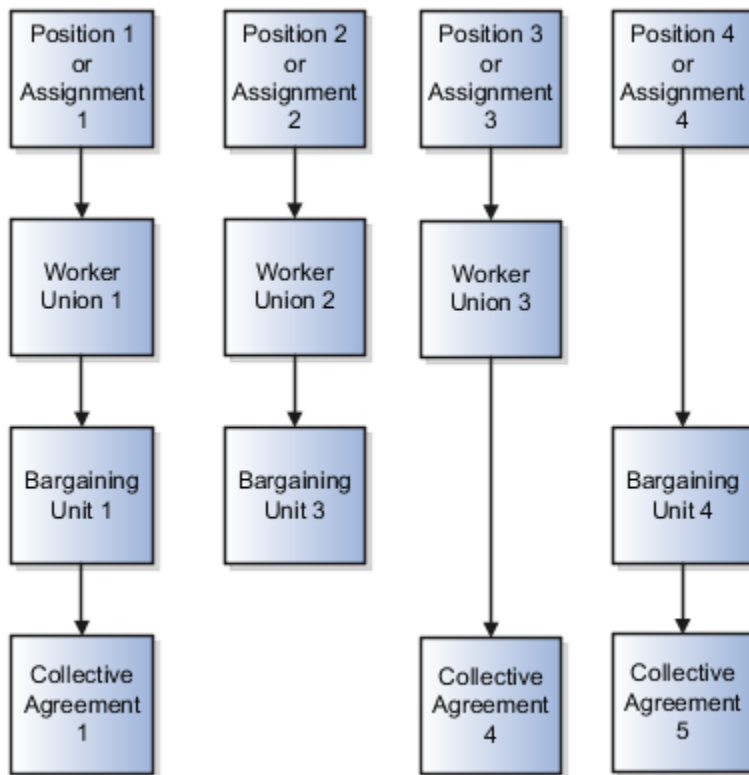
You can optionally associate worker unions with their affiliated bargaining units. The values in the Bargaining Unit and Location fields are filtered to match the country you selected. You can add more than one work union contact and enter the contact details, such as contact name, union title, work phone, and work Email.

This figure illustrates the association between worker union, bargaining unit, and collective agreement:



A worker union can be associated with multiple bargaining units. However, a bargaining unit can be associated with only one worker union. A collective agreement can be associated with only one worker union and bargaining unit. A worker union or bargaining unit can be associated with multiple collective agreements.

This figure illustrates the association between position or assignment and worker union, bargaining unit, and collective agreement:



A position or worker assignment can be associated with only one collective agreement, bargaining unit, and worker union. However, a bargaining unit, worker union, or collective agreement can be associated with multiple positions or worker assignments.

Bargaining Units

A bargaining unit is a specific group of employees who are represented by one authorized union or association for purposes of collective bargaining. A bargaining unit is defined as a lookup type.

Collective Agreements

A collective agreement is a special type of commercial agreement that's negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

Let's take a look at the collective agreement details:

A collective agreement is country-specific. You may enter the bargaining unit, legal employer, and union values depending on the country. For example, you can create a collective agreement without the bargaining unit and legal employer, or only with the legal employer. When you select the value in the Country field, the values in the Bargaining Unit, Legal Employer, and Union fields are filtered to match the country selected. You can optionally associate collective agreements with worker unions and attach documents to the collective agreement.

You can provide details of the parties negotiating the collective agreement, such as the employee and employer organizations. The employee organization can be the trade union or bargaining unit representing the employee while the employer organization is represented by the company management.

A collective agreement is date-effective, therefore, you can track changes to a collective agreement over time. You can also inactivate the collective agreement. You can configure additional attributes specific to a legislation or customer using the available descriptive flexfields and extensible flexfields. If you specify a Valid To date for a collective agreement, it lapses after that date and you can't link it to an employee.

Note: If the collective agreement is linked to an assignment, you can't edit the Identification Code, Country, Bargaining Unit, Union, and Legal Employer fields. Additionally, you can't delete the collective agreement.

Here's how you can link collective agreements:

You can link a collective agreement to an assignment provided the bargaining unit, country, and legal employer of the collective agreement are consistent with the assignment. If you created a collective agreement without associating it with a legal employer or bargaining unit, you can link the collective agreement to any assignment within the same country.

You can link a union, bargaining unit, or collective agreement with a worker assignment provided that its country and legal employer is consistent with the assignment.

The union, bargaining unit, and collective agreement list of values (LOV) that you can select for linking with an assignment or position are filtered as described in this table:

Attribute	Linking Object	Filter Conditions
Union	Assignment	The LOV is filtered to show unions that are active as of the start date and whose country matches the country of the legal employer on the worker assignment.
Union	Position	The LOV is filtered to show unions that are active as of the position start date. As there is no legislation context available for a position, the LOV isn't filtered based on the union country. All unions configured in the application are listed in the LOV.
Bargaining Unit	Assignment	<ul style="list-style-type: none"> If you don't select a union, the LOV is filtered to show bargaining units that are active as of the start date, and whose country matches the legal employer country or have no country tag itself. If you select a union, the LOV is filtered to show bargaining units that are active as of the start date and are associated with the selected union.
Bargaining Unit	Position	As there is no legislation context available for a position, the LOV isn't filtered based on country tags configured for the bargaining unit lookup codes.

Attribute	Linking Object	Filter Conditions
		<ul style="list-style-type: none"> If you don't select a union, the LOV is filtered to show bargaining units that are active as of the position start date. If you select a union, the LOV is filtered to show bargaining units that are active as of the position start date and are associated with the selected union.
Collective Agreement	Assignment	<p>Note: The LOV is filtered to show only those values that match the country of the legal employer on the worker assignment.</p> <p>If you don't select a union or bargaining unit, the LOV is filtered to show all active collective agreements as of the start date.</p> <p>If you select a union without selecting a bargaining unit, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected union, but don't have an associated bargaining unit (union-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). <p>If you select a bargaining unit without selecting a union, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected bargaining unit, but don't have an associated union (bargaining unit-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). <p>If you select a union and a bargaining unit, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected union and bargaining unit (union and bargaining unit-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values).
Collective Agreement	Position	<p>As there is no legislation context available for a position, the LOV isn't filtered based on the collective agreement country.</p> <p>If you don't select a union or bargaining unit, the collective agreement LOV is filtered to</p>

Attribute	Linking Object	Filter Conditions
		<p>show all active collective agreements as of the position start date.</p> <p>If you select a union without selecting a bargaining unit, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected union, but don't have an associated bargaining unit (union-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). <p>If you select a bargaining unit without selecting a union, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected bargaining unit, but don't have an associated union (bargaining unit-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values). <p>If you select a union and a bargaining unit, the LOV is filtered this way:</p> <ul style="list-style-type: none"> Shows collective agreements that are active and match the selected union and bargaining unit (union and bargaining unit-specific values). Shows collective agreements that are active and don't have an associated union or bargaining unit value (global values).

Attribute	Linking Object	Filter Conditions
		<p>Note:</p> <ul style="list-style-type: none"> • The global collective agreement values can be used on a position by configuring the following profile option: <ul style="list-style-type: none"> ○ Code: ORA_PER_ALLOW_GLOBAL_CAGR_ON_POSITIONS ○ Display Name: Allow Global Collective Agreements on Position • By default, the profile value is set to N. In this case, the global collective agreement values can't be used on a position even though the values are available for selection in the LOV. If you select a global collective agreement value, the application will display an error message when you submit the position change or creation. • If you set the profile value to Y, the global collective agreement values can be used on a position.

Collective Agreement Flexfields

Use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks in the Setup and Maintenance work area to manage flexfields. You can configure these collective agreement-related flexfields as required, to meet your enterprise requirements:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_COL_AGREEMENTS_F	PER_COL_AGREEMENTS_DDF	Collective Agreements Legislative Information	For storing additional legislative information regarding collective agreements.	Available only for Oracle localization use.
PER_COL_AGREEMENTS_F	PER_COL_AGREEMENTS_DFF	Collective Agreements Attributes	For storing additional information regarding collective agreements.	Available for use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_COL_AGRS_EXTRA_INFO_F	PER_COL_AGREEMENTS_EFF	Collective Agreements EIT Information EFF	For storing additional collective agreement information as single and multiple row extensible flexfield contexts.	Available for use.

Locations

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Location Details quick action in the Workforce Structures area on the My Client Groups tab.

You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

When specifying the location address, you can default the country in the location responsive pages. You configure the default location country on the **Manage Enterprise HCM Information** page. If you don't configure any default country, then the country is automatically defaulted to United States in the location address.

The locations that you create exist as separate structures that you can use for reporting purposes, and in rules that determine employee eligibility for various types of compensation and benefits. You enter information about a location only once. Subsequently, when you set up other workforce structures you select the location from a list.

A point to note is that the Ship-to Site, Receiving Site, Bill-to Site, Office Site, and Designated Receiver fields in the Shipping Details section of a location setup are for information purpose only and can be used to report upon. They aren't currently used by any feature or process within HCM.

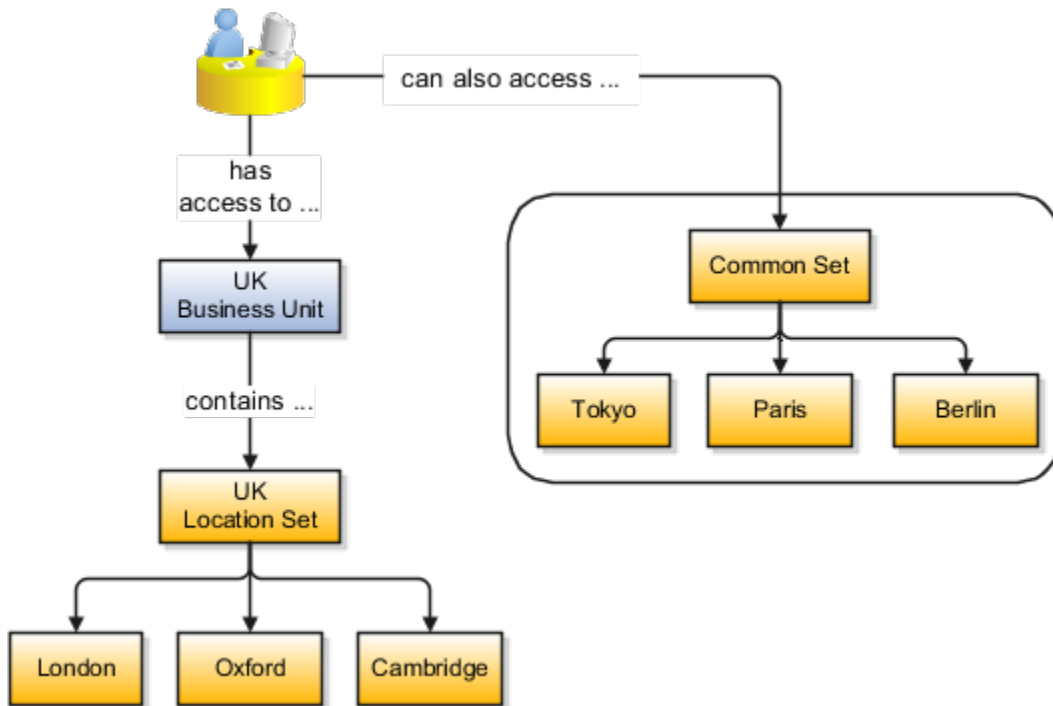
Location Sets

When you create a location, you must associate it with a set. Only those users who have access to the set's business unit can access the location set and other associated workforce structure sets, such as those that contain departments and jobs.

Note the following:

- You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit.
- You can also configure a location as an employee location on the **Location Details** page.
- When users search for locations, they can see the locations that they have access to along with the locations in the common set.

The following figure shows how locations sets restrict access to users.



Upload Locations Using a Spreadsheet

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

- Download a spreadsheet template
- Add your location information to the spreadsheet
- Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.

Update Location Details

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

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

Related Topics

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

Associate Legal Employers with Locations

You can associate multiple legal employers with a location. This enables filtering locations by legal employer on pages that have implemented this feature. You use the Legal Employers Operating At This Location extensible flexfield (EFF) context for the legal employer - location association.

These are some key points to note:

- A location must have at least one associated legal employer to filter the location by legal employer.
- You can associate multiple legal employers operating at a location, but can't associate the same legal employer twice with a location.
- You can associate the same legal employer with different locations.
- You can delete the legal employer - location association.
- The legal employer - location mapping is copied when you duplicate a location.
- You can associate legal employers when creating, updating, or correcting a location.
- The legal employer list of values displays all active and inactive legal employers configured. There isn't any filtering for only active legal employers. Similarly, there is no filtering of legal employers by matching the legal employer country with the location address country.
- Legal employers are listed in the ascending order of legal employer name.
- Locations are first filtered based on the set. And thereafter, if an association exists, they're filtered based on the legal employers.

In this example, Vision Enterprise has 3 legal employers Vision Corporation, Vision US, and Vision Consulting operating at multiple locations in the US. You want to filter locations from where Vision Corporation is operating.

Let's look at the steps to update this association.

Associate Vision Corporation with the Pleasanton Location

1. Go to **My Client Groups > Quick Actions > Workforce Structures**.
2. Click the **Location Details** task.
3. Click **Add**.
4. Select the **Additional Info** option on the questionnaire page and click **Continue**.
5. Enter these required details to create a location.

Section	Field	Value
When and Why	When does this location start?	8/25/21
Location Details	Name	Pleasanton
	Code	PLS
Main Address	Address Line 1	603

Section	Field	Value
	ZIP Code	94588
	City	Pleasanton
	State	CA
	County	Alameda

- In the Additional Info section, click **Add** in the Legal Employers Operating At this Location section to associate the **Vision Corporation** legal employer to this location.
- Select **Vision Corporation** from the **Legal Employer** list.

Note: As a prerequisite, the legal employer should already exist.

- Click **OK**.
- Click **Submit**.

Related Topics

- [Filter Locations Based on Legal Employers](#)

HCM Trees

Trees graphically represent the hierarchical structures of your organization. You manage trees in the Workforce Structures work area under My Client Groups.

These tree structures are supported - department, organization, position, and geography. What nodes can be added to the tree is controlled by each structure type. With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions of each tree. However, only one version of a tree is active at any time.

Each tree version contains a root node that's at the highest level in the hierarchy. The lines connecting the elements in a tree structure are branches and the elements are referred to as nodes. These relationships are explained as follows: a node is a parent of another node if it's one step higher in the hierarchy. Child nodes share the same parent node.

For example, in the Department Tree figure, Operations is the parent of Human Resources, Legal, and Finance, which are its child nodes.

Department Trees

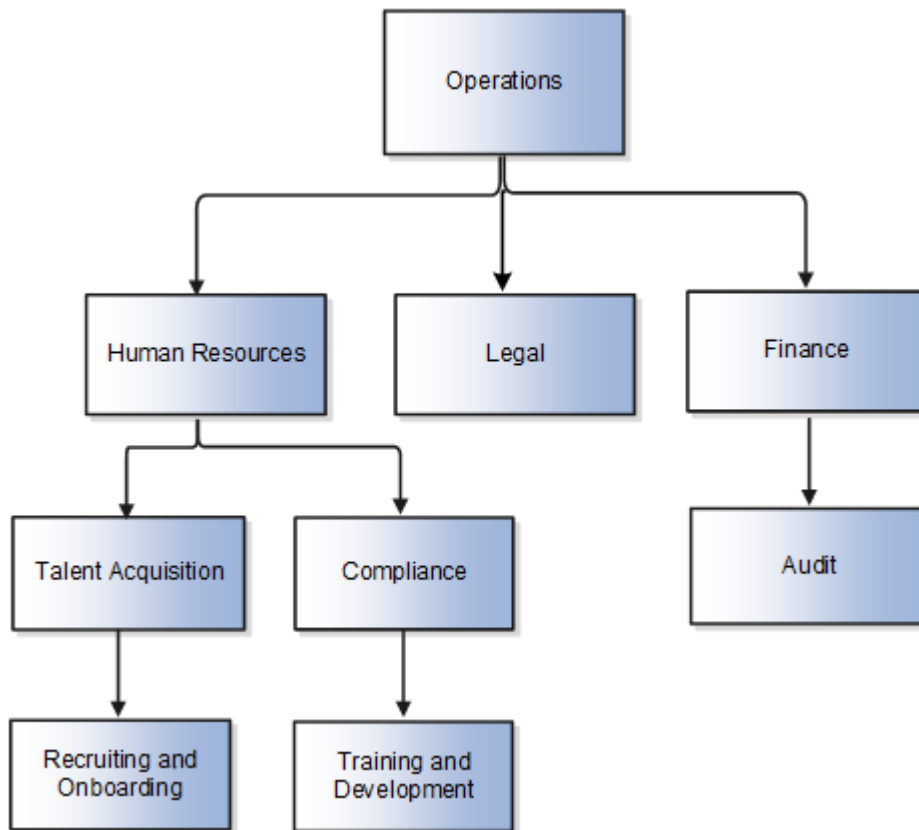
A department tree is a hierarchical representation of your departments. You can create versions of department trees but only one tree version is active at a time. A department can't be added more than once in the same tree version.

Department Tree Uses

- Maintain a hierarchy of all departments under one or multiple trees.
- Select the department hierarchy tree structure in the **Secure by Organization Hierarchy** setup of the organization security profiles to secure access to departments within that tree.
- Secure Areas of Responsibility (AOR) data using the **Hierarchy Type** list. The areas of responsibility defined for a hierarchy type can be used in securing by areas of responsibility while creating person security profiles to secure person records.
- Use the responsibility types defined in the AOR setup to define approval rules so that representatives defined using department tree can be approvers.
- Use the department hierarchy in your analysis to build roll-up analysis reports.
- Default the line manager from the department manager in a worker assignment using the department tree. You can use the PER_DEPARTMENT_TREE_FOR_MANAGER profile option to configure this setting.

Example of a Department Tree

The following figure illustrates a department hierarchy that you can establish using a department tree.



Organization Trees

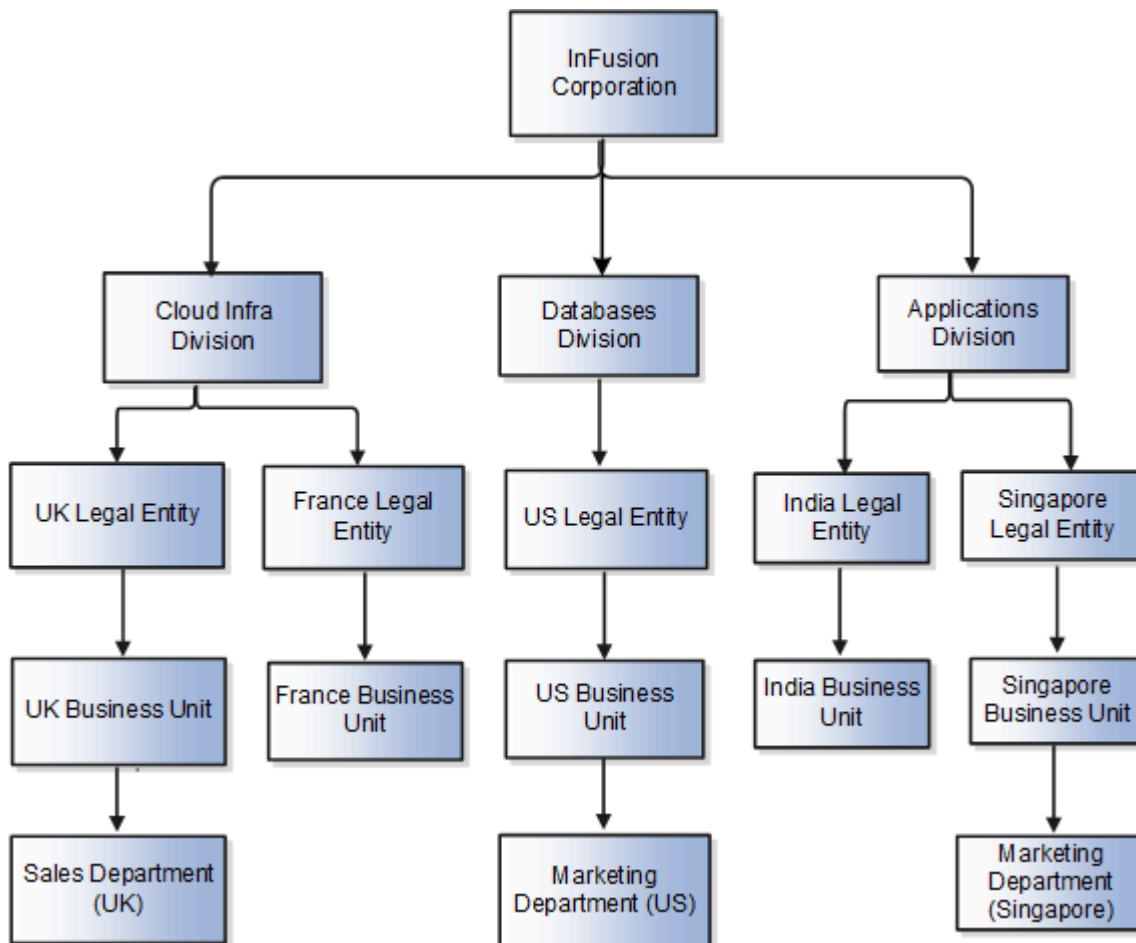
An organization tree is a hierarchical representation of your various organizational entities. You can select any organization including divisions, legal employers, business units, departments, and so on to create your organization tree. You can create versions of organization trees but only one tree version is active at a time. An organization can't be added more than once in the same tree version.

Organization Tree Uses

- Maintain a hierarchy of different organizational structures.
- Select the Generic organization hierarchy tree structure option in the **Secure by Organization Hierarchy** setup of organization security profiles to secure access to organizations within that tree.
- Secure Areas of Responsibility (AOR) data using the **Hierarchy Type** list. The areas of responsibility defined for a hierarchy type can be used in securing by areas of responsibility while creating person security profiles to secure person records.
- Use the responsibility types defined in the AOR setup to define approval rules so that representatives defined using organization tree can be approvers.
- Use the organization hierarchy in your analysis to build roll-up analysis reports, if departments are at the lowest level of the hierarchy.

Example of an Organization Tree

The following figure illustrates an organization hierarchy that you can establish using an organization tree.



Position Trees

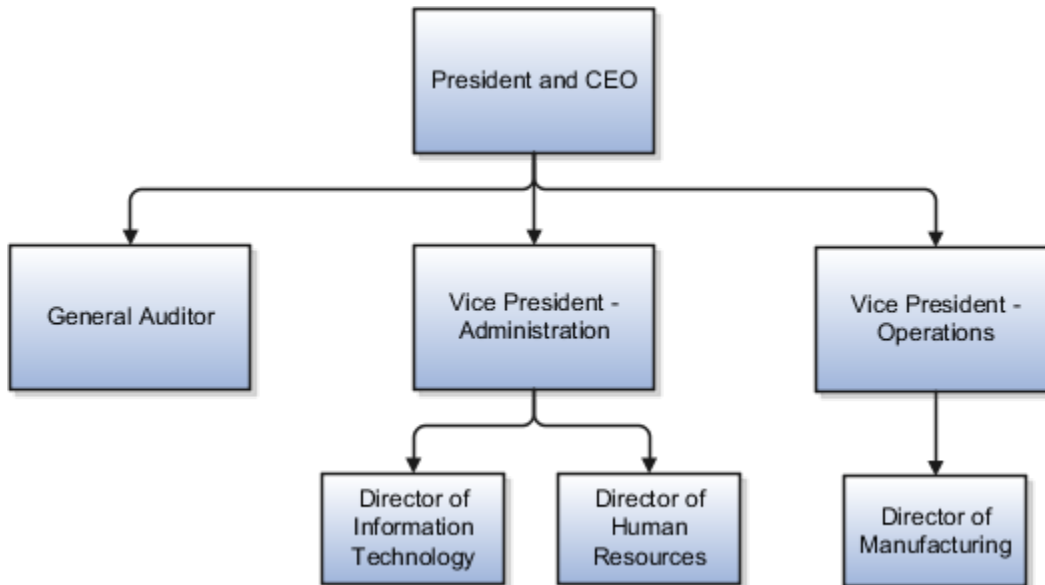
You can create multiple position trees using the predefined position tree structure in the Workforce Structures work area. You can then create multiple versions to establish reporting relationships among positions. Position trees can have only one top node.

Position Tree Uses

- Use position hierarchies for budgeting and organizational planning.
- Secure access to positions by identifying a position hierarchy in a position security profile. For example, you can create a position security profile that includes all positions in a position hierarchy under a specified first position. You can also include the position security profile in a person security profile to secure access to person records. In this case, the person security profile includes the person records of the people who occupy the positions in the position security profile.

Example of a Position Tree

The following figure illustrates a position hierarchy that you can establish using a position tree.



Geography Trees

You can create versions of the predefined geography tree structure to represent countries in which your enterprise operates. For each country, you can define lower-level nodes such as states and cities. For example, United Kingdom - England - London. You manage trees in the Workforce Structures work area.

Although you can create multiple versions, you can create only one tree in the hierarchy. Geography trees also have only one first node.

Calendar Events

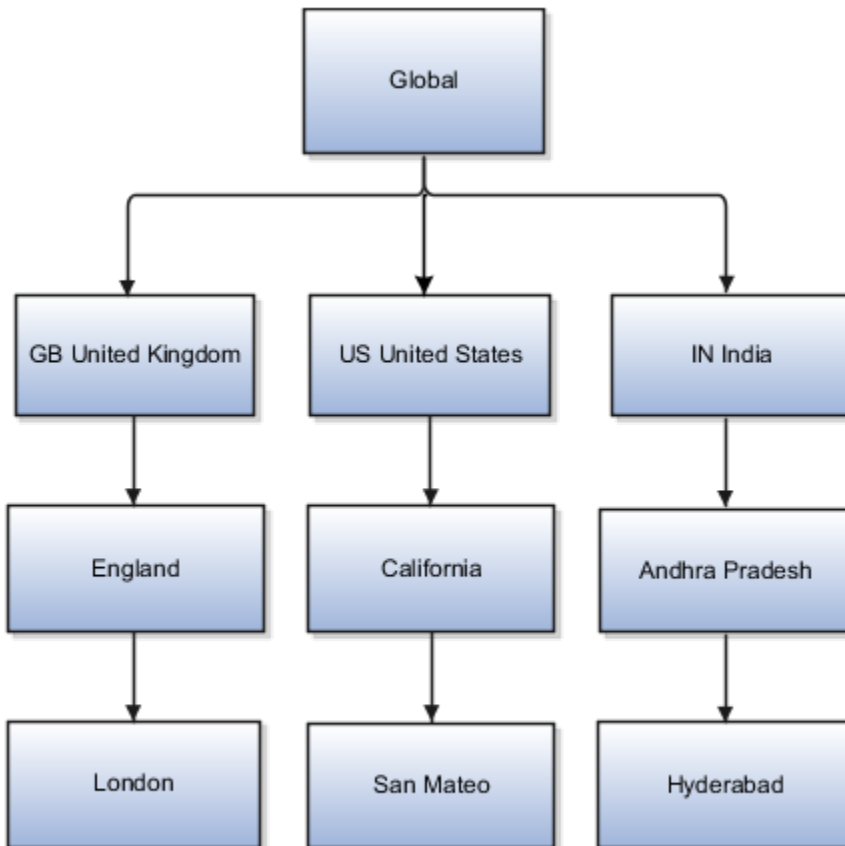
You use the geography tree to specify the locations to which calendar events apply. You can create the tree using these conditions.

- If an event applies to your entire enterprise, you can attach it to the first node in the tree, for example, Global.

- If an event applies only to specific countries in your enterprise, you can attach it to the nodes for those specific countries, for example, United Kingdom.
- If an event applies only to specific states or cities in a country, you can attach it to the state or city level nodes. For example, England, London.

Example of a Geography Tree

This figure illustrates the geographical hierarchy that you can establish using a geography tree.



Related Topics

- [Employment Profile Options](#)
- [Guidelines for Managing Trees and Tree Versions](#)

FAQs for Divisions, Departments, Worker Unions, Locations, and Trees

What's a reporting establishment?

A reporting establishment is an organization that's used for statutory reporting other than tax and social insurance reporting. In some countries, such as France, a reporting establishment can also be a tax reporting unit.

A reporting establishment and a legal employer share a parent-child relationship with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments. You create reporting establishments using the Manage Legal Reporting Unit HCM Information task in the Setup and Maintenance work area.

Can I delete an organization?

No you can't. However, you can disable an organization if it's no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive.

Changing the status of the organization disables the organization and the organization is no longer available to select.

How do I create a disability organization?

Use the Manage Integration of Additional Applications task in the Setup and Maintenance work area. Disability organizations are one of the choices when creating third-party organizations.

How can I identify my organization in a report?

Use the organization manager information in the Create and Edit Department pages to enter a reporting name to identify the organization in a report. You use organization hierarchies for statutory, legal and management reporting.

You can see all employees in the Manager list.

What's the purpose of the legislative action attributes?

When you create transfer or termination related actions using the Configure Actions task in the Workforce Structures work area, you can also enter legislative attributes for the actions. You can use the attributes to:

- Indicate whether an action is transfer-related.
- Specify the termination type for termination-related actions.

For example, the termination-related action Resignation can have the termination type as voluntary and the action Reduction in Force can have the termination type as involuntary. Typically you enter this information to meet specific legislative requirements or for reporting purposes.

What's the difference between department name and title?

A department name is unique but the department title is non-unique and can be the same across departments. You can't have 2 or more departments with the same name, but you can have multiple departments with the same title.

For example, you can have a Human Resources department (title) that can be common across the enterprise but there can only be one unique US Human Resources department (name) in the enterprise. A department name is mandatory but the title is hidden and optional, by default. You can enable the Title field and make it mandatory.

Why can't I see my location in the search results?

You can search for approved locations only. Also, if you created a location in Oracle Fusion Trading Community Model, then you can't access that location from Oracle Fusion Global Human Resources.

For use in Oracle Fusion HCM, you must recreate the location from the Manage Locations page.

How can I associate a location with an inventory organization?

From the Oracle Fusion Global Human Resources, go to the Manage Locations page. Use the Manage Locations task in the Workforce Structures work area.

To appear on the Create or Edit Location pages, your inventory organization must be effective as of the current date and must exist in the location set that you selected.

What happens if I select an inventory organization when I am creating or editing a location?

The location is available for selection in purchase documents of that inventory organization in Oracle Fusion Inventory Management. If you don't select an inventory organization, then the location is available in purchase documents across all inventory organizations.

What happens if I select a geographic hierarchy node when I create or edit a location?

The calendar events that you created for the geographic node start to apply for the location and may impact the availability of worker assignments at that location.

You manage locations using the Manage Locations task in the Workforce Structures work area.

The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

Related Topics

- [How an Individual's Schedule Is Identified](#)

What happens if I inactivate a location?

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

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

6 Jobs and Positions

Jobs

Jobs are typically used without positions by service industries where flexibility and organizational change are key features. As part of your initial implementation, you specify whether to use jobs and positions, or only jobs.

Basic Details

Basic details for a job include an effective start date, a job set, a name, and a code.

A job code must be unique within a set. Therefore, you can create a job with the code DEV01 in the US set and another job with the same code in the UK set. However, if you create a job with the code DEV01 in the Common set, then you can't create a job with the same code in any other set.

Benchmark Information

You can identify a job as being a benchmark job. A benchmark job represents other jobs in reports and salary surveys. You can also select the benchmark for jobs. Benchmark details are for informational purposes only.

Progression Information

A progression job is the next job in a career ladder. Progression jobs enable you to create a hierarchy of jobs and are used to provide the list of values for the Job field in the Promote Worker and Transfer Worker tasks.

The list of values includes the next job in the progression job hierarchy. For example, assume that you create a job called Junior Developer and select Developer as the progression job. Progression jobs show as suggested jobs; so when you promote a junior developer, the Suggested Jobs list of values for the new job will show Developer. You can select this value, or select another one.

Jobs and Grades

You can assign grades that are valid for each job. If you're using positions, then the grades that you specify for the job become the default grades for the position.

Related Topics

- [Considerations for Enforcing Grades at Assignment Level](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

Examples of Jobs

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

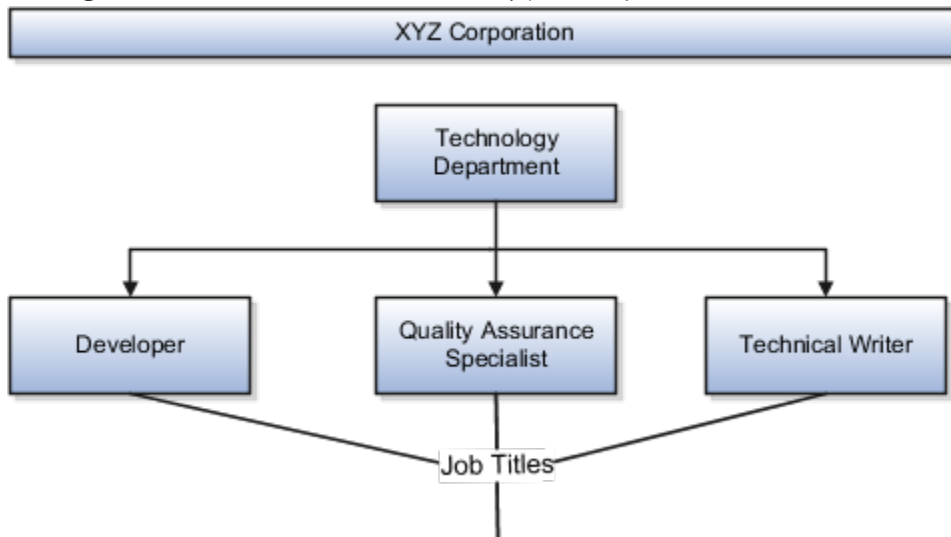
Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- Recently, three developers have resigned from the company.
- The director decides to redirect the headcount to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

In software industries, the organization is fluid. Using jobs gives an enterprise the flexibility to determine where to use headcount, because the job only exists through the person performing it. In this example, when the three developers leave XYZ Corporation, their jobs no longer exist, therefore the corporation has the flexibility to move the headcount to other areas.

This figure illustrates the software industry job setup.



Examples of Positions

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain headcounts, or have high turnover rates.

Retail Industry

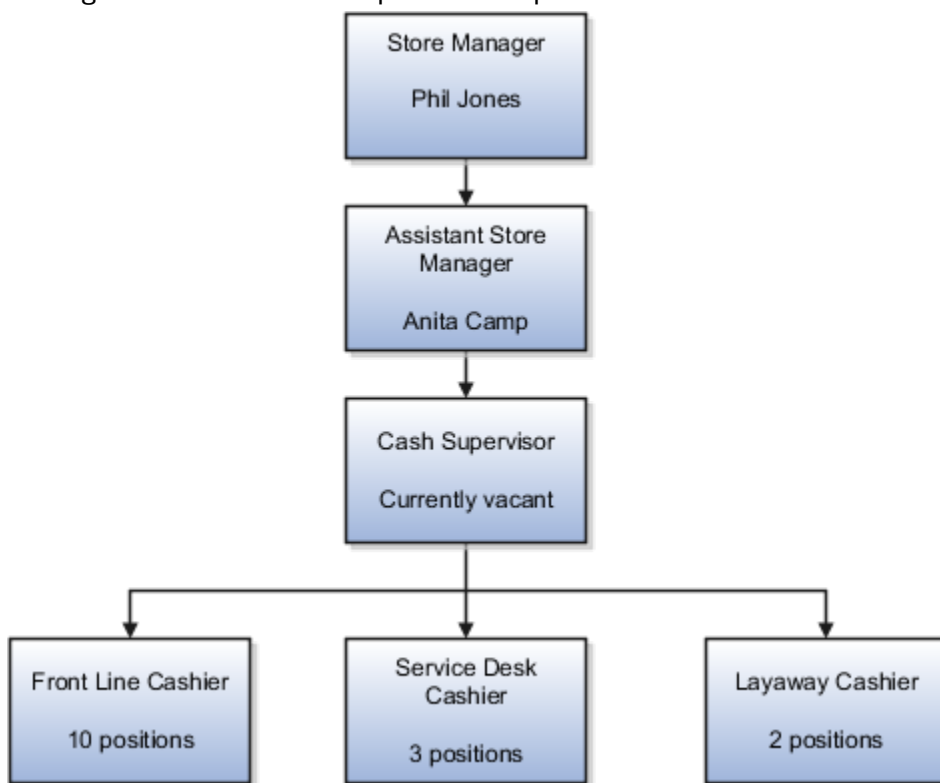
ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it's better for this industry to use positions.

Note the following:

- You have to create a vacancy manually when position synchronization is used and an employee terminates employment (when an incumbent moves out of the position).
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.

This figure illustrates the retail position setup.

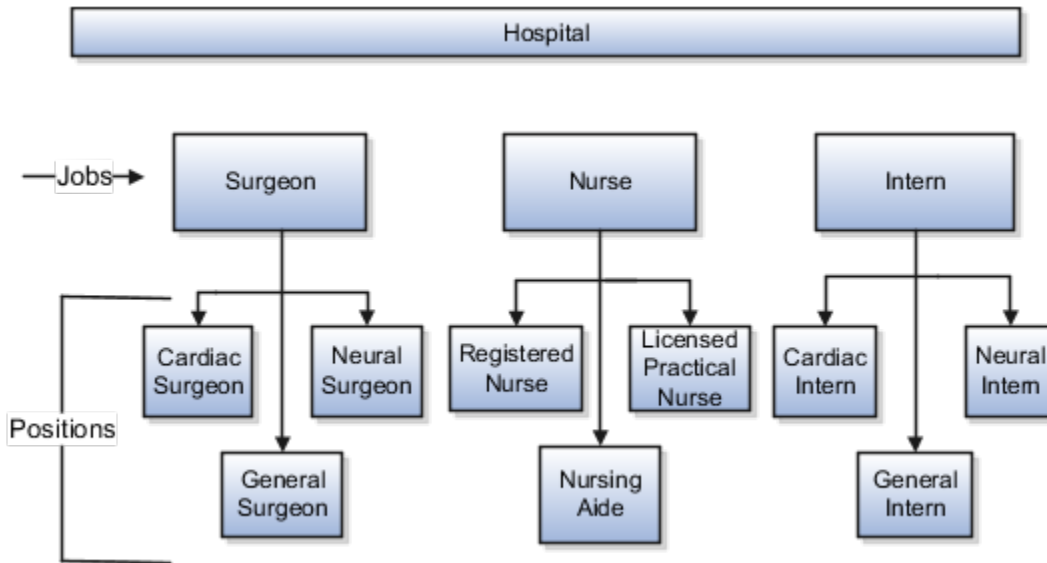


Health Care Industry

Health care is an industry that must regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.

This figure illustrates the hospital position setup.



Considerations for Using Jobs and Positions

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks.

Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.
- You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

During implementation, one of the earliest decisions is whether to use jobs or a combination of jobs and positions. The determinants for this decision are:

- The primary industry of your enterprise
- How you manage your people

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

Primary Industry	Workforce Setup
Mining	Positions
Utilities	Positions

Primary Industry	Workforce Setup
Manufacturing	Positions
Retail Trade	Positions
Transportation and Warehousing	Positions
Educational Services	Positions
Public Transportation	Positions
Agriculture, Forestry, Fishing, and Hunting	Jobs
Construction	Jobs
Wholesale Trade	Jobs
Information	Jobs
Finance and Insurance	Jobs
Professional, Scientific, and Technical Services	Jobs
Management of Companies and Enterprises	Jobs
Administrative and Support and Waste Management and Remediation Services	Jobs
Arts, Entertainment, and Recreation	Jobs
Accommodation and Food Services	Jobs
Other Services (Except Public Administration)	Jobs

Management of People

Consider the following scenarios how industries manage their employee turnover:

- Scenario 1: Replace employees by rehiring to the same role.
- Scenario 2: Replace headcount but the manager uses the headcount in a different job.

- **Scenario 3:** Rehire employees to the same position, but the manager requests reallocation of budget to a different post.

The following table displays suggestions of what the industry should use, either jobs or positions, in these three scenarios:

Industry	Scenario 1	Scenario 2	Scenario 3
Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)	Positions	Jobs	Jobs
Controlled (An industry that's highly structured in which all aspects of work and remuneration are well organized and regulated.)	Positions	Positions	Positions
Manufacturing	Positions	Jobs	Positions
Retail	Positions	Jobs	Positions
Education	Positions	Jobs	Positions
Other	Positions	Jobs	Jobs

Related Topics

- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)

Job and Position Structures

Job and position structures identify the descriptive flexfield structure that enables you to specify additional attributes that you want to capture when you define jobs and positions.

Job and position attributes provide further detail to make jobs and positions more specific. You also use attributes to define the structure of your jobs and positions. You can specify attributes at the enterprise level for jobs and positions, at the business unit level for positions, and at the reference data set level for jobs. Job and position structures are optional.

Enterprise-Level Job Attributes

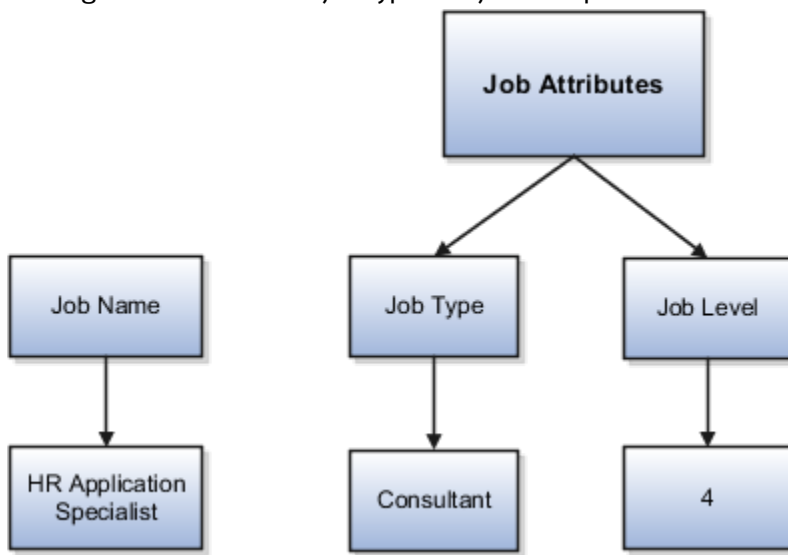
When you define a job, you enter a value for the name of the job. To make job names more specific, set up attributes to identify additional details about the job. This includes the nature of the work that is performed or the relative skill

level required. If these attributes apply to all jobs within your enterprise, set up enterprise-level job attributes. Standard capabilities mean that you can use the different segments of the name to:

- Identify common jobs or job holders for analysis or compensation.
- Group records in reports, such as to find all jobs of a specific job type.

Don't use attributes with values that change regularly, for example, salary ranges or expense approval levels that change every year.

This figure illustrates how job type and job level provide further details for the HR Application Specialist job.



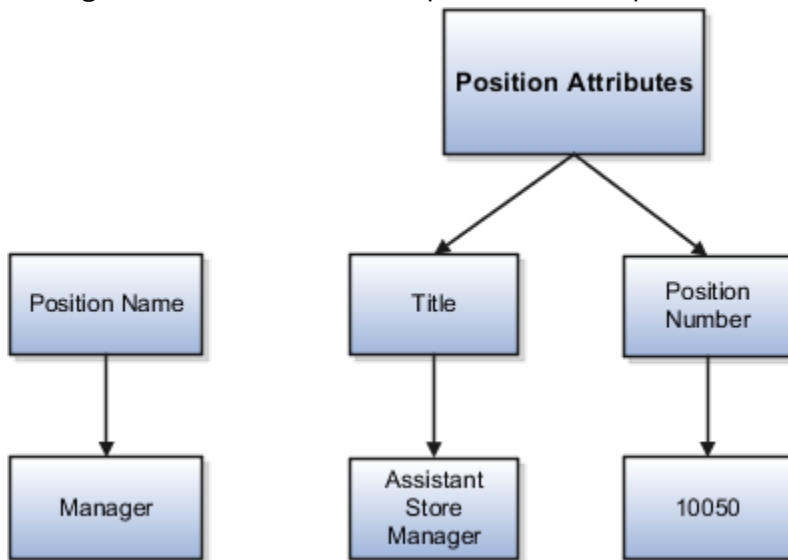
Enterprise-Level Position Attributes

Position attributes at the enterprise level are similar to those for jobs. Each position that you define identifies a specific role in the enterprise, which you can manage independently of the person in the position. A position belongs to one specific department or organization. The name of each position must be unique. To simplify the process of managing unique names for positions, set up enterprise-level attributes to identify separate components of the position name. For example, you can set up an attribute for position title and one for position number. When defining the attributes that make up the structure of a position name, consider whether any of your attributes are part of the definition of a common job type. Using job types for a position can help you manage common information that applies to many different positions.

For example, you can:

1. Define a job type of Manager.Level 1.
2. Use it for comparison of positions across departments or lines of business or for setting common job requirements.
3. Define multiple manager-type positions in your HR department, each of which has responsibility for a different management function or group.

This figure illustrates how title and position number provide further details for the manager position.



Business Unit-Level Attributes for Positions

If you have information that you want to capture for positions that are specific to each business unit, then you can define attributes at the business unit level for positions. When you create positions, these attributes appear in addition to any enterprise-level attributes. For example, you might want to identify the sales region for all positions in the sales business unit. You can set up a text attribute called Sales Region and use it to enter the necessary information when creating positions for the sales business unit.

Reference Data Set-Level Attributes for Jobs

If you have information for jobs that applies to specific reference data sets, set up attributes for jobs at the reference data set level. When you create jobs, these attributes appear in addition to any enterprise-level attributes. For example, you might want to identify all information technology (IT) jobs within a specific set. You can set up a text attribute called Function and use it to enter IT in jobs that you create that perform an IT function within a specific set.

Workforce Structures Code Generation Methods

A code uniquely identifies either a position or a job. Currently, you can generate a code for position and job workforce structures. Use the Manage Enterprise HCM Information task in the Workforce Structures work area to configure the code generation method for positions and jobs.

You can generate the position code or the job code in one of these 3 ways:

- Manually
- Automatically prior to submission
- Automatically upon final save

Manual: Use this method to manually enter the code when creating a position or a job. You can update the code in the Details page. This is the default method for generating the position and job code.

Automatic prior to submission: Use this method to automatically create and display the code when you create a position or job. This method may create gaps in the code sequence if the transaction is canceled after the position or job code is generated.

Automatic upon final save: Use this method to create position or job codes only after the create transaction is approved. You can't see the position or job code when you're creating the respective workforce structure, but can see it on the Details page after the transaction is approved. This method has less possibility of creating gaps in the generated codes.

The **Automatic prior to submission** and **Automatic upon final save** methods use an enterprise number sequence. All workforce structures' codes that are generated using the automatic methods are numeric only. By default, the sequence starts from 1; however, you can change the starting number. The code increments by one for each new position or job created.

You can change the position or job code generation method from **Automatic prior to submission** method to the **Automatic upon final save** method and the other way around. You can also change from the automatic method to the manual method and the other way around but you must be careful which method you choose if you have existing data. You can't edit an automatically generated position or job code.

Initial Position and Job Code

You can specify the initial position or job code for your enterprise when you generate the code automatically. The application uses this number for the first record that you create using the automatic position and job code setting and increments the number by one for subsequent records. By default, the initial code is 1. The validation on the initial position and job code helps you identify the starting code in automatic code generation when the method is changed from manual to automatic.

Using the initial position and job code, you can retain the legacy codes for existing positions and jobs respectively. Additionally, you can automate the number generation for new positions and jobs, starting from the last legacy person number plus one. You can change the initial code.

Note: To avoid duplicate codes being generated, follow these recommendations.

- If you have been using the manual method of position or job code generation for sometime and now moving to the automatic method, we recommend setting an initial code to a value higher than the old position or job codes that were specified manually.
- When using HDL to load positions or jobs, the position and job code can be automatically generated, hence we recommend you leave the code blank in the dat file.

Evaluation Criteria for Jobs and Positions

You can define evaluation criteria such as evaluation system, date, unit of measure, for for jobs and positions

By default, 2 evaluation systems are available. The Hay system is a predefined evaluation system. Another custom evaluation system is available for which you need to define your own criteria and values..

Enable Evaluation Criteria Section

The Evaluation Criteria section is hidden by default, you need to enable it in the Transaction Design Studio. For example, here's how you can enable it in the Position Details page

1. Click **My Client Groups > HCM Experience Design Studio**.
2. Select the **Position Details** action.
3. Click **Add** to add a rule.
4. Enter a name and description for the rule.
5. In the Page Attributes section, select the **Configure Save Options and Regions** option.
6. For the Evaluation Criteria region, select **Visible**.
7. Select **Evaluation Criteria** from the Region list to ensure that the Evaluation System field is enabled in the section.
8. Click **Save and Close**.

You can enable for the Job Details page similarly by selecting the Job Details action in Transaction Design Studio. In the Request a New Position and Request a Position Change flow, the Evaluation Criteria section is available in the Show or Hide Regions section.

Points to Consider

- The evaluation criteria data associated to a job or position isn't copied when a job or position is duplicated.
- You can see only the Evaluation Date and the Evaluation System fields in the read-only job or position pages, if there isn't any evaluation data.
- The Evaluation Date doesn't default to the start date of the job or position unlike the classic job and position pages.
- The Evaluation Date can't be earlier than the start date of the job or position.
- Any updates to evaluation data are retained in the cache until you submit the data. Only the data submitted or committed to the database is displayed on the page, irrespective of the earlier data updates.
- If you want to remove the evaluation data for a job or position, you need to remove the Evaluation System value. However, if the Evaluation System is defaulted and the field is hidden, you have to first unhide the field and then remove the Evaluation System to delete the evaluation data.

Default Evaluation System

You can specify a default evaluation system for job and position flows on the Manage Enterprise HCM Information page. If you specify a default evaluation system it applies to both jobs and positions. However, you can change it in the respective flows.

Here are some key points to note about the evaluation system defaulting.

- The Evaluation System is defaulted when you specify an evaluation date in the Evaluation Criteria section.
- The Default Evaluation System configuration isn't date effective on the Manage Enterprise HCM Information page.

Related Topics

- [Workforce Structures Flexfields](#)
- [Workforce Structures Lookups](#)

How FTE is Calculated in Positions

The full-time equivalent (FTE) value is the result of multiplying the working hours with the headcount and dividing by the standard working hours.

For example, if the working hours are 30, the headcount is 2 and the standard working hours are 40, then the FTE value is 1.5.

Ways to Calculate the FTE

You can either enter the FTE manually or calculate it automatically.

- **Manually:** Use the FTE field in the Budget Details section to enter a FTE value manually. If an FTE value is already provided, you can update it based on the ratio of the working hours to standard working hours.
- **Automatically:** Select the Calculate FTE option in the Budget Details section to automatically calculate the FTE. This check box is shown only when the Enable FTE Calculation in Positions profile option is set to Yes. Earlier, the FTE value was automatically calculated only when a position was created. However, when this check box is deselected automatic FTE calculation is disabled even when a position is created.

When the Calculate FTE option is selected and you edit the working hours or the headcount in the position pages, the FTE is automatically calculated and the FTE field becomes read-only. However, you can override the automatic calculation of FTE by deselecting the Calculate FTE option on the position pages.

This check box is available in these flows - Request a New Position, Request a Position Change, Update or Correct Position, and Duplicate Position flows.

The Calculate FTE Option

Here are some points to note about Calculate FTE option.

- The Calculate FTE option is disabled for positions created before enabling automatic FTE calculation.
- The Calculate FTE setting is copied when a position is duplicated.
- If FTE is configured as hidden in the Transaction Design Studio (TDS), then the Calculate FTE option is also hidden even though the profile option is enabled.

Work Hours and Duration

Full-time equivalent (FTE) is the number of hours worked by an employee on a full-time basis.

It's calculated by dividing the working hours by standard working hours. For example, if the working hours are 20 and the standard working hours are 40, the FTE is 0.5.

Organizations use FTE to determine their employees' workload; specifically the number of part-time employees required and the hours they work to add up to the same number of hours worked by full-time employees. Hence, the general assumption is that an employee works 2,080 hours annually. This value is derived by calculating the number of

hours worked by a full-time worker in a week multiplied by the number of weeks in a year - 8 hours per day x 5 days per week x 52 weeks per year = 2,080 hours.

However, the working hours duration might vary across industries. For example, in the manufacturing sector, an annual number of working hours contract may be in place due to seasonal fluctuations, with only premium pay applicable when the prorated annual hours exceed the specified annual hours. In the education sector, the duration may be linked to the academic teaching timetable.

In such cases, the FTE calculation needs to be adjusted for such employees. These work hours attributes defined in a position help in determining the adjusted FTE.

Standard Working Hours - Standard working hours are usually those of a full-time worker. You define them for the enterprise, legal employer, department, location, job, or position.

If you define standard working hours for more than one work structure, the application uses this hierarchy to derive standard working hours for the position: Job > Location > Department > Enterprise. The application uses this hierarchy to derive standard working hours for the worker assignment: Position > Job > Location > Department > Legal Employer > Enterprise.

Working Hours - Working hours are the same as standard working hours, by default.

Working hours and standard working hours may remain the same. For example, if an employee is working the department's standard working hours, standard working hours and working hours are the same. For part-time workers, there is usually a difference between standard working hours and working hours. Where there is a difference, you update the working hours for the position and the assignment.

Standard Annual Working Duration – You define the standard annual working duration for the enterprise, legal employer, department, location, job, or position.

If you define the standard annual working duration for more than one work structure, the hierarchy to derive the standard annual working duration is same as standard working hours.

Annual Working Duration – Annual working duration is same as the standard annual working duration. The value may differ but the duration is the same as the duration defined for the standard annual working duration.

Workday Information Defaults

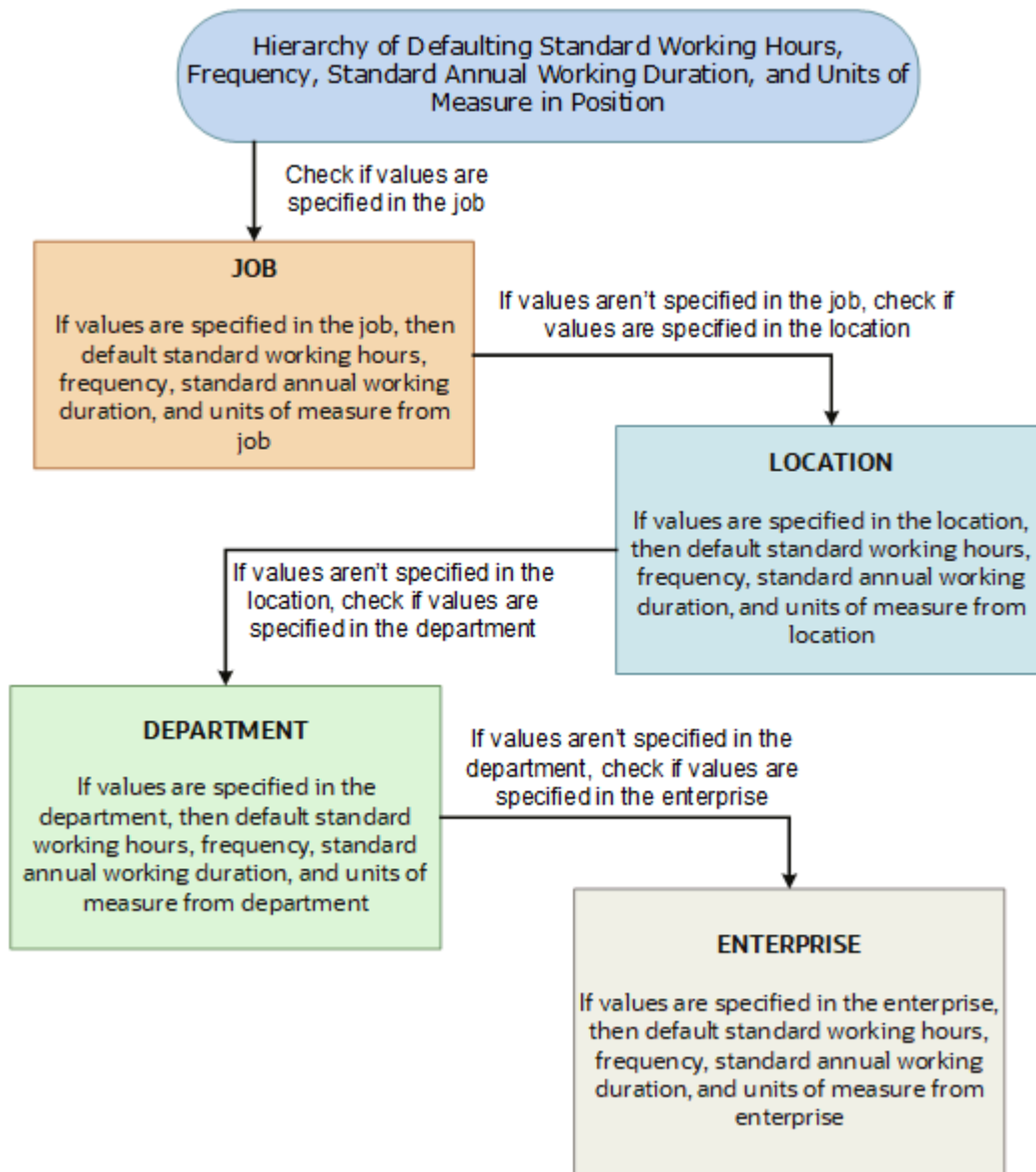
The Full-Time Equivalent (FTE) is the number of hours worked by a worker on a full-time basis and is typically used to determine the workload.

You can either specify your own values or default the standard working hours, standard annual working duration, and the unit of measure (UOM) values. The workday information is used to calculate the full-time equivalent (FTE) of a worker.

You can default the workday information attributes from these entities in this order.

1. Job
2. Location
3. Department
4. Enterprise

Let's look at how this works with the help of a diagram.



The defaulting logic for the standard working hours, frequency, standard annual working duration, and units of measure is given below.

Entity	How it Works
Job	The first check is on the job specified in the position. If values for any of these attributes are available in the job, then these values are defaulted on the position.
Location	If any of the attribute values aren't specified on the job, then the check is done on the location specified in the position. If these values are specified in the location, then these values are defaulted on the position.
Department	If any of the attribute values aren't specified on the location, then the check is done on the department specified in the position. If these values are specified in the department, then these values are defaulted on the position.

Enterprise	If any of the attribute values aren't specified on the department, then the check is done on the enterprise. If these values are specified in the enterprise, then these values are defaulted on the position.
------------	--

If you change the business unit, department, location, or job in the position, then the existing defaulted workday information is also removed, if they are defaulted from any of these objects. However, this doesn't apply when you duplicate a position.

In addition, the defaulting hierarchy gets recalibrated when you provide a value in any of the entities. For example, if the standard annual working duration was earlier defaulted from the enterprise and you have specified a value for the standard annual working duration for a department now. The latest standard annual working duration value will now be defaulted from the department.

How You Match Position Valid Grades with Job Grades

You can enforce that valid grades of the position match with valid grades of the associated job by setting this profile option value to yes: Validation to Match Position's Valid Grades With Job Valid Grades Enabled.

When the profile option is enabled, only valid grades specified in the selected job can be added in the position. An error is shown when you add grades that aren't specified for the job.

A new position inherits the valid grades defined in the selected job. Valid grades for the position are those that are active and associated with the common set or the set associated with the business unit. Valid grades are used in assignments that use the position and subsequently in payroll calculation.

Position Synchronization

If position synchronization is enabled, assignments inherit specified values from the associated position.

Synchronized Attributes

You can select any of the following attributes for synchronization when position synchronization is enabled:

- Department
- Job
- Location
- Grade
- Grade Ladder
- Manager
- Full Time or Part Time
- Regular or Temporary
- Assignment Category
- FTE and Working Hours

- Start Time and End Time
- Probation Period
- Union, Bargaining Unit and Collective Agreement
- Synchronize Mapped Flexfields

Position Changes

All active assignments that are synchronized from position automatically inherit changes from the position. Assignment attributes synchronized from position automatically inherit changes from the position. For those attributes not synchronized from position, you can either retain the existing values or update values from the position.

The Review page in the Edit Position page displays the list of impacted assignments with a status for each assignment. The status indicates if there are any issues due to the position change. You must correct all errors before submitting the position changes.

Assignment Changes

When you change the position in existing assignments you have a choice whether to inherit the values for those attributes which aren't synchronized from the position. If you choose not to inherit, then the previous values remain unchanged.

Position Synchronization Configuration Changes

If the position synchronization configuration is changed after person and assignments are created, then the Synchronize Person Assignment from Position process must be run to apply the changes in assignments.

Position Hierarchy Configuration Changes

When the manager is synchronized from the HCM position hierarchy and you change the parent position, all assignments inherit the new manager from the current parent position. When you remove a position from the hierarchy, all child positions move one level up in the hierarchy. Hence, the grandparent position is the new parent position.

The incremental flattening process is triggered when you add or change a parent position. The flattening process will update the changes in the position hierarchy.

When you change the position in an existing assignment, the manager value is updated based on the parent position of the changed position. If the parent position doesn't have an incumbent, the incumbent in the position in the next level up in the hierarchy is the new manager.

Uploading Changes Using HCM Data Loader and Workers REST API

When you create or update assignments using HCM Data Loader or Workers REST API, you can synchronize them from positions. In this case, you must:

- Enable position synchronization before you load the assignments. If you enable it after the assignments are loaded, then you can synchronize from positions for current and future dates only.
- Set the **Synchronize from Position** (Position Override) attribute on the employment terms or assignment object to Y.

After loading the assignments using HCM Data Loader or Workers REST API, you must run the Synchronize Person Assignments from Position process to synchronize the assignments. When you run the process, set the **Past Period to Be Considered in Days** parameter to an appropriate value. For example, if you set this parameter to 60 days, then

any assignment records with start dates during the previous 60 days are synchronized from positions. By default, **Past Period to Be Considered in Days** is set to 30 days.

Note: If you're using the Compensation Workbench to promote your workers and have enabled position synchronization, then after running the Transfer Workforce Compensation Data to HR process, you need to also run the Synchronize Person Assignments from Position process. This will update the other synchronized position attributes in the assignment.

Related Topics

- [How Assignment Values Are Inherited from Position](#)
- [Synchronize Person Assignment from Position Process](#)

Set Up Position Synchronization

Position synchronization is inheritance of values in an assignment from the values specified in the associated position.

You can enable position synchronization at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks (in the Setup and Maintenance work area) respectively.

Enterprise Level Setup

You can enable position synchronization either at the enterprise or the legal employer levels. Select the Enable Position Synchronization attribute in the Edit Enterprise page to enable position synchronization for the enterprise. By default, this attribute is deselected. You can also specify whether the inherited values can be overridden at the assignment level.

If you enable position synchronization at the legal entity and the enterprise levels, then the settings specified at the legal employer level takes precedence over the settings specified at the enterprise level.

Legal Employer Level Setup

Set the Enable Position Synchronization attribute to Yes in the Position Synchronization page to specify the attributes to be configured with the position for the legal employer.

Select No for the Enable Position Synchronization attribute, to exclude a specific legal employer.

You can also use the same settings as defined for the enterprise. In this case, you must select the **Use Enterprise** option, which is the default value. If position synchronization is configured at the enterprise level, then the assignment inherits the attribute values from the position selected. You can also override these values at the assignment level.

Enabling Position Synchronization Post Setup

Here are the steps to enable position synchronization for the enterprise or legal entity post setup..

1. On the Home page, under **My Client Groups** tab, click the **Show More** link to access more quick actions.
2. Navigate to **Workforce Structures > Manage Enterprise HCM Information** page or **Manage Legal Entity HCM Information** page.
3. Under Position Synchronization Configuration section, select the attributes that you want to synchronize.
4. Select the **Allow Override at the Assignment** option if you want to exclude an assignment from synchronization.

5. Using HCM Data Loader, you need to update all assignments that you want to must be synchronized from the position (as of the date you want to enable position synchronization).
6. Set the **Synchronize from Position** (position override check in HCM Data Loader) attribute on these assignments to **Y**. This enables position synchronization even if you don't want to allow override at the assignment.
7. Run the Synchronize Person Assignments from Position process to synchronize the assignments.

Related Topics

- [Synchronize Person Assignment from Position Process](#)

How Assignment Values Are Inherited from Position

If you enable position synchronization, assignments inherit specified values from the associated position. You can also specify whether the inherited values can be overridden in the assignment.

You can specify this at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks respectively.

Overriding of Assignment Values

When you enable position synchronization, you specify which attributes the assignment inherits from the position due to synchronization. Assignment attributes synchronized from position inherit their values from the position and aren't editable. The restriction on editing values in the assignment applies only to the information that's entered in the position. For example, if the Bargaining Unit isn't entered in the position, you can edit this value in the assignment even though it's one of the attributes inherited from the position. If override is allowed at the assignment level, then you can specify at the assignment level whether you want to synchronize from position or not. By default, the Synchronize from Position attribute on the Edit Assignments page is set to Yes. If you prevent override at the assignment level, users can't update the specified attributes that the assignment has inherited from the position. You can use personalization to enable managers to specify a value for the Synchronize from Position field.

You can choose to either retain the existing values in the assignment or update the values from the position for any attributes that aren't synchronized. So, if you don't select the grade attribute for synchronization and update the grade value in the position, you can either retain the existing grade value in the assignment or update it from the position.

If a synchronized attribute is empty at the position, then this attribute won't be synchronized in the assignment. You can enter any value for this attribute in the assignment. If a value already exists for this attribute, it will be retained and you can change it to any other value.

Let's see how assignments are impacted when position and position synchronization details are modified using different applications.

Parameters	Responsive Employment Flows	HDL or HSDL	REST	Request a Position Change - Impacted Assignments	Synchronize Person Assignment from Position Process
Position Attributes	Yes	Yes	Yes	Yes	Yes
Position Flexfields	Yes	N/A	N/A	N/A	Yes

Parameters	Responsive Employment Flows	HDL or HSDL	REST	Request a Position Change - Impacted Assignments	Synchronize Person Assignment from Position Process
	Note: Only if the mapping is defined for the assignment flexfield.				
Manager from Position Hierarchy	Yes	N/A	N/A	N/A	Yes
Manager from Position	Yes	N/A	N/A	Yes	Yes
Synchronize Reports from Position Hierarchy	N/A	N/A	N/A	N/A	Yes
Calculate FTE as per Position Working Hours	Yes	N/A	N/A	N/A	Yes

For example, if position synchronization is enabled and you change the position in the responsive employment flows, all position parameters are synchronized except direct reports. If you load the position parameters changes using HCM Data Loader (HDL), HCM Spreadsheet Data Loader (HSDL), or REST, then only the position attributes are synchronized. The Synchronize Person Assignment from Position process updates all assignments irrespective of the application used.

These are some key points to note.

- Position attributes are synchronized irrespective of the application used for the update.
- Position flexfields are synchronized in responsive employment flows and when you run the Synchronize Person Assignment from Position process. Flexfield data can also be updated in responsive employment flows.
- Line manager is defaulted from the position hierarchy in responsive employment flows, and when you run the Synchronize Person Assignment from Position process.
- Line manager is defaulted from the position in responsive employment flows, when there is change in the position, and when you run the Synchronize Person Assignment from Position process.
- Direct reports can be synchronized only when you run the Synchronize Person Assignment from Position process.
- FTE is calculated based on the position working hours in responsive employment flows and when you run the Synchronize Person Assignment from Position process.

For more information on the attributes that can be synchronized, refer to the topic Position Synchronization.

Note: If you choose to specify your own values for an assignment, then that assignment won't be synchronized with any future position changes.

HCM Position Hierarchy

Position hierarchy defines positions' relationships. The HCM position hierarchy is built based on these relationships. You enable the HCM position hierarchy on the Manage Enterprise HCM Information page in the Setup and Maintenance work area.

When you enable HCM position hierarchy:

- You can specify the parent position for a position on the Create and Edit Position pages in the Workforce Structures work area. When you search for positions based on a parent position, it will show all child positions for the specific parent position.
- You can also use the hierarchy to synchronize the line manager in the assignment from the line manager value in the parent position.
- You can view the positions that are part of the HCM position hierarchy on the My Team page and view the incumbents for a position.
- You can inactivate a position only if an incumbent with an inactive assignment exists.

Updating the Position Hierarchy

You can only correct the HCM position hierarchy. You can enable or disable the position hierarchy configuration by flattening the existing hierarchy. You must run the Synchronize Person Assignments from Position process to flatten the position hierarchy.

When the position hierarchy is flattened, then schedule to run the Synchronize Person Assignments from Position process. This will apply the manager changes in assignments if the position hierarchy is changed after person and assignments are created. The assignment changes can exist on the current date, date in the future, or in the past.

You can't change the position hierarchy configuration if the line manager is synchronized based on the HCM position hierarchy. However, if line manager synchronization was configured as of a date in the past, then you can correct the position hierarchy configuration.

Graphical Position Hierarchy

The HCM position hierarchy shows the relationship between positions and their parent positions. You can view and edit the hierarchy on the HCM Position Hierarchy page, if your data security profile allows you.

You can identify a position's parent on the Manage Positions page if the Use HCM Position Hierarchy option is enabled for the enterprise.

The nodes of the position hierarchy represent positions and parent positions. You can:

- Add child positions under a position either by creating a new position or by selecting an existing position as the child.
- Create a copy of an existing position by specifying a new name and code. The rest of the information is copied from the original position to the copy. You can change any information that you want.
- Edit the position.

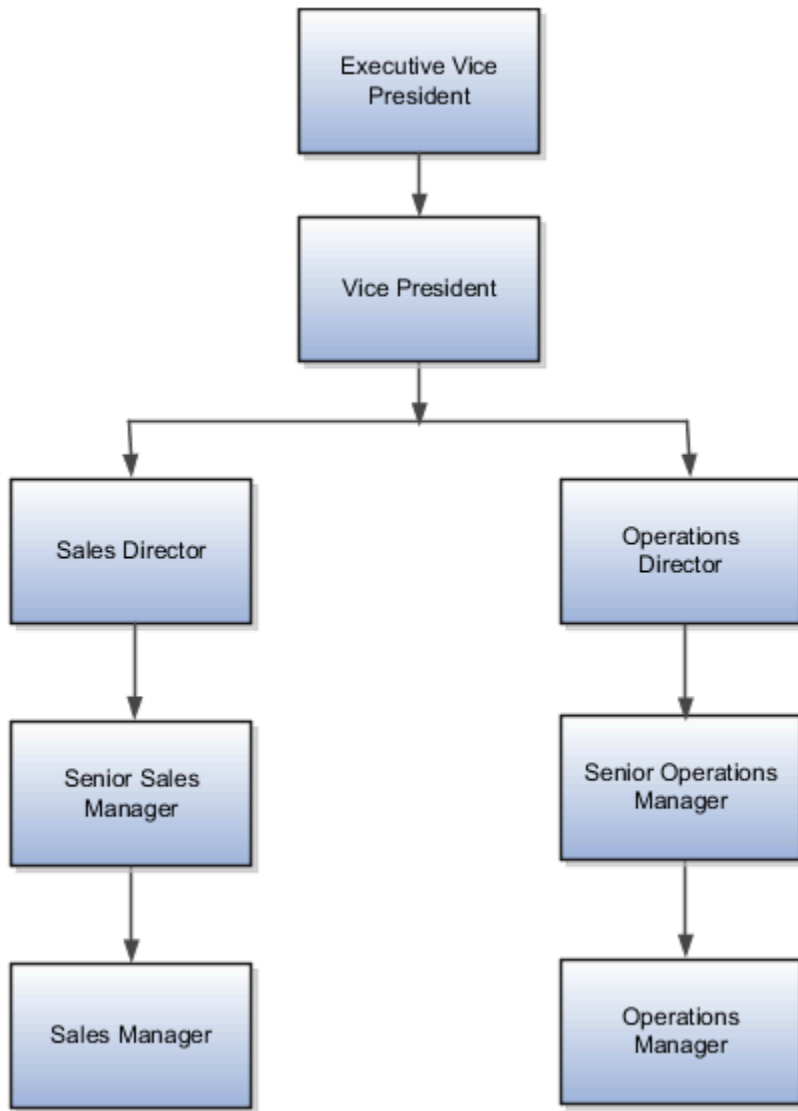
- View the incumbent details including name, person type, person number, position entry and exit dates, and their status as of the current date.
- Delete any position that doesn't have any incumbents or child positions.

In each position node, you can view:

- Position name and code.
- Business unit, job, department, and location.
- Number of incumbents for the position.
- Open Full Time Equivalent (FTE)
- Current incumbents in the position.

How You Create a Graphical Position Hierarchy

Vision Corporation is reorganizing its workforce and defining the hierarchy for all positions. You must create a position hierarchy as shown here.



The following table summarizes the key decisions for this scenario.

Decisions to Consider	In this Example
Which business unit do these positions belong?	Vision Corp. US
What is the method for position code generation?	Manual

You must do the following before creating the position hierarchy:

1. On the Manage Enterprise HCM Information page, enable HCM Position Hierarchy.

2. Ensure you have the Manage HCM Position Hierarchy privilege, which enables you to update the hierarchy.
3. Create the following positions -Executive Vice President, Vice President, Senior Sales Manager, and Senior Operations Manager.
4. Display additional fields on the Create and Edit Position pages using personalization, if required.

Add a Parent Position to an Existing Position

1. On the **My Client Groups** tab, click **Workforce Structures**.
2. On the Manage Positions page, search and select the Vice President position.
3. On the Position: Vice President page, click **Edit** and select **Update**.
4. Select **Reorganization**.
5. Click **OK**.
6. Search and select the Executive Vice President position as the parent position.
7. Click **Review**.
8. Click **Submit**.
9. Click **Yes**.
10. Click **OK**.

Create a New Child Position

1. On the HCM Position Hierarchy page, click the orange arrow icon in the Vice President node and select **Create Child Position**.
2. On the Create Child Position page, enter the following details:

Field	Value
Name	Sales Director
Code	SALES_DIR
Job	Director
Type	Single Incumbent
FTE	1
Headcount	1

3. Click **Save and Close**.
4. For the Vice President node, repeat steps 1 and 2 using the following details:

Field	Value
Name	Operations Director

Field	Value
Code	OPS_DIR
Job	Director
Type	Single Incumbent
FTE	1
Headcount	1

5. Click **Save and Close**.

Add an Existing Position as a Child Position

1. In the Sales Director node, click the orange arrow icon and select **Add Existing Position as a Child**.
2. Search and select the Senior Sales Manager position.
3. Click **OK**.
4. On the Edit Position: Senior Sales Manager page, click **Save and Close**.
5. In the Operations Director node, click the orange arrow icon and select the **Add Existing Position as Child** option.
6. In the Select Position window, search and select the Senior Operations Manager position.
7. Click **OK**.
8. On the Edit Position: Senior Operations Manager page, click **Save and Close**.

Create Duplicate Positions

1. In the Senior Sales Manager node, click the orange arrow icon. and select **Duplicate Position**.
2. On the Create Duplicate Position page, enter the following details:

Field	Value
Name	Sales Manager
Code	SALES_MGR
Type	Single Incumbent
FTE	1
Headcount	1

3. Click **Save and Close**.
4. In the Senior Operations Manager node, click the orange arrow icon. and select **Duplicate Position**.
5. On the Create Duplicate Position page, enter the following details:

Field	Value
Name	Operations Manager
Code	OPS_MGR
Type	Single Incumbent
FTE	1
Headcount	1

6. Click **Save and Close**.

Move the Sales Manager Node

You added the Sales Manager node under the Sales Director node instead of under the Senior Sales Manager node. You can drag the node and drop it on the Senior Sales Manager node.

1. Select the Sales Manager node and drop it on the Senior Sales Manager node. The Sales Manager position automatically becomes a child of the Senior Sales Manager position.

If you created a node in a wrong place, you can just drag and drop the node to the correct place. The hierarchy automatically adjusts itself when you do so.

Review and Submit the Position Hierarchy Changes

1. On the HCM Position Hierarchy page, click **Review**. This page shows the positions that you added to the hierarchy or the changes made to existing positions.
2. Click **Submit**.
3. Click **Yes**.
4. Click **OK**. If approval rules are set up, you'll be able to see the hierarchy changes after they are approved/

Considerations for Using Position or Position Hierarchy for Synchronizing Assignment Manager

To select a line manager synchronization option for the enterprise or for individual legal entities, use the Manage HCM Enterprise Information and Manage HCM Legal Entity Information in the Setup and Maintenance work area respectively. This topic discusses the line manager synchronization options available.

HCM Position Hierarchy

Use the HCM Position Hierarchy to synchronize the line manager on the assignment with the incumbent of the parent position in the position hierarchy.

When there is a change in the position hierarchy, you need to run the Synchronize Person Assignments from Position process to update the affected assignments. Alternately, when you update a position using the HCM Data Loader also you must run the Synchronize Person Assignments from Position process for the assignments to inherit the position changes. For example, if a position is moved under a different parent position, if there are any direct reports they're automatically reassigned to the incumbent in the new parent position. If there is no manager in the parent position, the application checks for the incumbent in the grandparent position, or until it finds an incumbent. If there are multiple incumbents in a parent position, the incumbent with the longest tenure in the position is assigned as the new manager. You can change the manager to the other incumbent on the Employment page.

If you move a position or remove it from the hierarchy, the grandparent position becomes the new parent position for all the child positions. For example, if you have a hierarchy as follows: Manager (grandparent), Team lead (parent), and Developer (child), and you move the Team Lead position to a different branch. The Manager position is the new parent position for the Developer position.

Note: If you're using HCM position hierarchy, remove the function privilege for the Manage Position Trees task in the Setup and Maintenance work area for your users. You can also hide the Manager field on the Create Position and Edit Position pages using personalization if you synchronize the line manager using position hierarchy.

Position Manager

Use the position manager to synchronize the line manager on the assignment with the line manager defined for the position. You can use this option if you're not using the HCM Position Hierarchy and want to manually maintain the manager at the position. .

Related Topics

- [Guidelines for Loading Positions](#)

Synchronize Assignment Action Reason From Position

You can synchronize the action reason in assignments with the action reason specified when a position is updated using these flows and process.

- Update Position (from Position Details)
- Request a Position Change
- Synchronize Person Assignments from Position ESS process

The action reason is synchronized in the assignment if these conditions are satisfied.

- Position synchronization is enabled at the enterprise or the legal entity level.
- Action reason attribute is selected for synchronization in the position synchronization setup.
- Action reason is specified in the selected position.
- Synchronization from Position action has associated reasons configured.

- Action reason specified in the position is one of the reasons associated with Synchronization from Position (ORA_POS_SYNC) action and to action of type Update Position (PER_POS_UPD)
- At least one of the synchronized attributes is updated in the position apart from action reason.

A point to note is that the action reason is synchronized only when the first position synchronization record is created in the assignment. If there's a correction in the position, then all changed attributes from position will be synchronized in the assignment apart from the action reason.

How You Enable Action Reason Synchronization

You need to enable position synchronization at the enterprise or legal entity level. These are the steps to enable position synchronization at the enterprise-level.

1. On the **Home** page, click **My Client Groups > Workforce Structures**.
2. Click the **Manage Enterprise HCM Information** task.
3. Click **Edit > Update**.
4. Click **OK**.
5. In the Position Synchronization Configuration section, select **Enable Position Synchronization** and **Action Reason** check boxes. Select any other attributes for synchronization.
6. Click **Review** to check your changes.
7. Click **Submit**.
8. Click **OK**.

After position synchronization is enabled, let's add action reasons to the Synchronization from Position and Update position actions.

1. On the **Home** page, click **My Client Groups > Workforce Structures**.
2. Click the **Configure Actions** task.
3. Search for **Synchronization from Position** (ORA_POS_SYNC) action.
4. Click **Continue**.
5. In the Action Reasons section, Click **Associate** to associate the action reasons with the action.
6. Click **Ok**.
7. Click **Submit**.
8. Click **Configure Actions** task
9. Search for and click **Update** (PER_POS_UPD) action.
10. Click **Continue** in the Action section.
11. Click **Associate** and add the same action reason you added to the **Synchronization from Position** action, for example, Promotion.
12. Click **Ok**.
13. Click **Submit**.

Example of Action Reason Synchronization in Assignments

You can synchronize the action reason in the position with the action reason in the assignment. Let's understand how this works with an example.

Position synchronization is enabled at the Global Business Institute enterprise level and department, job, full time or part time, and action reason attributes are enabled for synchronization.

There are 3 positions - Architect, Sales Manager, and Director with these action reasons and jobs respectively.

Position Info

Position Name	Action Reason	Job
Architect	Promotion	Software Development
Sales Manager	Organization Change	Sales Manager - SAAS
Director	Assignment Change	Director - Operations

The Synchronization from Position action is associated with only promotion and Organization Change action reasons and the Update Position action is associated with Assignment Change and Organization Change action reasons.

Action Reason Info

Action	Associated Action Reason
Synchronization from Position	<ul style="list-style-type: none"> Promotion Organization Change
Update Position	<ul style="list-style-type: none"> Assignment Change Organization Change

Assignment Info

Person	Position	Job	Action Reason	Updated Job	Updated Action Reason
John Doe	Architect	Software Development	NA	NA	(no update in the assignment action reason)
Bonnie Vickers	Sales Manager	Sales Manager - SAAS	NA	Software Development	Organization Change
David Steward	Director	Director - Operations	NA	Software Development	(no update in the assignment action reason)

Action Reason Synchronization in Assignment

- **John Doe** - There is no update in the assignment action reason because none of the attributes were updated in the Architect position.
- **Bonnie Vickers** - The Sales Manager position was updated with a new job and the action reason specified in the position is Organization Change. The Organization Change action reason is associated with both - Synchronization from Position and Update position actions. Since all conditions are met, the assignment is updated with the Organization Change action reason.
- **David Steward** - Though the Director position was updated with a new job, but the action reason (Assignment Change) wasn't updated in the assignment because the action reason is associated only with Update Position action type and not the Synchronization from Position action.

Synchronize Assignment Flexfields From Position Flexfields

You map position flexfields with assignment flexfields using the Manage Assignment Flexfields Mapping task in the Functional Setup Manager.

Use the task to map assignment descriptive flexfield segments to position descriptive flexfield segments. Synchronizing mapped flexfields includes the following steps:

1. Define flexfield mapping
2. Enabling flexfield synchronization
3. Synchronizing assignment flexfields from position flexfields

Define Flexfield Mapping

To map flexfields, follow these steps.

1. In the Functional Setup Manager, click the **Manage Assignment Flexfields Mapping** task.
2. Specify the following information.

Field	Description
Source Context	The context for the position descriptive flexfield. If you want to map a global position flexfield segment, leave the source context blank
Source Segment	The position descriptive flexfield segment of the selected context or the global segment if the context was left blank
Destination Context	The context for the assignment descriptive flexfield you want to map the position flexfield to. If you want to map it to a global assignment flexfield segment, leave the destination context blank.
Destination Segment	The assignment descriptive flexfield segment of the selected assignment context or the global segment if the context was left blank.
Enterprise Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the enterprise. Leave this field blank if the flexfield mapping applies to a specific legal employer.
Legal Employer Configuration: Legal Employer	Use this option if the flexfield mapping doesn't apply to the enterprise. You can select multiple legal employers. Select the legal employer.
Legal Employer Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the selected legal employer.

Field	Description

3. Add more mappings as required and specify information described in step 2 for each row.
4. Save the mapping.

Enabling Flexfield Synchronization

To enable flexfield synchronization, follow these steps.

1. In the Setup and Maintenance work area, click the **Manage Enterprise HCM Information** task to enable the setting for the enterprise, or click the **Manage Legal Entity HCM Information** task to enable the setting for a specific legal entity.
2. Click **Edit** and select **Update**.
3. Select the **Enable Position Synchronization** and **Synchronize Mapped Flexfields** check boxes in the Position Synchronization Configuration section.
4. Click **Submit**.

Synchronizing Assignment Flexfields from Position Flexfields

To synchronize assignment flexfields from position flexfields, follow these steps.

1. In the Navigator, click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. Run the Synchronize Person Assignments from Positions process.

Related Topics

- [Position Synchronization](#)
- [Considerations for Flexfield Mapping in Position Synchronization](#)
- [Synchronize Person Assignment from Position Process](#)

Considerations for Flexfield Mapping in Position Synchronization

You map position descriptive flexfields to assignment descriptive flexfields using the Manage Assignment Flexfield Mapping task in Oracle Fusion Functional Setup Manager.

Use this mapping to automatically populate values for those assignment flexfields mapped to the position flexfields, when position synchronization is enabled. This topic describes what to consider when you're mapping flexfields.

Enterprise or Legal Entity Levels

Before you map flexfields, you must decide whether you want the mapping to be available for the enterprise or for specific legal entities only. You can reuse a mapping across different legal entities. Settings at the legal employer level takes precedence over enterprise settings, if both are specified.

You need to define the enterprise or legal employer mapping for each position flexfield segment by selecting each row corresponding to the flexfield segment.

Note: If you have defined position synchronization at the legal employer level and haven't defined flexfield mapping for a legal employer, the position flexfields won't be synchronized at the assignment for that legal employer.

Context Specific or Global

You must decide whether to map context specific or global flexfield segments because you can't map a context specific flexfield segment to a global flexfield segment. You can't map two or more segments of different contexts or multiple position segments to the same assignment segment.

When you change the position value in an assignment, all synchronized global segments inherit the value from the new position. You can manually update those segments that have a blank value in the position.

When you change the position value in an assignment, all context specific segments inherit the value from the new position. If the new position has similar values to the old position and additional contexts defined, the assignments retain the same values and inherit the additional values from the new position.

Selecting and removing a position in an assignment makes the context and segments editable but the current values aren't removed if they're synchronized from the position.

Numeric or Character

You can map flexfields of the same type (for example, numeric-to-numeric or character-to-character only), same precision, and the same value set (same value set ID).

Related Topics

- [Position Synchronization](#)
- [Considerations for Managing Descriptive Flexfields](#)

Synchronize Person Assignment from Position Process

To synchronize the position changes with the affected assignments, run the Synchronize Person Assignments from Position process. The Initialize Position Synchronization process to load position synchronization changes is incorporated into the Synchronize Person Assignments from Position process.

The Synchronize Person Assignments from Position process is triggered in these scenarios.

Assignment

- Assignment update causing a date-effective split.
- Direct report assignment change because of change in assignment. This might be due to either position change or termination of the manager.

Position

- Position update causing a date-effective split.
- Parent position change.

Position Synchronization Configuration

- Position synchronization configuration update either at the enterprise or the legal entity level.

Run the Synchronize Person Assignment from Position to:

- Update affected assignments in the enterprise or legal entity if position synchronization is enabled (either initially or later, as a change).
- Prevent data corruption
- Synchronize the line manager based on the HCM position hierarchy.
- Synchronize action reason based on the position action reason and the available action reasons under Synchronization from Position action.
- Update assignments affected by the position changes, uploaded using HCM Data Loader.

Note: You must schedule this process to run on a regular basis. If you're synchronizing the manager, then it's recommended to run this process daily.

Use the Schedule New Process page in the Scheduled Processes work area to run the Synchronize Person Assignment from Position process.

Before you run the process, you must enable position synchronization on the Manage Enterprise HCM Information or Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area

Process Parameters

Past Period to Be Considered in Days

Number of days in the past to be considered for updating the attribute in the assignments. The default value is 30 days. Note that even if position synchronization was enabled in the past and you loaded position data with an effective date of 6 months back, you don't need to specify 180 days as the number of days. This is because the process detects the effective date and the last updated date of the position data. You can enter 2 days as the parameter value though changes are effective 6 months back.

Run at Enterprise Level

Select **Yes** to run the process for the enterprise, or **No** to run it for a specific legal entity.

Legal Entity

Legal entity for which you want to run the process.

Process Results

This process updates all affected assignments with the changes from the position. This includes:

- Changes due to position synchronization.
- Past or future-dated changes to the position hierarchy.
- Rollback of line manager changes in assignments for reverse termination.
- Line manager hierarchy changes
- Flexfield-mapping changes.
- Changes in position loaded using HCM Data Loader

Create a Position Profile

Profiles help you in identifying the requirements and competencies for a position. You can associate an existing profile. You can also create a new profile and associate it with the position by updating or correcting the position.

You can associate a profile to a position using any of these pages - Position Details, Position Change, and Request a New Position. Here's how you create a position profile.

1. On the Home page, click **My Client Groups**.
2. Navigate to the quick actions and click the **Show More** link.
3. Under Workforce Structures, click **Position Details**.
4. Search for and click the position for which you want to associate the profile.
5. On the Position Details page, click **Create Profile** under the **Actions** menu.
6. On the Create Position Profile page, enter these details.

Field	Description
Position Responsibility	Responsibilities that are required for the position.
Position Qualifications	Qualifications that are required of the people in the position.

7. Click **Save**.

Associate Action Reasons in Position with Role

You can make the action and action reason role-specific on these position pages by selecting the applicable roles when you configure the action and action reason.

- Request a New Position
- Request a Position Change
- Update Position (from Position Details)
- Correct Position (from Position Details)
- Duplicate Position (from Position Details)

After the configuration, the position pages will display the action and action reason that are specific to the worker's logged in user role. You need to associate the action reasons on the **Configure Actions** page. In these steps, we will create a new action reason and associate the role.

1. On the Home page, click **My Client Groups > Workforce Structures > Action Reasons**.
2. Click **Add**.
3. Enter a **name**, **code**, and **description** for the action.
4. Click **Submit**.
5. On the Home page, click **My Client Groups > Workforce Structures > Configure Actions**.

- Search and click the action with which you want to associate the specific action reason, for example, **Update**. This table lists the flows associated with the action.

Action	Code	Applies to
Create	PER_POS_NEW	<ul style="list-style-type: none"> ○ Request a New Position ○ Duplicate Position
Update	PER_POS_UPD	<ul style="list-style-type: none"> ○ Update Position ○ Correct Position ○ Request a Position Change

- On the **Edit Action** page, click **Continue** in the Action section.
- Click **Associate**.
- Select the action reason you created.
- Enter a start date for the association.
- Select the roles you want to associate.
- Click **Submit**.

In addition to the action reasons associated with the role, you can also see the action reasons that are available for all users and not associated with any role in the **Action Reasons** LOV.

How You Route Position Approvals

You can route position approval rules to incumbents in the parent position instead of just the initiator's hierarchy.

The routing of approvals to incumbents in the parent position is for these processes:

- Create Position
- Edit Position
- Request New Position
- Request Position Change

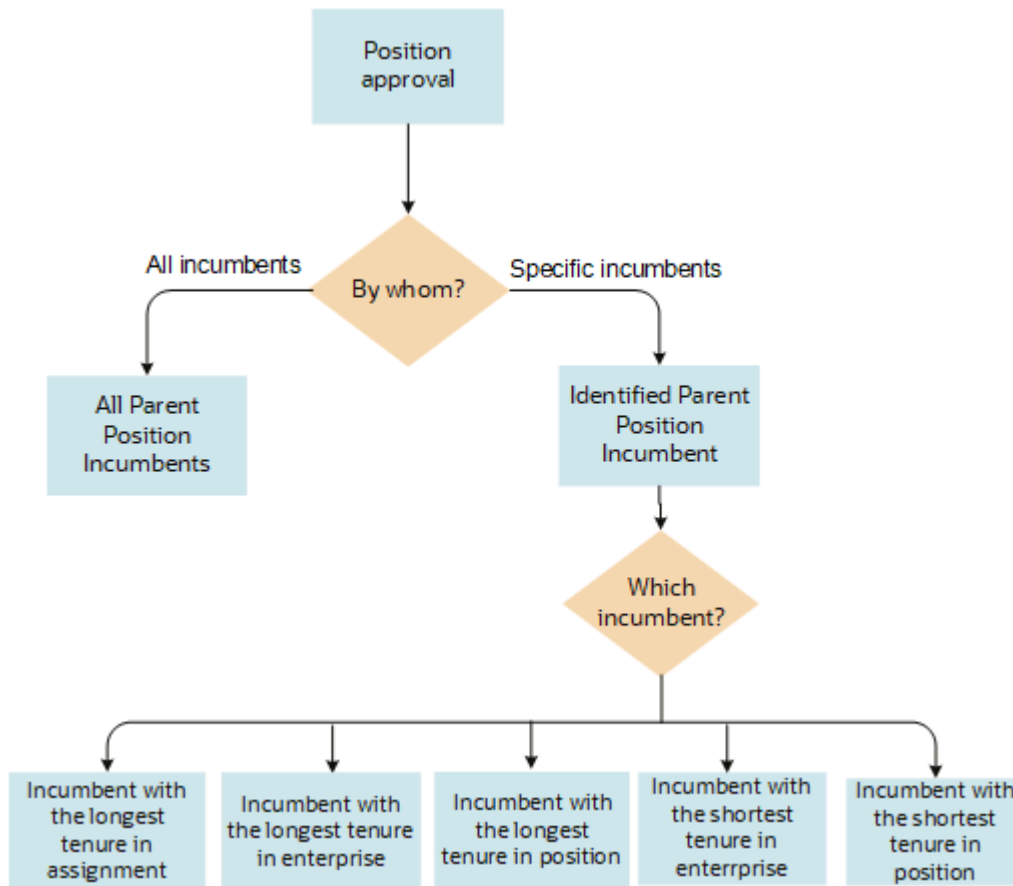
The position approval can be routed to either **All Parent Position Incumbents** or to a specific **Identified Parent Position Incumbent**.

Routing Options for Position Approvals

Routing Option	Description
All Parent Position Incumbents	Approval notification will be routed to all incumbents in the parent position.
Identified Parent Position Incumbents	<p>Approval notification will be routed to only a specific incumbent in the parent position. The incumbent to whom the approval will be routed depends on the value defined in the ORA_PER_POS_INCUMBENT_TENURE_ASG_SUP profile option:</p> <ul style="list-style-type: none"> • Longest tenure in assignment • Longest tenure in enterprise

Routing Option	Description
	<ul style="list-style-type: none"> • Longest tenure in position • Shortest tenure in enterprise • Shortest tenure in position

This diagram describes how position approvals work.



You can define the approvals to be routed to either all incumbents or only a specific incumbent in the parent position. To route the approval to a specific incumbent only, you need to set the appropriate value in the profile option.

Examples of Tenure Calculation

Let’s look at how the tenure is calculated for the purpose of approval routing to a specific incumbent in some of these scenarios.

1. Multiple Managers in Parent Position in Single Assignment and Assignment Changes

Two managers, Amit Shukla and Donna Smith are in the same position. The former spent the longest in the same assignment and the latter spent the longest tenure in the enterprise but with changes in assignment.

Employee	Action	Date	Position	Status	Tenure	Comments
Amit Shukla	Hire	1-Jan-2009	Assistant Manager	Active	12 years	Active in the position for 12 years
Donna Smith	Hire	1-Jan-2000	Assistant Manager	Active	5 years	NA
Donna Smith	Change Assignment	1-Jan-2005	Sales Analyst	Active	6 years	NA
Donna Smith	Change Assignment	1-Jan-2010	Assistant Manager	Active	11 years	Adding the tenure for the Assistant Manager position, 16 years (11 + 5) Even if the profile value was set to Longest Tenure in Enterprise , the approval will be routed to Donna Smith.

2. Multiple Managers in Parent Position in Single Assignment and with Inactive Assignment

Two managers, Amit Shukla and Jason King are in the same position. The former spent the longest in the same assignment and the latter spent the longest tenure in the enterprise but was transferred to a different legal employer (global transfer).

Employee	Action	Date	Position	Status	Tenure	Comments
Amit Shukla	Hire	1-Jan-2009	Assistant Manager	Active	12 years	Active in the position for 12 years
Jason King	Hire	1-Jan-2005	Assistant Manager	Active	6 years	NA
Jason King	End Assignment	31-Dec-2010	Sales Analyst	Inactive	NA	The last day of this assignment is 31-Dec-2010. The effective start date of the assignment's inactive status is 1-Jan-2011.
Jason King	Add Assignment	1-Jan-2010	Assistant Manager	Active	11 years	Adding the tenure in the Assistant Manager position and removing the overlap period, we get: 16 years (6 + 11 - 1) years (Overlap Removed)

3. Multiple Managers in Parent Position in Single Assignment and with Rehire

Two managers, Amit Shukla and Paul Smith are in the same position. The former spent the longest in the same assignment and the latter spent the longest tenure same assignment and position even after being rehired into the same position.

Employee	Action	Date	Position	Status	Tenure	Comments
Amit Shukla	Hire	1-Jan-2009	Assistant Manager	Active	12 years	Active in the position for 12 years
Paul Smith	Hire	1-Jan-1995	Assistant Manager	Active	6 years	NA
Paul Smith	Termination	31-Dec-2000	Assistant Manager	Inactive	NA	NA
Paul Smith	Rehire	1-Jan-2010	Assistant Manager	Active	11 years	Adding the tenure the person is active in the given position: 17 years (6 + 11) years

Note: If more than one incumbent fulfills the tenure criteria, then the person record creation date and time are considered for approval routing.

Profile Option for Routing Position Approvals

The **Identified Parent Position Incumbent** option is based on the `ORA_PER_POS_INCUMBENT_TENURE_ASG_SUP` profile option.

By default, this profile option is set to **Longest tenure in assignment**.

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to configure this profile option. Search for and select the `ORA_PER_POS_INCUMBENT_TENURE_ASG_SUP` profile option. Select one of these profile values as required, to meet your enterprise requirements.

Profile Option Value	Description
Longest tenure in assignment	The approval is routed to the parent position incumbent with the longest tenure in the assignment. This option considers both, active and suspended assignments. This is the default value.
Longest tenure in enterprise	The approval is routed to the parent position incumbent with the longest tenure in the enterprise. This option considers only active assignments.
Longest tenure in position	The approval is routed to the parent position incumbent with the longest tenure in the position. This option considers only active assignments.
Shortest tenure in enterprise	The approval is routed to the parent position incumbent with the shortest tenure in the enterprise. This option considers only active assignments.
Shortest tenure in position	The approval is routed to the parent position incumbent with the shortest tenure in the position. This option considers only active assignments.

Route Position Approvals to the Representative of the Parent Position Incumbent

You can also route position approvals to the representative of the incumbents of the parent position for these processes:

- Request New Position
- Request Position Change
- Edit Position
- Delete Position
- Delete Date Effective Position Record

Suppose you want to route the Request New Position approval to the representative of the incumbent of the parent position. While configuring the approval rule for the Request New Position process, select the following:

- **Representative** in the **Approvers** list
- A value for **Representative Type**
- **Identified Parent Position Incumbent's Representative** in the **Representative Of** LOV

Now, when you create a new position using the Request a New Position UI by associating a parent position which has incumbents with representatives, the approval is routed to the Identified Parent Position Incumbent's Representative.

Related Topics

- [Workforce Structures Profile Options](#)

Upload Workforce Structures Using a Spreadsheet

Using a spreadsheet, you can upload multiple objects at a time, for the following workforce structures:

- Jobs
- Locations
- Departments

For example, to upload multiple jobs at a time:

- Select Manage Jobs in the Workforce Structures work area
- Display the Create menu
- Select Create in Spreadsheet

Uploading Using a Spreadsheet

For each workforce structure, you can do the following:

- Download a predefined spreadsheet template from the application
- Work on the spreadsheet offline, and upload the spreadsheet to the application when your changes are complete
- Upload the spreadsheet multiple times to accommodate revisions

Effective Start Date

Ensure that the effective start date of the workforce structure is same as or earlier than the hire date of persons associated with the workforce structure; for example, enter a job start date earlier than the hire date of persons associated with the job. You may want to consider creating all objects as of a common early date, for example, create all locations with the start date 1-1-1950.

Entering Descriptive Flexfield Values

Use the Attribute columns in the main sheet to enter values for the descriptive flexfields that are already defined for the object. Use the DFF Reference sheet to understand which attribute columns map to which descriptive flexfields, since this information isn't displayed in the main sheet.

Note: You can't enter values in the DFF Reference sheet, you can only view details of the descriptive flexfields.

Uploading Jobs Using a Spreadsheet

When uploading jobs using a spreadsheet, you:

- Can't create a new job profile
- Can only associate an existing job profile
- Must enter the name of an existing job profile in the spreadsheet

Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

FAQs for Jobs and Positions

What's the difference between a job set and a job family?

A job family is a group of jobs that have different but related functions, qualifications, and titles. They are beneficial for reporting. You can define competencies for job families by associating them with model profiles.

A job set is an organizational partition of jobs. For example, a job set can include global jobs for use in all business units, or jobs for a specific country or line of business. When you select a job for a position or an assignment, you can view the available jobs in your business unit set and the common set.

Related Topics

- [What's a job set?](#)

Why can't I see the position code for the new position?

Based on your enterprise settings, the position code is generated after the Create Position transaction is approved. For example, once the transaction is approved, you can see the position code on the Position Details page.

When can I enable position synchronization?

You can enable position synchronization at any time but if there are existing assignments in an enterprise or legal employer, you can enable it only as of the current or future date.

If you update an assignment as of a past date the values from the new position won't be updated in the assignment. For example, if you create a transfer as of a past date before enabling position synchronization, the values from the new position won't be updated in the assignment.

What happens if I specify a parent position?

You can specify a parent position when you enable HCM position hierarchy using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. A parent position is one, which is the next position up in the position hierarchy.

On the Manage Positions page, click the parent position link to view the position details and click the icon next to the parent position to refresh the search with the parent position.

As a prerequisite, you specify a parent position to synchronize the line manager from the parent position. When you select to synchronize the line manager using the position hierarchy the incumbent in the parent position is populated as the new manager.

Related Topics

- [Position Synchronization](#)

What happens if I specify the standard working hours in a position?

In an assignment, the standard working hours are inherited from the position. The working hours and the standard working hours provided in the position are used to calculate the FTE (Full Time Equivalent) in the assignment.

If there is a FTE value already existing in the position, you can choose to update it based on the ratio of the working hours to standard working hours.

When position synchronization is enabled, even if FTE value exists for the position, it is not copied to the assignment during synchronization. Instead, the assignment FTE value is calculated as a ratio of working hours to standard working hours, if specified.

What happens when grades are synchronized?

The profile options to default or enforce valid grades are ignored when grades are synchronized.

If multiple valid grades exist at the position, then you can select an appropriate grade in the assignment. If you hire a person into the position, which has an entry grade specified, then the entry grade will be the default value in case of multiple valid grades.

If the assignment has both position and job, then synchronization from the position always takes precedence and the values at the job will be ignored. Let's say you haven't defined any valid grades for the position. However, valid grades are defined for the job and the assignment has a position. Then any valid grades for the job are ignored.

How can I exclude some assignments from position synchronization?

If you want to use position synchronization only for a section of workers, you need to enable position synchronization at the legal employer level.

To exclude some assignments from synchronization, select **Allow Override** at the Assignment in the Position Synchronization Configuration section on the Manage Enterprise HCM Information page.

To exclude a specific assignment from synchronization, select **No** in the **Synchronize from Position** field in the assignment (even if override is allowed). All read-only fields become editable but the assignment won't be synchronized and will no longer inherit any changes made at the position level. However, it isn't possible to exclude only some synchronized attributes.

How do I override position synchronization at the attribute level?

If you want to capture a different value for one attribute only, leave that attribute blank at the position

Let's say the location attribute is synchronized from the position but except in a few cases it doesn't matter into which location the person is hired, then you can leave the location field blank at the position. Since blank values aren't synchronized, the location will be editable in the assignment enabling you to select a value manually.

What happens if I select Synchronize Mapped Flexfields?

When you select this option, assignment flexfields are synchronized with the mapped position flexfields.

You must first map position flexfields to assignment flexfields using the Manage Assignment Flexfield Mapping task in the Functional Setup Manager, and then select this option in the Manage Enterprise HCM Information task. When position synchronization is enabled, the position flexfields are inherited in the assignments.

7 Grades, Grade Rates, and Grade Ladders

Grades

From the Manage Grades page, create grades to record the level of compensation for workers.

You can do these actions.

- Create grades for multiple pay components, such as salary, bonus, and overtime rates
- Define one or more grades that are applicable for jobs and positions

This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments for a worker.

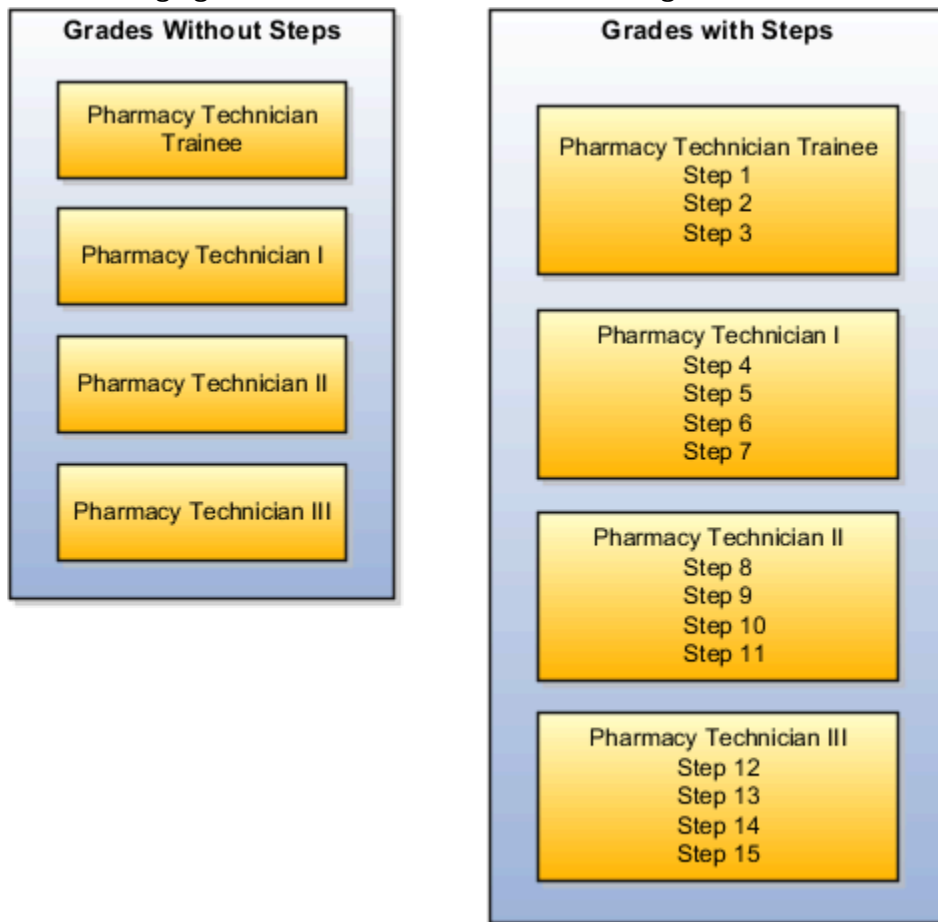
Grades and Sets

You assign each grade to a set. If you assign a grade to the common set, then the grade is available for use in all business units. To limit a grade to a single business unit, you can assign it to a set that's specific to that business unit.

Grade Steps

Grade steps are distinct increments of progression within a grade. You can set up grades with or without grade steps.

The following figure illustrates the difference between grades with and without steps.



Grade Rates

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades.

For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

Grade Ladders

You can combine grades into grade ladders to group your grades or grades with steps in the sequence in which your workers typically progress. For example, you might create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Related Topics

- [Grade Rates](#)
- [Grade Ladders](#)
- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Grade Rates

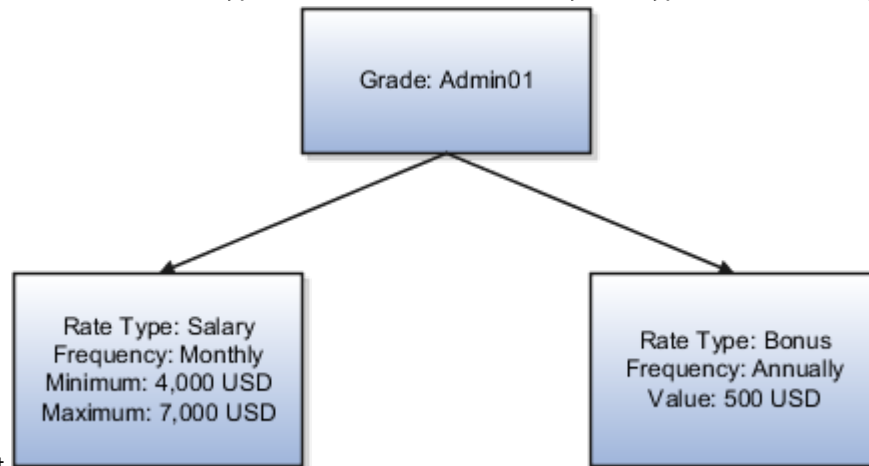
Grade rates contain the pay values that are related to each grade.

Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay such as salary, overtime, and bonuses.

Note the following:

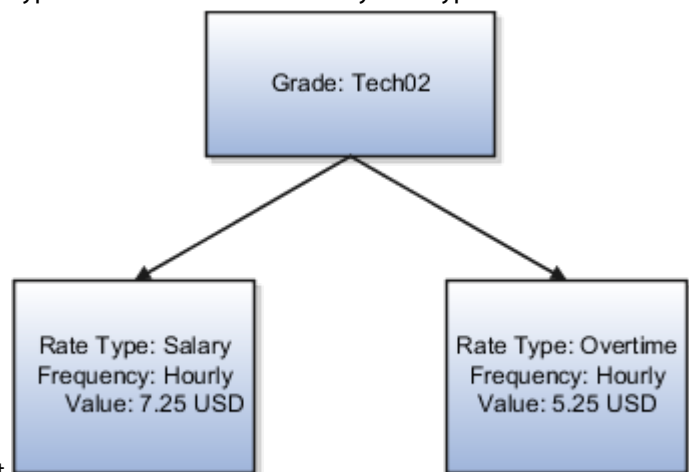
- Grade rates for some jobs or positions might include an hourly salary rate and an overtime rate.
- Grade rates for other jobs or positions might contain a salary rate type with a range of amounts and a bonus rate type with a fixed amount.
- Grade rates typically serve only as a guideline to validate that the salary you propose during the compensation process for a worker on a certain grade is appropriate for that grade.

This figure illustrates a grade that has two rate types associated with it: Salary rate type that has a range of values Bonus



rate type with a fixed amount

This figure illustrates a different grade that has two rate types associated with it: Salary rate type that has a fixed



amount Overtime rate type that also has a fixed amount

Rate Types

The types of rates that you can set up depend on the values for lookup type GRADE_PAY_RATE_TYPE. Examples of rate types are salary, bonus, and overtime pay.

Grade Rates and Legislative Data Groups

You assign a legislative data group to each grade rate. Depending on how your enterprise is configured, you may have several legislative data groups. You can set up grades that are shared across different areas of your business, and enter rates that are specific to each legislative data group.

Grade Rates and Grades

You can do the following:

- Set up grade rates when you set up grades
- Set up grade rates independently from grades

For grades with steps, you enter rates when you attach the grades to a grade ladder.

Related Topics

- [How Grades, Grade Rates, and Sets Work with Legislative Data Groups](#)
- [How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Grade Ladders

Grade ladders group grades and grades with steps in the sequence in which your workers typically progress.

You create grade ladders either from the Manage Progression Grade Ladders page (in the Compensation work area) or from the Manage Grade Ladders page (in the Workforce Structures work area).

Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You may create different grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades

You create ladders with grades by building a hierarchy of grades that were created without steps. When you set up this type of ladder, only grades without steps are available to add to the ladder. You can't create a grade ladder with a combination of both grades and grades with steps.

You don't define any grade rates when you set up a ladder with grades; the rates for the grades within the ladder are inherited from the rates that were added when you set up the grades. To add or edit rates for grades, you must use the Manage Grade Rates task.

Ladders with Grade Steps

You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.

You define step rates when you set up the ladder, and the rates are unique to each ladder. You can't share step rates between grade ladders.

Related Topics

- [Grade Rates](#)
- [Grades](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)
- [How You Set Up Grade Ladders for Pay Scale Requirements](#)

Lookup Types for Grades

The Lookup type for Grades task identifies the lookup type for managing grades that has an extensible configuration level.

The GRADE_PAY_RATE_TYPE lookup type identifies compensation components you want to set up for grade rates. The predefined values are salary, bonus, and overtime. Review these lookup values, and update them as appropriate to suit enterprise requirements.

Grade Ladder on Worker Assignment

You can use the grade ladder in the worker assignment to ensure that workers are compensated according to the grade structure defined in the job or position.

Selecting Grade Ladder for Worker Assignment

Transactions, such as New Hire, Add Assignment, and Create Work Relationship involve creating a new assignment. During assignment creation, the grade ladder is automatically populated based on the selected job or position. This isn't true for transactions that involve an assignment update (for example, promotion, transfer). You must manually select the grade ladder when you update the assignment.

Note: The Grade Ladder field isn't displayed if a grade ladder isn't defined for the worker organization.

You must select from the grades populated for the grade ladder. If the selected grade includes steps, you can view the steps and the associated salary rates by clicking the Grade Details icon. The step rate is displayed based on the legislative data group associated with the assignment business unit.

The grade step progression process evaluates a worker's eligibility to progress to a new grade or step based on the defined rules and updates the salary rate. The process can be run for workers associated with a particular grade ladder to move them to a new grade or step and update their salary rate.

If the grade ladder selected in the assignment is associated with an automatic grade step progression process, you can exclude the worker from the process. To exclude the worker, deselect the Include in grade step progression check box.

Note: The Include in grade step progression check box isn't displayed if a grade ladder isn't defined for the worker organization.

Related Topics

- [Grade Ladders](#)
- [Grades](#)
- [Grade Rates](#)

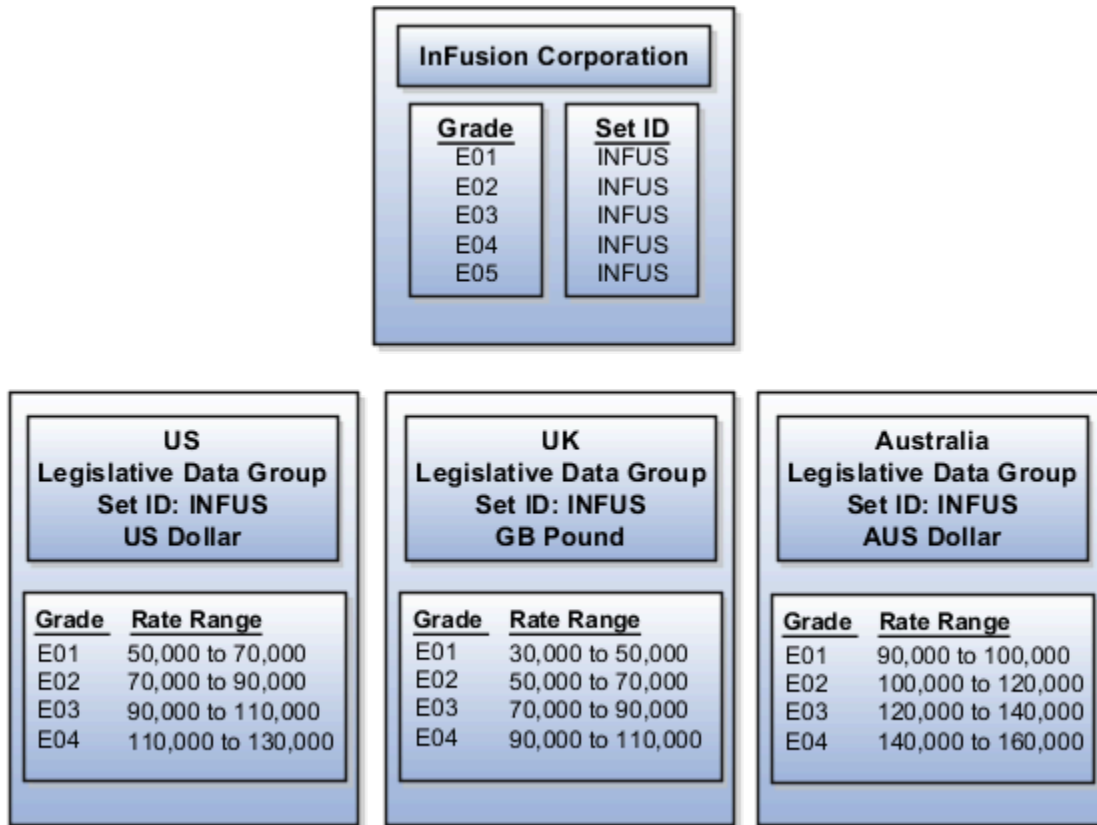
How Grades, Grade Rates, and Sets Work with Legislative Data Groups

You assign grades to sets, and grade rates to legislative data groups from the Workforce Structures > Manage Grade Rates page.

If you have grades that are common across multiple business units, you can:

- Assign them to the set that's associated with business units.
- Set up grade rates that are specific to each legislative data group.

The following figure illustrates how you can use sets to share grades across multiple business units and change the grade rates for each legislative data group.



Grades and Sets

Sets enable you to share grades that are common across business units in your enterprise. You can assign grades to either a specific set or to the common set to each grade. If you assign the grade to the common set, then the grade is available for use in all business units.

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people.

For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that's shared between the countries, but set up different grade rates for each country in the applicable currency.

Related Topics

How Grades and Grade Rates Work with Jobs, Positions, Assignments, Compensation, and Payroll

You use grades and grade rates in the following components of Oracle Fusion HCM to ensure that workers are compensated according to the grade structure that you create.

- Jobs
- Positions
- Assignments
- Compensation
- Payroll

How Grades Work with Jobs and Positions

You can define one or more grades that are applicable for each job and position. Using this list of valid grades, combined with the settings for two profile options you restrict the grades that can be selected when you set up assignments for a worker.

Note the following:

- If you use positions, then the grades that you assign to jobs are the default grades for the positions that you associate with each job.
- You can use the default grades for the position, remove ones that don't apply, or add new ones.

How Grades Work with Assignments

When you set up assignments, you can select the applicable grade for the job or position.

Two profile options determine the grades that are available for selection:

Profile Option	Description
PER_ENFORCE_VALID_GRADES	<p>If you set this site-level profile option to Yes:</p> <ul style="list-style-type: none"> • Users can select a grade only from the list that you defined for the job or position. ○ If users select both job and position for the assignment, they can select grades that are valid for the position only. ○ If valid grades are defined for neither job nor position, then users can select from all grades. <p>If you set this site-level profile option to No:</p> <ul style="list-style-type: none"> • User can select from all the grades • This is also the default value

Profile Option	Description
PER_DEFAULT_GRADE_FROM_JOB_POSITION	<p>If you set this site-level profile option to Yes and there is only one valid grade for a job or position:</p> <ul style="list-style-type: none"> • The grade is used by default in the assignment. ○ If an entry grade is defined for a position, then that grade is used by default when the user creates a new assignment. <p>If you set this site-level profile option to No:</p> <ul style="list-style-type: none"> • User can select from all the grades • This is also the default value

How Grades and Grade Rates Work with Compensation and Payroll

Depending on the configuration of the legal employer to which workers belong, their salary can be stored at the assignment level. The grade rate can be linked to the salary basis within the salary record, in which case their salaries are validated using the grade rates.

For example, assume an assignment record for a worker indicates they're in Grade A1 with the salary of USD 40000.00:

- The grade rate range that's attached to Grade A1 is 30,000.00 USD to 50,000.00 USD. Therefore, the salary is within the grade rate range and no warnings are issued.
- If their manager or a human resource (HR) specialist changes their salary to 55,000.00 USD, a warning is issued that the new salary is outside their salary range.

In addition, compa-ratios and salary range positions for workers are calculated using the minimum and maximum amounts that are defined in the grade rates for their grades.

Payroll elements reference grades in the eligibility criteria. For example, assume you want to process a bonus for all workers who are at grade level A2. To accomplish this, you would create an earnings element for the bonus and specify A2 for the grade in the eligibility criteria. The result of this setup, when combined with additional eligibility criteria that may be applied by the bonus plan, is that when payroll is processed, workers who are at grade level A2 and who meet the additional eligibility criteria would receive the bonus.

Related Topics

- [How Many Salary Bases to Create](#)

Examples of Grades, Grade Rates, and Grade Ladders

The following examples illustrate how InFusion Corporation might set up different types of grades, rates, and ladders for the different types of jobs within the company. The examples include grade structures for administrative workers, managers, senior executives, and line workers.

Note: All amounts in the examples are US dollars.

Grades with Steps

The grade structure for annual salary amounts for administrative workers in InFusion Corporation includes five grades, and each grade includes five steps.

- When workers move from one grade to another in this ladder, they don't always start at step 1 of a grade.
- The next step is based on their previous salary plus two steps.

For example, a worker could move from Step 5 in Grade 1 to Step 3 in Grade 2.

The following table lists the five grades, steps, and the rates associated with them for administrative workers at InFusion Corporation.

Grade	Step 1	Step 2	Step 3	Step 4	Step 5
1	17,803	18,398	18,990	19,579	20,171
2	20,017	20,493	21,155	21,717	21,961
3	21,840	22,568	23,296	24,024	24,752
4	24,518	25,335	26,152	26,969	27,786
5	27,431	28,345	29,259	30,173	31,087

To set up your grade structure to reflect this table, perform the following tasks:

- Set up five different grades and add five steps for each grade.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for annual salary amounts using the rates in the preceding table.

Grades Without Steps

The grade structure for annual salary amounts for level 3 managers at InFusion Corporation includes grades without steps. The grade rates are fixed amounts.

The following table lists the grades and associated rates for level 3 managers at InFusion Corporation.

Grade	Annual Salary Amount
1	103,900
2	111,800
3	119,900

Grade	Annual Salary Amount
4	127,800
5	135,900
6	143,700
7	151,800
8	155,500

To set up your grade structure to reflect this table, perform the following tasks:

- Set up eight separate grades.
- For each grade, enter the rates from the preceding table.
- Set up a grade ladder with the Grades type and add all eight grades to the ladder.

Grades with Grade Rate Ranges

The grade structure for annual salary amounts for senior executives at InFusion Corporation includes grades with no steps, and the rates are set up using ranges.

The following table lists the rate range for senior executives at InFusion Corporation.

Grade	Minimum Annual Salary Amount	Maximum Annual Salary Amount
SNREXEC	154,300	243,900

To set up a grade structure to reflect this table, perform the following tasks:

- Create a single grade.
- Create a grade rate and enter the minimum and maximum amounts from the preceding table for the grade rate range.

Grade Rates with Hourly Amounts

The grade structure for line workers at InFusion Corporation includes grades with steps, and the rates are hourly amounts.

The following table lists the hourly rates for line workers at InFusion Corporation.

Grade	Step 1	Step 2	Step 3	Step 4	Step 5
1	10.64	11.07	11.49	11.96	12.40

Grade	Step 1	Step 2	Step 3	Step 4	Step 5
2	11.77	12.27	12.76	13.24	13.72
3	12.92	13.46	13.98	14.55	15.07
4	14.03	14.63	15.21	15.80	16.39
5	15.20	15.83	16.46	17.12	17.75

To set up your grade structure to reflect this table, perform the following tasks:

- Create five grades, each with five steps.
- Set up a grade ladder using the Grades with Steps type, and select all five grades.
- Set up step rates for hourly amounts using the rates in the table.

How You Set Up Grade Ladders for Pay Scale Requirements

This example illustrates how to use a grade ladder to create a pay scale that's typical of technicians in the metal industry in Germany. The ladder includes four grades, and each grade includes four steps.

The following table summarizes key decisions for the grades, rates, and grade ladder in this scenario.

Decision to Consider	In This Example
Are steps required for the grades?	Yes.
Which step in each grade should be the ceiling step?	The last step in each grade.
What type of rates are necessary?	Salary rates only.
Will the ladder be created using grades or grades with steps?	Grades with steps.

Summary of the Tasks

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Create Grades

- Under My Client Groups, In the Workforce Structures work area, click **Manage Grades** to open the Manage Grades page.
- On the Manage Grades page, click **Create** to open the Create Grade: Grade Details page.
- In the Grade Details region of the Create Grade: Grade Details page, complete the fields as shown in this table, using the default values unless otherwise indicated.

Field	Value
Grade Set	Common
Name	Technicians 03
Code	Tech03

- Click **Next** to access the Create Grade: Grade Steps page.
- In the Grade Steps region of the Create Grade: Grade Steps page, click **Add Row**.
- Add four steps for the grade by completing the fields as shown in this table. You must click **Add Row** after adding each step.

Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

- Verify that Year 4 is the ceiling step.
- Click **Submit**. You will add the grade rates when you create the grade ladder.
- In the Warning dialog, click **Yes**.
- In the Confirmation dialog, click **OK**.
- Repeat steps 2 through 9 to add three more grades with steps. Complete the information for each grade using the information in these tables. The ceiling step in each grade is Year 4.

Field	Grade 2	Grade 3	Grade 4
Grade Set	Common	Common	Common

Field	Grade 2	Grade 3	Grade 4
Name	Technicians 04	Technicians 05	Technicians 06
Code	Tech04	Tech05	Tech06

Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

Create a Grade Ladder

1. In the Workforce Structures work area, click **Manage Grade Ladders** to open the Manage Grade Ladders page.
2. On the Manage Grade Ladders page, click **Create** to access the Create Grade Ladder: Grade Ladder Details page.
3. In the Grade Ladder Details region of the Create Grade Ladder: Grade Ladder Details page, complete the fields as shown in this table, using default values unless otherwise indicated.

Field	Value
Grade Set	Common
Name	Metal Technicians
Grade Type	Grade with steps

4. Click **Next** to access the Create Grade Ladder: Grades page.
5. In the Search Grades region of the Create Grade Ladder: Grades page, enter TECH in the **Code** field and click **Search**.
6. Select Tech03 and click **Add to Grade Ladder**.
7. Select Tech04 and click **Add to Grade Ladder**.
8. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
9. Select Tech05 and click **Add to Grade Ladder**.
10. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.

11. Select Tech06 and click **Add to Grade Ladder**.
12. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
13. Verify that the grades appear in numerical order, with Tech06 at the beginning of the ladder and Tech03 at the end of the ladder.
14. Click **Next** to access the Create Grade Ladder: Rate Values page.
15. On the Create Grade Ladder: Rate Values page, select the legislative data group for Germany.
16. In the Grade Step Rates region, click **Add Row**.
17. Complete the following fields as shown in this table.

Field	Value
Name	Technician Ladder Rates
Rate Type	Salary
Frequency	Monthly
Annualization Factor	12
Currency	EUR

18. In the Step Rate Values region, enter rates for the four steps in each grade by completing the fields as shown in this table.

Grade Name	Step Name	Value
Technicians 03	Step 1	1,750.73
Technicians 03	Step 2	1,878.90
Technicians 03	Step 3	2,009.79
Technicians 03	Step 4	2,143.92
Technicians 04	Step 1	2,238.57
Technicians 04	Step 2	2,408.39
Technicians 04	Step 3	2,577.68
Technicians 04	Step 4	2,744.81

Grade Name	Step Name	Value
Technicians 05	Step 1	2,831.87
Technicians 05	Step 2	3,047.14
Technicians 05	Step 3	3,257.52
Technicians 05	Step 4	3,469.00
Technicians 06	Step 1	3,586.36
Technicians 06	Step 2	3,851.38
Technicians 06	Step 3	4,122.34
Technicians 06	Step 4	2,143.92

19. Click **Next**.
20. On the Create Grade Ladder: Review page, review the grade ladder hierarchy and the rates, and click **Submit**.
21. In the Warning dialog, click **Yes**.
22. In the Confirmation dialog, click **OK**.

Related Topics

- [Example of Setting Up Grade Ladders for Spine Point Requirements](#)
- [Examples of Grades, Grade Rates, and Grade Ladders](#)

Example of Setting Up Grade Ladders for Spine Point Requirements

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points. You manage grade ladders using the Manage Grade Ladders task in the Workforce Structures work area.

Spine Points

Some public sector organizations in the United Kingdom (UK) use spine points to structure their grades. Each spine point corresponds to one or more steps within a grade, as grades often overlap each other.

Grade Structure

You can use grade ladders to meet the requirements of a grade structure with spine points. The following table illustrates a grade structure with spine points that's similar to the one used for university workers in the UK.

Spine Point	Salary	Grade	
1	25,674		1
2	26,361		
3	27,068		
4	27,796		
5	30,394		
6	31,778	2	
7	32,648		
8	33,542		
9	34,466		
10	35,425		
11	38,441		
12	39,510		3
13	40,634		
14	41,746		
15	42,914		
16	44,118		
17	45,358		

To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number.
- Create a grade ladder with all three grades.
- Create step rates with annual salary amounts.

Resulting Grades, Rates, and Grade Ladder

The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

Grade Name	Steps	Ceiling Step
Grade 1	<ul style="list-style-type: none"> • Spine Point 1 • Spine Point 2 	Spine Point 5

Grade Name	Steps	Ceiling Step
	<ul style="list-style-type: none"> Spine Point 3 Spine Point 4 Spine Point 5 Spine Point 6 	
Grade 2	<ul style="list-style-type: none"> Spine Point 6 Spine Point 7 Spine Point 8 Spine Point 9 Spine Point 10 Spine Point 11 Spine Point 12 	Spine Point 11
Grade 3	<ul style="list-style-type: none"> Spine Point 12 Spine Point 13 Spine Point 14 Spine Point 15 Spine Point 16 Spine Point 17 	Spine Point 17

The following table lists the grades, steps, and rates to add to the ladder.

Grade Name	Steps	Rates
Grade 1	<ul style="list-style-type: none"> Spine Point 1 Spine Point 2 Spine Point 3 Spine Point 4 Spine Point 5 Spine Point 6 	<ul style="list-style-type: none"> 25, 674 26, 631 27, 068 27, 796 30, 394 31, 778
Grade 2	<ul style="list-style-type: none"> Spine Point 6 Spine Point 7 Spine Point 8 Spine Point 9 Spine Point 10 Spine Point 11 Spine Point 12 	<ul style="list-style-type: none"> 31, 778 32, 648 33, 542 34, 466 35, 425 38, 441 39, 510
Grade 3	<ul style="list-style-type: none"> Spine Point 12 Spine Point 13 	<ul style="list-style-type: none"> 39, 510 40, 634

Grade Name	Steps	Rates
	<ul style="list-style-type: none"> Spine Point 14 Spine Point 15 Spine Point 16 Spine Point 17 	<ul style="list-style-type: none"> 41, 746 42, 914 44, 118 45, 358

Related Topics

- [Examples of Grades, Grade Rates, and Grade Ladders](#)
- [How You Set Up Grade Ladders for Pay Scale Requirements](#)

FAQs for Grades, Grade Rates, and Grade Ladders

Can I edit the legislative data group for a grade rate?

No. If you need to change the legislative data group for a grade rate, you must change the grade rate to inactive and create a new grade rate with the correct legislative data group.

How can I add rates to grade steps?

Rates can be added to a grade with steps, when you add the grade to a grade ladder.

What's the difference between grade ladders and progression grade ladders?

Grade ladders group grades and grades with steps in the sequence in which your workers typically progress. Progression grade ladders are hierarchies used to group grades and steps and define their sequence.

They include the associated progression rules and rates for each grade and step within the ladders. Oracle Fusion Human Capital Management has both a Grade Ladder and a Progression Grade Ladder For a specific grade ladder definition; you should use one of these, but not both.

The differences between them are:

Progression Grade Ladders	Grade Ladder
<ul style="list-style-type: none"> Viewed in Manage Progression Grade Ladders page in Compensation work area 	<ul style="list-style-type: none"> Viewed in Manage Grade Ladders page in Workforce Structures work area

Progression Grade Ladders	Grade Ladder
<ul style="list-style-type: none"> • Required if you're using grade step progression or rate synchronization processes • Enables population of worker salary record from grade or step rates during employment transactions • Only one rate (grade rate or step rate) allowed per progression grade ladder • Associated with a single legislative data group 	

How can I edit rates for a grade?

You can edit rates using the Manage Grade Rates task. However, you can't edit rates within the Manage Grades task, because grades and rates have separate effective dates.

What's a grade ladder hierarchy?

The grade ladder hierarchy consists of grades. You can move the grades up and down within the hierarchy, and add or remove grades. You can click any grade to view the details.

What's a ceiling step?

A ceiling step is typically the highest step within a grade to which a worker may progress. When a worker reaches the ceiling step within a grade, typically any further progress must be made by moving the worker to another grade.

You can override the ceiling for individual assignments. In most cases, the ceiling step is the last step in the sequence. For example, if the grade has steps 1 through 5, step 5 is the ceiling step. However, you may have situations where you want another step to be the ceiling. For example, in a grade with steps 1 through 5, you might indicate that step 4 is the ceiling step, and workers can progress from step 1 to step 4, and then on to the next grade. You can use step 5 when a worker isn't entitled to move to the next grade, perhaps because he doesn't yet have the required qualifications or certificates, but you still want to increase his pay to reward him for many years of experience and good performance. You can provide the pay increase by moving him to step 5.

8 Workforce Structures - Configuration Options

Workforce Structures Enterprise-Level Configuration

Let's look at the different configuration options for workforce structures and the minimum search characters configuration for each workforce structure at the enterprise-level.

Workforce Structure Configuration Options

You can configure workforce structure-related options at the enterprise level using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. This table provides the description and default value for each option.

Option	Description	Default Value
Default Effective Start Date	You can default the effective start date when creating workforce structure objects such as position, job, location and so on in responsive and classic pages.	None
Default Location Country	You can default a country for the location at the enterprise level. This defaults the selected country under the country field (Main Address) from Location Details (Add) Quick Actions. If the country value is not defaulted at Enterprise setup then the default country is United States	None
Default Evaluation System	You can set a default evaluation system at the enterprise level which would default the specified evaluation system for both job and position	None
Guided Flows: Future-Dated Records Validation	You can use this option to control whether users can update work structures with future-dated records using the self-service work structure related pages. You can select from these values: <ul style="list-style-type: none"> • None: No validation is displayed. • Error: An error message is displayed indicating that the work structure has a future-dated record, and the user is prevented from updating the work structure. • Warning: A warning message is displayed indicating that the work structure has a future-dated record. The user can choose 	None

Option	Description	Default Value
	to ignore the message and continue with the transaction.	
Initial Position Code	<p>You can specify the initial position for your enterprise when you generate the code automatically.</p> <p>The application uses this number for the first record that you create using the automatic position code setting and increments the number by one for subsequent records. By default, the initial code is 1.</p>	1
Initial Job Code	<p>You can specify the initial job for your enterprise when you generate the code automatically.</p> <p>The application uses this number for the first record that you create using the automatic job code setting and increments the number by one for subsequent records. By default, the initial code is 1.</p>	1
Job Code Generation Method	<p>You can generate a code for job workforce structure. Use the Manage Enterprise HCM Information task in the Workforce Structures work area to configure the code generation method for jobs for your enterprise.</p> <p>You can generate the job code in one of these 3 ways:</p> <ul style="list-style-type: none"> • Manually • Automatically prior to submission • Automatically upon final save 	None
Position Code Generation Method	<p>You can generate a code for position workforce structure. Use the Manage Enterprise HCM Information task in the Workforce Structures work area to configure the code generation method for positions for your enterprise.</p> <p>You can generate the position code in one of these 3 ways:</p> <ul style="list-style-type: none"> • Manually • Automatically prior to submission • Automatically upon final save 	None

Minimum Search Characters

You can define the minimum number of characters to search for workforce structure objects using the Manage Enterprise HCM Information task in the Setup and Maintenance work area.

The minimum search characters are used to search for the name and code for each search page depending on the number of objects. For performance reasons, the minimum value is 1.

Note: If your organization has a detailed department structure with a large number of departments, it's recommended that you use 3 characters to search for departments. But, if you have a few departments, then you can set the value to 1 character to make the search easier.

Workforce Structure	Minimum Search Suggested Characters	Default Value
Grade	1	None
Grade Ladder	1	None
Grade Rate	1	None
Job	2	None
Job Family	1	None
Location	1	None
Organization	3	None
Position	2	None

Effective Start Date Defaults

You can set the default effective start date for workforce structure objects in responsive and classic pages using the Manage Enterprise HCM Information task in the Setup and Maintenance work area.

This table lists the behavior of the effective date on responsive and classic pages in certain scenarios.

Scenario	Behavior in Responsive Pages	Behavior in Classic Pages
Default Effective Start Date field is blank on the Manage Enterprise HCM Information page and an effective date isn't specified on the search pages.	Current date is defaulted when creating a new workforce structure.	1-Jan-1951 is defaulted when creating a new workforce structure.
Default Effective Start Date field is blank on the Manage Enterprise HCM Information page and an effective date is selected on the search pages.	Current date is defaulted when creating a new workforce structure.	When you search for a workforce structure using an effective date, then this date is defaulted when creating a new workforce structure from the search page .
Default Effective Start Date isn't blank on the Manage Enterprise HCM Information page and an effective date is selected on the search pages.	Configured default date specified for the enterprise is defaulted when creating a new workforce structure.	When you search for a workforce structure using an effective date, then this date is defaulted when creating a new workforce structure from the search page ..
Default Effective Start Date field on the Manage Enterprise HCM Information page isn't blank and an effective date isn't specified on the search pages.	Configured default date specified for the enterprise is defaulted when creating a new workforce structure.	Configured default date specified for the enterprise is defaulted when creating a new workforce structure.

Workforce Structures Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these workforce structure-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Value	Description
ORA_PER_ALLOW_GLOBAL_CAGR_ON_POSITIONS	Allow global Collective Agreements on Position	No	Allow global Collective Agreements to be associated to a Position.
ORA_PER_DEPARTMENT_LOV_STARTSWITH_NUMROWS	Search LOV Departments Starts With Row Count Threshold	10000	Enable department search to start with characters entered when row count is high. Row count is across organization units, organization unit classifications, location details and sets
ORA_PER_DEPTTREE_LOV_STARTSWITH_NUMROWS	Search LOV Department Tree Nodes Starts With Row Count Threshold	10000	Enable department tree node search to start with characters entered when row count is high. Row count is across department tree nodes, organization units/classifications
ORA_PER_ENABLE_DEPARTMENT_TITLE	Title Attribute in Departments Enabled	N	Enable the Title attribute in Departments.
ORA_PER_GRADESTEP_LOV_STARTSWITH_NUMROWS	Search LOV Grade Steps Starts With Row Count Threshold	10000	Enable grade step search to start with characters entered when row count is high. Row count includes rows across tables for grade steps
ORA_PER_GRADE_LOV_STARTSWITH_NUMROWS	Search LOV Grades Starts With Row Count Threshold	10000	Enable grade search to start with characters entered when row count is high. Row count includes rows across tables for grades and sets
ORA_PER_JOB_LOV_STARTSWITH_NUMROWS	Search LOV Jobs Starts With Row Count Threshold	10000	Enable job search to start with characters entered when row count is high. Row count includes rows across tables for jobs, job families and sets
ORA_PER_LOCATION_LOV_STARTSWITH_NUMROWS	Search LOV Locations Starts With Row Count Threshold	10000	Enable location search to start with characters entered when row count is high. Row count includes rows across tables for locations, territories and sets
ORA_PER_LOV_COMPACT_DEPARTMENT_SEARCH	Department LOV Compact Search Enabled	No	Enable compact search to use only department name when searching for departments
ORA_PER_LOV_COMPACT_JOB_SEARCH	Job LOV Compact Search Enabled	No	Enable compact search to use only job name and code when searching for jobs

Profile Option Code	Profile Display Name	Default Value	Description
ORA_PER_LOV_COMPACT_LOCATION_SEARCH	Location LOV Compact Search Enabled	No	Enable compact search to use only location name and code when searching for locations
ORA_PER_LOV_COMPACT_POSITION_SEARCH	Position LOV Compact Search Enabled	No	Enable compact search to use only position name and code when searching for positions
ORA_PER_ORGTREE_LOV_STARTSWITH_NUMROWS	Search LOV Departments Starts With Row Count Threshold	10000	Enable organization tree node search to start with characters entered when row count is high. Row count is across organization tree nodes, organization units/ classifications
ORA_PER_POSITIONTREE_LOV_STARTSWITH_NUMROWS	Search LOV Position Tree Nodes Starts With Row Count Threshold	10000	Enable position tree node search to start with characters entered when row count is high. Row count is across position tree nodes, positions, organization units/ classifications
ORA_PER_POSITION_LOV_STARTSWITH_NUMROWS	Search LOV Positions Starts With Row Count Threshold	10000	Enable position search to start with characters entered when row count is high. Row count includes rows across tables for positions, jobs and departments
ORA_POS_HIRING_STATUS_FILTER	ORA_POS_HIRING_STATUS_FILTER	N	Enable Position List of Values filtering based on Hiring Status. In pending worker pages, the position LOV isn't filtered, but instead an error message is shown if the user selects a position that isn't approved for hiring. The same validation also applies when using HCM Data Loader (HDL). The position filtering doesn't apply for nonworkers.
ORA_PER_POS_NUM_VALID_GRADES_ALLWD	Number of Valid Grades Allowed on a Position	0	Specify a number between 1 and 5 to restrict the number of valid grades allowed on a position. Select 0 to specify any number of valid grades.
ORA_PER_MATCH_POS_GRADES_WITH_JOB_GRADES_ENABLED	Validation to Match Position's Valid Grades With Job Valid Grades	N	Enable validation to match valid grades on the position with valid grades of the job.

Note: Compact Search/NUMROWS Profile Options – For all the above listed Compact Search Profiles a scheduled process, "Optimize Workforce Structures LOV to Use Starts With" runs automatically on a daily basis. The process switches the search from 'contains' to 'starts with' for all large workforce structures LOVs when the row threshold is exceeded. The default for the threshold for the number of rows is 10,000. You can change the default value as per your requirements. You can set it to 0 if you don't want the application to change the LOV search. This is because the scheduled process won't consider the profile option if the value is ≤ 0 , or if it contains a non-numeric character.

Workforce Structures Lookups

This topic identifies common lookups that are work structure-related and have user or extensible configuration levels. Review these lookups and update them as appropriate to suit enterprise requirements. You review lookups using the Manage Common Lookups task in the Setup and Maintenance work area.

Lookup Type	Description	Configuration Level
BARGAINING_UNIT_CODE	Identifies a legally organized group of people which has the right to negotiate on all aspects of terms and conditions with employers or employer federations. This is applicable for positions.	User
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.	Extensible
EVAL_SYSTEM_MEAS	Measurement unit for evaluation criteria on job or position	Extensible
GRADE_PAY_RATE_TYPE	Shows rate types like salary, bonus, and over time.	Extensible
JOB_FUNCTION_CODE	Description of the primary function of a job. Used for grouping and reporting jobs of like function.	User
MANAGER_LEVEL	Description of the seniority of a manager on the job	User
PROBATION_PERIOD	Specifies the unit of measurement for the Probation Period of a Position. For example, 365 "Day", 52 "Week", 12 "Month", 1 "Year", and so on.	Extensible
SECURITY_CLEARANCE	Classifies if security clearance is needed.	Extensible

Workforce Structures Flexfields

Use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks in the Setup and Maintenance work area to manage flexfields. You can configure these workforce structure-related flexfields as required, to meet your enterprise requirements:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
Organizations				
HR_ALL_ORGANIZATION_UNITS_F	PER_ORGANIZATION_UNIT_DFF	Organization Attributes	For storing additional information on organizations	Available for use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
HR_ORGANIZATION_INFORMATION_F	PER_ORGANIZATION_INFORMATION_EFF	Organization Information EFF	For storing additional organization information as single and multiple row extensible flexfield contexts.	Available for use.
Grade and Grade Rates				
PER_GRADES_F	PER_GRADES_DF	Grade Additional Details	For storing additional grade information.	Available for use.
PER_GRADE_LEG_F	PER_GRADES_LEG_EFF	Grade Legislative Information	For storing additional legislative information for grades as single and multiple row extensible flexfield contexts	Available only for Oracle localization use.
PER_GRADE_LADDERS_F	PER_GRADE_LADDERS_DF	Grade Ladder Additional Details	For storing additional information related to grade ladder.	Available for use.
PER_RATES_F	PER_RATES_DF	Rate Additional Details	For storing additional grade rate details.	Available for use.
Jobs				
PER_JOB_EVALUATIONS	PER_EVALUATION_CRITERIA_DFF	Evaluation Criteria Attributes	For storing additional job evaluation information.	Available for use.
PER_JOBS_F	PER_JOBS_DFF	Job Attributes	For storing additional job information.	Available for use.
PER_JOB_EXTRA_INFO_F	PER_JOBS_EIT_EFF	Job EIT Information	For storing additional job information as single and multiple row extensible flexfield contexts.	Available for use.
PER_JOB_LEG_F	PER_JOBS_LEG_EFF	Job Legislative Information	For storing additional legislative information related to job as single and multiple row extensible flexfield contexts	Available only for Oracle localization use.
PER_JOB_FAMILY_F	PER_JOB_FAMILY_DFF	Job Family Attributes	For storing additional job family information.	Available for use.
Locations				
PER_LOCATION_DETAILS_F	PER_LOCATIONS_DF	Location Attributes	For storing additional location information.	Available for use.
PER_LOCATION_EXTRA_INFO_F	PER_LOCATION_INFORMATION_EFF	Location Information EFF	For storing additional location information as single and multiple row extensible flexfield contexts.	Available for use.
PER_LOCATION_LEG_F	PER_LOCATION_LEG_EFF	Location Legislative EFF	For storing additional location legislative information as single and multiple row extensible flexfield contexts.	Available only for Oracle localization use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
Positions				
PER_POSITION_EXTRA_INFO_F	PER_POSITIONS_EIT_EFF	Position EIT Information	For storing additional position legislative information as single and multiple row extensible flexfield contexts.	Available for use.
PER_POSITION_LEG_F	PER_POSITIONS_LEG_EFF	Position Legislative Information	For storing additional position legislative information as single and multiple row extensible flexfield contexts.	Available only for Oracle localization use.
HR_ALL_POSITIONS_F	PER_POSITIONS_DFF	Position Attributes	For storing additional position information.	Available for use.

Parameters for Work Structure Extensible and Descriptive Flexfields

Flexfield segments have list of values that are dependent on standard attributes. Workforce structure attributes can be used as these objects:

- Flexfield parameters for workforce structure descriptive flexfields.
- Input parameters when creating a value set for a flexfield segment.

You can use workforce structure attributes and descriptive flexfields as parameters when you configure workforce structure extensible flexfields (EFF) and workforce structure descriptive flexfields (DFF).

Note: If you have configured the value set or default conditions using parameters for the EFF, these values will be reinitialized only when you navigate to the EFF field.

Grades

This table shows the parameters that you can use for these grade workforce structures EFF.

- PER_GRADES_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_GRADES_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

Jobs

This table shows the parameters that you can use for these job workforce structures DFF and EFF.

- PER_JOBS_DFF
- PER_JOBS_EIT_EFF
- PER_JOBS_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_JOBS_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_JOBS_DFF	SET_ID	NUMBER	Set ID
PER_JOBS_EIT_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_JOBS_EIT_EFF	SET_ID	NUMBER	Set ID
PER_JOBS_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

Locations

This table shows the parameters that you can use for these location workforce structures DFF and EFF.

- PER_LOCATIONS_DF
- PER_LOCATION_INFORMATION_EFF
- PER_LOCATION_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATIONS_DF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATIONS_DF	SET_ID	NUMBER	Set ID
PER_LOCATION_INFORMATION_EFF	ACTION_REASON_CODE	VARCHAR2	Action Reason Code
PER_LOCATION_INFORMATION_EFF	ACTIVE_STATUS_CODE	VARCHAR2	Active Status Code
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_1	VARCHAR2	ADDRESS_LINE_1
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_2	VARCHAR2	ADDRESS_LINE_2
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_3	VARCHAR2	ADDRESS_LINE_3
PER_LOCATION_INFORMATION_EFF	ADDRESS_LINE_4	VARCHAR2	ADDRESS_LINE_4
PER_LOCATION_INFORMATION_EFF	BILL_TO_SITE	VARCHAR2	Bill-to Site Flag

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_INFORMATION_EFF	BUILDING	VARCHAR2	BUILDING
PER_LOCATION_INFORMATION_EFF	COUNTRY	VARCHAR2	COUNTRY
PER_LOCATION_INFORMATION_EFF	DESIGNATED_RECEIVER_ID	NUMBER	Designated Receiver ID
PER_LOCATION_INFORMATION_EFF	DESIGNATED_RECEIVER_LIST_NAME	VARCHAR2	Designated Receiver List Name
PER_LOCATION_INFORMATION_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_LOCATION_INFORMATION_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATION_INFORMATION_EFF	FLOOR_NUMBER	VARCHAR2	FLOOR_NUMBER
PER_LOCATION_INFORMATION_EFF	GEOGRAPHIC_HIEARCHY_CODE	VARCHAR2	Geographic Hierarchy Code
PER_LOCATION_INFORMATION_EFF	INTERNAL_LOCATION_CODE	VARCHAR2	Location Code
PER_LOCATION_INFORMATION_EFF	INVENTORY_ORGANIZATION_CODE	VARCHAR2	Inventory Organization Code
PER_LOCATION_INFORMATION_EFF	LEGISLATION_CODE	VARCHAR2	Legislation Code
PER_LOCATION_INFORMATION_EFF	LOCATION_ID	NUMBER	Location ID
PER_LOCATION_INFORMATION_EFF	OFFICE_SITE	VARCHAR2	Office Site Flag
PER_LOCATION_INFORMATION_EFF	POSTAL_CODE	VARCHAR2	POSTAL_CODE
PER_LOCATION_INFORMATION_EFF	RECEIVING_SITE	VARCHAR2	Receiving Site Flag
PER_LOCATION_INFORMATION_EFF	REGION_1	VARCHAR2	REGION_1
PER_LOCATION_INFORMATION_EFF	REGION_2	VARCHAR2	REGION_2
PER_LOCATION_INFORMATION_EFF	REGION_3	VARCHAR2	REGION_3
PER_LOCATION_INFORMATION_EFF	SET_CODE	VARCHAR2	Set Code
PER_LOCATION_INFORMATION_EFF	SET_ID	NUMBER	Set ID
PER_LOCATION_INFORMATION_EFF	SHIP_TO_LOCATION_CODE	VARCHAR2	Ship-to Location Code

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_INFORMATION_EFF	SHIP_TO_LOCATION_SET_ID	NUMBER	Ship-to Location Set ID
PER_LOCATION_INFORMATION_EFF	SHIP_TO_SITE_FLAG	VARCHAR2	Ship-to Site Flag
PER_LOCATION_INFORMATION_EFF	TOWN_OR_CITY	VARCHAR2	TOWN_OR_CITY
PER_LOCATION_LEG_EFF	ACTION_REASON_CODE	VARCHAR2	Action Reason Code
PER_LOCATION_LEG_EFF	ACTIVE_STATUS_CODE	VARCHAR2	Active Status Code
PER_LOCATION_LEG_EFF	ADDRESS_LINE_1	VARCHAR2	ADDRESS_LINE_1
PER_LOCATION_LEG_EFF	ADDRESS_LINE_2	VARCHAR2	ADDRESS_LINE_2
PER_LOCATION_LEG_EFF	ADDRESS_LINE_3	VARCHAR2	ADDRESS_LINE_3
PER_LOCATION_LEG_EFF	ADDRESS_LINE_4	VARCHAR2	ADDRESS_LINE_4
PER_LOCATION_LEG_EFF	BILL_TO_SITE	VARCHAR2	Bill-to Site Flag
PER_LOCATION_LEG_EFF	BUILDING	VARCHAR2	BUILDING
PER_LOCATION_LEG_EFF	COUNTRY	VARCHAR2	COUNTRY
PER_LOCATION_LEG_EFF	DESIGNATED_RECEIVER_ID	NUMBER	Designated Receiver ID
PER_LOCATION_LEG_EFF	DESIGNATED_RECEIVER_LIST_NAME	VARCHAR2	Designated Receiver List Name
PER_LOCATION_LEG_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_LOCATION_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_LOCATION_LEG_EFF	FLOOR_NUMBER	VARCHAR2	FLOOR_NUMBER
PER_LOCATION_LEG_EFF	GEOGRAPHIC_HIEARCHY_CODE	VARCHAR2	Geographic Hierarchy Code
PER_LOCATION_LEG_EFF	INTERNAL_LOCATION_CODE	VARCHAR2	Location Code
PER_LOCATION_LEG_EFF	INVENTORY_ORGANIZATION_CODE	VARCHAR2	Inventory Organization Code
PER_LOCATION_LEG_EFF	LEGISLATION_CODE	VARCHAR2	Legislation Code
PER_LOCATION_LEG_EFF	LOCATION_ID	NUMBER	Location ID
PER_LOCATION_LEG_EFF	OFFICE_SITE	VARCHAR2	Office Site Flag
PER_LOCATION_LEG_EFF	POSTAL_CODE	VARCHAR2	POSTAL_CODE
PER_LOCATION_LEG_EFF	RECEIVING_SITE	VARCHAR2	Receiving Site Flag
PER_LOCATION_LEG_EFF	REGION_1	VARCHAR2	REGION_1
PER_LOCATION_LEG_EFF	REGION_2	VARCHAR2	REGION_2
PER_LOCATION_LEG_EFF	REGION_3	VARCHAR2	REGION_3

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_LOCATION_LEG_EFF	SET_CODE	VARCHAR2	Set Code
PER_LOCATION_LEG_EFF	SHIP_TO_LOCATION_CODE	VARCHAR2	Ship-to Location Code
PER_LOCATION_LEG_EFF	SHIP_TO_LOCATION_SET_ID	NUMBER	Ship-to Location Set ID
PER_LOCATION_LEG_EFF	SHIP_TO_SITE_FLAG	VARCHAR2	Ship-to Site Flag
PER_LOCATION_LEG_EFF	TOWN_OR_CITY	VARCHAR2	TOWN_OR_CITY

Organizations

This table shows the parameters that you can use for these organization workforce structures DFF and EFF.

- PER_ORGANIZATION_UNIT_DFF
- PER_ORGANIZATION_INFORMATION_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_ORGANIZATION_UNIT_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_ORGANIZATION_UNIT_DFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_ORGANIZATION_UNIT_DFF	SET_ID	NUMBER	Set ID
PER_ORGANIZATION_INFORMATION_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_ORGANIZATION_INFORMATION_EFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_ORGANIZATION_INFORMATION_EFF	SET_ID	NUMBER	Set Id

Positions

This table shows the parameters that you can use for these position workforce structures DFF and EFF.

- PER_POSITIONS_DFF
- PER_POSITIONS_EIT_EFF
- PER_POSITIONS_LEG_EFF

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_POSITIONS_DFF	ASSIGNMENT_CATEGORY	VARCHAR2	Assignment Category
PER_POSITIONS_DFF	BARGAINING_UNIT_CD	VARCHAR2	Bargaining Unit Code
PER_POSITIONS_DFF	BUSINESS_UNIT_ID	NUMBER	Business Unit Id
PER_POSITIONS_DFF	COLLECTIVE_AGREEMENT_ID	NUMBER	Collective Agreement Id

Flexfield Code	Parameter Code	Data Type	Parameter Description
PER_POSITIONS_DFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_POSITIONS_DFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_POSITIONS_DFF	ENTRY_GRADE_ID	NUMBER	Entry Grade Id
PER_POSITIONS_DFF	ENTRY_STEP_ID	NUMBER	Entry Step Id
PER_POSITIONS_DFF	GRADE_LADDER_ID	NUMBER	Grade Ladder Id
PER_POSITIONS_DFF	JOB_ID	NUMBER	Job Id
PER_POSITIONS_DFF	LOCATION_ID	NUMBER	Location Id
PER_POSITIONS_DFF	ORGANIZATION_ID	NUMBER	Organization Id
PER_POSITIONS_DFF	UNION_ID	NUMBER	Union Id
PER_POSITIONS_EIT_EFF	ASSIGNMENT_CATEGORY	VARCHAR2	Assignment Category
PER_POSITIONS_EIT_EFF	BARGAINING_UNIT_CD	VARCHAR2	Bargaining Unit Code
PER_POSITIONS_EIT_EFF	BUSINESS_UNIT_ID	NUMBER	Business Unit
PER_POSITIONS_EIT_EFF	COLLECTIVE_AGREEMENT_ID	NUMBER	Collective Agreement
PER_POSITIONS_EIT_EFF	EFFECTIVE_END_DATE	DATE	Effective End Date
PER_POSITIONS_EIT_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date
PER_POSITIONS_EIT_EFF	ENTRY_GRADE_ID	NUMBER	Entry Grade Id
PER_POSITIONS_EIT_EFF	ENTRY_STEP_ID	NUMBER	Entry Step Id
PER_POSITIONS_EIT_EFF	JOB_ID	NUMBER	Job Id
PER_POSITIONS_EIT_EFF	LOCATION_ID	NUMBER	Location Id
PER_POSITIONS_EIT_EFF	POSITION_TYPE	VARCHAR2	Position Type
PER_POSITIONS_EIT_EFF	UNION_ID	NUMBER	Union Id
PER_POSITIONS_LEG_EFF	EFFECTIVE_START_DATE	DATE	Effective Start Date

9 Person

Person Number Generation Methods

You can select one of the following person number generation methods for your enterprise on the Edit Enterprise page of the Manage Enterprise HCM Information task in the Setup and Maintenance work area:

- Manual
- Automatic prior to submission
- Automatic upon final save

Manual: You can use the Manual method to manually enter a person number when creating person records. You can update person numbers in the Manage Person page.

Automatic prior to submission: The Automatic prior to submission method automatically creates person numbers when creating person records. This method is the default method for person number generation.

Note: The Automatic prior to submission method may create gaps in the person number sequence if the transaction is canceled after the person number is generated.

Automatic upon final save: The Automatic upon final save method creates person numbers only after the Add Person transaction is approved. You can't view the person number when creating the person record. However, you can view the person number on the Person page after the transaction is approved. This method generates person numbers without gaps in the sequence.

Note: Person numbers are also assigned to contacts if they are created as a part of the Add Person transaction. For example, if a person is assigned person number 5 and two contacts are created during the Add Person transaction, then the contacts will be assigned person number 6 and 7. This means the next new person will be assigned person number 8.

The Automatic prior to submission and Automatic upon final save methods use an enterprise number sequence. By default, the sequence starts from 1; however, you can change the starting number. The person number increments by one for each new person record created.

You can change the person number generation method but you must be careful of the method that you select if you have existing data. You can change from Automatic prior to submission method to the Automatic upon final save method and change it back again. You can also change from the automatic method to the manual method and change this to the former.

Initial Person Number

You can specify the initial person number for your enterprise when you generate person numbers automatically. The application uses this number for the first person record that you create using the automatic person number setting, and increments the number by one for subsequent person records. By default, the initial person number is 1.

Using the initial person number option, you can retain the legacy person numbers for existing persons. Additionally, you can automate the number generation for new persons, starting from the last legacy person number plus one. You can change the initial person number.

Person Numbers for Contact Records

Workers and contacts have the same number sequence when the generation method is Automatic. You can correct automatically generated person numbers for contacts on the Manage Person page if the person number generation method is Manual. If contacts are later hired as workers, they retain their original person numbers.

Related Topics

- [Worker Numbers](#)

Person Types

You use person types to identify different groups of people in your enterprise.

For example, for purposes of reporting, you might want to identify the following:

- Contractual workers in your enterprise with the Contingent Worker person type.
- Regular employees with the Employee person type.

On the basis of the person type, you can:

- Maintain information for a group of people
- Secure access to information

System Person Types

These are predefined person types that the application uses to identify a group of people. You can't change, delete, or create additional system person types.

Not Managed by HR System Person Type

You might need to add nonworkers to your organization who aren't employees but can participate in company-related activities. For example, people that are added to the application for badging or application system integration purposes where you enter only minimal person information about these people. You can add such nonworkers using the system person type, Not Managed by HR.

You can't do these things for nonworkers categorized as Not Managed by HR:

- Manage their absences.
- Manage any assignment transactions such as working hours, promotions, adding grades, and so on.
- Manage Talent Management records: performance, goals, talent profiles, succession plans, and so on.
- Consider nonworkers as candidates in Oracle Recruiting.
- Manage any workforce compensation, individual compensation, or salary.

Note: If you have existing people that fall in this category, you need to terminate the existing work relationship. After that you need to create a new work relationship using the 'Not Managed by HR' work relationship. You can use HCM Data Loader (HDL), HCM Spreadsheet Data Loader (HSDL), or update worker records in the UI as needed.

Person Security Profile

You need to review your person security profiles if you want to search and view people that are created with this system person type. You can choose any of these options.

- The person security profile might be defined without a reference to person types. In such case, you can review and test the profile to ensure that the criteria includes people with this system person type.
- You can create a new person security profile with Not Managed by HR system person type.
 - You must not use Employee, Contingent Worker, Nonworker, or Pending Worker person types in the same security profile. This is a known limitation of the person security profile.
 - You need to create a new role associated with this security profile and assign it to users who need access to people with this system person type.
- You can create a new person security profile and use custom SQL.
- You can use the Oracle-delivered 'View All People' person security profile.

User Person Types

Each system person type contains a user person type that you can configure to your requirements. You can change, remove, or create additional user person types to suit your enterprise requirements. For example:

- If your enterprise refers to its employees as associates instead of employees, you change the Employee user person type to Associate.
- You can also add user person types under the Employee system person type. For example, if you want to classify employees further as equity partners, nonequity partners, and associates,

Note: When you create, delete, or cancel a person type work relationship record, then the person type usages record is deleted and recreated for that worker. As a result, a new person type usage ID is generated for the worker.

Related Topics

- [What happens if I change the status of a user person type?](#)
- [What's the purpose of the default user person type?](#)

Person Names and Languages

You can define how to display people's names in the application and in which language. You can define whether to display a person's name in the global or the local language.

Person name has two parts, style and format.

Name Styles

The name style determines these things:

- Which components of a person's name to display. For example, one country may display first name and last name while another may display the middle name too
- What's the order of display of the components

- Which components are required and which are optional. For example, title may be optional in some countries.

The legal employer sets the legislative context for the person record. So, if the legal employer is a Canadian legal entity, the Canadian name style is used. When a country-specific name style doesn't exist, a universal name style (last name, first name, title, and middle names) is used

Note: A person's contacts have the same name style as the person for whom they're contacts.

Name Formats

A name format is an arrangement of the name components.

- The format is an arrangement of these name components: first name, last name, and title. You can choose from these predefined name formats: Display name, List name, Full name, and Order name.
- The format can differ based on the display context. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global or Local

The profile option HR: Local or Global Name Format controls whether users see local names or global names. The profile option HR: Local or Global Name Format controls whether users see local names or global names by default. Global names use one name format. Users who manage people across countries may want to see the names displayed consistently so may use global names for example. Users who view or manage persons in a single country may prefer to see local names

Person-Name Languages

Each enterprise has a global-name language. Person names appear in this language by default. When you create a person record, you can define what language to use for the local name. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the language.

Let's look at an example:

- The global-name language for the enterprise is American English.
- You set the local-name language in a person record to Japanese. Users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese.
- All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English. Users can set preferences to select the language in which they want to see person names displayed in.

Person Name Styles

Person name styles define the person name components for a country. Only one style can exist for a country, while you can predefine name styles for some countries.

Note the following:

- You can create name styles for countries that have none.
- You can copy an existing style to use as the basis.
- You can create a new name style in case of specific requirements for a country

For countries that don't have a predefined person name style, the universal name style applies by default.

You can edit predefined name styles by doing the following:

- creating additional components
- selecting mandatory components
- changing order of components
- selecting list of values for the components

You can't delete predefined components and make mandatory components optional. You can delete only those components that were added to a predefined name style. You can't delete a predefined name style.

Note: You can create, edit, and delete user-defined name style and its components any time. If a user-defined name style is deleted after person names have been created using that style, the universal name style applies by default.

Person Name Components

Last Name is a mandatory name component for all person name styles. You can set other person name components as mandatory, based on specific requirements for a country.

Note the following:

- The name components Name Information 1 through Name Information 14 are reserved for localization requirements.
- You can use the components Name Information 15 through Name Information 30 to define specific person name components for a country.

For example, if you want to capture Mother's Maiden Name for a country, you can use the name component Name Information 15, and denote the display name for this component as Mother's Maiden Name.

Related Topics

- [What's the difference between person name formats and person name styles?](#)
- [Person Names and Languages](#)
- [Person Name Formats](#)

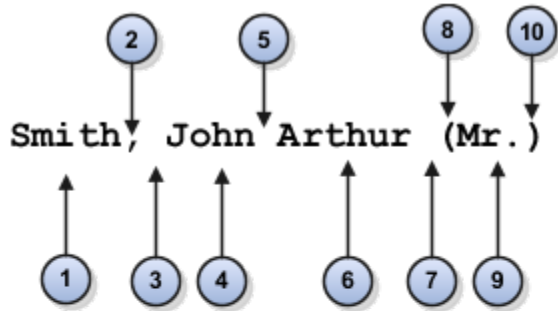
Person Name Formats

A person name format type determines how a person's name appears across applications.

- Each person name format type contains a sequence of name components that represents different parts of a person's name, for example, first name, last name, and punctuation marks.

- You can change the sequence of, remove, or include additional name components according to your requirements.

The following figure displays a sample name format, including the components and punctuation marks.



- | | |
|--------------|--------------------|
| 1 Last name | 6 Middle name |
| 2 Comma | 7 Space |
| 3 Space | 8 Opening bracket |
| 4 First name | 9 Title |
| 5 Space | 10 Closing bracket |

Predefined Name Format Types

Oracle Fusion HCM provides the following predefined format types.

Format Type	Usage	Default Structure
Full Name	Names that appear in reports.	[Last Name], [First Name] [Middle Name] [Title]
Display Name	Names that appear singly, for example, on the Personal Details page header.	[First Name] [Prefix] [Last Name]
List Name	Names that appear in lists	[Prefix] [Last Name], [First Name]
Order Name	Names that appear in name-ordered lists where the full name alone isn't sufficient to sort the list.	[Last Name] [First Name]

Note: When you create or edit format types, to avoid creating blank person names, ensure that you include at least one name component that's never blank.

Local and Global Name Formats

Oracle Fusion HCM includes local and global formats for each format type.

When you create a new format on the basis of an existing format type, you identify it as either local or global. For local format types, you must also select the legislation that the format type applies to

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

Conditional Name Format

Use the conditional name component to add conditions to person name formats. If there's a value in the first name attribute that's displayed else the value in the second name attribute is displayed. For example, let's say you create a display name format with a conditional name component including Known As and First Name as the first and second attributes respectively. If the person name attribute has a value in both Known As and First Name fields, then the Known As value is displayed. If the person name attribute doesn't have a value in the Known As field but has a value in the First Name field then the First Name value is displayed.

These are some of the key points to note about the conditional name component.

- You can use only 2 core name attributes for the conditional name component.
- You can have multiple conditional name components in the same person name format but you can't nest one conditional name component within another.
- You can't use punctuation such as space, open bracket, and closed bracket, or use sub-components or separators within the conditional name component.
- After updating the person name formats, you need to run the **Apply Name Formats to Person Names, Keywords and LDAP** job set from the **Scheduled Processes** page in the **Tools** work area with these parameters
 - Country Name for which you want to change the name format, and the
 - Format Type to apply the name format set.
- A person's first name and last name initials are displayed even when a person hasn't uploaded an image.

Related Topics

- [When does the application update stored names with a person name format?](#)
- [How can I switch between local and global formats to display person names?](#)

How You Specify Work Phones

A person can have only one primary phone. Typically, employees see others' phone details only if it's work related and primary. If you specify a nonwork phone as primary then workers can't see the phone details.

Who can see which phone number is controlled by Oracle's virtual private database policy, which can't be changed

Access Security and Privileges

You can see a coworker's work and nonwork phone numbers if your role has these privileges

- Manage person phones data
- View person phones data
- Report person phones data

It's important to understand these phone lookup codes since the virtual private database policy relies on the lookup codes:

Lookup Code	Meaning
W1	Work Phone
W2	Second Work Phone
W3	Third Work Phone
WF	Work Fax
WM	Work Mobile Phone

If you want to change the phone type, keep in mind the lookup code and how the VPD policy works with that lookup code. Lookup codes starting with W indicate the phone number is public and can be viewed by all. Lookup codes not starting with W indicate the phone number is private and can be seen only by people with the required privileges.

Apply Name Formats to Person Names, Keywords, and LDAP

When you change a person name format, the change isn't reflected in person records until you run the Apply Name Formats to Person Names, Keywords, and LDAP job set.

The job set includes these required child processes so you just need to run the parent process and not run these processes individually:

- Apply Name Formats to Person Names
- Send Personal Data for Multiple Users to LDAP
- Update Search Person Keywords

How the Process Works

When you run the process, this is what happens:

1. The Apply Name Formats to Person Names process is first executed.

2. The Update Search Person Keywords and Send Personal Data for Multiple Users to LDAP processes are then executed in parallel.

Let's say the Apply Name Formats to Person Names job set is executed successfully in the first step but either the Update Search Person Keywords or the Send Personal Data for Multiple Users to LDAP processes fails in the second step. The parent process and the child processes that failed are marked as failed. The successful processes are implemented, failed jobs aren't.

When the Apply Name Formats to Person Names, Keywords and LDAP job set is running, you can't schedule or run the Apply Name Formats to Person Names, Send Personal Data for Multiple Users to LDAP, and Update Search Person Keywords processes independently.

How You Run the Process

You run the job set from the Scheduled Processes task using these steps.

1. Navigate to **Tools > Scheduled Processes**.
2. Click **Schedule a Process**.
3. Select **Job set** and search for **Apply Name Formats to Person Names, Keywords and LDAP**.
4. Click **OK**
5. Select each job and enter the parameters.
6. Click **OK**

Apply Name Formats to Person Names

This process applies the name formats for Display Name, Full Name, List Name, and Order Name based on the corresponding name format defined.

Parameters usage:

- Format Type
 - Name format type to be applied
 - Display Name
 - Full Name
 - List Name
 - Order Name
- Country
 - Modifies the name format for the specific country

For more information about this process, see [When does the application update stored names with a person name format?](#)

Best Practices for Applying Name Formats on Person Names

Here are some best practices for applying name formats on person names.

Do's

You must run the Apply Name Formats to Person Names job only manually. You can run it for these scenarios:

- If the name format is changed
- If a new language is installed

- After P2T and data masking

Don'ts

Don't schedule the Apply Name Formats to Person Names job to run regularly. Unless there's a valid reason to apply a name format, a schedule will simply do redundant processing.

Related Topics

- [When does the application update stored names with a person name format?](#)
- [What are the scheduled processes?](#)

How You Update Person Search Keywords

Several attributes of person, employment, and profile records are used as person-search keywords. Keyword values are copied automatically from the originating records to the PER_KEYWORDS table, where they're indexed to improve search performance.

Process to Update Person Keywords

An event is raised when the value of a keyword attribute changes, for example, if a person acquires a language skill or a different phone number. In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table. Therefore most changes are made in PER_KEYWORDS immediately and automatically. When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.

Why You Run the Process

Although most changes to the PER_KEYWORDS table are automatic, you need to run the Update Person Search Keywords process regularly because of these reasons:

- The automatic process doesn't apply future-dated changes to the PER_KEYWORDS table.
- The process ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

When You Don't Need to Run the Process

Let's say a person's data is modified from anywhere in the Fusion Apps UI, except from Work Structures or CRM Resource Information. Then the keywords are updated directly and this job isn't required.

When You Run the Process

Here are some of the scenarios where you run the Update Person Search Keywords process:

- For a specific Batch ID
 - If post-processing is disabled during HDL load of Workers data, then run the "HCM Data Loader Worker Post processing" job using the specific UCM content ID.
- For a specific Person
 - Select person name in the Name parameter.

- For a specific person, the job can be executed as and when required.
- Estimated Execution Time: approximately 30 seconds to 1 minute.
- For only Delta population
 - To update keywords for the changed workers and to create keywords for new workers loaded, submit the job with only After Batch Load = Y.
 - Use this option only if the number of person records changed is less than 20,000.
 - Estimated Execution Time: approximately 20 minutes for every 20,000 records.
- For all the Persons in the system
 - Submit a request with all parameters as null to recreate keywords for all persons in the system.
 - Use this option only if a new language is installed or if the number of person records changed is more than 20,000.

How to Schedule the Process

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals (for example, weekly at a specified time).

The likely volume and frequency of changes to person records in your enterprise will determine how often you run the process:

- If the volume and frequency are high, you need to schedule the process to run frequently.
- If the volume and frequency are low, running the process once a month is recommended.

Running the Update Person Search Keywords process refreshes the whole PER_KEYWORDS table. Therefore, you must run the process at times of low activity to avoid performance issues.

Best Practices for Updating Person Search Keywords

Here are some best practices for updating person search keywords.

Do's

- Schedule the process at least once a day during off peak hours to run with parameter After Batch Load = Y to process any changed worker data (delta population) and keep keywords up-to-date.
- When loading workers by using HDL, enable post-processing to process keywords for the workers that were just loaded.
If the number of worker records loaded exceeds 20,000, then disable post-processing and manually run the job with all parameters as null, which will process the entire worker population.
- If you're running 'Refresh Manager Hierarchy' daily, then set the 'Updated Within the Last N Days' parameter value as 1 for incremental updates. This prevents the delta population size from getting larger than 20,000, which would require the job to be run for the entire person population.

Don'ts

- Don't schedule the process to run at frequent intervals with all parameters as null.
 - Running the job with all parameters as null processes all person records in the system, which is unnecessary and can potentially leave the index in an inconsistent state.

- You must run the job manually with all parameters as null only if the number of worker records for whom keywords should be updated exceeds 20,000.
- Don't run or schedule the process with Batch ID values as -100 and -200. These are unsupported values and can cause issues with keyword search.

Related Topics

- [Person-Record Keyword Searches](#)

Person-Record Keyword Searches

The application searches for keywords in these attributes: department, person number, job name and code, position name and code, person name, primary email, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, memberships, interest areas, and areas of expertise.

Access to Restricted Information

Line managers can access their workers' restricted information such as competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations. Restricted information is included in search results when the searcher is a line manager. For example, if a line manager searches for a language skill and a match is found in any direct or indirect reports, that information appears in the search results. However, if the match is found in public information such as areas of expertise, it appears in the search results for any user.

Keyword Indexing

Keywords are indexed values, which means that they're copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied to ensure that the source and indexed values don't differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

Name and Keyword Search

The person search uses a person's full name instead of the first name or last name. The full name definition may vary for each country. For example, the full name definition for India may be First Name Middle Name Last Name, while the full name definition for Canada may be First Name Known As Last Name Suffix. You control the definition of the full name using the Manage Person Name Formats task in the Setup and Maintenance work area.

There's an implied OR condition between the search criteria when you use keyword search. When you use the name search, there's an implied AND condition between the search criteria. For example, when you enter **Chris Harper** in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results. Here are some examples:

You enter...	Search Results
Harper Chris	<ul style="list-style-type: none"> • Jenner, Chris • Harper, Smith • Chris, Ray

You enter...	Search Results
	<ul style="list-style-type: none"> Harper, Liam Harper, Chris Harper, Christopher
Chris Harper	<ul style="list-style-type: none"> Jenner, Chris Harper, Smith Chris, Ray Harper, Liam Harper, Chris Harper, Christopher
Chris%	<ul style="list-style-type: none"> Jenner, Chris Black, Chris Blake, Christopher Simpson, Christy Harper, Chris Harper, Christopher Christ Johnson
Chris	<ul style="list-style-type: none"> Jenner, Chris Black, Chris Harper, Chris
"Chris Harper"	<ul style="list-style-type: none"> Harper, Chris
Chris and Harper	<ul style="list-style-type: none"> Harper, Chris
"Chris" "Harper"	<ul style="list-style-type: none"> Harper, Chris

Date-Effective Search

In the person search UI, you can enter an effective as-of date. When date-effective values such as work location are copied to the keywords table, their history isn't copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results may not be as expected. Here's an example:

- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.
- The changed work location is copied automatically to the keywords table on 27 January, 2011.
- You search for a person on 1 February, 2011 using the keyword Headquarters and the effective as-of date 10 January, 2011.

Although the work location on 10 January, 2011 was Headquarters, assignment 12345 doesn't appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

How You Optimize Person Search Keywords

The Oracle Text index in the PER_KEYWORDS table is utilized for person searches in My Client Groups, and the Directory. This index may become fragmented over a period of time and may cause a delay in displaying search results.

Why You Run the Process

You run the Optimize Person Search Keywords Index process to identify the fragmented indexes and help improve the overall search performance. To launch this process, use the Navigator > Tools > Scheduled Processes > Schedule New Process button in the search results table.

Note: You must run the Update Person Search Keywords process first and then the Optimize Person Search Keywords process. You can't schedule both processes simultaneously. If you schedule them at the same time, the second process will wait for the first process to complete before it starts.

When to Run the Process

You must run the Optimize Person Search Keywords Index process daily at times of low activity with the options, Full mode and the appropriate maximum time. The default time is 180 minutes. Although, if the process is run consistently over time it may take about 10 to 30 minutes only. You can decide the frequency of running the process based on the size of your customer base, system usage, database usage, data loaders used, index fragmentation, and schedule of the Update Person Search Keywords process.

Best Practices for Optimizing Person Search Keywords

Here are some best practices for optimizing person search keywords.

Do's

- Schedule the Optimize Person Search Keywords Index process to run at least once a week during off peak hours with all parameters null, to prevent the keywords index from being fragmented.
- It's recommended that you don't schedule both these processes to run simultaneously:
 - Update Person Search Keywords
 - Optimize Person Search Keywords Index

Even if you do, the second process waits for the first process to complete before it starts.

- Let's say a large volume of person records are updated every day, and the Update Person Search Keywords process is scheduled to run daily. Then you need to schedule the Optimize Person Search Keywords Index process with all parameters as null to run immediately after the Update Person Search Keywords process.

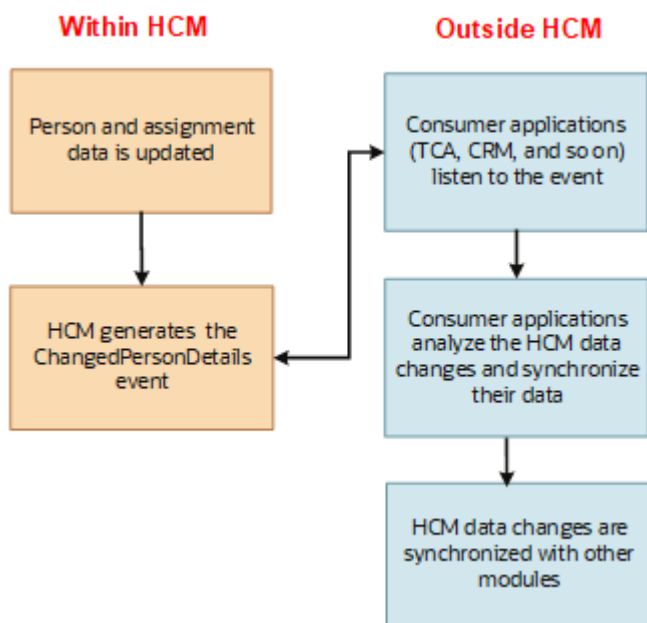
Don'ts

Don't schedule the Optimize Person Search Keywords Index process to run more frequently than once daily. That's because the keywords index isn't expected to be fragmented heavily in such a short period of time.

How You Communicate Person and Assignment Changes to Consumer Applications

You may need to alert other Oracle Fusion applications when you make changes to person and assignment details to synchronize their information with Oracle Fusion Global Human Resources.

To share the changes made to person and assignment details with consumer applications, you need to run the Synchronize Person Records process. The process generates an HCM event, ChangedPersonDetails that consumer applications listen to.



The Synchronize Person Records process generates events and notifies about the person and assignment for Contingent Worker and Employee worker types only.

When you start the process, you can specify the start and end dates. The process generates events for the changes made between the start and end dates that you specified. If you don't specify the dates, the process runs on the application date, and generates events for changes made on that date.

Note: If you make changes to person records daily, it's recommended that you schedule the Synchronize Person Records to run once daily at the end of the day (without specifying start and end dates). Don't schedule the process multiple times in a day.

Note that in the Coexistence for HCM environment, you can run Synchronize Person Records after you upload person records to Oracle Fusion for the first time.

You must keep these points in mind when you run the Synchronize Person Records process:

- When you run the process for the first time, specify the start date and end date. Start date refers to the date when the oldest existing record for that person was created in the application, and end date refers to the application date.

Example for start date:

Let's say a person was hired on 01/01/2009 as an employee. But their employment was cancelled for some reason. Though they're no longer an employee, their person record exists in the application. The date on which this person's record was created in the application is their start date, which is 01/01/2009.

Now, if the same person is rehired on 05/05/2015, then the hire date is 05/05/2015. But their start date still remains as 01/01/2009, which is the oldest record for that person in the application.

- When you load person records subsequently, run Synchronize Person Records on the application date (without specifying the start and end dates).
- To ensure optimum performance, ensure that the start date and end date of the process has a maximum difference of only up to 7 days.

This table summarizes the process parameters.

Parameter	Data Type	Default Value	Purpose
From Date	Date	Application date (Today's date)	Used along with the To Date parameter. The date range identifies all changes stored in Oracle HCM Cloud that should generate an event. The date range must not be longer than 7 days.
To Date	Date	Application date (Today's date)	Used along with the From Date parameter. The date range identifies all changes stored in Oracle HCM Cloud that should generate an event. The date range must not be longer than 7 days.
After Batch Load	Character	No (N)	Use this parameter when you are loading data through HCM Data Loader (HDL) or HCM Spreadsheet Loader (HSDL). The ChangedPersonDetails event is suppressed for these batch loading processes. Because of this data isn't synchronized during the data load. To enable synchronization, you need to run the process with this parameter set to Yes. When this parameter is set to Yes, the process considers all changes during the period by considering these dates. <ul style="list-style-type: none"> • Effective_start_date • Last_update_date of the person or employment tables When the parameter value is set to No, only the Effective_Start_Date is considered

When You Run the Process

Let's look at the common use cases when you need to run the process and the parameters that you need to specify.

Use Case	Execution Type	Parameter Values	Guidelines
When future dated hires or work relationships become effective. When pending workers are converted as employees or contingent workers.	Daily (To handle future dated changes)	<ul style="list-style-type: none"> From Date: Null To Date: Null After Batch Load: No 	When you specify the dates as NULL, it's assumed that the changes that happened on the application date (today's date) must be picked up by the process.
When data load contains active employees or contingent workers.	After loading data	<ul style="list-style-type: none"> From Date: Date when the data load started To Date: Date when the data load completed After Batch Load: Yes 	Person or assignment data, or both is loaded in 1 or 2 days. Hence, the date range between loads is 1-2 days. When you provide the date range, ensure it's less than 7 days, else the process will terminate with a warning message.
When future-dated hires or work relationships become effective as on today's date, OR when pending workers are converted to employees or contingent workers, and are effective as of today's date	Future-dated changes that are effective on that day		

Changes Notified to Consumer Applications

When you run Synchronize Person Records, the process generates the ChangedPersonDetails event when you make changes to the following person and assignment details:

- Person details:
 - Name
 - Work email
 - Work phones
 - Service dates
- Assignment details:
 - Job
 - Position
 - Department
 - Work location
 - Work location address
 - Manager
 - Work type

Note: Please note these important considerations:

- The ChangedPersonDetails event isn't generated if you make changes to the following workforce structure setup objects.
 - Job
 - Position
 - Department
 - Work location
 - Work location address
- The event isn't generated for data changes in these cases.
 - Changes to ex-employees and ex-contingent worker records as of the application date (current date).
 - Changes to employee records with a future hire or start date.

Guidelines for Synchronizing Person Records

This topic lists the guidelines you need to follow when running the Synchronize Person Records process.

Batch Load Processing

- After every batch load of workers, run the process with From Date and To Date values covering the date range when workers were loaded and After Batch Load = Y to process all workers that were loaded. This is required because the ChangedPersonDetails event isn't raised for the loaded workers during HDL load.
- Run this process immediately after loading the data using HDL, HSDL or any other loaders. However, if data loading has to be done multiple times in a day, it's recommended to run the process after the execution of the final load.
- Run this process with From Date and To Date parameters as start date of data load and completion date of data load respectively.
- The After Batch Load parameter must be set to Yes, if the process is run after a data upload using HDL or HSDL or any other data loader that suppresses the events. Otherwise, set the parameter to No.

Submit the process for a given date only once

- Synchronize Person Records process generates events to inform TCA application about the changes to person and corresponding assignment records.
- Larger the number of events raised, heavier the processing by TCA application in SOA server. To avoid unnecessary and duplicate processing, it's strongly recommended to run this process only once for a given date range. Hence:
 - Schedule once a day with no values for From Date and To Date, and After Batch Load = N at the start of each day to process future dated employees and contingent workers becoming active that day.
 - You may optionally schedule the job to run once a day at the end of the day with no date parameter values and After Batch Load = Y. This schedule will pick up all person records loaded that day and may not have been processed already.

Submit only one instance of the process at any given time

- At any given time, only one instance of this process must be running
- If the process is already in running state, then don't submit the process again
- If a second instance of the process is submitted by mistake, cancel it immediately and let the first one complete.

Guidelines for Batch Loading Workers

This topic lists the guidelines to follow when loading over 100,000 workers during cut-over activities as part of go-live, and complete the related processing with minimal overhead.

Prerequisites

Prepare Worker HCM Data Loader (HDL) Data File

1. Set `INVOKE_POST_PROCESS` to **N** to avoid automatic submission of each HDL Worker data load post-processing jobs. This will avoid submitting too many post-processing jobs that can get blocked with each other. Once the planned workers dat files are loaded, post-processing can be done manually. Refer the Disable Postload Processing topic for more information.
2. Set `GeneratedUserAccountFlag` to **N** for workers for whom a user account isn't required.
3. Don't configure any role mappings yet. This is to ensure that no role memberships are provisioned at the time of account creation. Role provisioning can be done in a later step.
4. Ensure these processes aren't running or scheduled to run.
 - Synchronize Person Records
 - Maintain Party and Location Current Record Information
 - Refresh Manager Hierarchy
 - Update Person Search Keywords
 - Optimize Person Search Keywords Index
 - Send Pending LDAP Requests
 - Autoprovision Roles for All Users
 - Send Personal Data for Multiple Users to LDAP
5. Ensure the Apply Name Formats to Person Names, Keywords and LDAP process set isn't running.

You need to do these steps in the listed order after you complete the steps in Preparing the Worker HDL Data File.

1 - Load Workers and Synchronize Person Records

Typically, you run the Synchronize Person Records process to synchronize workers' person records in HCM with party records in Trading Community Architecture (TCA) to manage HR Help Desk, Payroll, Expenses, and so on.

Since a large number of worker records are created, updated, or both this process can result in events processing overhead for the Enterprise Scheduler Service (ESS) or the Service Oriented Architecture (SOA) servers. Hence, it's recommended to use this approach.

1. Split the workers data file into batches if there are more than 100,000 workers to load. It's recommended not to exceed 100,000 workers per batch.
2. Ensure the Synchronize Person Records ESS process isn't running.

3. Set these profile options.
 - o ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER to Yes
 - o HRC_DISABLE_HCM_EVENTS_PROCESSING to Yes
4. Load worker data in batches of 100,000 or less and synchronize them to create party records. Repeat these steps until all workers are loaded and synchronized.
 - a. Load a batch of worker data
 - b. Run Update Person Search Keywords ESS process with Batch ID as 1 to create Person Type Usage records that are required by the next step. This step doesn't create person search keywords, it only creates Person Type Usage records required for the next step.
 - c. Run Maintain Party and Location Current Record Information ESS process with these parameters.

Parameter	Value
Synchronization Type	Worker
Person Type	Null or Default
From Date	Date on or after which worker records are loaded
To Date	Date on or before which worker records are loaded
Person Number	Null or Default

5. After all worker data is loaded and synchronized successfully, set these profile options to No. This step is extremely important to make sure the application functions normally after go-live.
 - o ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER to No
 - o HRC_DISABLE_HCM_EVENTS_PROCESSING to No

CAUTION: These profile options are set to Yes only when you're synchronizing a large number of person records to create parties. When you set the HRC_DISABLE_HCM_EVENTS_PROCESSING profile option to Yes, it disables all HCM events across all modules including HCM approval transactions. Hence, this profile option should be set to No at all other times. Since the above steps will synchronize person records in bulk, don't run the Synchronize Person Records ESS process at this time.

2 - Refresh Manager Hierarchy

Run the Refresh Manager Hierarchy ESS process to de-normalize manager hierarchy information for all workers.

3 - Create Person Search Keywords and Optimize Keywords Index

After all workers are loaded for the first time, create person search keywords for people.

1. Run Update Person Search Keywords ESS process with all parameters left blank to create keywords for all workers.
2. Run Optimize Person Search Keywords ESS process with default parameters.

4 - Create User Accounts

After all the workers are loaded, these LDAP requests are created.

1. CREATE - Request to create a new user account
2. UPDATE - Request to update an existing user account
3. TERMINATE - Request to terminate the user account. Created only if workers with termination dates are loaded.

The following points are expected because when workers are loaded there shouldn't be any role mappings:

1. For CREATE request types, there are no records in PER_LDAP_ROLE_MEMBERSHIPS
2. No requests of type USERROLE should exist.

Create User Accounts

Create user accounts for all eligible workers without assigning any roles to users.

1. Don't load the Users HDL dat file to assign any role memberships.
2. Go to **Manage Enterprise HCM Information → Edit → Correct** (do not use Update) and set **User Account Maintenance to None..**
 - o This option controls whether to suspend user accounts if the user has no roles provisioned.
 - o When set to None, SUSPEND requests are created as SUPPRESSED.
3. Run Send Pending LDAP Requests ESS process with **Batch Size = 20**. This creates User Accounts for eligible workers in Identity Store, and creates SUSPEND requests in SUPPRESSED status and user accounts without roles aren't suspended.
4. Go to **Manage Enterprise HCM Information → Edit → Correct** (do not use Update) and set **User Account Maintenance to Both Person and Party**.

CAUTION: If all workers have the same email address, it's recommended not to set the username generation rule to email address because it can cause performance issues with the Send Pending LDAP Requests ESS process. The application has to make multiple trips to the LDAP server to generate unique usernames based on the same email address for all workers. Therefore, it's recommended to use a username generation rule other than Email or pre-generate unique usernames and load the Workers dat file instead of the application generating it.

5 - Provision Roles to Users

Assign roles to user accounts created in step 4.

1. Configure all required role mappings.
2. Enable bulk operation for the Autoprovision Roles for All Users ESS job using these steps.
 - a. Go to **Setup and Maintenance → Manage Profile Options**.
 - b. Create a new profile option with these details. The profile option must be updatable only for SITE level.

Field	Value
Profile Option Code	PER_AUTO_PROVISION_ROLES_ENABLE_BULK
Profile Display Name	Enable Bulk Mode for Autoprovision Roles
Application	Global Human Resources
Module	Users

Field	Value
Start Date	<Today's date>

- c. Set the profile value to **Y** at the SITE level.
3. Run the Autoprovision Roles for All Users ESS process with default input parameters. Roles are provisioned to users based on role mapping rules. If roles are provisioned to suspended user accounts, those accounts will be activated.

6 - Synchronize Personal Data for Users from HCM to Identity Store

1. After workers are loaded for the first time and user accounts are created, run the Send Personal Data for Multiple Users to LDAP ESS process with **All users** as the parameter. This step updates all personal information including manager details for the workers in their user account details.
2. Depending on the user population size, this process can take time to complete. Enable concurrent processing to improve throughput.
 - a. Go to **Setup and Maintenance → Manage Profile Options**.
 - b. Create a new profile option with these details. The profile option must be updatable only for the SITE level.

Field	Value
Profile Option Code	PER_IIP_SEND_PERSONAL_DATA
Profile Display Name	PER_IIP_SEND_PERSONAL_DATA
Application	Global Human Resources
Module	Users
Start Date	<Today's date>

- c. Go to **Setup and Maintenance → Manage Administrator Profile Values**.
- d. Set the **execution_mode_concurrent=Y** for the profile option at SITE level

7 - Schedule Required ESS Processes

After cut-over is completed and the Fusion HCM application is in regular use, schedule these processes as per the recommendations in this documentation on My Oracle Support.

- Fusion Global HR: ESS Jobs - Person Area (Doc ID 1593212.1)
- *Best Practices for User and Role Provisioning in HCM*

Person Lookups

This topic identifies common lookups that are person-related and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements using the Manage Common Lookups task.

Person Information Lookups

Person information lookups are described in the following table:

Lookup Type	Description	Configuration Level
ORA_PER_EXT_IDENTIFIER_TYPES	Type of a person's identifier in an external application, such as time device badge identifier, third-party payroll identifier, or third-party payroll alternate identifier	User
PER_NATIONAL_IDENTIFIER_TYPE	Type of a person's national identifier, such as social security number, civil registration number, or national insurance number	User
PERSON_TYPE_STATUS	Status of a user person type, such as active or inactive	User
EMAIL_TYPE	Type of a person's email address, such as home email or work email Note: A person can have only one work email by default. If you want to add a secondary work email, you must define another lookup type.	Extensible
ADDRESS_TYPE	Type of a person's address, such as home address or mailing address	Extensible
PHONE_TYPE	Type of a person's phone, such as home phone or mobile phone	Extensible
PER_CM_MTHD	Communication methods for a person, such as email or instant messenger	Extensible
PER_CONTACT_TIMES	Times of day when a specified phone number can be used, such as evenings or weekends	Extensible
PER_ETHNICITY	Person's ethnicity, such as Hispanic, Asian, or American Indian	User

Lookup Type	Description	Configuration Level
PER_RELIGION	Person's religion, such as Christianity, Hinduism, or Islam	Extensible
PROFESSION	Person's profession reported on a visa or work permit, such as engineer, nurse, or teacher	Extensible
TITLE	Person's title, such as Miss, Doctor, or Professor, forming part of the person's name	Extensible
HONORS	Higher qualifications, such as CPA, PhD, or DDS, forming part of the person's name	Extensible
PER_HIGHEST_EDUCATION_LEVEL	Person's highest level of academic qualification, such as BSc, Diploma, or MA.	User
MILITARY_RANK	Person's military rank, such as private, sergeant, or corporal, forming part of the person's name	Extensible
BLOOD_TYPE	Person's blood group, such as A rhesus negative or B rhesus positive	User
CONTACT	Relationship between a person and the person's contact, such as partner, child, or brother	User
MAR_STATUS	Person's marital status, such as single, married, or legally separated	User
SEX	Person's gender, such as male or female.	User
PER_VISA_PERMIT_TYPE	Person's visa permit type, such as study visa, visit visa, or work visa.	User

For some of the person lookups that have a configuration level of User, Oracle has mapped and delivered corresponding system lookup types. This is because Oracle delivers reports and processes that only permit specific values. If you add or modify existing lookup codes, you need to map new or modified lookup codes to the Oracle-delivered lookup codes. If this isn't done, the report will be incorrect. Use the Manage Extended Lookup Codes task in the Setup and Maintenance work area to map the user or extensible lookup codes to system lookup codes.

User-Configurable Lookup Type	System Lookup Type
CONTACT	ORA_PER_CONTACT
MAR_STATUS	ORA_PER_MAR_STATUS

User-Configurable Lookup Type	System Lookup Type
PER_HIGHEST_EDUCATION_LEVEL	ORA_PER_HIGHEST_EDUCATION_LEVE
PER_NATIONAL_IDENTIFIER_TYPE	ORA_PER_NATIONAL_IDENTIFIER_TY
PER_ETHNICITY	ORA_PER_ETHNICITY
PER_VISA_PERMIT_TYPE	ORA_PER_VISA_PERMIT_TYPE
SEX	ORA_PER_SEX

These are some key points.

- If you change any of the details in an Oracle delivered lookup code in the user lookup types, you take ownership of the lookup code. The lookup code won't be updated when Oracle delivers any updates to that lookup code. But, if you delete the lookup code in the user lookup type, it will be replaced when Oracle delivers updates to the lookup type.
- If the lookup code is specific to a country then the country is selected in the Extended Lookup Codes table. If a lookup code has multiple countries, then there will be multiple entries, one for each country in the Extended Lookup Codes table. Alternatively, if no country is selected, the lookup code is considered global.

Document Information Lookups

Document information lookups are described in the following table.

Lookup Type	Description	Configuration Level
PER_DRIVERS_LICENSE_TYPE	Type of a person's driver's license, such as permanent or temporary	Extensible
PER_CITIZENSHIP_STATUS	Status of a person's citizenship, such as active or expired	Extensible
PER_PASSPORT_TYPE	Type of a person's passport, such as emergency or regular	Extensible
PER_VISA_PERMIT_TYPE	Type of a person's visa or work permit, such as temporary worker or residence permit	User
PER_VISA_PERMIT_STATUS	Status of a person's visa or work permit, such as pending or active	Extensible

Disability Information Lookups

Disability information lookups are described in the following table.

Lookup Type	Description	Configuration Level
DISABILITY_CATEGORY	Type of a person's disability, such as hearing loss or visual impairment	User
DISABILITY_REASON	Causes of a person's disability, such as accident or illness	Extensible
DISABILITY_STATUS	Status of a person's disability registration, such as approved or pending	User
ORA_PER_SELF_DISCLOSE_DISABILITY	Type of self-disclosure responses for a disability based on the country selection.	User
ORA_PER_DISABILITY_COUNTRY	List of all countries for which disability information can be defined. This lookup is used to manage the display of countries when workers specify their own disabilities.	Extensible

Use Gender Lookup Type in the EEO Report

In this example, you will learn what you need to do so that the Oracle delivered United States Equal Employment Opportunity (EEO) report operates correctly if you add a new lookup code in the SEX lookup type.

Kate Williams is the Director of Human Resources and she wants her employees in the United States to be able to select a value of "Undeclared" while specifying the gender.

As a part of this, you will create a new lookup code in the SEX lookup type with a value of "Undeclared" and a tag of "+US", and map this to the Oracle delivered Gender of a person (System Lookup).

Note: This is an example of the mapping that needs to be done if you add a new lookup code. Oracle doesn't recommend that the "Undeclared" value always be mapped to the "Male" value for EEO reporting purposes.

Create a New Code

1. Click **Setup and Maintenance** under the name menu.
2. Search for and click the **Manage Common Lookups** task.
3. Enter **SEX** as the Lookup Type and click **Search**.
4. Click the **+** icon (New) in the SEX: Lookup Codes section and enter this information.

Field	Value
Lookup Code	UNDECLARED

Field	Value
Enabled	Select the check box
Start Date	01/01/2000
Meaning	Undeclared
Tag	+ US

5. Click **Save and Close**.

Map the New Lookup Code to the System Lookup

1. Click **Setup and Maintenance** link under the name menu.
2. Search for and click the **Manage Extended Lookup Codes** task.
3. Navigate to and select **Gender of a person (System Lookup)** in the Lookup Type region.
4. Click **Add** to enter this information.

Field	Value
Country	United States
Lookup Code	Male
Extended Code	UNDECLARED (this is the value added in the Lookup Code in the above task)
Extended Name	Undeclared (this is the value added in the Meaning in the above task)
All Enterprises	Yes

5. Click **Save and Close**.

The EEO report will now display all employees who have selected a gender of "Undeclared" as "Male".

Related Topics

- [Overview of Lookups](#)

Considerations for Duplicate Checks When Importing Person Records

You can specify at the enterprise level whether to search for duplicates when creating person records using HCM Data Loader or the new hire flows (except the classic pages).

Use the Manage Enterprise HCM Information task in the Setup and Maintenance work area to set duplicate checks when importing or creating person records. You can also request a duplicate person check for individual worker objects that you load using HCM Data Loader. Any setting specified on the worker object takes precedence over the enterprise-level setting.

If one or more criteria is missing when the other criteria produce a match, the application identifies the record as a matching record. All records that are a match aren't imported.

You can select from any of these **Person Creation Duplicate Check** settings

None

The application doesn't check for any matching person records.

National ID Country-Type-ID

The application checks for the national identifier country, type, and country in a person's record. If the national identifier value is null, no duplicates are found.

Last Name, First Initial, DOB Or NID Country-Type-ID

The application checks for the national identifier record with the same country and type, or if either one is null. Alternatively, it checks for the last name, first initial and date of birth.

Last Name, First Initial, DOB, Gender Or NID Country-Type-ID

The application checks for the last name, the first name initial, and the date of birth, or only the national identifier with the same country and type.

Last Name, First Name, DOB, Gender Or NID Country-Type-ID

The application checks for the last name, the first name, the date of birth, and the gender, or only the national identifier with the same country and type.

Other Options

The other options are 1) NID 2) Last Name, First Initial, Date of Birth or National ID 3) Last Name, First Initial, Date of Birth, Gender or National ID, and 4) Last Name, Full First Name, Date of Birth, Gender or National ID.

Related Topics

- [How Person Records Are Matched](#)

Considerations for Loading Person Photos

You can load employees' photos in the employee's public information page, from the Change Photo quick action on the Me tab, or the HCM Data Loader. Employees can also upload their own photos using the person spotlight window.

In this topic, you will learn about the important considerations to note when loading person photos.

Employee Personal Health Data

Before loading employee photos, consider whether the photos might create an unintended connection to employee's personal health data. Privacy and security protections in your country may apply.

Include or Exclude Photos

To upload multiple photos at a time use the Worker object in the HCM Data Loader.

When uploading the photo,

- Ensure that the file size is less than 20 megabytes.
- Upload a photo in any format, but the typical format is either a .png or .jpeg file.
- Ensure that the photo dimensions are 90 x 120 pixels to help reduce the distortion of photo. If the photo isn't 90 x 120 pixels, it's recommended to maintain a 3 x 4 aspect ratio.

If you want to disable workers from uploading photos, you must either remove the related security privilege from the Worker role or hide the photo section using page composer.

Note: Contact your administrator to remove the security privilege.

Shape of Photo Section

To set the shape of the photo section, you must specify a value in the PER_PERSON_IMAGE_DISPLAY profile option. You can set the value for this profile as Circle or Square.

Caching Images

To cache person photos to improve performance of pages that display many images, for example, organization chart, you must specify Y in the PER_IMAGE_ENABLE_CACHING profile option. You can also choose not to cache photos especially if people at your site use kiosks to access the application.

Related Topics

- [How You Cache Person Photos](#)

How You Cache Person Photos

You can cache person photos to improve performance, using the profile option `PER_IMAGE_ENABLE_CACHING`. You create the profile option using the Manage Profile Options task.

After you create the profile option, set the value using the Manage Administrator Profile Values task in the Setup and Maintenance work area.

Creating the Profile Option and Setting the Value

You can improve the performance of pages that display many photos (for example, organization chart) by caching the person photo.

You create the profile option by providing `PER_IMAGE_ENABLE_CACHING` as the profile option code, Per Image Enable Caching as the display name, and Global Human Resources as the application and module. As this is a site-level profile, select the Enabled and Updatable check boxes at the Site level. After creating the profile option, set the profile value to Y using the Manage Administrator Profile Values task.

You can choose not to cache the photos especially if people at your site use kiosks to access the application.

Related Topics

- [Create and Edit Profile Options](#)

How National Identifiers are Validated

A national identifier is unique when it doesn't match any other national identifier in the application.

You can set up validation to check for the country-type-number combination by setting the Person Creation Duplicate Check enterprise option to one of the options that contains these 3 attributes. For example, when you specify the option National Identifier Country and National Identifier Type and National Identifier Number as the enterprise option, then the check for national identifier uniqueness is done on national identifiers having these 3 attributes. A national identifier - United States, SSN, 887-2234 will be considered unique to the national identifier - United Kingdom, SSN, 887-2234, simply because the countries don't match even if the type and number are the same.

The national identifier is validated when you add a national identifier during any of the add new person processes or while changing a person's information. The ID is also validated when you add it when creating a person record using any of these services:

- Worker v2 service
- Worker REST service
- HCM Data Loader and HCM Spreadsheet Data Loader

A point to note is that Oracle Recruiting candidates aren't included in the check when a person record is created using the methods mentioned earlier. However, the national identifier of these candidates can be checked against the national identifiers of all non-candidates when they become pending workers.

Profile Option to Validate the National Identifier

You need to enable the National Identifier Uniqueness Validation Mode profile option to check if the national identifier in a person record is unique. You can choose any of these values at the site-level.

Profile Option Value	Description
None	The national identifier isn't checked for uniqueness.
Warning	A warning is displayed indicating the national identifier isn't unique. You can continue with the same value however.
Error	An error message is displayed preventing you from entering a national identifier, which isn't unique.

Duplicate Person Check

The duplicate person check identifies whether a person record is unique based on the first and last names, date of birth, and national identifier. The national identifier validation checks for the uniqueness of the national identifier in the person record. The differences between the two are indicated in this table:

Attribute	National Identifier Validation	Duplicate Person Check
How is it configured?	Configured using the National Identifier Uniqueness Validation Mode profile option.	Configured using the Person Creation Duplicate Check enterprise option.
When is it triggered?	When you create or update a person's national identifier record (excluding Oracle Recruiting candidates)	When you hire an employee, a contingent worker, a nonworker, a pending worker, or when a candidate is transformed into a pending worker, depending on the configuration in Oracle Recruiting.
How does it work?	<p>Enabled using a profile option and checks uniqueness of national identifier.</p> <p>When enabled, each new or updated national identifier record is checked for uniqueness against the records of all other people (excluding Oracle Recruiting candidates), to show a warning or error to prevent the action if a national identifier number is found to belong to another person.</p>	<p>This is independent of national identifier uniqueness validation. When enabled, each new person record will first be checked for any existing duplicate records. If any possible duplicates are found, the user can decide how to proceed. The definition of duplicate is configured in the enterprise option, and can include comparing the names, dates of birth, and even genders, or the national identifiers and their countries and types.</p>

Related Topics

- [Candidate Duplicate Check and Merge After Job Offers](#)

How Person Addresses Are Validated

When a user enters the postal code from the UI, the other corresponding address fields are updated automatically and a validation is done to check whether the value entered is correct.

However, from REST and HDL, no such validation is done to check whether the geography hierarchy or the combination of address values entered are invalid. For such scenarios, you can run the Validate Geographies of Addresses Against Master Geographies ESS process with these parameters: Location Table Name = PER_ADDRESSES_F, Run Type = ALL, Country Code. This ESS process will give the list of addresses that don't match the validation. You can then correct these addresses.

Related Topics

- [Guidelines for Loading Person Address](#)

User and Role-Provisioning Setup Options

User and role-provisioning options control the default management of some user-account features. To set these options, perform the Manage Enterprise HCM Information task in the Workforce Structures functional area for your offering. You can edit these values and specify an effective start date.

User Account Creation

The **User Account Creation** option controls:

- Whether user accounts are created automatically when you create a person, user, or party record
- The automatic provisioning of roles to users at account creation

Note: User accounts without roles are suspended automatically. Therefore, roles are provisioned automatically at account creation to avoid this automatic suspension.

The **User Account Creation** option may be of interest if:

- Some workers don't need access to Oracle Applications Cloud.
- Your existing provisioning infrastructure creates user accounts, and you plan to integrate it with Oracle Applications Cloud.

User Account Role Provisioning

After a user account exists, users both acquire and lose roles as specified by current role-provisioning rules. For example, managers may provision roles to users manually, and the termination process may remove roles from users automatically. You can control role provisioning by setting the **User Account Role Provisioning** option.

Note: Roles that you provision to users directly on the Security Console aren't affected by this option.

User Account Maintenance

The **User Account Maintenance** option controls whether user accounts are suspended and reactivated automatically. By default, a user's account is suspended automatically when the user is terminated and reactivated automatically if the user is rehired.

User Account Creation for Terminated Workers

The **User Account Creation for Terminated Workers** option controls whether user-account requests for terminated workers are processed or suppressed. This option takes effect when you run the **Send Pending LDAP Requests** process.

Related Topics

- [User Account Creation Option](#)
- [User Account Role Provisioning Option](#)
- [User Account Maintenance Option](#)
- [User Account Creation for Terminated Workers Option](#)

Considerations for Configuring the Personal Info Pages in the Transaction Design Studio

Let's look at the key considerations when configuring these responsive pages in the Transaction Design Studio - Personal Details, Contact Info, Family and Emergency Contacts, Identification Info, and Additional Person Info.

- You can't use the Country parameter along with the Page Attributes but you can use the Country parameter in conjunction with the Available Attributes to show or hide, or make the fields required. This is because the Country parameter works based on the country of the record. For example, for the country of the national Identifier, visa, or passport, you can use this parameter to display different attributes per country. For the national Identifier, you can display the Expiration Date for one country but not for other countries.
- Email and Biographical Info objects don't have a country stripe. So, the Country parameter can't be used even with Available Attributes for these objects.
- You can't configure the Name and Address regions in the Transaction Design Studio. The display of these regions is controlled by the settings specified in the Manage Person Name Styles and Manage Address Format configuration tasks. Hence, they are excluded from the Transaction Design Studio to avoid conflicts between the configuration setup and the Transaction Design Studio settings.
- Because of the global person model, a single country setting doesn't apply for a person.

Considerations for Deleting Tags from Lookup Codes

Tags are used in the HCM application to identify either a specific legislation or a group of legislations for a specific lookup code

Before you delete a tag from a lookup code, you need to first check to make sure that you do not have any records that reference that tag. If you do, you should first delete the record with the lookup code associated with that tag, then delete the tag from the lookup code.

If you delete the tag before deleting the identified record, then you need to add the tag back, delete the identified record, then delete the tag.

Deep Links for Person Spotlight Public Info

You can use deep links to open the Person Spotlight Public Info responsive pages without navigating through the menu structure. Deep links are useful when you want users to go directly from various locations to Oracle Applications Cloud.

You can add deep links to a business intelligence report, an email notification, or a company website hosted on Oracle Cloud. For example, you can enable direct navigation to the My Team page. To see a complete list of the available deep links, use the Deep Links work area (Navigator > Tools > Deep Links). To access this work area, you need to have the View Administration Link (FND_VIEW_ADMIN_LINK_PRIV) privilege.

How Deep Links Work

You can copy a URL from the Deep Links page and use it on your company website or other content, such as your reports and analytics. You can use deep links as is, or edit the link details to open product-specific pages and then add them to external sources. For more information, refer to your product-specific documents.

Note: If users click a deep link URL from your company website, but aren't yet signed in to Oracle Applications Cloud, they're automatically redirected to the Sign In page.

URL Pattern of Deep Links

Here's the typical URL pattern of a deep link.

```
https://<pod-name>/fndSetup/faces/deepLink?  
objType=<objID>&objKey=<name1=value1;name2=value2>&action=<action>&returnApp=<returnappURL>&returnAppParams=<returnA
```

To direct users to a product-specific action page, you need to add specific parameters to the deep link URL.

You can use these parameters in the person spotlight public info deep links:

- Person ID
- Assignment ID

Note: Here are a few points to keep in mind:

- You must not click deep links that require parameters directly on the deep links page. If the signed-in user doesn't have an associated person record, then a blank page is displayed when the user clicks the deep link.
- If the signed-in user doesn't have an associated person record, then a blank page is displayed when the user clicks the deep link.

This table lists the parameters for deep links, along with their descriptions and some examples of parameter values.

Parameters with Descriptions and Values

Parameter	Description	Example of Parameter Values
<code>pod-name</code>	Identifies the host name.	<code>pod.oraclecloud.com</code>
<code>objType</code>	Identifies the object type, such as work areas.	<code>DIRECTORY_ORG_CHART</code>
<code>objKey</code>	Identifies the specific object ID.	<code>personId</code>
<code>action</code>	<p>Identifies the specific action that you want the users to do on the UI. Here are a few points to keep in mind:</p> <ul style="list-style-type: none"> If you don't add any value for the action parameter, this value is considered as NONE by default. So users will be taken to a high-level page, such as an overview page or a search page. But you can also add other actions, such as EDIT. If the value that you add for the action parameter doesn't match with any action on the UI, or the user doesn't have the privileges to access that action, they will be taken to a high-level page. 	<p>NONE</p> <p>VIEW</p> <p>CREATE</p> <p>EDIT</p>
<code>returnAppURL</code>	<p>Specifies the application URL to which the users will be automatically redirected, when they try to return to the previous page or after they complete their task. If you're using a third party URL, make sure the application name is registered using the Manage Integration of Additional Applications page in the Setup and Maintenance work area.</p>	MyOracle
<code>returnAppParams</code>	If required, you can add parameters to your returnAppURL.	<code>type=photo</code>

List of Available Deep Links and Their Security Requirements

When you add deep links to a business intelligence report or a company website, users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation. You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them.

This table lists the deep links for Person Spotlight Public Info and Organization Chart that are available in the Deep links work area.

Deep Links for Person Spotlight Public Info

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Directory (DIRECTORY_ORG_CHART,NONE)	Opens the ORG chart page of the signed-in user.	N	NA	NA
Directory (DIRECTORY_SEARCH,NONE)	Opens the directory search landing page.	N	NA	NA
Person (PUBLIC_PERSON_PAGE,NONE)	Opens the public person page of the signed-in user.	N	NA	NA
Person Spotlight (PERSON_SPOTLIGHT,NONE)	Opens the person spotlight page of the signed-in user.	N	NA	NA
Person Spotlight (PERSON_SPOTLIGHT_ANY,NONE)	Opens the person spotlight page of any person.	Y	pPersonId : Person Identifier of Person pAssignmentId : Assignment Identifier of Person	pPersonId: PERSON_ID column in PER_PERSONS or PER_ALL_PEOPLE_F tables pAssignmentId: ASSIGNMENT_ID column in PER_ALL_ASSIGNMENTS_M table

This table lists the target audience and security requirements for different Person Spotlight Public Info deep links.

Note: When you use the URLs mentioned in the examples:

- Replace instances of pod.oraclecloud.com with your pod name.
- For the pPersonId and pAssignmentId objKey parameters, use the actual person ID and assignment ID. In the examples, these are indicated with sample values.

Security Requirements for Person Spotlight Deep Links

Deep Link	Audience	Security Requirements	Examples
Directory (DIRECTORY_ORG_CHART,NONE)	Employee	Functional Security: <ul style="list-style-type: none"> • Access FUSE Directory Page Data Security: <ul style="list-style-type: none"> • Search Person Deferred • (Access Person Gallery) 	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DIRECTORY_ORG_CHART&action=NONE
Directory (DIRECTORY_SEARCH,NONE)	Employee, Manager, HR	Functional Security: <ul style="list-style-type: none"> • Access FUSE Directory Page Data Security: <ul style="list-style-type: none"> • Search Person Deferred • (Access Person Gallery) 	https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DIRECTORY_SEARCH&action=NONE

Deep Link	Audience	Security Requirements	Examples
Person (PUBLIC_PERSON_PAGE, NONE)	Employee, Manager, HR	Functional Security: <ul style="list-style-type: none"> Access FUSE Directory Page Data Security: <ul style="list-style-type: none"> Search Person Deferred (Access Person Gallery) 	https://pod.oraclecloud.com/fscmUI/faces/deepLink?objType=PUBLIC_PERSON_PAGE&action=NONE
Person Spotlight (PERSON_SPOTLIGHT,NONE)	Employee, Manager, HR	Functional Security: <ul style="list-style-type: none"> Access Person Spotlight Data Security: <ul style="list-style-type: none"> Search Person Deferred (Access Person Gallery) 	https://pod.oraclecloud.com/fscmUI/faces/deepLink?objType=PERSON_SPOTLIGHT&action=NONE
Person Spotlight (PERSON_SPOTLIGHT_ANY,NONE)	Employee, Manager, HR	Functional Security: <ul style="list-style-type: none"> Access Person Spotlight Data Security: <ul style="list-style-type: none"> Search Person Deferred (Access Person Gallery) 	https://pod.oraclecloud.com/fscmUI/faces/deepLink?objType=PERSON_SPOTLIGHT_ANY&action=NONE&objKey=pPersonId=300

FAQs for Person

What happens if I change the status of a user person type?

The status of a user person type determines whether it's available across Oracle Fusion HCM.

If you inactivate a user person type, there is no impact on worker assignments that are currently associated with that person type. However, starting from the date of inactivation, you can't select that person type to associate with worker assignments.

Note: You cannot inactivate a default user person type. You must first select a different user person type as the default.

What's the purpose of the default user person type?

Each system person type contains a default user person type that the application uses to associate with person records for reporting and display purposes.

When you hire a worker and specify assignment information, the application associates the default user person type with that worker assignment. However, if you select a different person type, then the application considers the selected person type as the default one for that worker.

When does the application update stored names with a person name format?

When you update a name format, you run the Apply Name Formats to Person Names process so that the application updates the stored names according to the updated format type rules. You run the process for a specific name format and legislation combination.

You then run the Update Person Search Keywords process followed by the Synchronize Person Records process. For these processes, use the same date as when the Apply Name Formats to Person Names process was run and set After Batch Load to Yes. This is because the `last_update_date` in the `PER_PERSON_NAMES_F` table is updated when the Apply Name Formats to Person Names process is run.

How can I switch between local and global formats to display person names?

You use the HR: Local or Global Name Format profile option. If you select the global name format, then person names appear in the same format across all legislations.

If you select a particular legislation, then person names appear in a format specific to that legislation. For example, if you set the profile option to Japan, then Japanese person names appear in the local name format that was created for Japan. However, person names that were stored using formats other than those of the Japanese legislation appear according to the global name format.

What's the difference between person name formats and person name styles?

Person name formats determine the order of the person name components for a specific format type.

The sequence of components for predefined name format types can be configured for a country. For example: Display Name can be defined as First Name, Last Name, and List Name can be defined as Last Name, First Name.

Person name styles define the person name components that can be captured for a country; for example, first name, last name, title, previous last name, known as, and so on. Person name styles can be configured by selecting the required name components for a country.

Why can't I see the people I just imported?

After you load person data, you need to run these processes in order.

1. Synchronize Person Records process with the required date range and the **After Batch Load** parameter set to **Yes**.
2. Update Person Search Keywords process with **After Batch Load** parameter set to **Yes**.
3. Send Pending LDAP Requests process with the **User Type** parameter set to **All** and **Batch Size** parameter set to **A**.

What are the lookup types associated with person identifiers?

The `ORA_PER_EXT_IDENTIFIER_TYPES` lookup type provides the predefined identifier types. You can add more types such as a person's parking pass identifier by adding values to this lookup type. The predefined identifier types are Time Device Badge identifier, Third-Party Payroll identifier, and Third-Party Payroll Alternate identifier.

How can I enable the Employment Details tab in the Personal Information work area?

The tab isn't available out of the box. To enable the tab, you must create a sandbox and set the Visible property of the tab to Yes.

To do this, select Configuration > Structure from the Navigator menu, expand the Me category, and click Personal Information. Then, set the property for the tab in the Tabs area.

How can I add additional content on the questionnaire pages?

You can enable and configure an additional content card for each HCM app that uses the questionnaire page such as Pay, Personal Info, and Absences, on the Me tab in the main menu.

When you click the additional content card, a blank page is displayed that you can configure. On this page, you can provide employees information and content specific to your organization such as policy and procedures, links, and instructional videos. Here's how you add the additional content card on the questionnaire page.

1. Activate a sandbox.
2. In the main menu, click **Configuration > Structure**.
3. Click **Me** and expand the application for which you want to enable the additional content card (for example, Personal Info).
4. Select **Additional Content for Personal Info**.
5. Change the **Name** and **Image** as per your requirements, and change **Visible** to **Yes**, or enter an **EL expression** to determine who sees the card.
6. Click **Save and Close**.
7. Use Page Composer to add additional content

Related Topics

- [Create and Activate Sandboxes](#)
- [Guidelines for Using Page Composer](#)
- [Add Additional Content to the Guided Flow for Promote Action](#)

What are the parameters that I can use for different flexfield configurations?

You can use these parameters for the flexfield configurations.

- PER_PASSPORT_DFF - LegislationCode and LEGISLATION_CODE
- PER_PERSON_EIT_EFF - EFFECTIVE_START_DATE and PERSON_ID
- PER_VISA_PERMIT_DFF - LEGISLATION_CODE and LegislationCode

How can I hide the Comments or the Attachments fields on the Family and Emergency Contacts page?

You can hide or display the Comments or Attachments fields using the Transaction Design Studio (TDS).

In the TDS > Family and Emergency Contacts > Page Attributes > New Contact,

- The Comments attribute controls the Comments field in the Comments and Attachments section.
- The Attachments attribute controls the Attachments field in the Comments and Attachments section.
- The Comments and Attachments attribute controls the entire Comments and Attachments section.

If you don't want either the Comments or Attachments fields to be displayed, you can set the Comments and Attachments attribute to Not Visible. But, if you want just one of the fields or both fields to be visible, then you need to set the Comments or the Attachments fields, or both to Visible and also set the Comments and Attachments field to Visible.

10 Employment

Employment Model

The employment model comprises two types of entities, which are work relationships and assignments.

To configure employment models for the enterprise or for individual legal employers, use the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively.

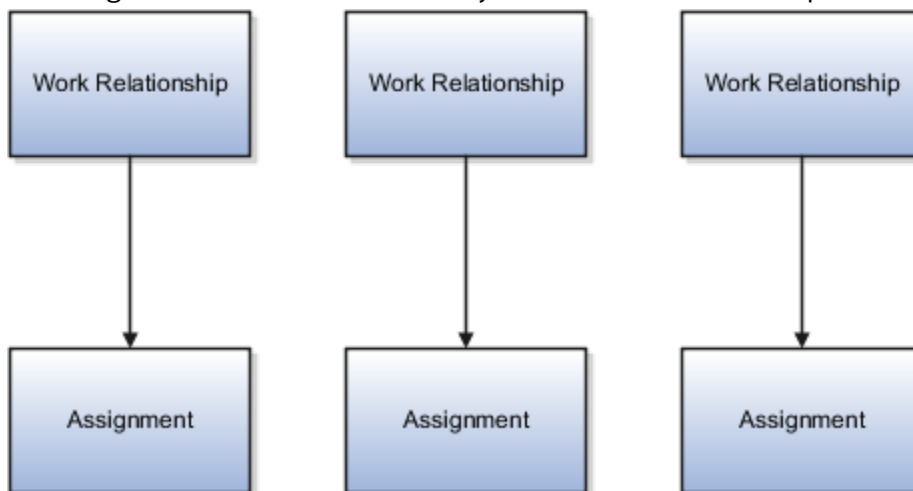
When you configure the employment model for the enterprise or legal employer (when you create or update the enterprise or legal employer), you can select from four options:

- Single Assignment
- Single Assignment with Contract
- Multiple Assignments
- Multiple Contracts with Single Assignment

Single Assignment

If you select Single Assignment, each work relationship of any type has one assignment only.

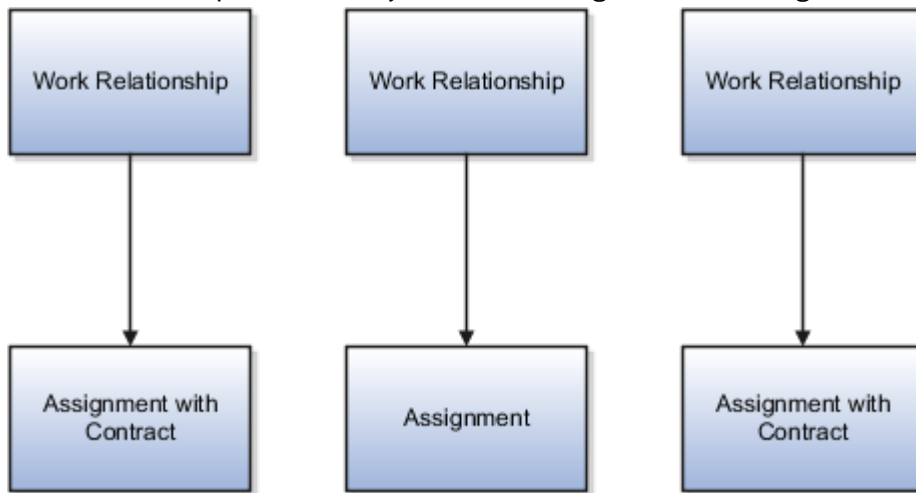
The assignment is created automatically when the work relationship is created.



Single Assignment with Contract

If you select Single Assignment with Contract, users can include contract information in the single assignment.

Creating the work relationship automatically creates the assignment. Including contract information in the assignment

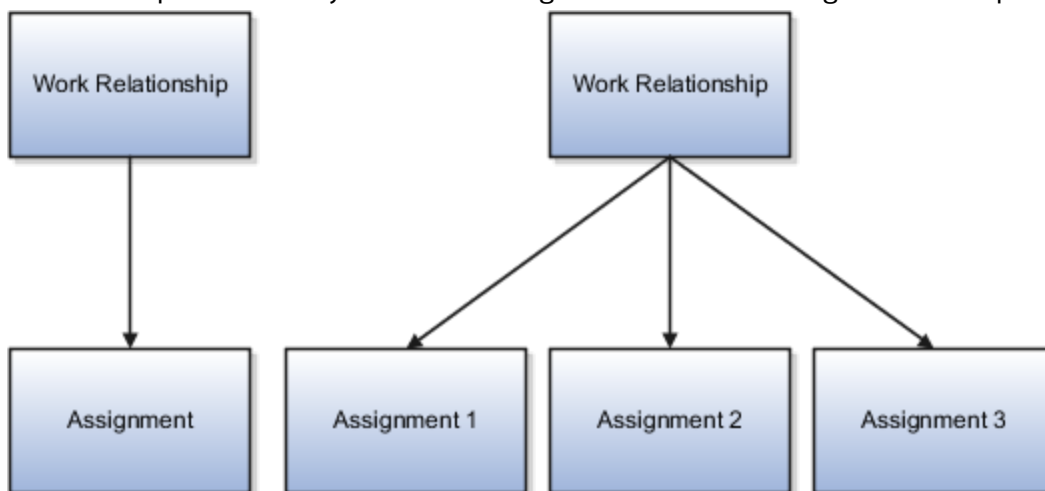


is optional.

Multiple Assignments

If you select Multiple Assignments, each work relationship of any type can include one or more assignments.

Creating the work relationship automatically creates one assignment. Additional assignments are optional; you create

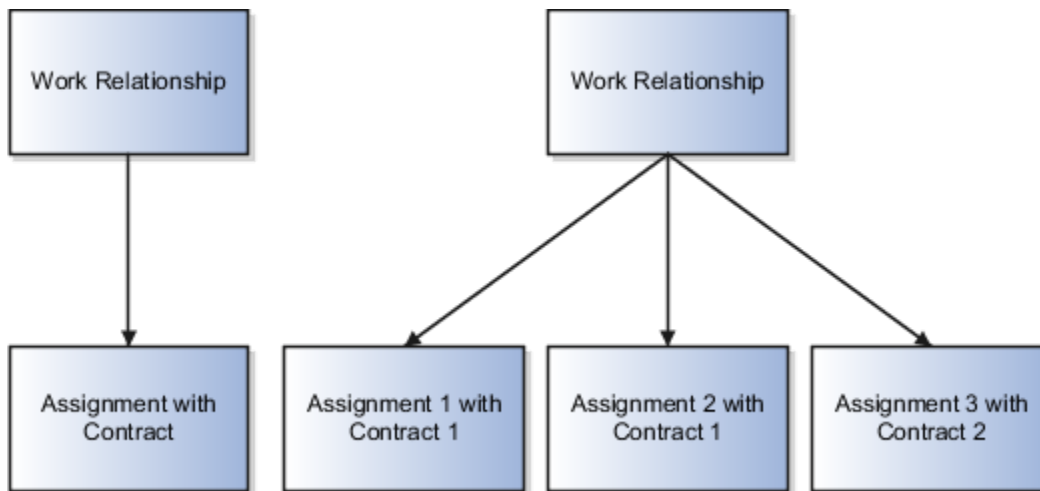


those manually.

Multiple Contracts with Single Assignment

If you select Multiple Contracts with Single Assignment, users can include multiple contracts. Each contract is associated with a single assignment. However, if you're using the responsive Employment Contracts page, then you can associate a single contract with multiple assignments during the responsive Add Assignment process.

Creating the work relationship automatically creates one assignment. Additional assignments are optional; you create those manually. Including contract information in the assignment is optional.



Related Topics

- [When to Select the Employment Model](#)
- [Assignments](#)
- [Work Relationships](#)

When to Select the Employment Model

By default, every enterprise uses the single-assignment employment model. To select a different employment model for the enterprise or for individual legal employers, use the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively.

This topic discusses the choices you can make and identifies any restrictions.

You can select a different employment model for individual legal employers.

Single Assignment v. Multiple Assignment

If you select:

- Single Assignment or Single Assignment with Contract, all work relationships in the enterprise or legal employer are restricted to a single assignment.

Note: Even if the employment model is Single Assignment or Single Assignment with Contract, you can still add a temporary or permanent assignment using the Add Assignment quick action. Single assignment employment models don't display the Add Assignment action in the Actions list of values on the classic Manage Employment page.

- Multiple Assignments, all work relationships in the enterprise or legal employer can include one or more assignments; therefore, work relationships can include a single assignment when appropriate.

Note: If you don't want multiple assignments, make the Add Assignment action codes as inactive and remove the security privileges related to the Add Assignment action.

- Multiple Contracts with Single Assignment, all assignments in the enterprise or legal employer can be associated with its individual contract.

Changing the Employment Model for the Enterprise or Legal Employer

In general, you can change the employment model for the enterprise or legal employer both during initial implementation and later. However, there are some restrictions on switching to and from particular employment models.

The following table identifies the valid and restricted switching options.

From	To Single Assignment	To Single Assignment with Contract	To Multiple Assignments	To Multiple Contracts with Single Assignment
Single Assignment	N/A	Yes	Yes	Yes
Single Assignment with Contract	See note	N/A	See note	Yes
Multiple Assignments	Yes	Yes	N/A	Yes
Multiple Contracts with Single Assignment	See note	See note	See note	N/A

Note: Yes, provided that no work relationships exist in the enterprise or legal employer.

Note: Use HCM Data Loader when you're changing the employment model from a Single Assignment or Multiple Assignments models to either Single Assignment with Contract or Multiple Contracts with Single Assignment and you want to add a contract for existing workers.

Employment Configuration Options

You can configure employment-related options at the enterprise level by using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. This table provides the description and default value for each option.

Option	Description	Default Value
Guided Flows: Future-Dated Records Validation	You can use this option to control whether users can update assignments with future-dated records using the self service employment pages. You can select from these values: None: No validation is displayed.	None

Option	Description	Default Value
	<p>Error: An error message is displayed indicating that the assignment has a future-dated record and the user is prevented from updating the assignment.</p> <p>Warning: A warning message is displayed indicating that the assignment has a future-dated record. The user can choose to ignore the message and continue with the transaction.</p>	
<p>Validation For Existing Subordinates Termination</p>	<p>You can use this option to control whether users can terminate workers with direct reports using the Terminate Work Relationship page. You can select from these values:</p> <p>None: No validation is displayed.</p> <p>Error: An error message is displayed indicating that the worker has direct reports and the user is prevented from terminating the worker.</p> <p>Warning: A warning message is displayed indicating that the worker has direct reports. The user can choose to ignore the message and continue with the transaction.</p>	<p>Warning</p>
<p>Employment: Approver Region Collapsed</p>	<p>You can use this option to control whether the Approvers region appears expanded or collapsed in the Review pages in employment flows. You can select from these values:</p> <p>Y: The Approvers region appears collapsed.</p> <p>N: The Approvers region appears expanded.</p>	<p>Y</p>
<p>Automatically Convert Pending Workers</p>	<p>You can use this option to apply the setting to all new pending worker records. You can select from these values:</p> <p>Y: All new pending worker records have a default value of Yes in the Include for Automatic Conversion field. The records that match the conversion criteria will be automatically converted when the Convert Pending Workers Automatically process is run.</p> <p>N: All new pending worker records have a default setting of No for the Include for Automatic Conversion field. These records aren't converted when the scheduled process is run.</p> <p>Null or Blank: The behavior is similar to N.</p>	<p>Null or Blank</p>
<p>Default Enterprise Seniority Date</p>	<p>You can use this option to control whether the enterprise seniority date must be defaulted to the first hire date. You can select from these values:</p>	<p>Null or Blank</p>

Option	Description	Default Value
	<p>Y: The enterprise seniority date will be defaulted to first hire date.</p> <p>N: The enterprise seniority date will be blank.</p> <p>Null or Blank: The behavior is similar to N.</p> <p>Note: This configuration option is applicable only for version 1 (V1) seniority dates.</p>	
Recruiting Integration	This field isn't available for use currently.	N/A

Employment Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these employment-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
HR_DISABLE_PENDING_APPROVALS_CHECK_IN_HCM_DATA_LOADER	HR: Disable pending approvals check in HCM Data Loader	No	HDL	If you set the profile option to Yes, the pending approval check is disabled when loading data using HCM Data Loader.
ORA_PER_CLE_COPY_FUT_ASG	Future Assignment Changes Copy Enabled	N	User Interface	<p>By default, the future assignment updates won't be moved to the new assignment during a legal employer change. To move the future assignment to the new assignment, you must set the profile option to Y.</p> <p>If you set the profile option to Y, these things happen:</p> <ul style="list-style-type: none"> • Future assignment updates are copied. • Future updates for these Payroll objects are copied: <ul style="list-style-type: none"> ○ Overtime Period ○ Timecard Required ○ Element entries not linked to Calculation

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>Cards, including future non-recurring entries.</p> <ul style="list-style-type: none"> Assignment updates are also copied to the new assignment if there are date effective updates on the source assignment past the termination date of the source work relationship.
ORA_PER_CLE_COPY_FUT_TERMINATION	Future Termination Copy Enabled	Y	User Interface	<p>By default, the future termination will be moved to the new work relationship during a legal employer change. To stop the future termination from being moved to the new work relationship, you must set the profile option to N.</p> <p>If you set the profile option to Y, these things happen:</p> <ul style="list-style-type: none"> Future termination will be copied even if future assignment updates are set to not copy. Future termination will be copied even if future assignment updates fail to copy successfully.
ORA_PER_DOR_DELETE_ON_DELETE_ASG_DATE_EFFECTIVE_CHG	Delete All Document Records Associated with the Deleted Assignment Record	No	User Interface	<p>By default, the feature to delete document records associated with the deleted assignment record isn't enabled. To enable the feature, you must set the profile option to Yes.</p>
ORA_PER_EMP_RETAIN_CHANGES	Retain employment changes	N	User Interface	<p>By default, your changes won't be retained in the employment flows. To retain your changes, you need to set the profile option to Y.</p> <p>When the profile option is set to Y, only valid employment and person changes are retained as of the new effective date. Changes for other sections, such as Payroll and Absences aren't retained.</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>To retain the salary changes, you need to navigate to the Salary section after changing the effective date. If the salary basis changes when you change the effective date, the salary changes won't be retained.</p> <p>If you change the transaction date, and the date is earlier than the previous assignment record or later than the future assignment record, your changes won't be retained. In this case, the current application behavior of resetting your changes will continue.</p> <p>When you enter a value that's not valid as of the newly changed date, the value will be reverted to the old value.</p>
ORA_PER_EMPL_ADD_ASG_DEL_INFO	Add Additional Information While Deleting an Assignment Update	N	User Interface	Specify additional information when deleting an assignment update.
ORA_PER_EMPL_COMBINED_CORRECTION_DELETION	Combined Correction and Deletion Enabled for Employment Records	No	User Interface	By default, the combined correction and deletion feature isn't enabled for employment records. To enable the feature, you must set the profile option to Yes.
ORA_PER_EMPL_DEFAULT_BUSINESS_TITLE_FROM	Business Title Defaulting Option	Retain User Changes	<ul style="list-style-type: none"> • User Interface • REST • HDL 	<p>By default, the current application behavior of retaining the user changes is followed. When the profile option is set to Retain User Changes, the application defaults the business title to the job name whenever there is a change in job on the worker's assignment. However, if the user has manually updated the business title on the worker's assignment, the changes entered by the user are retained even if there is a change in job on the worker's assignment.</p> <p>If you set the profile option to Automatically Update</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>Based on Job Change, the application defaults the business title to the job if there is a change in job on the worker's assignment.</p> <p>If you set the profile option to Automatically Update Based on Position Change, the application defaults the business title to the position if there is a change in position on the worker's assignment.</p>
ORA_PER_EMPL_DEFAULT_EFFECTIVE_DATE	Employment Transaction Date Set by Default	Y	User Interface	By default, the effective start date is defaulted in employment flows. If you don't want the effective start date to be defaulted, you must set the profile option to N.
ORA_PER_EMPL_DFLT_LOGGED_USER_AS_LINE_MGR_ENABLED	Default Logged in User as Line Manager Enabled	Yes	User Interface	Defaults the logged in user as the line manager in Add Person and Create Work Relationship flows.
ORA_PER_EMPL_DISABLE_TIME_CARD_CHK_CANCEL_WR	Time Card Check Disabled for Cancel Work Relationship and Delete Assignment	N	<ul style="list-style-type: none"> • User Interface • REST • HDL 	By default, the application prevents cancellation of the work relationship and deletion of the assignment when a time card exists. If you don't want the application to prevent cancellation and deletion when a time card exists, set the profile value to Y.
ORA_PER_EMPL_DISPLAY_GT_HISTORY	Display assignment history across global transfers	No	User Interface	<p>If you set the profile option to Yes, the assignment history across legal employer changes is displayed on the Employment Info responsive page.</p> <p>To view the worker's assignment history across legal employer changes, their source and destination assignments must be linked.</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>Note: For more information about linking assignments during a legal employer change, see the Process to Link Source and Destination Assignments for Global Transfer topic in the Related Topics section.</p>
ORA_PER_EMPL_ENABLE_WRK_ASG_REST_LOV	Enable Worker Assignment REST LOV	N	User Interface	<p>By default, the REST LoV isn't used in the Business Title LoV. To use the REST LoV in the Business Title LoV, set the profile value to Y.</p> <p>Note: The ORA_PER_EMPL_ENABLE_WRK_ASG_REST_LOV profile option setting isn't specific to Employment Info. It applies to all HCM products that use the new Business Title LoV.</p>
ORA_PER_EMPL_FLOW_REPLACED	Banner to Display Replaced Employment Flow	Y	User Interface	<p>By default, the banner message is displayed which says that the employment flow will be replaced. If you don't want to display the banner message, you must set the profile option to N.</p>
ORA_PER_EMPL_GTA_POP_DIRECTS	Defaulting of Direct Reports in Selected Section	Reassign Existing Reports	User Interface	<p>By default, the existing direct reports of the manager will be copied to the Reassign Existing Reports section. To display existing direct reports in the Add Direct Reports section, you must set the profile option to Add Direct Reports.</p> <p>If you set the profile option to Reassign Existing Reports, the application defaults the manager's existing direct reports in the Reassign Existing Reports section of the Global Temporary Assignment flow.</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>If you set the profile option to Add Direct Reports, these things happen:</p> <ul style="list-style-type: none"> • The application defaults the manager's existing direct reports in the Add Direct Reports section of the Global Temporary Assignment flow. • The application doesn't display direct reports in the Add Direct Reports section if there is a pending employment transaction for the direct report. • Direct reports who don't have line manager relationship with the source assignment continue to stay in the source assignment and aren't moved to the assignment which is newly created as part of the global temporary assignment. • The Reassign Existing Reports section won't be shown in the global temporary assignment regardless of whether you select the section in the questionnaire page. <p>Only those direct reports with which the source assignment has a line manager relationship will be populated in the Add Direct Reports section. For example, Donna is a line manager of Jeff and Marry, and project manager for Shaun. In this case, only Jeff and Marry will be defaulted in the Add Direct Reports section when the global temporary assignment is started for Donna.</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
ORA_PER_POS_INCUMBENT_TENURE_ASG_SUP	Identifies the tenure to aid in defaulting the manager during position synchronization	Shortest Tenure in Enterprise	<ul style="list-style-type: none"> User Interface Enterprise Scheduler Service (ESS) 	By default, the shortest tenure in the enterprise is used to identify the incumbent of a position with multiple incumbents as part of defaulting the manager during position synchronization. The other tenures you can use to set the profile option are: Longest Tenure in Assignment, Longest Tenure in Enterprise, Longest Tenure in Position, and Shortest Tenure in Position.
PER_DEFAULT_GRADE_FROM_JOB_POSITION	PER_DEFAULT_GRADE_FROM_JOB_POSITION	N	User Interface	<p>If you set this site-level profile option to Y, and there's only one valid grade for a job or position, then these conditions apply in these flows:</p> <ul style="list-style-type: none"> Hire and Add Assignment <ul style="list-style-type: none"> If the selected position has an entry grade, then the entry grade is defaulted. If the selected position doesn't have an entry grade and has a single valid grade, then the single valid grade is defaulted. If the selected position doesn't have any valid grades (entry grade is also a valid grade), then no grade is defaulted. If no position is selected and the job has a single valid grade, then the single valid grade is defaulted. Employment, Promote, and Transfer <ul style="list-style-type: none"> The grade isn't overridden except when the PER_ENFORCE_VALID_GRADES and PER_DEFAULT_GRADE_FROM_JOB_POSITION profile options are set

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>to Yes and the single valid grade is defined at the position or job.</p> <p>If you set this site-level profile option to N, the grade is defaulted only if it's an entry grade for the position and the flow is Hire or Add Assignment.</p>
PER_DEPARTMENT_TREE_FOR_MANAGER	PER_DEPARTMENT_TREE_FOR_MANAGER	Null	NA	<p>If you set this profile option to the department tree value, the application defaults the line manager from the selected department tree.</p> <p>If no department manager is defined, the application searches higher levels in the department tree and fetches the manager from the defined department.</p> <p>If the transaction is performed on the department manager assignment, the application defaults the line manager from a higher level in the department tree.</p> <p>If the department tree has an active tree version, then the line manager is defaulted from the active tree version.</p> <p>If the department tree doesn't have an active tree version, then the line manager is defaulted from the tree version that's in draft status and has the latest last updated date.</p>
PER_EMP_MANAGER_NAME_LOV	PER_EMP_MANAGER_NAME_LOV	Y	User Interface	<p>If you set the profile option to N, the application displays assignment numbers in the manager name list of values in the employment classic page.</p>
PER_EMPL_NOT_DEF_DEPT_MGR	Do Not Default Line Manager from Department	N		<p>By default, the department manager is defaulted as the line manager. To change the default behavior, you must change the profile value to Y (after creating the profile option). Then</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				<p>the department manager isn't defaulted as the line manager and the PER_DEPARTMENT_TREE_FOR_MANAGER profile option is ignored.</p> <p>Note: You need to create this profile option as it's not delivered with the application.</p>
PER_ENFORCE_VALID_GRADES	PER_ENFORCE_VALID_GRADES	N	<ul style="list-style-type: none"> User Interface REST HDL 	<p>If you set this site-level profile option to Y, users can do these actions:</p> <ul style="list-style-type: none"> Select a grade only from the list of valid grades that are defined for the assignment set in the selected job or position. <p>Note: You can add grades belonging to multiple sets as valid grades for the job or position.</p> <ul style="list-style-type: none"> If users select the job and position for the assignment or employment terms, they can only select grades that are valid for the position. Also, if the position doesn't have any valid grades, then the valid grades of the job aren't applied. If you don't define valid grades for the job or position, then users can select grades from the grade ladder. If the grade ladder doesn't have any grades, then the user can select from all grades. <p>If you set this site-level profile option to N, users can select grades from</p>

Profile Option Code	Profile Display Name	Default Profile Value	Applicability	Description
				the grade ladder. If the grade ladder doesn't have any grades, then the user can select from all grades defined for the assignment set.
PER_MANAGE_CONTRACTS_RESPONSIVE_ENABLED	PER_MANAGE_CONTRACTS_RESPONSIVE_ENABLED	Y	User Interface	<p>By default, the responsive pages are enabled. If for some reason you can't move to the responsive pages at this time, you need to change the default by setting the profile option to N.</p> <p>Note: Until release 20D, the PER_MANAGE_CONTRACTS_RESPONSIVE_ENABLED profile option had no impact on the classic Manage Employment pages. However, from release 21A, the contract details won't be available in the classic Manage Employment pages if the profile option is set to Y. You can manage employment contracts using either the responsive or the classic Manage Employment page, but not both.</p>

Related Topics

- [Process to Link Source and Destination Assignments for Global Transfer](#)
- [Business Title Defaulting for Assignment in Employment Flows](#)
- [Control Default of Effective Start Date in Employment Flows](#)

Employment Lookups

This topic identifies common lookups that are employment-related and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements. You review lookups using the Manage Common Lookups task in the Setup and Maintenance work area.

Worker Contract Lookups

Lookup Type	Description	Configuration Level
CONTRACT_TYPE	Type values, such as fixed-term, full-time, and seasonal	User

Assignment Lookups

Lookup Type	Description	Configuration Level
BARGAINING_UNIT_CODE	Codes that identify bargaining units, such as health professionals, steel workers, and public service workers	User
BUDGET_MEASUREMENT_TYPE	Work measure values, such as headcount and FTE	Extensible
EMP_CAT	Assignment categories, such as full-time regular and part-time temporary	User
EMPLOYEE_CATG	Worker type values, such as white collar, blue collar, and civil servant	User
HOURLY_SALARIED_CODE	Identifier for the hourly assignment or salary assignment	Extensible
PER_NON_WORKER_TYPES	Lists all nonworker system person types	Extensible
PER_SUPERVISOR_TYPE	Manager types, such as line manager, project manager, and technical manager	Extensible

Note: If your enterprise uses matrix management (where a worker assignment has multiple managers of different types), then you must review the predefined manager types in the PER_SUPERVISOR_TYPE lookup and add any missing types. You may also need to create job roles for managers other than line managers and ensure that they have appropriate access to the records of workers who report to them.

Seniority Dates Lookups

Lookup Type	Description	Configuration Level
ORA_PER_SENIORITY_ITEMS	Seniority date rules, such as enterprise seniority, legal employer seniority, and so on.	User

Lookup Type	Description	Configuration Level

Terminations Lookups

Lookup Type	Description	Configuration Level
ORA_PER_YES_NO_NOT_SPECIFIED	For rehire recommendation	Extensible
PER_PDS_REHIRE_REASON	Reasons, such as misconduct and poor performance, for not recommending rehire of a worker	User

Areas of Responsibility Lookups

Lookup Type	Description	Configuration Level
PER_RESPONSIBILITY_TYPES	Worker responsibilities, such as benefits representative, union representative and fire warden	Extensible

Employment Flexfields

Use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks in the Setup and Maintenance work area to manage flexfields. You can configure these employment-related flexfields as required, to meet your enterprise requirements:

Assignment Flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ALL_ASSIGNMENTS_M	PER_ASG_DF	Assignment Attributes	For storing additional assignment information.	Available for use.
PER_ASSIGNMENT_EXTRA_INFO_M	PER_ASSIGNMENT_EIT_EFF	Assignment EIT Information EFF	For storing additional assignment information as single and multiple row extensible flexfield contexts.	Available for use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ALL_ASSIGNMENTS_M	PER_ASG_LEG_DDF	Legislative Assignment Attributes	For storing additional legislative assignment information.	Available only for Oracle localization use.
PER_ASSIGN_GRADE_STEPS_F	PER_ASG_GRADE_STEPS_LEG_DDF	Assignment Grade Steps Legislative Information	For storing additional legislative information regarding assignment grade steps.	Not available for use.
PER_ASSIGN_WORK_MEASURES_F	PER_ASG_WORK_MEASURES_DF	Assignment Work Measures Attributes	For storing additional information regarding assignment work measures.	Not available for use.
PER_ASSIGNMENT_SUPERVISORS_F	PER_ASG_SUPERVISOR_DF	Assignment Supervisors Attributes	For storing additional information regarding assignment supervisors.	Not available for use.

Action Occurrence Flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ACT_OCCURRENCE_EXTRA_INFO	PER_ACTION_OCC_EIT_EFF	ActionOccurrence EIT Information EFF	For storing extra information about the deleted assignment record in the Employment Info page.	Available for use.

Work Relationship Flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_PERIODS_OF_SERVICE	PER_PPS_DF	Work Relationship Attributes	For storing additional work relationship information.	Available for use.
PER_PERIODS_OF_SERVICE	PER_PPS_LEG_DDF	Work Relationship Legislative Information	For storing additional legislative information regarding the work relationship.	Available only for Oracle localization use.

Employment Contract Flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_CONTRACTS_F	PER_CONTRACT_DF	Contract Attributes	For storing additional contract information.	Available for use.
PER_CONTRACTS_F	PER_CONTRACT_LEG_DDF	Contract Legislative Information	For storing additional legislative information regarding the contract.	Available only for Oracle localization use.

Parameters for Assignment Extensible and Descriptive Flexfields

Flexfield segments have list of values that are dependent on standard attributes. Assignment and work relationship attributes can be used as these objects:

- Flexfield parameters for assignment and work relationship descriptive flexfields.
- Input parameters when creating a value set for a flexfield segment.

You can use assignment attributes and descriptive flexfields as parameters when you configure assignment extensible flexfields (EFF) and assignment descriptive flexfields (DFF).

Note: If you have configured the value set or default conditions using parameters for the EFF, these values will be reinitialized only when you navigate to the EFF field.

This table shows the parameters that you can use in the assignment EFF (PER_ASSIGNMENT_EIT_EFF) and assignment DFF (PER_ASG_DF):

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
ACTION_CODE	Action	Varchar2	Yes	Yes
ASG_INFORMATION_DATE1 to ASG_INFORMATION_DATE15 ASG_INFORMATION_NUMBER1 to ASG_INFORMATION_NUMBER20 ASG_INFORMATION1 to ASG_INFORMATION50 ASG_INFORMATION_CATEGORY	Legislative flexfields	Date Number Varchar2 Varchar2	Yes	Yes

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
ASS_ATTRIBUTE_DATE1 to ASS_ATTRIBUTE_DATE15 ASS_ATTRIBUTE_NUMBER1 to ASS_ATTRIBUTE_NUMBER20 ASS_ATTRIBUTE1 to ASS_ATTRIBUTE50 ASS_ATTRIBUTE_CATEGORY	Customer flexfields	Date Number Varchar2 Varchar2	Yes	Yes
ASSIGNMENT_ID	Assignment identifier	Number	Yes	Yes
ASSIGNMENT_STATUS_TYPE	Assignment status type	Varchar2	Yes	Yes
ASSIGNMENT_STATUS_TYPE_ID	Assignment status type identifier	Number	Yes	Yes
ASSIGNMENT_TYPE	Assignment type	Varchar2	Yes	Yes
BARGAINING_UNIT_CODE	Bargaining unit code	Varchar2	Yes	Yes
BUSINESS_UNIT_ID	Business unit identifier	Number	Yes	Yes
COLLECTIVE_AGREEMENT_ID	Collective agreement identifier	Number	Yes	Yes
CONTRACT_ID	Contract identifier	Number	Yes	Yes
EFFECTIVE_END_DATE	Effective end date	Date	Yes	Yes
EFFECTIVE_START_DATE	Effective start date	Date	Yes	Yes
EMPLOYEE_CATEGORY	Worker category	Varchar2	Yes	Yes
EMPLOYMENT_CATEGORY	Assignment category	Varchar2	Yes	Yes
ESTABLISHMENT_ID	Reporting establishment	Varchar2	Yes	Yes
EXPENSE_CHECK_ADDRESS	Expense check send-to address	Varchar2	Yes	Yes
FULL_PART_TIME	Full time or part time	Varchar2	Yes	Yes

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
GRADE_ID	Grade	Number	Yes	Yes
GRADE_LADDER_PGM_ID	Grade ladder	Number	Yes	Yes
GSP_ELIGIBILITY_FLAG	Include in grade step progression	Varchar2	Yes	Yes
HOURLY_SALARIED_CODE	Hourly paid or salaried	Varchar2	Yes	Yes
JOB_ID	Job	Number	Yes	Yes
LABOUR_UNION_MEMBER_FLAG	Union member	Varchar2	Yes	Yes
LEGAL_ENTITY_ID	Legal employer	Number	Yes	Yes
LEGISLATION_CODE_VALUE	Legislation code value	Varchar2	Yes	Yes
LOCATION_ID	Location	Number	Yes	Yes
MANAGER_FLAG	Working as a manager	Varchar2	Yes	Yes
ORGANIZATION_ID	Organization	Number	Yes	Yes
PERIOD_OF_SERVICE_ID	Period of service identifier	Number	Yes	Yes
PERMANENT_TEMPORARY_FLAG	Regular or temporary	Varchar2	Yes	Yes
PERSON_ID	Person	Number	Yes	Yes
PERSON_TYPE_ID	Person type	Number	Yes	Yes
POSITION_ID	Position identifier	Number	Yes	Yes
POSITION_OVERRIDE_FLAG	Synchronize from position option	Varchar2	Yes	Yes
PRIMARY_ASSIGNMENT_FLAG	Primary assignment option	Varchar2	Yes	Yes
PRIMARY_FLAG	Primary option	Varchar2	Yes	Yes

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
PRIMARY_WORK_RELATION_FLAG	Primary work relationship indicator	Varchar2	Yes	Yes
PROPOSED_WORKER_TYPE	Proposed person type	Varchar2	Yes	Yes
REASON_CODE	Action reason	Varchar2	Yes	Yes
SENIORITY_BASIS	Basis for seniority calculation	Varchar2	Yes	Yes
SET_OF_BOOKS_ID	Set of books identifier	Number	Yes	Yes
SOURCE_ASSIGNMENT_ID	Source assignment identifier	Number	Yes	Yes
SYSTEM_EFFECTIVE_DATE	System effective date	Date	Yes	Yes
SYSTEM_PERSON_TYPE	Worker type	Varchar2	Yes	Yes
UNION_ID	Union	Number	Yes	Yes
WORK_AT_HOME	Working at home	Varchar2	Yes	Yes

You can't use Contract ID as a parameter in Assignment DFF and Assignment EFF in these flows:

- Create flows, such as Hire an Employee, Add a Contingent Worker, Add a Pending Worker, and Add a Nonworker
- Local and Global Transfer (Global Transfer and Global Temporary Assignment)
- Create Work Relationship
- Add Assignment

This table shows the parameters that you can use in the work relationship DFF (PER_PPS_DF):

Parameter Code	Parameter Description	Data Type
DATE_START	Start date	Date
LEGAL_ENTITY_ID	Legal entity identifier	Number
LEGISLATION_CODE	Legislation	Varchar2
PERIOD_OF_SERVICE_ID	Period of service identifier	Number

Parameter Code	Parameter Description	Data Type
PERIOD_TYPE	Period type	Varchar2
PERSON_ID	Person identifier	Number
PRIMARY_FLAG	Primary indicator	Varchar2

Using Attribute Values for Value Sets

You can use the assignment or work relationship attributes as input parameters when you create a value set by selecting the table validation type. The following is the syntax that you can use for the WHERE Clause field:

```
FIELD NAME = :{PARAMETER.<parameter name>}
```

For example, JOB_ID = :{PARAMETER.JOB_ID} and COUNTRY_CODE = :{PARAMETER.LEGISLATION_CODE}

You can use the following syntax when using flexfield segments:

```
Flexfield Segment = :{SEGMENT.<flexfield segment code>}
```

For example, if PayGroup is a segment code, you can use paam.ASS_ATTRIBUTE6= :{SEGMENT.PayGroup}

Note: You can't use flexfield segments that have a space.

Related Topics

- [Default Segment Values](#)
- [Overview of Value Sets](#)

Configure Flexfield Parameters in Value Sets for Worker Assignments

You want to use assignment or work relationship attributes as input parameters when creating a value set for a flexfield segment.

Using parameters, you have the flexibility to control the list of values in the assignment descriptive flexfields (DFF) based on the assignment or work relationship attributes. Consider the following use case:

The Vision India company wants to capture the job and the job specialty at the worker's assignment and filter the job specialty value based on the selected job. To achieve this, the company does these things:

- Defines the job specialty using the job extensible flexfield (EFF) and provides a one-to-many relationship between the job and the job specialty.
- Allows the user to select from the list of job specialties at the worker's assignment. The job specialties are defined using the job EFF for the selected assignment job.

Summary of Tasks

1. Set up the job EFF.
2. Set up the assignment DFF.

Set up Job EFF

1. Define a multi-row EFF at the job level using these values:
 - o **Name:** Job Specialty
 - o **Type:** Multi-Row EFF
 - o **Data Type:** Character
 - o **Table Column:** JEI_INFORMATION1 (You can use any available column)
2. After you define the EFF, populate it with the value you want for different jobs.

Set Up Assignment DFF

1. Create the value set to be used in the assignment DFF by using the job as the parameter.

- a. Go to the task **Manage Value Set**.
- b. In the Create Value Set page, enter these values:
 - **Value Set Code:** Job Speciality
 - **Module:** Search and select Employment
 - **Validation Type:** Table
 - **Value Data Type:** Character
- c. In the **FROM Clause** field, enter the following syntax:

```
PER_JOB_EXTRA_INFO_F
```

- d. In the **Value Column Name** field, enter **JEI_INFORMATION1** (or the column which is defined while creating the job EFF).
- e. In the **WHERE Clause** field, enter the following syntax:

```
Job_ID = :{PARAMETER.JOB_ID}  
AND JEI_INFORMATION_CATEGORY = 'Job Speciality'  
and INFORMATION_TYPE = 'EIT'
```

2. Create the assignment DFF by using the value set defined in the previous step.
 - a. In the Setup and Maintenance work area, go to the following:
 - Functional Area: Workforce Information
 - Task: Manage Employment Descriptive Flexfields
 - b. On the Manage Employment Descriptive Flexfields page, select the PER_ASG_DF row and click **Edit** on the **Actions** menu.
 - c. Select the Assignment Attributes row and click **Edit** on the **Actions** menu.
 - d. Click the **Create (+)** icon in the Global Segments area and create a segment by entering these values:
 - **Name:** Job Speciality
 - **Data Type:** Character

- e. Use the value set defined in the previous step.
 - f. Deploy the flexfield.
3. In the assignment section of the employment flows, verify that the values in the newly defined flexfield are filtered based on the selected job and job specialty values defined in the job setup.

People Group

Use the People Group key flexfield to record people group information and assign people to specific groups, such as unions or working groups. For example, you may want to assign people to unions or pension plans to determine eligibility or regulate access to payrolls.

The key flexfield is part of the Global Human Resources application and is identified by the PPG flexfield code and People Group Flexfield name.

How to Enable People Group for Use in HCM

You can enable the flexfield either at the enterprise level (using the Manage Enterprise HCM Information task) or the legal employer level (using the Manage Legal Entity HCM Information task).

People Group is an optional field and is available on all assignment and employment pages (except the Change Manager page).

Note: The People Group field is hidden out-of-the-box, you can enable it through personalization.

Where People Group Information is Stored

- The information is stored in the PEOPLE_GROUP_ID column of the PER_ALL_ASSIGNMENTS_M table.
- The PEOPLE_GROUP_ID column is a foreign key to the PEOPLE_GROUP_ID column in the PER_PEOPLE_GROUPS table.

Related Topics

- [Overview of Key Flexfields](#)

How You Configure the Default Expense Account

You need to set up a default expense account in your human resources application for every person who uses expenses in the Oracle Financials Cloud.

Note: If you don't set up default expense accounts for all users, they can't submit expense reports.

Default Expense Account is a key flexfield. It is part of the General Ledger application and is identified by the GL# flexfield code and Accounting Flexfield name.

Enable Default Expense Account for use in HCM

1. Navigate to the Setup and Maintenance work area.
2. In the Tasks panel drawer, click **Search**.
3. Search and click the **View Business Units** task name.
4. Search for the business unit.
5. Select the business unit row in the search results.
6. On the **Actions** menu, click **Assign Business Functions**.
7. Select the primary ledger and default legal entity.
8. Click **Save**.

Where You Maintain the Default Expense Account

The Default Expense Account and Expense Check Send-to Address fields are optional and displayed on all assignment and employment related pages, except these pages:

- Change Location
- Change Working Hours
- Change Manager

In the Expense Check Send-to Address field, you specify where to send the worker's expense reimbursement check. The values for this field are populated using the PER_WORKER_ADDRESS_TYPE application lookup. There are two values, Home and Office that are available out-of-the-box. You can't modify these values or add new values because this is an application lookup.

Note: These fields are hidden out-of-the-box. You can unhide the fields using personalization.

Where the Default Expense Account is Stored

- The information is stored in the DEFAULT_CODE_COMB_ID column of the PER_ALL_ASSIGNMENTS_M table.
- The DEFAULT_CODE_COMB_ID column is a foreign key to the CODE_COMBINATION_ID column in the GL_CODE_COMBINATIONS table.

Related Topics

- [Overview of Key Flexfields](#)
- [Example of Loading a Default Expense Account for a Worker](#)

Secured Approval Notifications for Employment Flows

Employment approval notifications are secured using security privileges in responsive employment flows. This table lists the different security privileges:

Employment Flow	Security Privilege Securing BIP Notification	Security Privilege Securing Edit by Approver	Securing Business Object
Add Assignment	N/A	Add Worker Assignment	N/A
Add Contingent Worker	N/A	Add Contingent Worker	N/A
Add Nonworker	N/A	Create Nonworker	N/A
Add Pending Worker	N/A	Hire Pending Worker	N/A
Additional Assignment Info	Manage Additional Assignment Info View Additional Assignment Info	Manage Additional Assignment Info	PER_ALL_ASSIGNMENTS_M
Cancel Work Relationship	Cancel Work Relationship Edit Work Relationship Manage Work Relationship View Work Relationship	N/A	PER_PERIODS_OF_SERVICE
Change Assignment	Change Worker Assignment View Employment Information Summary	Change Worker Assignment	PER_ALL_ASSIGNMENTS_M
Change Location	Change Worker Location View Employment Information Summary	Change Worker Location	PER_ALL_ASSIGNMENTS_M
Change Manager	Change Worker Manager View Employment Information Summary	Change Worker Manager	PER_ALL_ASSIGNMENTS_M
Change Working Hours	Change Worker Working Hours View Employment Information Summary	Change Worker Working Hours	PER_ALL_ASSIGNMENTS_M
Correct Termination	Terminate Work Relationship View Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE
Create Work Relationship	N/A	Create Work Relationship	N/A
Delete Assignment	Delete Worker Date Effective Assignment	N/A	PER_ALL_ASSIGNMENTS_M

Employment Flow	Security Privilege Securing BIP Notification	Security Privilege Securing Edit by Approver	Securing Business Object
	View Employment Information Summary		
Edit Work Relationship	Edit Work Relationship Manage Work Relationship View Work Relationship	Edit Work Relationship Manage Work Relationship	PER_PERIODS_OF_SERVICE
Eligible Jobs	Manage Eligible Jobs View Eligible Jobs	Manage Eligible Jobs	PER_ALL_ASSIGNMENTS_M
Employment Contract	Manage Worker Contract View Worker Contract Search Worker	Manage Worker Contract	PER_ALL_ASSIGNMENTS_M
Employment Details	Manage Person Assignment Data Correct Worker Assignment Data View Employment Information Summary Data	Manage Person Assignment Correct Worker Assignment	PER_ALL_ASSIGNMENTS_M
Hire	N/A	Hire Employee	N/A
Local and Global Transfer	N/A	Perform Worker Local and Global Transfers	N/A
Manage Directs	Manage Direct Reports View Employment Information Summary	Manage Direct Reports	PER_ALL_ASSIGNMENTS_M
Promotion	Promote Worker View Employment Information Summary	Promote Worker	PER_ALL_ASSIGNMENTS_M
Resignation	Terminate Work Relationship View Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE
Reverse Termination	Terminate Work Relationship View Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE
Termination	Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE

Employment Flow	Security Privilege Securing BIP Notification	Security Privilege Securing Edit by Approver	Securing Business Object
	View Terminate Work Relationship		
Transfer	Transfer Worker View Employment Information Summary	Transfer Worker	PER_ALL_ASSIGNMENTS_M
Withdraw Resignation	Terminate Work Relationship View Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE
Employment Start Dates	View Employment Information Summary Data Employment Start Dates Data	Employment Start Dates	PER_ALL_ASSIGNMENTS_M

Check and Correct Employment-Related Data Issues

Use the Correct Employment Data Integrity Issues process to detect and correct any employment data integrity-related issues. Run this process from the Scheduled Processes work area.

The process reports and fixes the following issues:

- Invalid Person Type Usage Records
- Legal Employer Varies for Assignment and Work Relationship
- Work Terms With Primary Assignment Field Set to Y
- Business Unit Varies for Assignment and Work Terms
- Inactive Work Relationship Active Work Terms or Assignment
- Legislation Varies for Assignment and Work Relationship
- Assignment With People Group Without Structure Information
- Person Type Missing in Assignment Record
- User and System Person Types Vary in Assignments
- Supervisor Records Created After Termination Date
- Supervisor Records Extending Beyond Termination Date
- User and System Person Types Vary in Person Type Usages
- Overlapping Working Hour Pattern Records
- Flexfield Structure and People Group Vary in Assignments
- Primary Field Set to Y When Manager Type Not Line Manager

You must run the following procedures in the order specified to detect and correct any issues, and verify the results:

1. Selecting the process

2. Using Summary mode
3. Using Report mode
4. Using Update mode
5. Confirming whether issues are corrected

Selecting the Process

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**, and click **Job** in the **Type** field.
3. Expand the **Name** list, and click **Search**.
4. Type **Employment** in the **Name** box, and click **Search**.
5. In the search results table, select **Correct Employment Data Integrity Issues**, and click **OK**.
6. In the **Schedule New Process** dialog box, click **OK**.

Using Summary Mode

Run the process in Summary mode to generate a .csv file listing the count of the issues, if any. You can run the process in this mode for a person or all people.

1. In the **Process Details** dialog box, select **Summary** from the **Mode** list.
2. In the **Name** list, select the person for whom you want to run the process.
Note: If you don't select a name from the list, the process runs for all people.
3. Click **Submit**, and click **OK** in the **Confirmation** dialog box. Note the process ID.
4. Click **Close** in the **Process Details** dialog box.

You can view the .zip file when you select the row containing the process ID in the search results table in the Overview page.

Using Report Mode

If you find any issues in the .csv file, run the process in Report mode to generate a .zip file. The .zip file contains a .csv file for each integrity check. The .csv file provides details of the issues and the people affected by it

1. Click **Schedule New Process**. Select **Correct Employment Data Integrity Issues** from the **Name** list, and click **OK**.
2. In the **Process Details** dialog box, select **Report** from the **Mode** list.
3. Click **Submit**, and click **OK** in the **Confirmation** dialog box. Note the process ID.
4. Click **Close** in the **Process Details** dialog box.

You can view the .zip file when you select the row containing the process ID in the search results table in the Overview page.

Using Update Mode

Run the process in Update mode to correct the issues. After you run the process, a .zip file is generated that contains a .csv file for each integrity check. The .csv file provides details of the issues post the update.

1. Click **Schedule New Process**. Select **Correct Employment Data Integrity Issues** from the **Name** list, and click **OK**.
2. In the **Process Details** dialog box, select **Update** from the **Mode** list.
3. Click **Submit**, and click **OK** in the **Confirmation** dialog box. Note the process ID.

4. Click **Close** in the **Process Details** dialog box.

You can view the .zip file when you select the row containing the process ID in the search results table in the Overview page.

Confirming Whether Issues are Corrected

Run the process again in Summary mode to confirm that the issues are corrected.

Related Topics

- [Submit Scheduled Processes and Process Sets](#)

Add Additional Content to the Guided Flow for Promote Action

You want to include information about the company's employee promotion policies within the promotion flow for an employee. To do this, you need to first enable the Additional Content card on the Promote page, using the Transaction Design Studio.

You can use the Page Composer to add information on the Additional Content page for the employee.

Note: This content in the Additional Content section is read-only. You can't enter any data in this section.

Prerequisites

1. Sign in as an administrator user who has the access to create and manage sandboxes.
2. Activate a sandbox where you can create a rule in the Transaction Design Studio.
3. Enable the HCM Experience Design Studio and Page Composer options for the sandbox.
4. Enable page-level configuration at the Site level.

Select the Action

1. On your Home page, select **My Client Groups > Employment > HCM Experience Design Studio**.
2. Select the **Transaction Design Studio** tab.
3. Select **Promote** from the **Actions** list.

Configure Rule

1. Click **Add** to add a new rule.
2. Enter these rule details.

Field	Value
Name	Promote With Additional Content Rule

Field	Value
Description	Enable Read-Only Additional Content for Promote Action
Active	Select the check box.

3. In the Show or Hide Regions section, enter these details.

Field	Value
Show questionnaire page	Yes
Additional Content	Required and Visible

4. Click **Save and Close**.

5. Click **Done**.

Add Content

1. On your Home page, select **My Client Groups > Employment > Promote**.
2. Select a worker.
3. On the Promote page, enter the basic and promotion details.
4. Select **Edit Pages** from the **Settings and Actions** menu in the global area (select the drop-down list next to the login name).
5. From the **View** menu, select **Source**.
6. Use Page Composer to add content related to the company's promotion policy in the Additional Content region.

Related Topics

- [Create and Activate Sandboxes](#)
- [Overview of Page Modification](#)
- [Guidelines for Using Page Composer](#)
- [HCM Experience Design Studio](#)

How You Access a Report of Employer Comments for Terminated Workers

The Comments and Attachments section in the responsive UI replaces the Employer Comments field in the classic UI.

In the classic UI, navigate to My Client Groups > Person Management > Work Relationship > Actions > Terminate. You can create a report for the values in the Employer Comments field that are stored in the PER_PERIODS_OF_SERVICE table using OTBI or BIP.

If you use in-flight classic termination transactions, move the comments from the Employer Comments field to the Comments and Attachments section. The comments and attachments are available in the BPM tables. It is best practice to keep the transaction details, including comments and attachments in the BPM tables until you are ready to archive the approval details. Once you archive the BPM comments and attachments, you can access the comments from the BPM archive tables.

For more information on OTBI reports, see the Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports for HCM guide on the Oracle Help Center (<https://docs.oracle.com/en/cloud/saas/index.html>).

For more information on BI Publisher, see the Report Designer's Guide for Oracle Business Intelligence Publisher guide on the Oracle Help Center (<https://docs.oracle.com/en/middleware/>)

For more information about archiving BPM workflows, see *Archive and Purge Transactions* in the Implementing Applications guide on Oracle Help Center.

Related Topics

- [How You Configure the Report Task Type](#)
- [Archive and Purge Transactions](#)

Personalize the Universal Header for Employment Flows

You want to personalize the page sub header with the person's display name and assignment number in the Promote employment flow. You can use the procedure similarly for other employment flows. Let's look at the steps to personalize the universal header.

For any mandatory fields not mentioned in the steps, you can use the default values.

Create and Enable Sandbox

1. Click **Navigator > Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter the **Name**.
4. Select the **Active** check box for the **Page Composer** option.
5. Click **Create and Enter**.

Edit Page Header

1. On the home page, click the **My Client Groups** tab.
2. Navigate to the quick actions and click the **Show More** link.
3. Under Employment, click **Promote**.
4. Search and select the person for whom you want to personalize the page sub header.
5. The Promote questionnaire page if enabled will be displayed. Click **Continue**.

Note: This is a common page for which you can't customize the page sub header.

6. The Promote container page is displayed.
7. Click the user name in the global header region, and then click **Edit Pages** from the Settings and Actions menu.
8. The Promote customization page is displayed. Click **Source** from the View menu.
9. Click the display name. Click **Edit** in the confirmation dialog box.
10. Scroll down to the bottom of the page and hover the mouse pointer at the bottom left. Click **Show More Links**, and then click **simplePanel**. Drag the region above the tool bar upward so that you see the page components.
11. Select **simplePanel**, and then click **Close** next to it.
12. Click **Edit** in the confirmation dialog box.
13. The universalPanel header is displayed. Select **universalPanel**, and then click **Show the properties of universalPanel** icon in the tool bar.
14. The Component Properties: universalPanel dialog box is displayed. Scroll down to the **Sub Header** field. Click the drop down arrow next to the field, and then select **Expression Builder**.
15. The Expression Editor dialog box is displayed. Click **Choose a value**, and select the binding parameter that you want to display in the page sub header. For example, if you want to display the person's display name, select **BindingParams** and **Display Name** from the drop-down lists. The expression for the display name is automatically populated in the **Type a value or expression** field. Click **OK**. The Component Properties: universalPanel dialog box is displayed.

Note: When you select the binding parameter, only the expression for that parameter is displayed in the **Type a value or expression** field. However, if you want to enter more than one expression in the field, click **Type a value or expression** and combine the expressions by using a separator, such as hyphen (-) or asterisk (*). For example, you can enter this expression to display the person's display name and assignment number in the universal panel sub header: `#{bindings.DisplayName.inputValue} - #{bindings.AssignmentNumber.inputValue}`.

To see the different expression value for each binding parameter, refer the table after the steps in this section.

16. Click **Apply**, and then click **OK**.
17. Click **Close** on the Promote customization page.
18. The universal panel sub header is customized with the person's display name and assignment number. This table shows the binding parameters and their corresponding expression values. You can use these values to display worker identification information in the page sub header:

Binding Parameter	Expression
Display Name	<code>#{bindings.DisplayName.inputValue}</code>
Person Number	<code>#{bindings.PersonNumber.inputValue}</code>
Assignment Number	<code>#{bindings.AssignmentNumber.inputValue}</code>
Assignment Name (Business Title)	<code>#{bindings.AssignmentName.inputValue}</code>

Tips and Considerations

1. All the four binding parameters (display name, person number, assignment number, and business title) if enabled, will appear in a single line in the page sub header.

2. The business title and assignment number won't be refreshed in the page sub header when it's updated in flows, such as promote, transfer, and employment details. The changes are reflected after the transaction is committed.

Action Framework

The action framework consists of the action type, action, action reason, and assignment status components.

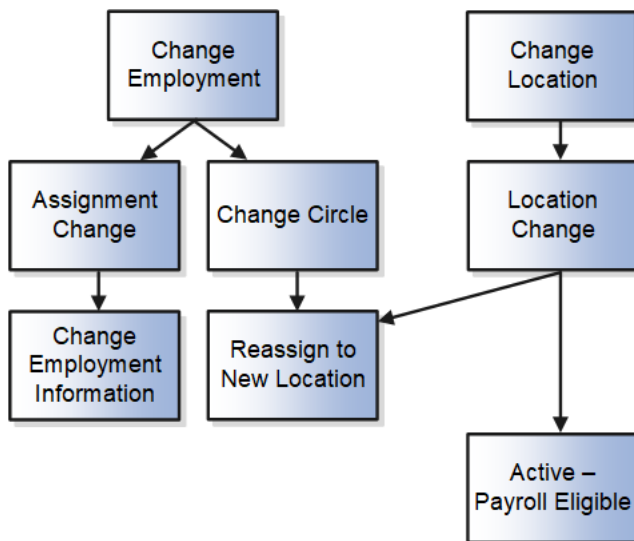
The action type identifies the business process associated with the action and can have one or more predefined actions.

The action tracks changes to the employment and assignment record. You can associate the actions you create with the predefined action types.

Each action has an action reason and you can optionally associate the action reason with the action for analysis and reporting purposes. You can associate the same action reason with multiple actions or with a specific action according to your business need.

Each assignment contains an assignment status. When you create or edit an assignment, you select an action that categorizes the change and determines what are the next steps. Some actions make an automatic change to the assignment status. Otherwise, you must set the assignment status directly.

This figure illustrates an action framework example using the Change Employment and Change Location action types.



The Assignment Change and Change Circle actions are associated with the Change Employment action type. The Assignment Change action updates the assignment record and the reason for the change is indicated by the Change Employment Information action reason. Similarly, the Change Circle action updates the assignment record and the reason for the change is indicated by the Reassign to New Location action reason.

The Location Change action is associated with the Change Location action type. The Location Change action updates the assignment record and the reason for the change is indicated by the Reassign to New Location action reason. When you select the Location Change action to update the assignment, the assignment status is automatically set to Active - Payroll Eligible.

Action Type

An action type:

- Identifies the type of business process associated with the action and determines what happens when you select an action.
- Is associated with one or more predefined actions.

You can associate the actions you create with the predefined action types. For example, the Hire an Employee action type is associated with the Hire action. You could create an action Hire Part-Time and associate it with the Hire an Employee action type. Your action will then appear in the Actions list in the Hire an Employee page. To hire a part-time employee, users can select the Hire Part-Time action instead of the predefined Hire action.

This table shows the list of employment flows and its associated action types:

Employment Flow	Action Type
Hire an Employee	Hire an Employee
Add a Contingent Worker	Add Contingent Worker
Add a Pending Worker	Add Pending Worker
Add a Nonworker	Add Nonworker
Create Work Relationship	<ul style="list-style-type: none"> • Add Employee Work Relationship • Add Contingent Worker Relationship • Add Nonworker Relationship • Add Pending Worker Relationship • Renew Placement <p>Note: The action based on this action type is displayed only if the selected assignment that's used to start this flow belongs to an inactive contingent worker work relationship.</p> <ul style="list-style-type: none"> • Rehire an Employee <p>Note: The action based on this action type is displayed only if the selected assignment that's used to start this flow belongs to an inactive employee work relationship.</p>
Add Assignment (Permanent)	Add Assignment
Add Assignment (Temporary)	Temporary Assignment
Change Assignment	<ul style="list-style-type: none"> • Change Employment • Start Probation Period • End Probation Period • Demote Employment • Suspend Assignment

Employment Flow	Action Type
	<ul style="list-style-type: none"> • End Assignment Note: The action based on this action type is displayed only if the selected worker has more than one active assignment. • End Temporary Assignment Note: The action based on this action type is displayed only if the selected worker has more than one active assignments and the assignments are created using the Add Assignment (Temporary) flow. • Extend Temporary Assignment Note: The action based on this action type is displayed only if the selected worker has more than one active assignments and the assignments are created using the Add Assignment (Temporary) flow. • Promote Note: The action based on this action type is displayed only if this flow is started from the Offer page. • Transfer Note: The action based on this action type is displayed only if this flow is started from the Offer page.
Change Location	Change Location
Change Manager	Change Manager
Change Working Hours	Change Working Hours
Direct Reports	Change Manager
Employment Contracts	The actions which has the Used in Contract field set to Yes in the action configuration will be available for selection on the Employment Contract page.
Local and Global Transfer (Local)	Transfer
Local and Global Transfer (Permanent Global Transfer)	Global Transfer
Local and Global Transfer (Global Temporary Assignment)	Global Temporary Assignment
Promote	Promote
Resignation	Terminate Work Relationship
Transfer	Transfer
Termination	Terminate Work Relationship End Global Temporary Assignment

Employment Flow	Action Type
	<p>Note: The action based on this action type is displayed only if the selected worker has more than one active work relationship and the work relationship is created using the Global Temporary Assignment action.</p>
Terminate Employment	<p>Terminate Work Relationship End Global Temporary Assignment</p> <p>Note: The action based on this action type is displayed only if the selected worker has more than one active work relationship and the work relationship is created using Global Temporary Assignment action.</p> <p>End Assignment</p> <p>Note: The action based on this action type is displayed only if the selected worker has more than one active assignment.</p>
Create Mass Assignment Change	<ul style="list-style-type: none"> • Change Employment • Change Location • Change Manager • Change Working Hours • Demote Employment • End Probation Period • Promote • Start Probation Period • Suspend Assignment • Transfer
Mass Legal Employer Change	Global Transfer

This table shows the list of seeded action types:

Action Type Code	Action Type
CMP_CHANGE_SALARY	Salary Change
CMP_GRADE_STEP_PROGRESSION	Grade Step Progression
CMP_GROUP_COMPENSATION	Group Compensation
CMP_INDIVIDUAL_COMPENSATION	Manage Individual Compensation
CMP_MANAGE_CONTRIBUTIONS	Manage Contributions
CMP_RATE_RECALCULATION	Rate Recalculation
EMPL_ADD_ASG	Add Assignment

Action Type Code	Action Type
EMPL_ADD_CWK	Add Contingent Worker
EMPL_ADD_EMP	Hire an Employee
EMPL_ADD_NWK	Add Nonworker
EMPL_ADD_PWK	Add Pending Worker
EMPL_ADD_TERMS	Add Employment Terms
EMPL_CHANGE	Change Employment
EMPL_CHG_LOCATION	Change Location
EMPL_CHG_MANAGER	Change Manager
EMPL_CHG_WORK_HOURS	Change Working Hours
EMPL_GLB_TEMP_ASG	Global Temporary Assignment
EMPL_GLB_TRANSFER	Global Transfer
EMPL_IRC_ACCEPT_JOB_OFFER	Accept Job Offer
EMPL_POS_SYNC	Position Synchronization
EMPL_PRIMARY_WR_CHANGE	Primary Work Relationship Change
EMPL_PROMOTION	Promote
EMPL_REHIRE	Rehire an Employee
EMPL_RENEW_CWK	Renew Placement
EMPL_TEMP_ASG	Temporary Assignment
EMPL_TERMINATE	Terminate Work Relationship
EMPL_TRANSFER	Transfer
EMPL_WR_CWK	Add Contingent Worker Relationship
EMPL_WR_EMP	Add Employee Work Relationship
EMPL_WR_NWK	Add Nonworker Relationship
ORA_EMPL_CANCEL_WR	Cancel Work Relationship
ORA_EMPL_CHG_HIRE_DATE	Change Hire Date
ORA_EMPL_DELETE_CHANGE	Delete this change
ORA_EMPL_OFFER_CHANGE	Change Offer

Action Type Code	Action Type
ORA_EMPL_OFFER_CREATE	Create Offer
ORA_EMPL_REV_TERMINATION	Reverse Termination
ORA_EMPL_WR_PWK	Add Pending Worker Relationship
PER_GRD_CREATE	Create Grades
PER_GRD_DELETE	Delete Grades
PER_GRD_LDR_CREATE	Create Grade Ladder
PER_GRD_LDR_DELETE	Delete Grade Ladder
PER_GRD_LDR_UPDATE	Update Grade Ladder
PER_GRD_RATE_CREATE	Create Grade Rate
PER_GRD_RATE_DELETE	Delete Grade Rate
PER_GRD_RATE_UPDATE	Update Grade Rate
PER_GRD_UPDATE	Update Grades
PER_JOB_CREATE	Create Job
PER_JOB_FAMILY_CREATE	Create Job Family
PER_JOB_FAMILY_DELETE	Delete Job family
PER_JOB_FAMILY_UPDATE	Update Job Family
PER_JOB_UPDATE	Update Job
PER_LOC_CREATE	Create Location
PER_LOC_UPDATE	Update Location
PER_ORG_CREATE	Create Organization
PER_ORG_UPDATE	Update Organization
PER_POS_CREATE	Create Position
PER_POS_DELETE	Delete Position
PER_POS_UPDATE	Update Position

Action

Actions track changes to Human Capital Management (HCM) records, such as changes to employment and assignment records. When you create or update these records, the action identifies the cause of the creation or change.

You can view a history of effective-dated changes (assignment history, for example), and the action and reason details are particularly useful for reporting and tracking.

You can use actions to categorize the type of change. Each predefined termination action is associated with a termination type (either voluntary or involuntary) to help categorize the termination. For example, the termination actions Death and Reduction in Force are categorized as voluntary and involuntary respectively.

In certain cases, actions determine the business flow. For example, you can select from a list of employment-related actions, such as Assignment Change, Transfer, or Termination. The action you select determines the path you take through the current business flow.

To create your own actions, use the Configure Actions quick action under My Client Groups > Workforce Structures on the Home page.

Note: It's recommended that you follow these practices:

- If you're creating your own termination-related action, you need to specify the termination type for the action, whether it's voluntary or involuntary. This information is useful for analysis and reporting purposes.
- Select at least one active action code within each action type that's applicable for all countries.

The application defaults the action in the Termination and Resignation pages by searching for the first Voluntary termination action which doesn't have any role or country associated with it.

This table shows the list of seeded actions that must not be end dated:

Action Type Code	Action Type	Action Code	Action Name	Description
CMP_CHANGE_SALARY	Salary Change	CHANGE_SALARY	Change Salary	Change Salary
CMP_GRADE_STEP_PROGRESSION	Grade Step Progression	CMP_GRADE_STEP_PROGRESSION	Automated Grade Step Progression	Automated Grade Step Progression
CMP_GRADE_STEP_PROGRESSION	Grade Step Progression	CMP_GSP_RATE_SYNCHRONIZATION	Grade Step Rate Synchronization	Grade Step Rate Synchronization
CMP_GRADE_STEP_PROGRESSION	Grade Step Progression	CMP_GSP_UPD_SAL_ON_ASG_CHG	Grade Step Change	Grade Step Change
CMP_GROUP_COMPENSATION	Group Compensation	ALLOCATE_GRP_CMP	Allocate Workforce Compensation	Allocate Workforce Compensation
CMP_INDIVIDUAL_COMPENSATION	Manage Individual Compensation	MNG_INDIV_CMP	Manage Individual Compensation	Manage Individual Compensation
CMP_MANAGE_CONTRIBUTIONS	Manage Contributions	MNG_CONTRIB	Manage Contributions	Manage Contributions

Action Type Code	Action Type	Action Code	Action Name	Description
CMP_RATE_RECALCULATION	Rate Recalculation	CMP_RECALCULATE_RATES	Recalculate Rates	Recalculate Rates
EMPL_CHG_MANAGER	Change Manager	MANAGER_CHANGE	Manager Change	Manager Change
EMPL_IRC_ACCEPT_JOB_OFFER	Accept Job Offer	ORA_IRC_ACCEPT_JOB_OFFER	Accept Job Offer	Accept Job Offer
EMPL_POS_SYNC	Position Synchronization	ORA_POS_SYNC	Synchronization From Position	Synchronization From Position
EMPL_POS_SYNC	Position Synchronization	ORA_SYNC_CONFIG_CHANGE	Position Synchronization Configuration Change	Position Synchronization Configuration Change
EMPL_POS_SYNC	Position Synchronization	ORA_SYNC_POS_TREE	Synchronization from Position Tree	Synchronization from Position Tree
EMPL_PRIMARY_WR_CHANGE	Primary Work Relationship Change	PRIMARY_WR_CHANGE	Primary Work Relationship Change	Primary Work Relationship Change
ORA_EMPL_CANCEL_WR	Cancel Work Relationship	EMPL_CANCEL_WR	Cancel Work Relationship	Cancel Work Relationship
ORA_EMPL_CHG_HIRE_DATE	Change Hire Date	ORA_EMPL_CHG_HIRE_DATE	Changes Hire Date	Change Hire Date
ORA_EMPL_DELETE_CHANGE	Delete this change	EMPL_DELETE_CHANGE	Delete Date Effective Change	Delete Date Effective Change
ORA_EMPL_OFFER_CHANGE	Change Offer	EMPL_OFFER_CHANGE	Change Offer	Change Offer
ORA_EMPL_OFFER_CREATE	Create Offer	EMPL_OFFER_CREATE	Create Offer	Create Offer
ORA_EMPL_REV_TERMINATION	Reverse Termination	ORA_EMPL_REV_TERMINATION	Reverse Termination	Reverse Termination
PER_GRD_CREATE	Create Grades	PER_GRD_NEW	Create	Create
PER_GRD_DELETE	Delete Grades	PER_GRD_DELETE	Delete	Delete
PER_GRD_LDR_CREATE	Create Grade Ladder	PER_GRD_LDR_NEW	Create	Create
PER_GRD_LDR_DELETE	Delete Grade Ladder	PER_GRD_LDR_DELETE	Delete	Delete
PER_GRD_LDR_UPDATE	Update Grade Ladder	PER_GRD_LDR_UPD	Update	Update
PER_GRD_RATE_CREATE	Create Grade Rate	PER_GRD_RATE_NEW	Create	Create
PER_GRD_RATE_DELETE	Delete Grade Rate	PER_GRD_RATE_DELETE	Delete	Delete
PER_GRD_RATE_UPDATE	Update Grade Rate	PER_GRD_RATE_UPD	Update	Update

Action Type Code	Action Type	Action Code	Action Name	Description
PER_GRD_UPDATE	Update Grades	PER_GRD_UPD	Update	Update
PER_JOB_CREATE	Create Job	PER_JOB_NEW	Create	Create
PER_JOB_FAMILY_CREATE	Create Job Family	PER_JOB_FAMILY_NEW	Create	Create
PER_JOB_FAMILY_DELETE	Delete Job family	PER_JOB_FAMILY_DELETE	Delete	Delete
PER_JOB_FAMILY_UPDATE	Update Job Family	PER_JOB_FAMILY_UPD	Update	Update
PER_JOB_UPDATE	Update Job	PER_JOB_UPD	Update	Update
PER_LOC_CREATE	Create Location	PER_LOC_NEW	Create	Create
PER_LOC_UPDATE	Update Location	PER_LOC_UPD	Update	Update
PER_ORG_CREATE	Create Organization	PER_ORG_NEW	Create	Create
PER_ORG_UPDATE	Update Organization	PER_ORG_UPD	Update	Update
PER_POS_CREATE	Create Position	PER_POS_NEW	Create	Create
PER_POS_DELETE	Delete Position	PER_POS_DELETE	Delete	Delete
PER_POS_UPDATE	Update Position	PER_POS_UPD	Update	Update

Employment-Contract-Specific Actions

You can add the contract action on the employment contract page. To do this, you need to select Yes in the Used in Contract field when you configure the action. After the configuration, the contract action will be available for selection on the employment contract page.

For more information on the Action Framework, see the document [Employment - Action Framework \(https://community.oracle.com/customerconnect/discussion/630984\)](https://community.oracle.com/customerconnect/discussion/630984) on Customer Connect.

Action Occurrences

When certain actions, such as Hire an Employee and Promote occur in different product areas of the application, a record of the action occurrence is stored in the PER_ACTION_OCCURENCES table.

The table stores information about different product areas and if required, the information can be retrieved by providing the appropriate entity type and parent entity type.

For example, when you cancel a work relationship, the assignment record is deleted. However, the record of the cancel action is stored in the PER_ACTION_OCCURENCES table. You can search for a person whose work relationship was canceled by querying the table. The PARENT_ENTITY_KEY_ID column in the table stores the person ID of the person whose work relationship was canceled.

This table lists the entity type and parent entity type for the objects that generate an action occurrence record. You can use this information to build your own reports to access the various actions that have occurred on the objects.

Flow	Entity Type - Entity ID	Parent Entity Type - Parent Entity Key ID
Employment pages	No entity type or ID is populated.	Person - Person ID
Delete record from Employment Details page	Assignment - Assignment ID	Person - Person ID
Salary when managed from the standalone salary pages	Salary - Salary ID	Assignment - Assignment ID
Grades	Grade - Grade ID	No parent entity type or ID is populated.
Grade Ladders	Grade Ladder - Grade Ladder ID	No parent entity type or ID is populated.
Grade Rates	Grade Rate - Rate ID	No parent entity type or ID is populated.
Jobs	Job - Job ID	No parent entity type or ID is populated.
Job Families	Job Family - Job Family ID	No parent entity type or ID is populated.
Locations	Location - Location ID	No parent entity type or ID is populated.
Organizations	Organization - Organization ID	No parent entity type or ID is populated.
Positions	Position - Position ID	No parent entity type or ID is populated.

Default Action Based on Country and Role

When the action is defaulted based on country and role, the defaulting is derived based on the sequence in this table:

Evaluation Sequence	Is the Country Configured for Action?	Is the Role Configured for Action?	How Default Action is Derived
1	No	No	When the actions don't have countries and roles configured, the first action in the Action LoV (sorted alphabetically by action name) is defaulted.
2	Yes	Yes	When the actions match the requestor's role and worker's legal employer country, the first action in the Action LoV (sorted alphabetically by action name) is defaulted.
3	Yes	No	When the actions match the worker's legal employer country, the first action in the Action LoV (sorted alphabetically by action name) is defaulted.
4	No	Yes	When the actions match the requestor's role, the first action in the Action LoV (sorted

Evaluation Sequence	Is the Country Configured for Action?	Is the Role Configured for Action?	How Default Action is Derived
			alphabetically by action name) is defaulted.

The application will default the first action in the Action LoV (sorted alphabetically by action name) in these scenarios:

- There is no match between the configured action countries and roles.
- There is a country match, but the roles don't match.
- There is a role match, but the countries don't match.

Note: In all scenarios, the action is derived within the context of allowed action types for the employment flow.

The resultant list of actions is displayed sorted alphabetically by the action name.

For the termination flow, here's the sequence of how the application derives the default action:

- Use the evaluation sequence 1 to 4 in the table for actions configured as voluntary.
- Use the evaluation sequence 1 to 4 for actions configured as involuntary.
- If no match is found, default the first action in the Action list (sorted alphabetically by action name) of voluntary actions.
- If no match is found, default the first action in the Action list (sorted alphabetically by action name) of involuntary actions.

Examples of How the Action is Defaulted Based on Sequence

Example 1:

Action	Country	Role
Hire	Null	Null
Deputation	India	HR Specialist India
Leave of Absence	United States	Null
Absconding	Null	HR Administrator
Local Transfer	United Kingdom	HR Specialist United Kingdom

In example 1, when the user performs a worker transaction, Hire action will be defaulted because it's a global action with no country and role.

Example 2:

Action	Country	Role
Deputation	India	HR Specialist India
Leave of Absence	United States	Null

Action	Country	Role
Absconding	Null	HR Administrator
Local Transfer	United Kingdom	HR Specialist United Kingdom

For example 2, this table shows the defaulted actions:

User	Worker Country	User Role	Defaulted Action
Vijay Singh	India	HR Specialist India	Deputation
Boris Klose	United States	HR Specialist United States	Leave of Absence
Stefan Anderson	Sweden	HR Administrator	Absconding
Donna Paulson	France	HR Specialist France	Absconding

For Donna Paulson, even though the Absconding action is defaulted, the action value won't be displayed in the Action LoV. If the user changes the value in the LoV, they can't enter the Absconding action value.

Action Reason

You can optionally associate reasons with actions, which is primarily useful for analysis and reporting purposes.

For example, a generic action of termination could have reasons such as voluntary retirement or involuntary layoff. You can view the action and reason details in the Employee Termination Report. Line managers can view predictions about who's likely to leave voluntarily, which are based on existing and historical terminations data.

The process that generates the predictions uses the action and reason data to identify whether a termination is voluntary or involuntary. When managers allocate compensation to their workers, they can select from a list of action reasons that help identify the type of or reason for the compensation allocation.

To create your own action reasons, use the Action Reasons quick action under My Client Groups > Workforce Structures on the Home page.

You can specify the code, name, and description when you create the action reason. You can't specify the action reason start date and end date because these dates are internally defaulted by the application as 1-Jan-1951 and 31-Dec-4712 respectively. You can't create an action reason while creating an action.

You can then associate the action reason with an action when creating the action or updating it. When you associate an action reason with an action, you can do these things:

- Select the countries for which you can associate the action and action reason.
- Select the roles that can see the action reason during worker transactions.
- Select the duration (start date and end date) for which the action reason will remain associated with the action.

You can associate the same action reason with multiple actions or with a specific action according to your business need. This makes the action reason list as global and reduces the effort of creating multiple action reasons.

The country you select for the action reason must match with any one of the countries selected for the action.

Country and Role-Specific Action and Action Reasons

You can make the action and action reason country-specific or role-specific on employment pages by selecting the required country or role when you configure the action and action reason. After the configuration, the employment pages will display the action and action reason that are specific to the worker's legal employer country or logged in user's role.

You can set the default assignment status for an employment-related action. To do this, ensure that all countries associated with the assignment status match the countries associated with the action type. After you configure, the employment pages will default the assignment status for the selected action type.

Note:

- If you want to keep the action and action reason global and not specific to any country or role, don't select any value for the country or role. The blank value signifies that the action or action reason is applicable for all countries.
- The country and role you selected for the action reason must match with any one of the countries or roles for the action.

How to Increase the Value Limit in the Action Reason Client LoV

You can increase the limit of 25 values in any client list of values (LoV) used in Oracle HCM Cloud. Here's an example procedure to increase the values to more than 25 in the action reason client LoV used in termination pages.

The example uses this test data:

- **Action:** Resignation
- **Associated Action Reasons (30 count):** Resignation Reason 01 to Resignation Reason 30

Note: Increasing the count of values in the client LoV may lead to performance degradation and affect user experience.

Create and Enable Sandbox

1. Click **Navigator > Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter the **Name**.
4. Select the **Active** check box for the **HCM Experience Design Studio** and **Page Composer** options.
5. Click **Create and Enter**.

Verify Count of Action Reasons on Termination Page

1. On the Home page, select **My Client Groups > Employment > Termination**.
2. Search and select the person for whom you want to see the action reasons.
3. On the Terminate Work Relationship page, select the **Resignation** action and expand the action reason.

Note: You will see 25 action reasons are displayed (Personal Reasons, Resignation Reason 01 to Resignation Reason 24).

Configure the Action Reason LOV to Display More Than 25 Items

1. On the Tools menu, select **Page Composer**.
2. Click the **Structure** tab, and then select the action reason field.
3. In the Confirm Shared Component Edit dialog box, click **Edit**.
4. Scroll down to the bottom of the page and drag the tool bar upward so that you see the page components.
5. Click the **Edit Component** link next to the secureInputSearch component.
6. In the Confirm Shared Component Edit dialog box, click **Edit**.
7. Click the **searchSection** component, and then click the **Show the properties of searchSection** icon on the toolbar. The data URL for the component is displayed in the dialog box.
8. Copy the value in the Data Url field to a text editor. The value will be as follows:
`#{backingBeanScope.TerminationWhenAndWhyBean.terminationReasonDataURL}`

Note: The Data URL value is used to fetch the REST API response. By default, this value is limited to 25. You can increase the default value by adding your desired parameter limit.

9. Edit the value to append a limit clause at the end (`#{'&limit=50'}`). The number 50 signifies that 50 rows need to be shown in the action reason field. The edited value will be as follows:
`#{backingBeanScope.TerminationWhenAndWhyBean.terminationReasonDataURL}#{'&limit=50'}`
10. Expand the Data Url field and select **Override**.
11. Expand the Data Url field again and select **Expression Builder**.
12. Copy the edited value from step 9 to the **Type a value or expression** field and then click **OK**.
13. Click **Apply**, and then click **OK**.
14. Click **Close** to exit Page Composer.
15. Navigate to the action reason field in the Terminate Work Relationship page. You will see all the configured values in the action reason field.

Action and Action Reason Flexfields

Use the Manage Descriptive Flexfields task in the Setup and Maintenance work area to manage flexfields. You can configure these action-related and action reason-related flexfields as required, to meet your enterprise requirements:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ACTION_REASON_USAGES	PER_ACT_REASON_USG_DFF	Additional Action Reason Usages Attributes	For storing additional information regarding action reason usages.	Available for use.
PER_ACTION_REASONS_B	PER_ACT_REASONS_DFF	Additional Action Reason Attributes	For storing additional information regarding the action reason.	Available for use.
PER_ACTIONS_B	PER_ACT_DFF	Additional Action Attributes	For storing additional information regarding the action.	Available for use.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ACTIONS_B	PER_ACT_LEG_DDF	Legislative Action Attributes	For storing additional legislative information regarding the action.	Available only for Oracle localization use.

Assignment Status

Each assignment contains an assignment status. The assignment status contains an HR status, a payroll status , and optionally user statuses. The HR status and payroll status values are linked to the assignment status and are set automatically when the assignment status changes.

This table summarizes the values of the three statuses.

Assignment Status	HR Status	Payroll Status
Active - payroll eligible	Active	Process
Active - no payroll	Active	Do not process
Active - process when earning	Active	Process when earning
Active - process nonrecurring element entry	Active	Process nonrecurring element entry
Suspended - payroll eligible	Suspended	Process
Suspended - no payroll	Suspended	Do not process
Suspended - process when earning	Suspended	Process when earning
Suspended - process nonrecurring element entry	Suspended	Process nonrecurring element entry
Inactive - payroll eligible	Inactive	Process
Inactive - no payroll	Inactive	Do not process
Inactive - process when earning	Inactive	Process when earning
Inactive - process nonrecurring element entry	Inactive	Process nonrecurring element entry

When you create or edit an assignment, you select an action that categorizes the change and determines what are the next steps. Some actions make an automatic change to the assignment status. For example, when you create an assignment, its status is set automatically to Active - payroll eligible. The same action sets the HR status to Active and the payroll status to Process. Otherwise, you must set the assignment status directly.

To create your own assignment status, use the Assignment Statuses quick action under My Client Groups > Workforce Structures on the Home page.

You can set the default assignment status for an employment-related action. To do this, ensure that all countries associated with the assignment status match the countries associated with the action type. After you configure, the employment pages will default the assignment status for the selected action type.

The assignment status is only applicable for action types related to employment and not for action types, such as compensation, workforce structures, and recruiting.

For global transfer, global temporary assignment, and temporary assignment, the default assignment status applies to the destination assignment.

Payroll Status

The payroll status Process When Earning indicates that payroll is processed only during payroll periods with earnings. The Process When Earning status typically is used in countries with cumulative tax rules, to stop tax refunds when payments are not issued. The status Process Nonrecurring Element Entry indicates that only the active element entry for the nonrecurring element is processed. The Process Nonrecurring Element Entry status typically is used for one-time payments for terminated employees.

User Status

You can define one or more user names for each assignment status value, using the Manage Assignment Status task in the Setup and Maintenance work area. If multiple user statuses exist for an HR status, you must designate any one user status as the default status corresponding to the HR status. The default assignment status is attached to an assignment unless you specify a default user status. For example, when you create an assignment, its status is set automatically to the default assignment status corresponding to the HR status Active.

Default Assignment Status Based on Action

You can default the assignment status for the action code related to the employment action type. After this mapping, responsive employment pages will default the assignment status that is mapped to the selected action code.

To map an assignment status with the action, ensure that all countries associated with the assignment status matches the countries associated with the action.

Note:

- This feature is only applicable for action types related to employment. It is not applicable for action types related to compensation, workforce structures, and recruiting.
- For global transfer, global temporary assignment, and temporary assignment, the default assignment status applies to the destination assignment.

To default the assignment status based on action, select a value in the Assignment Status list of values (LoV) when you add an action in the Add Action page.

The following action types don't support the defaulting of assignment status:

- Cancel Work Relationship

- Change Hire Date
- Change Location
- Change Manager
- Change Offer
- Change Working Hours
- Create Offer
- Delete this change
- Extend Employment Contract
- Position Synchronization
- Primary Work Relationship Change
- Reverse Termination
- Termination (Voluntary)

FAQs for Action Framework

Can I delete an action or action reason?

No. If you no longer want users to select an action or action reason you can enter an end date, beyond which the action or reason is unavailable.

Can I create additional action types?

No. You can't create your own action types. You can associate the actions you create with the predefined action types, using the Configure Actions task in the Workforce Structures work area.

Which action and action type should I use for withdrawing a resignation?

There's no predefined action available for withdrawing a resignation. You need to create a new action using the Configure Actions task in the Workforce Structures work area.

You need to then associate the action with the Reverse Termination action type (Code: ORA_EMPL_REV_TERMINATION) and the Voluntary termination type. The newly created action will then appear in the Actions list in the Withdraw Resignation page.

Related Topics

- [Action Framework](#)
- [What's the purpose of the legislative action attributes?](#)

Assignments

Considerations for Enforcing Grades at Assignment Level

This topic describes the effects of the following employment-related profile options:

- PER_ENFORCE_VALID_GRADES
- PER_DEFAULT_GRADE_FROM_JOB_POSITION

Enforce Valid Grades (PER_ENFORCE_VALID_GRADES)

If you set the PER_ENFORCE_VALID_GRADES site-level profile option to Yes, users can select a grade for an assignment. The grades can be selected only from those grades that are valid for the job or position.

- If users select a job and position for the assignment, they can select grades that are valid for the position only.
- If valid grades are defined for neither the job nor the position, users can select from all grades.

If you set this profile option to No (default value), users can select from all grades.

Default the Grade from the Job or Position (PER_DEFAULT_GRADE_FROM_JOB_POSITION)

You set the PER_DEFAULT_GRADE_FROM_JOB_POSITION site-level profile option to Yes, when there is only one valid grade for a job or position. In this scenario, by default, the valid grade is used in the assignment. Additionally, if an entry grade is defined for a position, by default, the grade is used when the user creates a new assignment.

If you set this profile option to No (default value), users can select from all grades.

Considerations for Using Worker Numbers

Every person record in the enterprise has a person number. You can also allocate worker numbers to employee and contingent worker work relationships.

Worker numbers are optional: they're provided primarily for Oracle E-Business Suite customers who have used employee and contingent worker numbers and want to continue using them.

Enabling Worker Numbers

By default, worker numbers aren't used. You can enable worker numbers at the enterprise and legal-employer levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively. If you enable worker numbers, each employee and contingent worker work relationship must have a worker number. If you don't enable worker numbers, they can't be used. If you enable the worker number at both the enterprise and legal employer levels, then the setting at the legal employer takes precedence.

Selecting the Number-Generation Method

Use the Manage Enterprise HCM Information task in the Setup and Maintenance work area, to select the number generation method for the enterprise. Worker numbers can be generated either manually or automatically.

If you select manual generation, you're recommended to define a numbering scheme to suit local requirements. For example, determine whether uniqueness within the enterprise or at the legal-employer level is important, and define the numbering scheme accordingly.

If you select automatic worker-number generation, numbers can be allocated from either an enterprise sequence or a legal employer sequence. If you use a legal-employer sequence, worker numbers aren't guaranteed to be unique in the enterprise. When you use a legal-employer sequence, the worker number doesn't change if you rehire in the same legal employer. However, the worker number changes if you rehire in a different legal employer or globally transfer to a different legal employer.

If you use an enterprise sequence, the worker number doesn't change when you:

- Rehire in the same legal employer.
- Rehire in a different legal employer.
- Globally transfer to a different legal employer.

Setting the Number-Generation Method for a Legal Employer

All legal employers automatically inherit the enterprise number-generation method if a method isn't specified at the legal employer level. You can override the number-generation method at the legal employer level by

- Selecting manual worker-number generation for a legal employer at any time.
- Selecting automatic worker-number generation for a legal employer, provided that no employee or contingent worker work relationships exist for that legal employer.

Use the Manage Legal Entity HCM Information task in the Setup and Maintenance work area, to select the number generation method for the legal employer.

Create Grade Retention Page and Associate With Retained Grade Context

In certain organizations, an employee is entitled to retain their previous grade even after moving to a position of lower responsibility.

The grade can be retained for a fixed time beginning on the date the employee is placed in the lower-graded position, unless grade retention is terminated.

A context is seeded for the assignment extensible flexfield to record this retained grade information. You need to associate this context to a page to use this functionality. You can associate this context with an existing page or you could create a new page based on your business requirements. Here's how you can associate it with a new page:

1. Search and click the **Manage Extensible Flexfields** task name in the Setup and Maintenance work area.
2. Enter **PER_ASSIGNMENT** in the Flexfield Code field, and then click **Search**.
3. In the Search Results area, click the **Edit** icon.
4. Select the **PerAssignmentEITCategory** item in the Category area, and then click the **Pages** tab in the PerAssignmentEITCategory: Details area.

5. Click the **Create** icon.
6. In the Create Page dialog box, enter **Grade Retention Info** in the **Display Name** field.
7. Enter **PER_RETAINED_GRADES_PAGE** in the **Code** field.
8. Enter the information in the **Description** field. For example, you can enter: **Provides additional assignment information for grade retention.**
9. Select the **Assignment EIT Information EFF** value from the **Usage** list.
10. Click **OK**.
11. Select the Grade Retention Info page that you created from the PerAssignmentEITCategory: Details area. The list of associated contexts for the page is displayed in the Grade Retention Info: Associated Contexts Details area.
12. Click the **Select and Add** icon in the Grade Retention Info: Associated Contexts Details area.
13. Search for the **Retained Grade** name in the Select and Add: Contexts dialog box.
14. Select the Retained Grade row from the search results.
15. Click **Apply**, and then click **OK**.
16. Click **Save and Close**.
17. In the Search Results area, select the Assignment EIT Information EFF row and deploy the flexfield.

Related Topics

- [Overview of Extensible Flexfields](#)

Retained Grade Context of the Assignment Extensible Flexfield

This table describes the lookup and SQL information for the different grade-related fields in the Retained Grade context of the Assignment extensible flexfield (EFF).

Grade Field	Related Lookup and Usage	SQL Clause
Start Date and End Date	<p>The start and end date of the retained grade entered by the user.</p> <p>Note: The start and end date fields are different from the effective start and end date fields. The start and end date fields contain user entered values whereas effective start and end date fields contain application maintained values for the retained grade records.</p>	Not applicable.
Pay Table ID	<p>The ORA_PER_RETGRD_GRADE_LADDER_VS lookup controls the Pay Table ID field. By default, the field displays all active grade ladders between the selected start and end date of the retained grade.</p>	<p>These are the SQL code clauses used by the Pay Table ID field:</p> <p>FROM Clause : PER_GRADE_LADDERS_F_VL GradeLadder, FND_SETID_SETS_VL SetId</p> <p>Value Column Name: SUBSTR(NAME,1,100)</p> <p>WHERE Clause : GradeLadder.GRADE_SET_ID = SetId.SET_ID(+) AND :{SEGMENT.ORA_PER_RETGRD_START_DATE_S} <= EFFECTIVE_END_</p>

Grade Field	Related Lookup and Usage	SQL Clause
Grade	<p>The ORA_PER_RETGRD_GRADE_VS lookup controls the Grade field. By default, the field displays all active grades that belong to the selected grade ladder.</p> <p>Note: If the grade ladder isn't selected, the Grade field displays all active grades in the application that are valid between the selected start and end date of the retained grade.</p>	<p>DATE and :{SEGMENT.ORA_PER_RETGRD_END_DATE_S} >= EFFECTIVE_START_DATE</p> <p>These are the SQL code clauses used by the Grade field:</p> <p>FROM Clause : per_grades_f_vl grades left outer join PER_GRADES_IN_LADDERS_F gradeinladder ON grades.grade_id = gradeinladder.grade_id</p> <p>Value Column Name: SUBSTR(grades.NAME,1,100)</p> <p>WHERE Clause : {SEGMENT.ORA_PER_RETGRD_START_DATE_S} <= grades.EFFECTIVE_END_DATE and : {SEGMENT.ORA_PER_RETGRD_END_DATE_S} >= grades.EFFECTIVE_START_DATE and grades.ACTIVE_STATUS = 'A' and (1= (CASE WHEN (:{SEGMENT.ORA_PER_RETGRD_GRADE_LADDER_S} is NULL) THEN 1 ELSE 2 END) OR gradeinladder.GRADE_LADDER_ID = to_number(:{SEGMENT.ORA_PER_RETGRD_GRADE_LADDER_S}))</p>
Step	<p>The ORA_PER_RETGRD_GRADE_STEP_VS lookup controls the Step field. By default, the field displays all grade steps that belong to the selected grade, and are active between the selected start and end date of the retained grade.</p> <p>Note: If the grade isn't selected, the Step field doesn't display any value.</p>	<p>These are the SQL code clauses used by the Step field:</p> <p>FROM Clause : per_grade_steps_f_vl</p> <p>Value Column Name: SUBSTR(NAME,1,100)</p> <p>WHERE Clause : GRADE_ID = to_number(: {SEGMENT.ORA_PER_RETGRD_GRADE_S}) and :{SEGMENT.ORA_PER_RETGRD_START_DATE_S} <= EFFECTIVE_END_DATE and : {SEGMENT.ORA_PER_RETGRD_END_DATE_S} >= EFFECTIVE_START_DATE</p>
Pay Basis	<p>The ORA_PER_RETGRD_PAY_BASIS_VS lookup controls the Pay Basis field. The lookup is SQL query-based and displays the existing retained grade data entered by the user in the Pay Basis field from the PER_ASSIGNMENT_EXTRA_INFO_M table.</p>	<p>These are the SQL code clauses used by the Pay Basis field:</p> <p>FROM Clause : (SELECT DISTINCT AEI_ATTRIBUTE6 FROM PER_ASSIGNMENT_EXTRA_INFO_M_V)</p> <p>Value Column Name: SUBSTR(AEI_ATTRIBUTE6,1,100)</p> <p>WHERE Clause : AEI_ATTRIBUTE6 IS NOT NULL</p>
Pay Plan	<p>The ORA_PER_RETGRD_PAY_PLAN_VS lookup controls the Pay Plan field. The lookup is SQL query-based and displays the existing retained grade data entered by the user in the Pay Plan field from the PER_ASSIGNMENT_EXTRA_INFO_M table.</p>	<p>These are the SQL code clauses used by the Pay Plan field:</p> <p>FROM Clause : (SELECT DISTINCT AEI_ATTRIBUTE7 FROM PER_ASSIGNMENT_EXTRA_INFO_M_V)</p>

Grade Field	Related Lookup and Usage	SQL Clause
		Value Column Name: SUBSTR(AEI_ATTRIBUTE7,1,100) WHERE Clause : AEI_ATTRIBUTE7 IS NOT NULL

How to Configure Matrix Managers for an Assignment

You need to configure the common lookup codes to add new types of matrix managers. Do these steps to add a new matrix manager:

1. Log in as an administrative user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and select the **Manage Common Lookups** task.
4. In the Manage Common Lookups page, search for the **PER_SUPERVISOR_TYPE** lookup type.

Note: In the Lookup Codes section, you will see only one line manager entry if you haven't configured any other matrix manager in your instance.

5. Click the New icon (+) to add the new matrix manager and enter these field values for example:

Lookup Code	Enabled	Meaning
PROJECT_MANAGER	Select the check box.	Project manager

6. Click **Save and Close**, and then click **Done**.

FAQs for Assignments

How can I display assignment numbers in the manager name list of values in employment flows?

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area. Search for the profile option PER_EMP_MANAGER_NAME_LOV and update the profile value to N. The profile value is Y by default.

What happens if the position that I selected in an assignment has no open headcount or FTE?

If the Overlap Allowed attribute is set to Yes in Edit Position page, then a warning is displayed and you can continue with the assignment.

If the attribute is set to No, then you must select a different position as the number of incumbents for the selected position has already been reached.

Related Topics

- [How do I enable Position Incumbents validation?](#)

How do I enable Position Incumbents validation?

The Position Incumbents validation prevents users from selecting a position in an assignment that doesn't have vacant Full Time Equivalents (FTEs) or headcount.

If overlap of headcount is allowed at the position, then a warning is displayed if the open FTE or headcount is exceeded. If overlap isn't allowed, users can't continue unless they select a different position that has vacant FTE or headcount. This validation is available out of the box if users have installed Oracle Fusion HCM for the first time. If users are already using Oracle Fusion HCM and upgrading it, then you must enable the validation to use it. To enable the validation:

1. Select the predefined Position Incumbent Validation (ORA_PER_EMP_POS_INCUMBENT_VALIDATION) context in the Organization Information extensible flexfield to view the Apply Incumbent Validation attribute in the Manage Enterprise page.
2. Select the Apply Incumbent Validation attribute in the Position Incumbent Validation section in the Edit Enterprise page.

Related Topics

- [Considerations for Managing Extensible Flexfields](#)

What happens to existing assignments when a position's attributes are changed?

If position synchronization is enabled for an enterprise or legal employer and you change a position's attributes, you can view all assignments that will inherit the change.

After the changes are approved, all incumbents with active assignments automatically inherit the change, if they have set the Synchronize from Position option to Yes in the Assignments page.

Areas of Responsibility

Configure the Areas of Responsibility Page Header

You want to configure the page header properties for Bob Price's area of responsibility record. .

Let's look at the steps to configure the page header. For any mandatory fields not mentioned in the steps, you can use the default values.

Create and Enable Sandbox

1. Click **Navigator > Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter the **Name**.
4. Select the **Active** check box for the **Page Composer** option.
5. Click **Create and Enter**.

Edit Panel Header Properties

1. Click **Home > My Client Groups > Show More**.
2. Click **Areas of Responsibility** under the **Employment** group.
3. Select Bob Price's record from the list of employees. The Areas of Responsibility page for Bob Price is shown.
4. Click **Page Composer** from the **Tools** menu.
5. Navigate to the **Structure** menu of the Page Composer.
6. Hover your cursor towards the bottom of the page to display the source code window. You can click or drag-up and release to expand the source window.
7. Click over the name (Bob Price) in the header
8. Click **Edit** in the **Confirm Shared Component Edit** window.
9. In the Structure, select `<outputText: Bob Price`.
10. Click the **Show properties of Bob Price** icon.
11. Click the **Value** drop down menu and select **Expression Builder**.
12. Click the **Type a value or expression** option and enter any of these expressions. We will add only the person number in this example.

To add	Expression
Person Number	<code>#{bindings.PersonNumber.inputValue}</code>
Assignment Number	<code>#{bindings.AssignmentNumber.inputValue}</code>
Assignment Name	<code>#{bindings.AssignmentName.inputValue}</code>

13. Click **OK**.
14. Click **Apply**.
Bob Price's area of responsibility record page header displays the additional attributes, person number, assignment number, and assignment name.
15. Test the Area of Responsibility page and verify results, then publish the sandbox changes.

Related Topics

- [Guidelines for Using Page Composer](#)

Terminations

Process to Migrate to Version 3 Termination

You run the Migrate Employment Data process to migrate the existing version 2 (V2) termination data to the new version 3 (V3).

You must run this process before you perform termination or resignation using the Terminate Employment or Resign from Employment quick actions. Use the Scheduled Processes work area to schedule and run the process.

Points to Consider

- Before you migrate to V3, you must first disable V2 termination. If you migrate before disabling V2 termination, you will receive an error message when you try to access V2 termination.
- You can run the process only once to migrate V2 termination data to the new V3. In principle, after you migrate to V3, you can't revert to V2.
- Before you decide to opt for the new V3 termination in a production environment, you must first thoroughly test the feature in a stage environment.
- If you decide to revert to V2 in the stage environment, you can do so by using the **Migrate to V2 Termination** diagnostic test. This test can only be run in a stage environment and not in a production environment. For more information about the diagnostic test, refer to this document on My Oracle Support: Migrate to V2 Termination (Doc ID 2851332.1)
- The **Migrate to V2 Termination** diagnostic test is intended for use only in stage environments and not production environments. Oracle is not responsible for any possible data corruption or loss of data integrity if the diagnostic test is run in a production environment.
- The **Migrate to V3 Termination** process migrates both termination and resignation data from V2 to V3.
 - You can't just migrate termination data to V3 and retain resignation data in V2.
 - Similarly, you can't just migrate resignation data to V3 and retain termination data in V2.

Process Parameter

You run the Migrate Employment Data process using the Migrate to V3 Termination parameter.

Parameter	Process Results
Migrate to V3 Termination	Version 2 termination data is moved to version 3.

For more information about the steps to enable for version 3 termination, see this document on My Oracle Support (<https://support.oracle.com>): Version 3 Termination and Resignation (Doc ID 2821906.1)

Related Topics

- [What are the scheduled processes?](#)
- [Submit Scheduled Processes and Process Sets](#)

FAQs for Employment

How can I create separate notification titles for resignation and termination?

When you specify a user-defined notification title for resignation and termination, you need to create two translation records, one each for resignation and termination.

Related Topics

- [Change Workflow Task Titles](#)

How can I disable the termination date field for employees?

You can do this using page composer. You need to make the Termination Date field on the Submit Resignation page read-only for employees and editable for approvers and other users accessing the page.

To do this, you use this EL expression in the page composer:

```
#{pageFlowScope.resignTerminateFlowMap.sameUserLoggedInFlag == 'Y'}
```

For more information about using expression language, see [Using Expression Language in Oracle Fusion Applications \(Doc ID 1982300.1\)](#) on My Oracle Support at <https://support.oracle.com>.

Related Topics

- [Examples of EL Expressions](#)

Where can I add personalized content for employment guided processes?

You can add in the Additional Content region. You need to enable this region for individual self-service transactions using the HCM Experience Design Studio. You have the option to make the region required or optional.

You can then use the ADF page composer to add your personal content such as a video, company policies, or links to internal documents.

Related Topics

- [How can I add additional content on the questionnaire pages?](#)
- [Add Additional Content to the Guided Flow for Promote Action](#)

11 Seniority Dates

Overview of Seniority Dates

All topics in this section pertain to version 3 (V3) of the seniority dates functionality. You can define and manage the seniority of workers using version 3 of the seniority dates functionality.

You can configure seniority dates using the Configure Seniority Dates task and a fast formula. You can manage them using the Seniority Dates task under Quick Actions.

For more information, see these documents on Customer Connect:

- Seniority Dates - Comparison between Different Seniority Dates Versions (<https://community.oracle.com/customerconnect/discussion/631037>)
- Seniority Dates - Troubleshooting Seniority Dates - Frequently Asked Questions (<https://community.oracle.com/customerconnect/discussion/631046>)
- Seniority Dates V3 - Calculating Seniority Dates Using Fast Formula (<https://community.oracle.com/customerconnect/discussion/631033>)
- Seniority Dates V3 - Common Use Cases Configured Using V3 Seniority Dates (<https://community.oracle.com/customerconnect/discussion/631036>)
- Seniority Dates V3 - Enabling Enterprise and LE Seniority During Hire (<https://community.oracle.com/customerconnect/discussion/631039>)
- Seniority Dates V1 - Seniority Dates Version 1 Frequently Asked Questions (<https://community.oracle.com/customerconnect/discussion/631042>)
- Seniority Dates V2 - Seniority Dates Version 2 (<https://community.oracle.com/customerconnect/discussion/631045>)

Note: If you're using V3 seniority dates, you can't view and manage V1 seniority dates of the legal employer and enterprise on the Work Relationship page.

Related Topics

- [Seniority Dates](#)
- [Examples of Calculating Seniority Dates](#)
- [Examples of Calculating Cumulative and Noncumulative Seniority Dates](#)

Seniority Date Attributes

You can configure seniority using these attributes:

Attribute	Where You Use it	Example
Enterprise and Legal Employer	<ul style="list-style-type: none"> • Termination • Absence entitlements • Benefits • Payments • Team schedules and availability • Awards and recognition 	<ul style="list-style-type: none"> • Workers with lower seniority are considered first for layoff. • Workers who have completed five years of service are entitled to additional vacation time or study leave. • Workers need to meet minimum service criteria to be eligible for long term disability plan. • Only workers who have completed eleven months of continuous service receive an annual bonus. Or, only workers with five years of continuous service are eligible for gratuity payments when they resign from the company. • Workers who have higher seniority are given preference for working in the normal shift. • Workers who have completed five years of service are presented with a certificate and company memento.
Grade, Job, and Position	<ul style="list-style-type: none"> • Promotion • Key additional assignments • Mentorship opportunities • Travel opportunities • Preference for public speaking and presentations 	<ul style="list-style-type: none"> • When performance is the same, workers with higher grade seniority are promoted. • Workers with higher job seniority are selected for greenfield assignments. • Workers with more experience are likely to be better mentors. • Workers with a longer tenure in certain sectors are more likely to be given preference for international travel.
Grade Step	Pay scales and pay increases	In certain sectors and industries, a worker is eligible for automatic movement to the next grade step in the progression. This eligibility is based on twelve continuous months of service at a particular grade step.
Union, Bargaining Unit, and Collective Agreement	Union office and benefits	Union members with higher seniority in the union become eligible for union offices and other union benefits.
Country	<ul style="list-style-type: none"> • Global temporary assignments • Visas and permits renewals • Payments 	<ul style="list-style-type: none"> • Workers who have spent specific time in a particular country may not be eligible to work in that country for a cooling period. • Workers who have spent specific time on a particular type of visa or permit, may have to re-apply or return to their home country. • Workers who have stayed for one year in a particular country may no longer be eligible for expenses and may be moved to that country payroll.

Attribute	Where You Use it	Example
Location, Department, and Business Unit	Transfer	In certain public offices, workers who have spent three years in a specific location, department, or business unit have to be transferred.
Assignment Category	<ul style="list-style-type: none"> Benefits Pay scales and pay increases 	In certain organizations, seniority in a certain assignment category, such as full-time regular is used to drive benefits, pay changes, employee eligibility to work certain hours, and wage progression rules.

Seniority Date Versions

You can manage the seniority of workers using V1, V2, or V3 versions of the Seniority Dates functionality. This table describes these versions:

Version	Description
V1	Seniority dates that are managed using the Work Relationship task are referred to as V1 seniority dates. You can only manage the Enterprise Seniority Date and Legal Employer Seniority Date using V1 seniority dates. V1 seniority dates are stored in the PER_PERIODS_OF_SERVICE table.
V2	<p>Seniority dates that are configured using the Configure Seniority Dates task without using advanced configuration options are referred to as V2 seniority dates. You can configure multiple seniority dates as per your requirement. These seniority dates are managed using the Seniority Dates task. V2 seniority dates are stored in the PER_SENIORITY_DATES table.</p> <p>Note: You run the Populate Seniority Dates ESS job to initially populate the seniority dates. After this job is run, you don't need to run any other scheduled process.</p>
V3	<p>Seniority dates that are configured using the Configure Seniority Dates task and advanced configuration options are referred to as V3 seniority dates. You can configure multiple seniority dates as per your requirement. These seniority dates are managed using the Seniority Dates task. V3 seniority dates are stored in the PER_SENIORITY_DATES_F table.</p> <p>Note: The seniority dates aren't calculated during run time. You must run the Calculate seniority Dates process to calculate seniority dates. You need to schedule this process because V3 seniority dates are populated only after the process is completed.</p>

For more information, see the document [Seniority Dates - Comparison between Different Seniority Dates Versions \(https://community.oracle.com/customerconnect/discussion/631037\)](https://community.oracle.com/customerconnect/discussion/631037) on Customer Connect.

Considerations for Migrating to V3 Seniority Dates

Here's some points to consider before you migrate to the new version (V3) from the earlier V1 or V2 version.

- Migrate from V1 to V3 while V2 exists
 - Select the **Migrate Seniority Data from V1 version of Seniority** process parameter.
 - After the migration, you can't view or modify V1 seniority dates.
 - You can no longer view or modify V2 seniority dates.
 - Create new rules for V3 seniority dates because all the V2 seniority date rules are inactivated.
- Migrate from V1 to V3 while V2 doesn't exist
 - Select the **Migrate Seniority Data from V1 version of Seniority** process parameter.
 - After the migration, you can't view or modify V1 seniority dates.
 - You can no longer view or modify V2 seniority dates.
- Migrate from V2 to V3 while V1 exists
 - Select the **Migrate Seniority Data from V2 version of Seniority** process parameter.
 - After the migration, you can't view or modify V2 seniority dates.
 - You can no longer view or modify V1 seniority dates.
 - Create new rules for V3 seniority dates because all the V1 seniority date rules are inactivated.
- Migrate from V2 to V3 while V1 doesn't exist
 - Select the **Migrate Seniority Data from V2 version of Seniority** process parameter.
 - After the migration, you can't view or modify V2 seniority dates.
 - You can no longer view or modify V1 seniority dates.
- No previous versions installed
 - New setup for V3 with no data migration.

Related Topics

- [Seniority Date Versions](#)
- [Process to Migrate Seniority Dates](#)

Process to Migrate Seniority Dates

You run the Migrate to Version 3 of Seniority Dates process to migrate the seniority dates data to the new version (V3) from earlier versions (V1 or V2). Use the Scheduled Processes work area to schedule and run the process.

Note: Before you migrate to V3, you must do these actions:

- Update the seniority basis for all worker assignment records to the appropriate values in days or hours. You can do this using HCM Data Loader.
- Verify the setup of V2 seniority rules if you're migrating from V2 to V3. If you have rules in V2 that are no longer required, inactivate them. The migration process won't create V3 seniority data for the inactive rules.

You can run the process only once to migrate seniority data from V1 or V2 to V3.

If you want to roll back to V1 or V2 after migrating to V3, run the Migrate from V3 to V2/V1 - Correct diagnostic test. For more information, refer to the Migrate from V3 to V2 or V1 - Correct attachment in the document Self-Service Data Integrity Framework for Employment Flows - Part 1 (Doc ID 2548287.1) on My Oracle Support (<https://support.oracle.com>).

What Happens When You Run the Process

V1 to V3 conversion: V1 seniority dates only display the hire date and seniority date for the enterprise and legal employer and you don't configure any seniority rules. When you run the process to migrate seniority data from V1 to V3, the application automatically creates these seniority rules:

- Legal Employer Seniority Date - Work Relationship Level - Migrate
- Enterprise Seniority Date - Person Level - Migrate

The process hides the seniority dates on the Work Relationship page and the application stops populating V1 seniority dates. However, the application will retain the value of the V1 seniority dates. If there are adjusted values for V1 seniority dates, the application automatically creates the corresponding adjustments for V3 seniority rules. Therefore, the resulting seniority dates values are the same in V3. The seniority dates region in the employment information UI will display V3 seniority dates instead of V1 seniority dates. After the migration to V3, seniority data is maintained in the PER_SENIORITY_DATES_F table and the PER_PERIODS_OF_SERVICE table is no longer used to maintain V1 seniority dates.

Note: All existing V1 and V2 seniority data are retained in the PER_PERIODS_OF_SERVICE and PER_SENIORITY_DATES tables respectively. However, the V2 seniority rules are marked as inactive during the migration process if only the V1 migration option is selected.

V2 to V3 conversion: In V2, you can configure seniority rules at various levels. When you run the process to migrate seniority data from V2 to V3, the application automatically converts the V2 seniority rules to V3 and retains the seniority date. The advanced configuration options of V3 seniority dates become available on the Configure Seniority Dates page. The seniority dates are now populated in the PER_SENIORITY_DATES_F table instead of the PER_SENIORITY_DATES table. The new seniority dates are displayed on the Seniority Dates page.

Note: You must re-evaluate the integrations, extracts, reports, derived factors, eligibility profiles, and fast formulas. This is because these items may be using the tables or database items where the underlying seniority dates version is V1 or V2. All existing V1 and V2 seniority data are retained in the PER_PERIODS_OF_SERVICE and PER_SENIORITY_DATES tables respectively.

Process Parameter

The Migrate to Version 3 of Seniority Dates process uses the Migrate Seniority Data From parameter. This parameter indicates whether you want to migrate seniority dates data to V3 from V1 or V2, or both based on your current application setup.

Parameter	Process Results
V1 Seniority to Non-Cumulative V3 Seniority	<ul style="list-style-type: none"> V1 seniority dates are moved to V3. V3 seniority rules corresponding to V1 seniority are created as non-cumulative. V2 seniority isn't migrated to V3.
V2 Seniority to Cumulative V3 Seniority	<ul style="list-style-type: none"> V2 seniority dates are moved to V3. V3 seniority rules corresponding to V2 seniority are created as cumulative. V1 seniority isn't migrated to V3.
V2 Seniority to Non-Cumulative V3 Seniority	<ul style="list-style-type: none"> V2 seniority dates are moved to V3. V3 seniority rules corresponding to V2 seniority are created as non-cumulative. V1 seniority isn't migrated to V3.
V1 and V2 Seniority to Non-Cumulative V3 Seniority	<ul style="list-style-type: none"> Both V1 and V2 seniority dates are moved to V3. V3 seniority rules corresponding to V1 and V2 seniority are created as non-cumulative.
V1 to Non-Cumulative and V2 to Cumulative V3 Seniority	<ul style="list-style-type: none"> Both V1 and V2 seniority dates are moved to V3. V3 seniority rules corresponding to V1 seniority are created as non-cumulative. V3 seniority rules corresponding to V2 seniority are created as cumulative.

Related Topics

- [Seniority Date Versions](#)
- [Considerations for Migrating to V3 Seniority Dates](#)
- [What are the scheduled processes?](#)
- [Submit Scheduled Processes and Process Sets](#)

V3 Seniority Dates Profile Options

For version 3 (V3) seniority dates, you can configure multiple seniority dates. However, for V1 seniority dates, only enterprise and legal employer seniority dates are available.

In the scenario where you want to identify two V3 seniority rules (enterprise and legal employer), these profile options can be used. The profile options indicate which V3 seniority rules should be considered as enterprise and legal employer seniority dates for use by other products and downstream or external applications. For example, the compensation product uses this mapping.

Note: You must configure these profile options only if you're using V3 seniority dates.

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these V3 seniority dates-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_SENIORITY_DATE_AT_ENT	Seniority Date code to fetch Seniority Date at Enterprise	Enterprise Seniority Date - Person Level - Migrate	Select the seniority rule for this profile option that you want to map as the enterprise seniority date for V3 seniority dates. If you don't set any value for the profile option, the compensation product uses the Enterprise Seniority Date - Person Level - Migrate seniority rule (created during V1 seniority dates migration).
ORA_PER_SENIORITY_DATE_AT_LE	Seniority Date code to fetch Seniority Date at Legal Employer	Legal Employer Seniority Date - Work Relationship	Select the seniority rule for this profile option that you want to map as the legal employer seniority date for V3 seniority dates. If you don't set any value for the profile option, the compensation product uses the Legal Employer Seniority Date - Work Relationship Level - Migrate seniority rule (created during V1 seniority dates migration).

How to Change V3 Seniority Dates Rule Configuration

You can change the version 3 (V3) seniority rule configuration only if transactional data isn't already generated for a V3 seniority date rule.

Use the **Seniority Dates V3 - Remove Seniority Dates Transaction Data** diagnostic process to change the version 3 (V3) seniority rule configuration by deleting transaction data for the selected seniority rule. You can change the seniority configuration for a single seniority rule even if it's used in the calculation.

Note: The V3 seniority rules setup doesn't allow the configuration to be changed for a seniority rule if transaction data exists for the rule.

Diagnostic Process Details

This table describes the diagnostic process:

Diagnostic Test Name	Description
Seniority Dates V3 - Remove Seniority Dates Transaction Data	Remove transaction data for seniority dates version 3. Once this process is completed, you can make configuration changes for the selected seniority rule.

The diagnostic process can be run only for a single V3 seniority rule which can be active or inactive. The test can be run in these two modes:

- **Validate:** The seniority rule transaction data is not deleted in this preview mode.
- **Commit:** The seniority rule transaction data is deleted for the selected rule.

When the process is run in the Validate mode, user can choose to automatically generate manual adjustments in the HCM Data Loader format. The adjustments can be loaded back after the configuration change, hence making the overall process simpler.

Note: The application generates the HCM Data Loader output in the process log file, and generates only in the Validate mode.

These are the steps to change the configuration for a V3 seniority rule:

1. Run the **Seniority Dates V3 - Remove Seniority Dates Transaction Data** process in Validate mode and generate the manual adjustments in the HCM Data Loader format.
2. Verify the results.
3. Run the **Seniority Dates V3 - Remove Seniority Dates Transaction Data** process in Commit mode. This will remove the transaction data, and you can make configuration changes in the seniority rule.
4. Perform the configuration changes for the seniority rule you want.
5. Run the **Calculate Seniority Dates** process for the selected seniority rule.
6. Load the manual adjustments using HCM Data Loader with the data generated in step 1.
7. Run the **Calculate Seniority Dates** process for the selected seniority rule.

You can migrate V1 and V2 seniority dates to V3 seniority dates in one go and choose to create your V3 seniority rules as cumulative or non-cumulative when migrating from V2. Also, you can change the seniority configuration for a single seniority rule even if it's used in the calculation.

For more information, see the following documents:

- Self-Service Data Integrity Framework for Employment Flows - Part 1 (Doc ID 2548287.1) > Migrate from V3 to V2 or V1 - Correct on My Oracle Support
- Seniority Dates - Troubleshooting Seniority Dates - Frequently Asked Questions (<https://community.oracle.com/customerconnect/discussion/631046>) on Customer Connect.

Related Topics

- [Process to Migrate Seniority Dates](#)
- [Guidelines for Loading Seniority Dates](#)

How You Configure Seniority Dates

You can configure the rules for creating seniority dates using the Configure Seniority Dates task.

The seniority date rule defines the name and behavior of the seniority date. For example, you can define an enterprise seniority date at person level. When the first work relationship is created for a person, the enterprise seniority date is calculated from the start date of the work relationship.

Note: After the seniority dates are calculated for a worker using a seniority rule, you can't change the configuration of the seniority rule. However, you can disable the seniority date rule by setting the active option to No.

Configuration Options

You can use the following options in the Configure Seniority Date Rules page:

- **Active:** You can enable or disable the seniority date rule using this option. If the rule is active, seniority dates are automatically generated when the employment data is changed, according to the rule definition. If the rule isn't active, seniority dates aren't generated.
 - **Note:** You can't edit or delete a seniority date rule if the corresponding seniority date rule has been used to populate seniority dates for a person in the application. However, you can disable the seniority date rule in the Active field.
- **Seniority Rule Name:** You must select from one of the predefined values, such as the bargaining unit seniority date - assignment level, enterprise seniority date - person level, and legal employer seniority date - work relationship level. These values are defined in the ORA_PER_SENIORITY_ITEMS lookup type. You can add a new value to the Seniority Rule Name list by adding the value as a lookup code to this common lookup type.
- **Attribute:** You can define the seniority date configuration based on this attribute. For example, legal employer is the seniority attribute in case of a legal employer seniority date and enterprise is the seniority attribute in case of an enterprise seniority date. When the seniority attribute is created or modified, the corresponding seniority date will be populated in the application according to the rules in the setup.
- **Level:** You can configure seniority dates at the person, work relationship, and assignment levels. Here's what's considered when deriving the seniority date for each level:
 - Person: All the work relationships and assignments of the person.
 - Work relationship: All the assignments in the work relationship.
 - Assignment: Only the individual assignment is considered while deriving the seniority date at the assignment level.
- **Adjustment Formula:** This option is hidden out-of-the-box in the Seniority Date Rule List table. You can display this option using the View menu from the table. You can configure an adjustment formula to calculate the seniority date adjustments using the Employment Seniority Date Adjustment formula type. This formula is evaluated for all assignment records that are used in the seniority calculation. If the formula-calculated seniority date adjustment has a zero value, the adjustment formula will be ignored in the seniority date calculation. You need to configure the formula such that it calculates a non-zero value for the effective date where the adjustment needs to be updated or corrected.

- Cumulative:** Identifies the calculation logic of seniority when there is a gap in service. When you create a new seniority rule, the default value of this option is No. When this option is set to yes, the application also considers the previous seniority calculations for the calculation of seniority. For example, consider a worker who was associated with an organization from 1-Jan-2001 to 31-Dec-2009 and the Cumulative option is set to yes for both the seniority dates. The details of his association and the seniority calculation is shown in the following table.

Action	Start Date	End Date	Legal Employer	Legal Employer Seniority	Enterprise Seniority	Comments
Hire	1-Jan-2001	31-Dec-2001	Vision US	1 year	1 year	
Global Transfer	1-Jan-2002	31-Dec-2002	Vision CA	1 year	2 years	The enterprise seniority is the sum of 1 year in the current work relationship and 1 year in the previous work relationship.
Termination	31-Dec-2002					
Rehire	1-Jan-2007	31-Dec-2007	Vision UK	1 year	3 years	The enterprise seniority date is configured to be cumulative. Therefore, the enterprise seniority is the sum of 1 year in the current work relationship and 2 years in the previous work relationship.
Global Transfer	1-Jan-2008	31-Dec-2009	Vision US	3 years	6 years	The legal employer seniority date is configured to be cumulative. Therefore, the seniority for the Vision US legal employer is the sum of 2 years in the current

Action	Start Date	End Date	Legal Employer	Legal Employer Seniority	Enterprise Seniority	Comments
						work relationship and 1 year in the previous work relationship. The enterprise seniority date is configured to be cumulative. Therefore, the enterprise seniority is the sum of 2 years in the current work relationship and 4 years in the previous work relationship.
Termination	31-Dec-2009					

- **Allow Edit:** Specify whether users can override the seniority date using the Seniority Dates task. If you set the value in this field to No, you can't edit the corresponding seniority date on the Seniority Dates page.
- **Display in Guided Flows:** Specify whether the seniority date can be displayed in the guided processes. If this option is set to yes for a seniority date, the seniority date is displayed in the guided processes in view-only mode.
- **Override Seniority Basis:** Seniority is calculated in days or hours based on the seniority basis value in the worker's assignment. You can define an override for the seniority basis at the individual seniority rule level. For example, you can specify that a seniority rule must always be calculated in hours even though the worker's assignment basis is days.
- **Conversion of Hours:** When you can't use a single set of conversion rules, you can convert hours to days using the Employment Seniority Hours to Days Conversion formula type. You can define the hours for:
 - Hours to day conversion
 - Hours to month conversion
 - Hours to year conversion

- **Seniority Filters:** This option is hidden out-of-the-box in the Seniority Date Rule List table. You can display this option using the View menu from the table. This table shows you examples of how the filter conditions can be used:

Seniority Filter	Example
Worker Type	To exclude only pending workers from the seniority dates calculation, you must select all other values except the Pending Worker value. By default, the Employee value is selected which means that only employees are included in the seniority date calculation.
Country	To calculate the seniority rule only for workers whose legal employers are in the United States, you must select the United States value.
Legal Employer	To calculate the seniority rule only for workers in two specific legal employers (for example, LE1 and LE2), you must select the LE1 and LE2 values.
Union and Collective Agreement	To calculate the seniority rule only for workers in one specific union and collective agreement (for example, UN1 and CA1), you must select the UN1 and CA1 values in the corresponding filter. The application will apply both the filter conditions when evaluating workers for the seniority rule.
Union Member	To calculate the seniority rule only for union workers, you must select the Yes value.

Related Topics

- [Seniority Dates](#)

Fast Formulas for V3 Seniority Dates

Fast formulas are generic expressions of calculations or comparisons that you want to repeat with different input variables. You can use fast formula to calculate the seniority dates of a worker.

Version 3 (V3) seniority dates support these fast formulas:

- Employment Seniority Date Adjustment
- Employment Seniority Hours to Days Conversion

This table lists the input parameters, return variables, and context for the fast formulas:

Fast Formula Type	Input Parameters	Return Variables	Context
Employment Seniority Date Adjustment	<ul style="list-style-type: none"> • EFFECTIVE_START_DATE (DATE) 	<ul style="list-style-type: none"> • EFF_DATE (DATE) 	<ul style="list-style-type: none"> • HR_RELATIONSHIP_ID

Fast Formula Type	Input Parameters	Return Variables	Context
	<ul style="list-style-type: none"> • EFFECTIVE_END_DATE (DATE) • SENIORITY_DATE_CODE (TEXT) • SENIORITY_BASIS (TEXT) • CUMULATIVE_FLAG (TEXT) • BASE_SENIORITY_DATE (DATE) • PREVIOUS_SENIORITY_EXIT_DATE (DATE) • SENIORITY_LEVEL_OBJECT_ID (NUMBER) • SENIORITY_TRIGGERING_FIELD_CODE (TEXT) • ACTION_CODE (TEXT) • CHANGED_VALUE_NEW (TEXT) • CHANGED_VALUE_OLD (TEXT) • SENIORITY_LEVEL_CODE (TEXT) • TOTAL_SENIORITY_HOURS (NUMBER) • PREVIOUS_TOTAL_SENIORITY_HOURS (NUMBER) • SENIORITY_DATE (DATE) • LEGAL_EMPLOYER_ID (NUMBER) • LEGAL_EMPLOYER_NAME (TEXT) • ENTERPRISE_ID (NUMBER) • ENTERPRISE_NAME (TEXT) • BARGAINING_UNIT_CODE (TEXT) • BARGAINING_UNIT_NAME (TEXT) • GRADE_ID (NUMBER) • GRADE_NAME (TEXT) • GRADE_STEP_ID (NUMBER) • GRADE_STEP_NAME (TEXT) • JOB_ID (NUMBER) • JOB_NAME (TEXT) • POSITION_ID (NUMBER) • POSITION_NAME (TEXT) 	<ul style="list-style-type: none"> • SENIORITY_ADJUST_COMMENT (TEXT) • SENIORITY_ADJUST_IN_DAYS (NUMBER) • SENIORITY_ADJUST_IN_HOURS (NUMBER) 	<ul style="list-style-type: none"> • HR_TERM_ID • PAYROLL_RELATIONSHIP_ID • PAYROLL_TERM_ID • DATE_EARNED • HR_ASSIGNMENT_ID • PERSON_ID • EFFECTIVE_DATE • PAYROLL_ASSIGNMENT_ID • LEGISLATIVE_DATA_GROUP_ID • LEVEL_OBJECT_ID • SENIORITY_DATE_CODE • SENIORITY_FIELD_NUMBER • UNIT_OF_MEASURE

Fast Formula Type	Input Parameters	Return Variables	Context
	<ul style="list-style-type: none"> UNION_ID (NUMBER) UNION_NAME (TEXT) LOCATION_ID (NUMBER) LOCATION_NAME (TEXT) DEPARTMENT_ID (NUMBER) DEPARTMENT_NAME (TEXT) COLLECTIVE_AGREEMENT_ID (NUMBER) COLLECTIVE_AGREEMENT_NAME (TEXT) PAST_PERIOD_IN_DAYS (NUMBER) EFFECTIVE_SEQUENCE (NUMBER) EFFECTIVE_LATEST_CHANGE (TEXT) 		
Employment Seniority Hours to Days Conversion	<ul style="list-style-type: none"> EFFECTIVE_START_DATE (DATE) EFFECTIVE_END_DATE (DATE) DIRECTION (TEXT) HOURS (NUMBER) YEARS (NUMBER) MONTHS (NUMBER) DAYS (NUMBER) 	<ul style="list-style-type: none"> RETURN_HOURS (NUMBER) RETURN_YEARS (NUMBER) RETURN_MONTHS (NUMBER) RETURN_DAYS (NUMBER) 	<ul style="list-style-type: none"> HR_RELATIONSHIP_ID HR_TERM_ID PAYROLL_RELATIONSHIP_ID PAYROLL_TERM_ID DATE_EARNED HR_ASSIGNMENT_ID PERSON_ID EFFECTIVE_DATE PAYROLL_ASSIGNMENT_ID LEGISLATIVE_DATA_GROUP_ID LEVEL_OBJECT_ID SENIORITY_DATE_CODE SENIORITY_FIELD_NUMBER UNIT_OF_MEASURE

How to Override Seniority Basis

You calculate seniority in days or hours using the seniority basis value in the worker's assignment. Using the Configure Seniority Dates task, you can override the seniority basis for a particular seniority rule.

For example, you can say that a seniority rule must always be calculated in hours even though the worker's assignment basis is days. The default value for the override in the application is Either Days or Hours.

Let's see how seniority rule is calculated depending on the override values you specify for the seniority basis.

Seniority Basis on the Assignment	Overridden Seniority Basis	Basis for Calculating Seniority Rule
Days	Days	Calendar days
Hours	Days	Calendar days
Days	Hours	Hours loaded in the seniority hours table
Hours	Hours	Hours loaded in the seniority hours table
Days	Either Days or Hours	Calendar days
Hours	Either Days or Hours	Hours loaded in the seniority hours table

Common Rule Configurations for V3 Seniority Dates

Let's see some examples of configuring version 3 (V3) seniority dates by using these seniority rules:

- **Enterprise Seniority Date:** You want the application to automatically account for the break in service.
- **Legal Employer Seniority Date:** You want to track the start date with each legal employer work relationship.
- **Latest Hire Date:** You want to track the last hire or rehire date for a worker.

Configuration Options

Rule Name	Level	Attribute	Cumulative Flag	Fast Formula
Enterprise Seniority Date	Person	Enterprise	Yes	Not required
Legal Employer Seniority Date	Work Relationship	Legal Employer	No	Not required
Latest Hire Date	Person	Enterprise	No	Not required

Sample Data Used

This table displays the sample data used in the example. In this table, the worker is hired for legal employer 1 (LE1 - GBI_GHR_2TSA) on 01-JAN-2014 and globally transferred from LE1 on 01-JAN-2015. The global transfer is to legal employer 2 (LE2 - GBI_GHR_2TSCSA) and the worker resigns from LE2 on 01-JAN-2016. The worker is then rehired for legal employer 3 (LE3 - GBI_GHR_2TMCSA) on 01-JAN-2017.

Action	Date	Legal Employer
Hire	01-JAN-2014	GBI_GHR_2TSA
Global Transfer	01-JAN-2015	GBI_GHR_2TSCSA
Resignation	01-JAN-2016	GBI_GHR_2TSCSA
Rehire	01-JAN-2017	GBI_GHR_2TMCSA

This table displays the seniority date calculation for the seniority rules used in the example.

Action	Date	Legal Employer	Enterprise Seniority Date	Legal Employer Seniority Date	Latest Hire Date
Hire	01-JAN-2014	LE1 - GBI_GHR_2TSA	01-JAN-2014	01-JAN-2014	01-JAN-2014
Global Transfer	01-JAN-2015	LE2 - GBI_GHR_2TSCSA	01-JAN-2014	LE2 - 01-JAN-2015 LE1 - 01-JAN-2014	01-JAN-2014
Resignation	01-JAN-2016	LE2 - GBI_GHR_2TSCSA	01-JAN-2014	LE2 - 01-JAN-2015 LE1 - 01-JAN-2014	01-JAN-2014
Rehire	01-JAN-2017	LE3 - GBI_GHR_2TMCSA	01-JAN-2015 Seniority date is auto adjusted by 366 days due to 2016 being a leap year and the worker not being in service during 2016.	LE3 - 01-JAN-2017 LE2 - 01-JAN-2015 LE1 - 01-JAN-2014	01-JAN-2017

Enterprise Seniority Date: The worker had a break in service for one year from the organization. The seniority date is automatically adjusted for this seniority rule because the cumulative option is set to yes.

Legal Employer Seniority Date: Since the worker was associated with 3 legal employers in the given period, the 3 legal employers are listed in the attribute list (GBI_GHR_2TMCSA, GBI_GHR_2TSA, and GBI_GHR_2TSCSA).

Note: The active legal employer will be listed first in the attribute list (GBI_GHR_2TMCSA).

Latest Hire Date: The worker had a break in service for one year from the organization. The last hire date is displayed in the Seniority Date field (01-JAN-2017).

Seniority Dates User Entities

You can use user entities to describe seniority date information for V3 seniority dates.

The following table describes the user entities that are available for seniority dates:

User Entity Name	Description	User Entity Context
PER_SENIORITY_DATES_V3_SDC_UE	This user entity is used to describe the seniority date information for V3 seniority dates.	The following contexts must be provided for this user entity: <ul style="list-style-type: none"> PERSON_ID EFFDT SENIORITY_DATE_CODE
PER_SENIORITY_DATES_V3_UE	This user entity is used to describe the seniority date information for V3 seniority dates.	The following contexts must be provided for this user entity: <ul style="list-style-type: none"> PERSON_ID EFFDT
PER_SENIORITY_HOURS_V3_UE	This user entity is used to describe the seniority hours information for an hours-based worker in V3 seniority dates.	The following context must be provided for this user entity: <ul style="list-style-type: none"> PERSON_ID

FAQs for Seniority Dates

How can I find out which version of seniority dates I am using?

Run this query in your database instance: `SELECT VERSION_CODE FROM FUSION.PER_EMPL_CONFIGURATIONS`

Why can't I see the seniority rule on the Employment Info page when it's displayed on the Seniority Dates page?

To display the rule on the Employment Info page, set the Display in Guided Flows option to Yes on the Configure Seniority Date Rules page.

How can I find the most recent hire date when using V3 seniority dates?

You can do so by configuring a non-cumulative rule at the person level for the enterprise attribute. For more information, see the document [Seniority Dates V3 - Common Use Cases Configured Using V3 Seniority Dates \(https://community.oracle.com/customerconnect/discussion/631036\)](https://community.oracle.com/customerconnect/discussion/631036) on Customer Connect.

How can I exclude pending workers from the seniority dates calculation?

You must clear the Pending worker check box in the Worker Type seniority filter on the Configure Seniority Date Rules page.

What's the source for the seniority hours used in calculating hours-based seniority?

The source is the hours loaded in the PER_SENIORITY_HOURS table.

How can I load hours in the seniority hours table?

By using HCM Data Loader. For more information, see the Oracle Human Capital Management Cloud Integrating with HCM guide on Help Center at <https://docs.oracle.com/en/cloud/saas/index.html>

Can I use assignment or standard working hours when calculating hours-based seniority?

No. To calculate hours-based seniority, you must load hours in the PER_SENIORITY_HOURS table using HCM Data Loader.

Why can't I calculate V3 seniority dates by running the Populate Seniority Dates process?

The Populate Seniority Dates process is used to calculate version 2 (V2) seniority dates after the initial conversion. You must run the Calculate Seniority Dates process to calculate the V3 seniority dates.

12 Checklists and Journeys

Overview of Checklists and Journeys

This topic highlights the key features of checklists and journeys.

A checklist is a group of tasks that need to be completed when an action occurs. For instance, tasks that need to be performed when onboarding new hires, off boarding, or transferring a worker.

You create and maintain checklist tasks within a template using the Checklist Templates task in Setup and Maintenance. A checklist can be automatically allocated when an action occurs or you can allocate it manually.

Based on the checklist category, you can manage standard checklists using the Allocate Checklists quick action, enterprise onboarding checklists using the Onboarding work area, and checklists of other types other than enterprise onboarding, using the Checklist Tasks app.

A journey extends the checklist functionality and enables all stakeholders to act on tasks in a single application. Tasks guide workers when they experience a change be it work related such as transfer or personal such as an update to their marital status.

You can create a journey by building on an existing checklist template or create a brand new journey in the Journeys app. A journey can be allocated manually or automatically. You can not only assign a journey to other people, you can also assign it yourself.

When you enable Journeys, other apps such as Onboarding and Checklist Tasks aren't available.

Related Topics

- [Profile Options](#)
- [Checklist and Journey Templates](#)

Checklist and Journey Configuration

Lookups

This topic identifies lookups related to onboarding and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements. You review lookups using the Checklist Lookups task in the Setup and Maintenance work area.

Checklist Lookups

Here's a list of checklists lookups you can use:

Lookup type	Description	Configuration Level
CHECKLIST_CATEGORY	Categories of checklists, such as on boarding and off boarding.	Extensible
ORA_PER_CHK_TASK_CATEGORY	Category of task in the task library.	Extensible
ORA_PER_ONB_CONTACT_TITLE	Title of the onboarding sponsor.	Extensible
ORA_PER_ONB_CONTENT_CATEGORY	Content category indicates the onboarding event.	Extensible
ORA_PER_CHK_TASK_ACTION_LIST	Supported application task list for a checklist task.	Extensible
ORA_PER_CHK_SUB_CATEGORY	Sub category of a checklist.	Extensible. Not in use.
ORA_CHK_SURVEY_CATEGORIES	Types of survey categories.	Extensible.

Note: ORA_PER_CHK_TASK_ACTION_LIST isn't available for use.

Categories

This table shows the different journey categories and their usage.

Category	Usage
Absence	Predefined absence journey template that can be assigned to workers. For example, Oracle- Long Sick Leave.
Benefits	Predefined benefits journey template that can be assigned to workers. For example, Oracle- Benefits Enrollment.
Career Development	To configure tasks that need to be performed by workers to excel in their current roles and for career growth. For example, tasks related to learning, skill development, and career mobility. You must configure this category as part of implementing Oracle Grow.
Compensation	Predefined compensation journey template that can be assigned to workers. For example, Oracle- Employee Recognition Award.
Contextual Journey	To configure tasks that need to be performed by different task performers before a HCM transaction. For example, tasks that a manager needs to do before a transfer action.
Enterprise onboarding	To configure journey to onboard new hires either before, on, or after their joining date. For example, Oracle – Onboarding Process.

Category	Usage
Enterprise onboarding step	To configure onboarding tasks that new hires need to complete during the onboarding process.
Gatekeeper law	Predefined gatekeeper law journey template that can be assigned to workers. This journey includes statutory tasks for compliance with the Gatekeeper Law, to support the reintegration of the employee back into the workforce after long-term or related sickness absences.
Guided Journey	To provide guidance, such as tutorials, company policies, and best practices in the context of an HCM flow using guided journey tasks. For example, tasks to help a line manager transfer an employee.
Health and Safety	Predefined health and safety journey template that can be assigned to workers. For example, Oracle-Virus or Illness or Injury.
Learn	Predefined learn journey template that can be assigned to workers. For example, Oracle- Learning Record Activation.
Off Boarding	Predefined off boarding journey template that can be assigned to workers. For example, Oracle-Reduction in Force or Furlough.
On Boarding	Predefined on boarding journey template that can be assigned to workers. For example, Oracle-Relocation Journey.
Person	Predefined person journey template that can be assigned to workers. For example, Oracle- Just Married.
Recruiting	Predefined recruiting journey template that can be assigned to workers.
Survey	To configure a survey journey to answer a questionnaire. For example, you want to send this survey to new hires who join the organization from September to October.
Talent Management	Predefined talent management journey template that can be assigned to workers. For example, Oracle-Succession Readiness.

Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage Checklist profile options.

You can configure these checklist-related profile options as required, to meet your enterprise requirements.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_HCM_ESIGN_URL	Provider URL for DocuSign	Not applicable, no longer in use	Enables you to provide the Provider URL for DocuSign.
ORA_PER_CHECKLIST_ACTION_PURGE_BEFORE_DAYS	Purge Duration for Checklist Action Occurrence Records	180 days	Specify the duration in days prior to which existing checklist action occurrence records should be deleted.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_CHECKLIST_ASYNC_IDLE_TIME_THREAD	Thread Idle Time During Asynchronous Web Service Checklist Allocation in Journeys	300 sec	Specify the idle time for threads during asynchronous web service checklist allocation in Journeys.
ORA_PER_CHECKLIST_ASYNC_MAX_THREADS	Maximum Threads Allowed During Asynchronous Web Service Checklist Allocation in Journeys	5	Specify the maximum number of threads to be used during asynchronous web service checklist allocation in Journeys.
ORA_PER_CHECKLIST_DEFER_DOCUSIGN_CREATION	Defer DocuSign Document Creation on Checklist Allocation Enabled	N	Enable the creation of DocuSign document to be deferred during checklist allocation. If you want to defer the creation of the document to be signed in DocuSign until the time the performer initiates the DocuSign journey task, set the profile value to Y.
ORA_PER_CHECKLIST_DEFER_I9_CREATION	Defer I9 Creation on Checklist Allocation Enabled	N	Enables the creation of I9 to be deferred during checklist allocation. An I9 document is created in HireRight when the checklist is allocated. If you want to defer the creation of the I9 document until the time the employee accesses the I9 task, set the value to Y.
ORA_PER_CHECKLIST_DISABLE_ALERTS	Disable Checklist and Task Alert Notifications	N	Disables alert notifications for checklist and task.
ORA_PER_CHECKLIST_MANUAL_ASYNC_ALLOCATION	Enable Asynchronous Checklist Allocation	RUI, REST	Enable asynchronous allocation of checklists in responsive pages and REST services.
ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL	Checklist Email Notifications Enabled	N	If you set this site-level profile option to Y, checklist email notifications are sent to a pending worker's home email address in addition to their user account email. For more information, see How You Enable Checklist Email Notifications During Preboarding.
ORA_PER_CHECKLIST_USE_OAUTH_IN_DOCUSIGN	Enable OAuth for DocuSign	N	Enable OAuth based authentication for DocuSign integration in checklists and journeys.
ORA_PER_CHECKLIST_USE_ORACLE_DOCUSIGN_INTG_KEY	Common Integration Key for DocuSign Enabled	Y	If you set this site-level option to N it enables the integration key field on the configuration page.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN	Production Account for OAuth DocuSign Integration Enabled	Y	Enable the production OAuth Account to be used for DocuSign integration in production environments.
ORA_PER_CHK_ADD_TASK_ENABLED	Enabled Add Properties for Checklist Task	N	<p>If you set this site-level option to Y, it displays the Notification Overrides, Display Properties, and Reminders sections in the Add Task or Edit Task responsive pages.</p> <p>Note: This profile option isn't applicable for Journeys (VBCS) pages.</p>
ORA_PER_CHK_ENABLE_I9_USERREF_CHANGE	Update of User Reference Enabled for I9 Section 2	N	If you set this site-level option to Y, the User Reference for Section 2 field in the Configure Checklist Integration page displays the Person Identifier and Person Number values in addition to the default Primary Email value.
ORA_PER_CHK_OPA_ENDPOINT	Specify Application Name for Oracle Process Automation End Point	ORA_PROCESS_AUTOMATION_APP	Specify the application name for Oracle Process Automation end point either as ORA_PROCESS_AUTOMATION_APP or ORA_DIGITAL_ASSISTANT_APP
ORA_PER_CONTEXTUAL_JOURNEYS_ENABLED	Enable Contextual Journeys	N	Enable contextual journeys user interface.
ORA_PER_NUDGE_PROCESS_JOURNEYS_ENABLED	Assigning Journeys to Nudge Recipients Enabled	N	Enable the Nudges ESS process to assign journeys to recipients.
ORA_PER_GUIDED_JOURNEYS_ENABLED	Enable Guided Journeys	N	Enable the user interface for guided journeys.
ORA_PER_JOURNEY_ARCHIVE_DURATION	Journeys Archive Duration	12	Specify the duration in months after which journeys should be archived. If you don't specify a value at the checklist template level then this profile value is used for archiving.
ORA_PER_JOURNEY_DEFAULT_SEARCH	Filter Option for Assigned Journeys	ALL	Specify whether to filter assigned journeys by all or direct reports. The possible values are: <ul style="list-style-type: none"> All Directs - Show only directs for the Organization filter. None - Doesn't display results without a search term.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_JOURNEY_DISABLE_COUNTS	Journeys Count Display Disabled	Hide journey counts and show only categories in use	The possible profile values are: <ul style="list-style-type: none"> Hide journey category chip Hide journey counts and show all categories Hide journey counts and show only categories in use Show journey counts
ORA_PER_JOURNEY_ENABLE_ADF_CONFIG_FORM	Redwood to Responsive Switch Enabled for Configurable Form Journey Task	N	Enable the display of the configurable form journey task from redwood to responsive page.
ORA_PER_JOURNEY_PURGE_DURATION	Journeys Purge Duration	12	Specify the duration in months after which journeys should be purged. If you don't specify a value at the checklist template level then this profile value is used for purging.
ORA_PER_JOURNEY_SEARCH_CRITERIA	Search Criteria for Assigned Journeys	Journey name or person name	Control the search criteria for the Assigned Journeys tab. The possible profile values are: <ul style="list-style-type: none"> Journey name or person name Person name only
ORA_PER_JOURNEY_TASKS_USERGUID_ENABLED	GUID Usage for Journey Task Performers Enabled	N	Enable the usage of the Globally Unique Identifier GUID for the logged in user instead of their user name.
ORA_PER_JOURNEYS_ENABLED	Journeys UI Enabled	N	If you set this site-level option to Y you can use Journeys to manage checklists of all categories be it predefined or user-defined from a single place. When you enable Journeys, the Onboarding and Checklists Tasks apps aren't available.
ORA_PER_JOURNEY_SECURITY_ENABLED	Data Security for Journeys Enabled	N	Enable to apply data security to journey templates and assigned journeys.
ORA_PER_JRNY_SEARCH_STARTSWITH	Enable Search in Journeys Using StartsWith	Y	Enables search in Journeys pages by using the StartsWith criteria.
ORA_PER_SOA_JOURNEY_ASSIGNEE_SELECTION_TYPE	Assignee Type for SOA Based Journeys	P	Controls the values in the Selection Type list of values on the Assign Journey page. You can select these types of assignees: <ul style="list-style-type: none"> Person (default option)

Profile Option Code	Profile Display Name	Default Profile Value	Description
			<ul style="list-style-type: none"> • Directs of a person. Directs refer to the immediate reportees of the selected person. • Organization of a person. Organization refers to the entire management hierarchy of the selected person.
PER_CHECKLIST_IMPEXP_ENABLED	Checklist Import Export Enabled	N	Enables the Import option in the Checklist Templates setup page. For information on creating the profile, see Create and Edit Profile Options in the Implementing Applications Guide.

Checklist and Journey Templates

Create checklist templates using the Checklist Templates task in the Setup and Maintenance work area.

By default, when a checklist is created, the status is Draft. If the checklist is ready for use set it to Active, else set it to Inactive. If you don't want to create a checklist template, you can make use of predefined checklist templates by making a copy of the template and setting it to Active.

The checklist code that displays is auto-generated and derived from the checklist name. This is a read-only field.

Note: You can use the Globe icon on the Create Checklist or Create Task pages to translate checklist and task details.

Validity

Specify the validity period during which the checklist template is available for allocation.

Checklist Category

Select a category from the Category drop-down list. Here's what you need to keep in mind:

- You can manage checklists of all checklist categories in Journeys if the profile option for Journeys is enabled.
- Line Managers and HR specialists manage standard checklists using the Allocate Checklists quick action.
- Employees, line managers, and HR specialists manage enterprise onboarding checklists using the Onboarding work area specific to their role (Me, My Team, My Client Groups respectively) or Quick Actions menu. This also includes the enterprise onboarding step for tasks that need to be performed in each phase of the onboarding process.
- You manage checklists of other types other than enterprise onboarding, using the Checklist Tasks app and Quick Actions menu.

Action Name

Actions track changes in personal circumstances, for example, new hire, transfer, or termination. Assign an action to allocate the checklist to persons automatically when they experience the action. The checklist template is still available for manual allocation, even if it's linked to an action.

Message

Use this tab to configure these details as required:

- **Message:** You can configure a message that is displayed at the banner header level when a user accesses a specific journey. Attributes such as FirstName, LastName, FullName, and DisplayName are supported.
- **Background Image:** You can upload an image or specify the URL of an image that's reflective of the journey when you create the checklist template. When you upload, ensure that the file size doesn't exceed 5 MB. The image displays on the header of the journeys page when users select and drill down into a specific journey either from the My Journeys or the Explore tabs.
- **Thumbnail Image:** You can specify the URL of an image when you create the checklist template. This appears on individual journey cards on the My Journeys and Explore tabs.
- **Processing Mode:** By default, this is Alerts based notification. You can modify it to BI Publisher based notification.
- **Alert Templates:** You can configure the alert templates that needs to be used when the checklist is assigned or force completed, including the combined notification template.
- **Contacts:** You can also include the contact details for a journey.

Title in Message Tab

This table lists the fields used to configure the Title text in different journey category templates and the pages on which it appears.

Attribute	Field Label in Enterprise Onboarding Category	Field Label in Enterprise Onboarding Step	Field Label in Other Categories	Field Label in Survey Category	Where This Text Displays
Title	Welcome Notification Title	Title	Title	Title	This appears on the Journeys page as the title when you drill-down into a specific journey from My Journeys. In Enterprise Onboarding journeys this text appears as the title of the assigned checklist welcome BIP notification.
Welcome Text	Welcome Notification Text	Not available	Text	Welcome Text	This doesn't appear on any of the pages. In Enterprise Onboarding journeys, this text appears as the text in the

Attribute	Field Label in Enterprise Onboarding Category	Field Label in Enterprise Onboarding Step	Field Label in Other Categories	Field Label in Survey Category	Where This Text Displays
					assigned checklist welcome BIP notification.
Subtitle	Not available	Not available	Not available	Subtitle	Applicable only to survey journeys. This text appears below the title.

Recurrence

If you want to specify recurrence for a journey in the Journeys app, you first need to set **Enable recurrent scheduling** to **Yes** on the Message tab of the journey template on the setup page. Based on the frequency specified in Journeys, a summary of the periods in the schedule is auto-generated and listed in Period Summary in the Scheduled Allocations tab. The periods are **Enabled** by default and can't be edited. However, HR specialists can deselect assignees or delete the whole schedule of an already assigned journey.

The Allocate Scheduled Journeys ESS process, which runs daily, automatically assigns the journey. This process checks for new population within a period and assigns the journey only to them.

Dashboard

Use this tab to include additional content such as note board, events and happenings for all categories of journey templates. You can only add text as part of the Notes Board and provide links to any attachments. Other types of content you can include are links or videos specific to the organization.

Related Topics

- [How You Configure the Background Image for a Journey](#)

Journey Eligibility Criteria

Link an eligibility profile at the journey template level or at the task level to determine to whom the template or task is applicable.

The checklist template or task is assigned only if it matches specific eligibility criteria such as person type, business unit, or legal employer and so on. Create the eligibility profile with Checklist as the value for Profile Usage.

The value you select in Assignments to Use can only be one of these options:

- Any assignment - enterprise
- Any assignment exclude inactive - enterprise
- Employee assignment only - enterprise
- Primary Employee assignment only - enterprise

In exclusion scenarios, it's recommended to use **Specific Assignment** as the **Assignment to Use** in the eligibility profile. For the eligibility criteria, you can enter criteria only in the Person, Employment, and Labor Relations tabs as they contain attributes which are applicable for the checklist. Additionally, you could create a fast formula.

Note:

- Journeys can't be assigned based on an eligibility profile criteria.
- The criteria that you configure in an eligibility profile is evaluated when a journey or task is assigned to a worker. The journey or task is only assigned to those workers who satisfy the eligibility profile criteria.
- When you associate eligibility profiles to a checklist or task and there are multiple checklists to be evaluated, there is no particular order in which the checklist is evaluated for eligibility. The first checklist that meets the criteria is assigned to the worker.
- Eligibility profiles are evaluated during manual checklist allocation only for checklist tasks and the enterprise onboarding step checklist. They are not evaluated for the enterprise onboarding master checklist and all other checklist categories.
- Journey templates are displayed in the Explore tab even if eligibility profiles are configured for the templates. However, you can control which templates should appear in the Explore tab by configuring template-level security.

Related Topics

- [Checklist and Journey Templates](#)

Journey Allocation and Completion Criteria

Set the criteria for checklist allocation and completion.

Here's how the criteria impacts checklist allocation and completion:

- **Allocation Criteria:** The checklist is allocated if it meets the specified criteria. Select a criterion to determine when the journey will be allocated.
 - Allocated manually, or when the record is created or approved. The checklist can be allocated manually or based on the action. For example, if a transfer action record is created on March 16th, 2019 and the transfer is effective on March 19th, 2019 it will be allocated on March 16th which is the date on which the record was created.
 - When the checklist action record becomes effective. The value entered in Days for Initiation field will determine the number of days before or after which the action occurs to allocate the checklist. The checklist is allocated based on the action. For example, if a transfer action record is created on March 16th, 2019 and effective on March 19th, 2019 it will be allocated on March 19th which is the date on which

the action record is effective. If you enter 2 in Days for Initiation field, it will be allocated on 21st March which is 2 days after the effective date.

- **Completion Criteria:** The checklist is marked completed automatically if it meets the specified criteria. Select a criterion to determine when the checklist will be marked complete:
 - All mandatory tasks completed. That is, whenever all the mandatory tasks in that checklist are completed, checklist status will be set to completed.
 - All mandatory and optional tasks completed. That is, whenever all mandatory and optional tasks are completed, the checklist status will be set to completed.
 - All mandatory tasks done, offset elapsed for optional tasks. This means that the checklist will be completed only when all mandatory tasks are completed and if there are incomplete optional tasks, the journey will be completed based on the offset period.

Note:

- Checklists can be automatically triggered only if the profile option HRC_DISABLE_HCM_EVENTS_PROCESSING is set to No.
- Certain checklists and tasks may be allocated but can't be completed due to various reasons. You can use the Force Complete option to forcefully mark them as complete. For example, you may set an off boarding checklist as completed because the employee withdrew the resignation.

Related Topics

- [Checklist and Journey Templates](#)

Predefined Journey Templates

You can use any of the available predefined checklist templates to assign to workers. Use the Checklist Templates page to search and modify predefined checklist templates.

Template Name	Category
Oracle - Add a Child Journey	Onboarding
Oracle - Complete Your HCM Profile	Onboarding
Oracle – Benefits Enrollment	Benefits
Oracle - Employee Recognition Award	Compensation
Oracle - Employee Spot Bonus Award	Compensation
Oracle - Employee Work Anniversary	Compensation

Template Name	Category
Oracle - Incident Vehicle	Health and Safety
Oracle - Intra-Company Transfer Journey Assignment	Onboarding
Oracle - Journey to an International Assignment	Onboarding
Oracle - Journey to taking on an Additional Role	Onboarding
Oracle - Just Married	Person
Oracle - Learning Record Activation	Learn
Oracle - Long Non-Sick Leave	Absence
Oracle - Long Sick Leave	Absence
Oracle - Onboarding Journey	Enterprise Onboarding
Oracle - Onboarding Process	Enterprise Onboarding
Oracle - Off boarding Journey	Off boarding
Oracle - Parental Leave	Absence
Oracle - Performance Improvement Guidelines	Talent Management
Oracle - Promotion Journey	Onboarding
Oracle - Return from Leave	Onboarding
Oracle - Return to the Workplace	Enterprise Onboarding
Oracle - Reduction in Force or Furlough	Off boarding
Oracle - Relocation Journey	Onboarding
Oracle - Safe Travels	Onboarding
Oracle - Sick Leave	Absence

Template Name	Category
Oracle - Succession Readiness	Talent Management
Oracle - Virus or Illness or Injury	Health and Safety

How You Use Predefined Templates

You need to modify available predefined checklist templates before you can use it. You use the Checklist Templates page to find a predefined checklist template and make the changes you need.

1. On the Checklist Templates page, enable the **Draft** filter to search for predefined templates.
2. After you identify a template, duplicate it to create a copy.
3. Provide a unique name for your copy.
4. Optionally, you can make changes as required.
5. You must configure either an action or an event to trigger the checklist automatically. You can manually assign the checklist otherwise.
6. Save your changes.
7. Activate the template by changing the status from **Draft** to **Active**. The checklist template is ready for use.

Considerations for Creating Templates

When creating a journey template, consider these points to decide whether to use the Enterprise Onboarding category or any other category.

This table lists the differences between journey categories to help you decide which journey category to choose.

Consideration	Enterprise Onboarding Category (including Enterprise Onboarding Step Category)	Other Categories
Do these categories need to be configured?	No, these are available by default and can't be modified.	Yes, since these journeys are user defined.
When to use the category?	Use this category to specifically create a journey for the employee onboarding process. The Onboarding work area includes advanced features to manage the onboarding process in a systematic manner. You can configure certain additional features when you select Enterprise Onboarding such as adding multiple phases or steps, for example, first day, first week, first month.	Use other categories to create generic journeys applicable to any process involving a series of tasks (off boarding processes, for example). These journeys can be allocated and managed using the Allocate Checklists quick action. Phases aren't supported in other category journeys.
Can multiple journeys of this category be allocated at the same time?	No. Let's say you specify the Move to HR and Add Pending Worker actions in enterprise onboarding journeys. The Move to HR action internally calls the Add Pending Worker action	Yes

Consideration	Enterprise Onboarding Category (including Enterprise Onboarding Step Category)	Other Categories
	<p>so both the journeys could get allocated. For the worker, the Onboarding page displays the journey allocated most recently.</p> <p>Note: It's better not use both these actions together.</p>	
<p>How do users access the journeys and tasks?</p>	<ul style="list-style-type: none"> • Me > Onboarding (Employees) • My Team > Onboarding (Line managers) • My Client Groups > Onboarding (HR specialists) <p>If you have enabled the profile option for Journeys you access the tasks from:</p> <ul style="list-style-type: none"> • Me > Journeys • My Team > Journeys • My Client Groups > Journeys <p>Note: When you enable Journeys, the Onboarding app won't be available.</p>	<ul style="list-style-type: none"> • Me > Checklists Tasks (Employees) • My Team > Employment > Allocate Checklists (Line managers) • My Client Groups > Employment > Allocate Checklists (HR specialists) <p>If you have enabled the profile option for Journeys you access the tasks from:</p> <ul style="list-style-type: none"> • Me > Journeys • My Team > Journeys • My Client Groups > Journeys <p>Note: When you enable Journeys, the Checklist Tasks app won't be available.</p>
<p>How can employees, line managers and HR specialists manage their tasks?</p>	<p>Employees have access to these task related sections:</p> <ul style="list-style-type: none"> • Tasks to Finish • Fun Stuff • Completed Tasks <p>Line managers and HR specialists have access to these task related sections:</p> <ul style="list-style-type: none"> • My Tasks • Incomplete Tasks • Others' Incomplete Tasks • Tasks Awaiting Allocation • Completed Tasks <p>If you have enabled the profile option for Journeys you access the tasks from:</p> <ul style="list-style-type: none"> • Me > Journeys • My Team > Journeys • My Client Groups > Journeys 	<p>Employees have access to these task related sections:</p> <ul style="list-style-type: none"> • Tasks to do for Self • Tasks to do for Others <p>Line managers and HR specialists have access to the same task-related sections as in the Enterprise Onboarding category.</p> <p>If you have enabled the profile option for Journeys you access the tasks from:</p> <ul style="list-style-type: none"> • Me > Journeys • My Team > Journeys • My Client Groups > Journeys <p>Note: When you enable Journeys, the Checklist Tasks app won't be available.</p>

Consideration	Enterprise Onboarding Category (including Enterprise Onboarding Step Category)	Other Categories
	<p>Note: When you enable Journeys, the Onboarding app won't be available.</p>	
How does action determine allocation?	<p>If you specify an action in the master journey which is of the enterprise onboarding category, the journey is allocated automatically. If you don't specify an action, the journey won't be allocated automatically. You can allocate the journey manually.</p> <p>If your enterprise onboarding journey has multiple steps, then the action you specify in the first step checklist and the action in the master checklist must be the same.</p>	If you specify an action, the journey is allocated automatically. If you don't specify an action, it won't be allocated automatically. You can allocate the journey manually.
Are eligibility profiles evaluated during manual journey allocation?	<ul style="list-style-type: none"> No for enterprise onboarding master journey Yes for enterprise onboarding step journey Yes for journey tasks 	<ul style="list-style-type: none"> No for journeys Yes for journey tasks Yes when journey is assigned from Journeys UI to multiple people at the same time. This activates an ESS job that evaluates eligibility.

Note: Even though you associate eligibility profiles to a journey or task, there is no order in which the journey is evaluated for eligibility. The first journey that meets the criteria is allocated to the new hire.

Related Topics

- [Checklist and Journey Templates](#)

How You Secure Template Category

You can use Category Security to control what categories users see when creating templates in the Create Checklist Template page and when creating a personal journey in the Journeys app.

For example, you can restrict a line manager to create journeys only of the Compensation category.

When securing the category, you can provide a role access to either of these options:

- Specific categories
- All categories

This table highlights the key points you need to keep in mind when configuring category security.

Security Configuration Option	Where You Configure This	What This Configuration Determines	Which Page is Impacted
Journey Category	Checklist Templates page > Category Security tab > Checklist Categories	Roles that can select this category when creating a journey	<ol style="list-style-type: none"> 1. Checklists Template setup page when creating global journeys. 2. Create Journeys flow in the Journeys app when creating personal journeys.

Configure Category Security

Follow these steps to configure category security based on a journey template:

1. Go to Setup and Maintenance work area or My Client Groups > Employment.
2. Search for and click the Checklist Templates task or quick action.
3. Click **Category Security** then select a category.
4. In the Assigned Roles: <Category>, click **Add**.
5. Select the role name in the **Search and Select Roles** dialog box.
6. Click **Add**.
7. Click **Save**.

Note:

- Ensure that the ORA_PER_JOURNEY_SECURITY_ENABLED profile option is enabled.
- The security configuration is only applicable to the Journeys app and Allocate Checklists quick action, but not to the Onboarding and Checklist Tasks apps.

Related Topics

- [Considerations for Configuring Journey Security](#)

How You Secure Journey Template Operations

You can use Journey Template Operations on the Security tab during setup to control journey template operations per journey template.

Depending on the access, you provide to a role, users with that role will be able to perform those actions. This table summarizes the key points related to securing journey template operations using a use case:

Security Configuration Options	Where You Can Do This	Configuration Determines	Which Page is Impacted	Use Case
Journey Template	Specific template > Security tab > Journey Template Operations > Configure Journey checkbox	Controls which roles can manage this journey	Checklists Template setup page and Create Journey in Journeys app	Onboarding Journey should only be managed by a HR specialist.

Security Configuration Options	Where You Can Do This	Configuration Determines	Which Page is Impacted	Use Case
	Specific template > Security tab > Journey Template Operations > Explore checkbox	Determines which roles can view this journey	Explore tab on Journeys app and Allocate Checklists page	Grow Your Career journey should be viewed by employee.
	Specific template > Security tab > Journey Template Operations > Assign to Self checkbox	Controls which roles can assign this journey to themselves	Specific journey from the Explore tab	Employee should be able to self-assign Grow My Career journey.
	Specific template > Security tab > Journey Template Operations > Assign to Others checkbox	Controls which roles can assign this journey to people in their person security profile	Specific journey from the Explore tab and Allocate Checklists page	Line manager should be able to assign Performance Review journey for their team.

Note: To enforce the security configuration you make, the journey template should be active and the `ORA_PER_JOURNEY_SECURITY_ENABLED` profile option should be set to Y.

Related Topics

- [Secure Journey Template Operations](#)

Secure Journey Template Operations

You want to configure security for a specific Offboarding Journey template. For this template, you want a HR specialist to be able to perform all operations, but a line manager to perform only certain specific operations.

Based on the configuration you make, users will be able to perform only those configured operations based on their role.

Before You Start

1. Create the Offboarding Journey template.
2. You should select the **Enable data security** check box to enforce security.

Secure the Offboarding Journey Template

1. Go to Setup and Maintenance.
2. Search for and click the Checklist Templates task or quick action.
3. Open the Offboarding Journey template and click the Security tab.
4. In the Journey Template Operations section, add the Human Resource Specialist and Line Manager role.

5. Select the options as indicated in this table for each of the roles.

Configuration Options	Human Resource Specialist Role	Line Manager Role
Enabled	Yes	Yes
Configure Journey	Yes	No
Explore	Yes	Yes
Assign to Self	Yes	No
Assign to Others	Yes	Yes

6. Click **Save and Close**.

When you configure this, here’s what happens:

- The Human Resource Specialist can configure the journey template, view this journey on the Explore tab and in List of Vales (LoVs), and assign this journey to themselves and others in their person security profile.
- The line manager can view the journey on the Explore tab and in LoVs and assign this journey to others in their person security profile. A line manager can’t configure the journey template and assign this journey to themselves.

Related Topics

- [How You Secure Journey Template Operations](#)

How You Secure Assigned Journeys Based on Specific Templates

Secure assigned journeys based on a specific journey template by configuring the options in the Assigned Journey Operations section.

Roles that you enable in this section will be able to view the journeys assigned based on the template. The access when configured takes into account the Person Security Profile and the View Assigned security configuration.

By default, All roles is selected to maintain backward compatibility. However, you can disable the All roles option and add only those roles that should have access to view the journeys assigned based on this template.

The table briefly describes the impact of the configuration options using a use case.

Security Configuration Options	Where You Configure This	What This Configuration Determines	Which Page is Impacted	Use Case
Assigned Journeys	Specific template > Security tab > Assigned Journey Operations	Control which roles can view assigned journeys, that are based on this journey, to persons in their person security profile	<ul style="list-style-type: none"> • My Journeys tab in Journeys app • Assigned Journeys tab in Journeys app 	Employee and HR specialist only should be able to view Vaccination Journey, not Line manager

Security Configuration Options	Where You Configure This	What This Configuration Determines	Which Page is Impacted	Use Case
			<ul style="list-style-type: none"> Allocate Checklists responsive page REST Get method 	

Related Topics

- [Secure Assigned Journey by Template](#)

Secure Assigned Journey by Template

You want an assigned journey based on a Vaccination Journey template to display for an employee and HR specialist but not for a line manager.

You want an assigned journey based on a Vaccination Journey template to display for an employee and HR specialist but not for a line manager.

Before You Start

Create the Vaccination Journey template.

Secure Assigned Journeys Based on the Vaccination Journey Template

1. Go to Setup and Maintenance.
2. Search for and click the Checklist Templates task or quick action.
3. Open the Vaccination Journey template and click the Security tab.
4. In the Journey Template Operations section, add the Human Resources Specialist role and enable all the configuration options.
5. In the Assigned Journey Operations section, add the Human Resource Specialist and Employee role and configure the options as indicated in this table.

Configuration Options	Human Resource Specialist	Employee
Enabled	Yes	Yes
View	Yes	Yes

When this journey is assigned, the Human resource specialist can see the journey in the Assigned Journeys tab while the employee can see this journey in their My Journeys tab.

Related Topics

- [How You Secure Assigned Journeys Based on Specific Templates](#)

Considerations for Configuring Journey Security

This topic lists the impact of configuring journeys security on various journey template operations:

- Impact of selecting Enable data security in the Security tab:
 - If you activate Enable data security in your existing templates, but don't enable the profile option ORA_PER_JOURNEY_SECURITY_ENABLED for security, then no security is applied at the template level and at the assigned journey level.
 - If the ORA_PER_JOURNEY_SECURITY_ENABLED profile option is set to Y but you don't select Enable data security in the Security tab of the checklist template, then no security is applied at the template level and at the assigned journey level.
- Impact on duplicating a journey:
 - If you duplicate a journey that has security configured, the security configuration is copied as well.
 - If you duplicate a journey template and save it as a personal journey, the journey template and view assigned security details won't be copied. You can still view the personal journey on the Explore tab and take actions such as Assign to Self, Assign to Others, Edit, Delete, and Force Complete of the personal journey.
- Impact on importing and exporting journey template configuration:
 - Any security configuration you make in a journey template can't be exported or imported in the Functional Setup and Manager (FSM). However, you can export or import the template and then reconfigure the security configuration.
 - Security configuration isn't exported or imported when you Export and Import journey templates on the Checklist Template page. However, you can export or import the template and then reconfigure the security.
- Template level and assigned journey level security configuration isn't supported in HCM Data Loader.
- You can't sync security configuration updates to assigned journeys using the Update Assigned Journey Attributes Based on Modified Journey Template ESS process.

Related Topics

- [How You Secure Template Category](#)
- [How You Secure Assigned Journeys Based on Specific Templates](#)
- [How You Secure Journey Template Operations](#)

Checklist Actions

Here are the list of actions you can use when configuring a checklist of a specific category.

Action	Checklist category to use	Scenarios where this is applicable
Hire (HIRE) Add Contingent Worker (ADD_CWK)	Enterprise Onboarding	Adding a new hire.

Action	Checklist category to use	Scenarios where this is applicable
Add Pending Worker (ADD_PEN_WKR)	Enterprise Onboarding	<p>Adding external candidates (through any source).</p> <p>Note: If you use Oracle Recruiting Cloud, when a new hire candidate is progressed to the HR phase, both the actions, Move to HR and Add Pending Worker, are triggered in case of a new hire. Hence, it's recommended that you don't configure a checklist based on the Move to HR action for new hire candidates. Instead, configure checklists for new hire candidates based on the action of Add Pending Worker.</p> <p>This configuration is also helpful in case the candidate gets delayed in the state Error During Processing after they're moved to the HR phase. The checklist will be allocated only after the issue gets resolved when the Pending Worker or Work Relationship can be created.</p>
Add Pending Work Relationship (ORA_ADD_PWK_WORK_RELATION)	Enterprise Onboarding	<p>Rehires who already have a terminated work relationship in the application.</p> <p>Note: If you use Oracle Recruiting Cloud, when a rehire candidate is progressed to the HR phase, both the actions, Move to HR and Add Pending Work Relationship, are triggered in case of a rehire. Hence, it's recommended that you don't configure a checklist based on the Move to HR action for rehire candidates. Instead configure checklists for rehire candidates based on the action of Add Pending Work Relationship.</p> <p>This configuration is also helpful in case the candidate gets delayed in the state Error During Processing after they're moved to the HR phase. The checklist will be allocated only after the issue gets resolved when the Pending Worker or Work Relationship can be created.</p>
Transfer, Global Transfer, Promotion, Termination and so on	Category other than enterprise onboarding	Movement of existing workers

Action	Checklist category to use	Scenarios where this is applicable
		<p>Note: If you use Oracle Recruiting Cloud, when an internal candidate gets moved into the HR phase, they arrive in the status HR - Pending Manual Processing and they wait for an HR specialist to process them in the Manage Job Offers work area. The HR specialist will transform the offer's values into the action that was originally selected in the offer, such as transfer, global transfer, or promote. If any checklist is configured with these actions, it will get allocated for the internal person only after the HR specialist has submitted this process based upon the offer. If you need your internal candidate to perform checklist tasks before their actual internal change becomes effective, then you would need to configure the checklist for the action of Move to HR.</p>
Move to HR (ORA_IRC_ACCEPT_JOB_OFFER)	Category other than enterprise onboarding	<p>This action is applicable only if you use Oracle Recruiting Cloud.</p> <p>Note: Although the code for the action Move to HR is ORA_IRC_ACCEPT_JOB_OFFER, this action isn't triggered when the candidate accepts the job offer. After an offer is accepted and before the Move to HR UI action, time may elapse and any custom-configured phases can intervene. So despite it's code which mentions acceptance, this action named Move to HR is triggered when the candidate's job application changes to another state in the HR phase.</p>
Create Offer (EMPL_OFFER_CREATE)	Category other than enterprise onboarding	<p>This action is applicable only if you use Oracle Recruiting Cloud. This isn't a recommended option, as there are many reasons that a newly-drafted offer may not result in a newly-hired or newly-transferred worker.</p> <p>Allocating a checklist too early in a candidate's lifecycle isn't effective. External candidates can't access any checklists allocated to them until after they become a pending worker. Internal mobility candidates may or may not end up accepting the offer as the recruiting process continues. So an appropriate time in the recruiting lifecycle to allocate a checklist is near the end, when the candidate's job application moves into the HR phase.</p> <p>Note: Checklist tasks are allocated to a line manager or area of responsibility only if the checklist is being allocated to an employee, contingent worker, and pending worker and not to a nonworker or candidate having an offer.</p>

Action	Checklist category to use	Scenarios where this is applicable
		For more information on checklist allocation during the recruitment phase, see the Implementing Recruiting guide on Oracle Help Center.
Change Offer (EMPL_OFFER_CHANGE)	NA	This action isn't used by any product currently.

Considerations for Configuring Actions

You can specify the action based on which you want to allocate a checklist either on the General tab or the Actions and Events tab during checklist setup.

Remember that any action you configure in the Actions and Events tab is effective only if there isn't any action configured in the General tab.

Note: You can configure multiple actions and action reasons in checklists of any category, other than Enterprise Onboarding Step.

Before you configure the action, here are some points for you to consider.

Where you configure the action	Checklist category this applies to	What you can do
General tab	<ul style="list-style-type: none"> All categories 	<ul style="list-style-type: none"> You can include one action in the checklist but can't include an action reason.
Actions and Events tab	<ul style="list-style-type: none"> All except Enterprise Onboarding and Enterprise Onboarding Step 	<ul style="list-style-type: none"> You can include multiple actions for a single checklist. Checklists can be allocated for specific action reasons within the selected action.

Note: These actions won't automatically trigger a checklist, even though they appear in the Action Name list of values when configuring a checklist template.

- Add Non-Worker
- Change Offer
- Contract Extension and Update when performed from the responsive Employment Contracts page
- Create Offer
- Position Synchronization Configuration Change
- Synchronization from Position Tree
- Update Assignment EFF

How You Configure Events

Events track legislative or personal attribute changes in a worker's person record. For example, workers' updates to their last name, contact information, ethnicity or disability. You can configure events on the Actions and Events tab during journey setup.

Note: You can configure events in journeys of any category, other than Enterprise Onboarding Step and Enterprise Onboarding.

How to Configure Person Events

Define one or more person related events to include in your journey by selecting a predefined attribute and specifying the existing value and new value. All events names that start with Person are considered as person events in the context of journey templates. When a worker makes updates that match the ones that you have defined, it causes the event to trigger the journey. These are the attribute values you can specify when defining an event in a journey. By default, the configuration is active.

Event Attribute Values	What it Means
Any value	Noneditable, considers the existing value in the person record.
No value	Noneditable, indicates that a value isn't present in the person record.
Specific value	Indicates a specific value for the event. For example, Marital Status = Married

Event Attribute Values	What it Means

How to Configure Other Events

You can configure events related to absence, health and safety, learn, recruiting, and talent in your journeys by selecting predefined attributes and creating a condition which when met triggers a journey automatically. You use **Condition Builder** to configure conditions that include specific attributes. If you need to include more than one condition, you create condition groups comprising expressions. Then you connect the expression groups using an OR or AND connector.

Listed in this table are event related attributes you can configure in your expression.

Category	Events	Attributes
Absence	Absence Entries	<ul style="list-style-type: none"> • Absence Status • Absence Type • Absence Type Reason • Approval Status • Duration • Previous Approval Status • Previous Absence Status • Previous Duration
Journeys	Checklist Completion	<ul style="list-style-type: none"> • Action Date • Allocation Date • Checklist Category • Checklist Instance • Checklist Name • Completion Date
Compensation	Individual Compensation	<ul style="list-style-type: none"> • Element Type
Health and Safety Incident	Incident Event	<ul style="list-style-type: none"> • Incident Event
Learn	Learning Record Activation	<ul style="list-style-type: none"> • Assigned As • Assigner Attribution Type • Assigner Number • Assignment Type • Learning Item • Learning Item Type
Learn	Learning Record Completion	<ul style="list-style-type: none"> • Assigned As • Assigner Attribution Type

Category	Events	Attributes
		<ul style="list-style-type: none"> • Assigner Number • Assignment Sub Status • Assignment Type • Learning Item • Learning Item Type
Recruiting	Internal Job Application Submitted	<ul style="list-style-type: none"> • Recruiting Type • Job Grade
Talent	Performance Rating	<ul style="list-style-type: none"> • Performance Rating • Performance Rating Source
Talent	Box Assignment	<ul style="list-style-type: none"> • Box Assignment Name
Talent	Risk of Loss	<ul style="list-style-type: none"> • Risk Level • Risk Level Source
Talent	Succession Readiness	<ul style="list-style-type: none"> • Candidate Readiness • Interim Successor • Previous Candidate Readiness • Previous Interim Successor

Configure Conditions Based on Absence Attributes

This example demonstrates how to use the condition builder to configure an absence event that triggers a checklist when an employee submits an absence request. You create one expression to check for absence type and another for absence status and connect these two expressions.

Expression for Absence Type

1. In Setup and Maintenance, go to the Checklist Templates task.
2. Enter details for the checklist.
3. Click the Actions and Events tab.
4. In the Configure Events section, click **Add** and select Absence Entries in the **Name** list of values.
5. Click Edit Condition to display the Condition Builder and click **Create Group**.
6. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Absence Type
Operator	Equals

Field	Value
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Maternity Leave

7. Click **OK**.

Expression for Absence Status

1. To join the first condition to the second group, click **Create Group** again.
2. Select And in the Expression Connector drop-down list.
3. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Absence Status
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Submitted

4. Click **OK**.
5. Click **Save**.

Related Topics

- [How You Configure Events](#)

FAQs for Templates

How do changes in the checklist template affect allocated checklists?

Changes in a checklist template can be synchronized to assigned journeys and allocated checklists. See the topic, [Process to Update Assigned Checklist and Journey Attributes](#).

Where do the journey category values come from and how can I configure or modify journey categories?

The values for a category are configured in the CHECKLIST_CATEGORY extensible lookup by using the Checklist Lookups task.

Journey categories that are delivered by Oracle can't be modified. However, you can add additional categories to the CHECKLIST_CATEGORY.

What's the purpose of the Country field in a checklist template?

The Country field is for information purpose only. It doesn't filter checklists based on this field.

If you want to restrict checklists based on country, then use eligibility profiles.

Can a checklist or task be triggered based on another checklist or task?

You can only trigger a task based on another task only within the same checklist or journey. See the topic, [How You Use Activation Criteria to Trigger Tasks](#).

FAQs for Journeys

What happens if I disable the profile option for Journeys?

When you disable Journeys, your allocated checklists are available in the Onboarding and Checklist Tasks apps.

Do I need to reconfigure my existing checklist templates to use Journeys?

No, you don't have to make any changes. Your existing checklist templates are not impacted and will work in Journeys as is.

Even though the user experience is new, the building blocks are the same. All assigned and in-progress journeys will be available on the Journeys page, if Journeys is enabled. Here are some points to consider:

- Journey templates will continue to be configured the way you have been currently configuring them.
- Any existing journey templates configuration will continue to be applicable and available even in Journeys. For example, configuration related to tasks, notifications, notes, comments and attachments, messages, action and events, dashboard, and eligibility profiles.
- All task types will continue to be available in Journeys.
- Journey allocation will continue to function the same way that is, automatically based on an action or person event.
- Journeys will continue to be available for pending workers as well.

What happens to changes that I made to user interface labels in existing checklist pages?

You need to redo any label changes you made. For example, if you renamed Complete to End Task, you need to change it using the User Interface Text Editor.

Related Topics

- [Modify Text Using User Interface Text Tool](#)

What happens to existing allocated checklists when you enable Journeys?

All existing allocated checklists appear on the Journeys page with the same status.

Can I load journeys using HDL or HSDL?

Yes, you can load journeys. For more information on loading and allocating checklists using HCM Data Loader (HDL), see the HCM Business Objects guide.

Why can't I add tasks from the task library when configuring a contextual or guided journey template?

You can't add the tasks because tasks created in contextual and guided journeys are different.

Not all task attributes are supported for tasks that are part of a contextual or guided journey.

Contextual Journeys

Using Contextual Journeys you can configure tasks that need to be performed by different task performers before a HCM transaction. For example, tasks that a manager needs to do before a transfer action.

You need to enable contextual journeys using the `ORA_PER_CONTEXTUAL_JOURNEYS_ENABLED` profile option. When this profile option is enabled and a configured contextual journey is available for a quick action, users see one or more eligible contextual journeys when they initiate a quick action from either Me, My Team, or My Client Groups.

To configure a contextual journey, you use the Contextual Journey category in Checklist Templates. Unlike other journey templates, the attributes to configure contextual journey are different. In addition to basic details, you need to select a context such as Me, My Team, or My Client Groups. You then associate this context to a quick action.

Additionally, you can choose attributes that are available for the action and configure criteria that will determine who will see the contextual journey. For example, if you want the contextual journey and tasks to be specific to worker locations, you can configure the location specific attributes at the template level. When the user initiates the quick action, they will see the contextual journey that has been configured for that worker's location.

Note:

- The contextual journey is displayed only when you initiate the quick action directly from the Me, My Team, or My Client Groups tabs on the application home page. For example, the contextual journey isn't displayed when you initiate the quick action from the list of actions for a worker in the My Team Overview page or from Deep Links.
- You can't change the category of an existing journey to Contextual Journey. Instead, define a new contextual journey.
- The DocuSign and I-9 task types aren't supported in contextual journeys.
- Redwood pages that are built using the Visual Builder Studio (VBS) are currently not supported.
- The processing mode for contextual journeys is set to Alerts based notifications by default and BI Publisher notifications aren't supported.
- You can't configure an eligibility profile at the checklist or task level for contextual journeys.
- The **Don't copy, use source document** check box is available when you configure a Document task type only in a contextual journey. If you enable this setting, a copy of the document isn't created at the time of task assignment thereby improving performance.

For more information on contextual journeys, see the document Contextual and Guided Journeys (<https://community.oracle.com/customerconnect/discussion/631002>) on Customer Connect.

Related Topics

- [How You Manage Contextual Journeys](#)

Create a Contextual Journey

You're creating a contextual journey that will display to Meg who is a line manager in Vision Corp, Redwood Shores when she's transferring Elizabeth, her direct report.

The contextual journey is intended to take Meg through the transfer process, complete required tasks, and finally initiate the transfer action.

Before You Start

- Create tasks relevant for the transfer like review of assignment information, meet the new manager, initiate handover of the employee's responsibilities, watch a video on how to transfer, and start the transfer.

- Since the contextual journey is specific to a specific legal employer and location, you configure those attributes accordingly.

Create a Contextual Journey for Transfer

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. Create the Contextual Journey in Checklist Templates with the new category Contextual Journey.
3. Click Add and enter details as detailed here. For other fields, use default values.

4.

Field	Value
Name	Contextual Journey for Transfer
Status	Active
Country	All Countries
Category	Contextual Journey
Context	My Team
Action Name	Transfer
Archive After Months	3
Purge After Months	3
Completion Criteria	All mandatory tasks completed
Days for Completion	0

5. Click **OK**.
6. In the Configure Criteria section, click Add.
7. In the Condition Builder dialog box, click **Create Group**.

Field	Value
Attribute	Legal Employer
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Vision Corp

8. Click **OK**. Repeat step 7 to add Redwood Shores for the Location attribute using **And** as the expression connector.
9. Click **OK** and **Save**.

When Meg initiates the **Transfer** action for Elizabeth Marvey, she navigates to a page where she can preview the tasks in the contextual journey. She clicks **Start This Journey** to begin the tasks.

Related Topics

Guided Journeys

You can provide guidance such as tutorials, company policies, and best practices in the context of an HCM flow using guided journey tasks. For example, tasks to help a line manager transfer an employee.

Based on the way you setup the guided journey, when employees, line managers, or HR specialists initiate an action they see a **Guide Me** button. This button appears in ADF and Redwood pages at the section header level, page header level, or both. It lists tasks that you add to guide the user in their transaction.

There are several aspects involved in creating a guided journey.

- First, you need to enable guided journeys using the `ORA_PER_GUIDED_JOURNEYS_ENABLED` profile option.
- You use the Guided Journey category in Checklist Templates to setup and add tasks that are relevant for the guided journey. You can only use tasks of the type Analytics, Document, Embedded Learning, External URL, Manual Task, Questionnaire, Report, and Video in a guided journey.
- Once the guided journey setup is done, you use the Transaction Design Studio (TDS) to associate it to an action using TDS rules. You use specific attributes available for a TDS action to further determine for whom the guided should display.
- You're done after you select and add tasks that you want to display at the page header or section header region.

Note:

- Guided journeys display in various responsive pages configured in TDS to help complete the transaction. You can't assign a guided journey to a worker, so guided journeys don't appear on the My Journeys or Assigned Journeys tabs in the Journeys app.
- You can't change the category of an existing journey to Guided Journey. Instead, define a new guided journey.
- It's recommended to use only one guided journey per TDS action.
- Only a limited set of TDS actions are currently available for configuring guided journeys.
- You can use **Set Modal Window Properties** during setup to specify the size of the modal window that opens up in the guided journey. Here are the properties you need to specify (applicable for mobile view as well):
 - width - The width of the modal window in pixels. The default is 500.
 - height - The height of the modal window in pixels. The default is 350.
 - modal - The type of window. Attributes are Y or N. Y indicates modal window and N indicates non-modal window.
 - resize - The option to resize. Attributes are Y or N. Y indicates users can resize the window.

For example, width=400;height=300;modal=Y;resize=Y

- Except the Questionnaire task type, all other task types used in guided journeys are read-only type tasks which don't save any data anywhere.
- It isn't possible to see the responses provided by the user as part of a guided journey questionnaire task anywhere. The responses are stored in the PER_CHK_GUIDED_RESPONSES questionnaire tables. You can build your own OTBI reports to extract this data.

For more information on guided journeys, see these resources:

- Contextual and Guided Journeys (<https://community.oracle.com/customerconnect/discussion/631002>) on Customer Connect.
- Use Transaction Design Studio to Configure Field Displays in this guide.
- Transaction Design Studio -What It Is and How It Works (Document ID 2504404.1) on My Oracle Support.

Surveys in Journeys

Setup

Unlike a regular journey template, the attributes that you configure for a survey journey are different. When you select the Survey journey category in the Create Checklist dialog box, you need to choose one of the survey subtypes listed here:

- **General:** Use the Journeys Survey subscriber to create the questionnaires for this subtype. You have to create your own BI report to see the survey results for this subtype.
- **Touchpoints:** Use the Touchpoints subscriber to create the questionnaires for this subtype. You have to use the Touchpoints dashboard to see the survey results for this subtype.

Similarly, the task that you associate to a survey journey is of the type Survey. Only one task of this type can be associated. This is the default and can't be changed. You need to associate a predefined questionnaire using the appropriate questionnaire subscriber to this task type.

Message

You can personalize the survey subtitle, welcome notification text, or completion message that displays when the survey journey is assigned to workers using the options in the Message tab.

Schedule

You may need to send a survey at regular intervals or may be just once. You can use the options in the Schedule Allocation tab to specify the frequency at which a survey should be assigned. The period summary is autogenerated and lists the periods based on the frequency. Although these periods are Active by default, if you don't want the survey journey to be assigned during a specific period, you can deselect Active.

Within a period too, you may want to assign the survey journey once or more than once. The Number of Runs Per Period drop-down list enables you to specify that.

On completion of the last period, the survey journey automatically expires.

Reporting

To compute survey responses, you can specify the analysis period in days, weeks, months, or years. You can also set the threshold against which to measure the survey response scores.

Note: Reporting is applicable for Touchpoints survey only.

Survey Assignment

Once the configuration is complete, the survey journey is available in the Journeys app. Configure the criteria to determine the population. Only those persons who meet the criteria such as legal employer and business unit are assigned the survey journey. However, you can assign the survey to assignees only if the date falls within one of the active periods in the survey schedule.

Note:

- Legal Employer and Business Unit are the only two attributes that are currently supported when you configure the criteria to determine the population.
- The survey journey needs to be manually assigned at least once for the recurring journey schedule to be initiated.

Allocate Scheduled Journey ESS Process

The Allocate Scheduled Journey ESS process which runs daily automatically assigns the journey. If it's a recurring survey journey, the process checks for new population within that period and assigns the survey journey only to them.

Once the surveys are assigned, you can use the Scheduled Allocations tab in the Checklist Templates page to review the status of scheduled survey journeys. If a particular allocation needs an update, administrators can drill-down to that allocation and make changes by deselecting a person or period.

Note:

- Survey journeys aren't available in the Checklist Tasks and Onboarding pages.
- You can't change the category of an existing journey to Survey journey. Instead, define a new survey journey.
- The display of the survey is based on the way the questionnaire is configured. A questionnaire can display one question per page, one section per page, or all questions on a single page.
- Touchpoints surveys are distributed only through Journeys at this point.
- You should have enabled Journeys to use Touchpoints surveys. For more information on Touchpoints, see the Using and Administering Touchpoints guide on Oracle Help Center.

Related Topics

- [Configure a Survey in Journeys](#)
- [How You Schedule Surveys in Journeys](#)

How You Schedule Surveys in Journeys

You configure the schedule based on which you want to assign a survey in the Schedule Allocation tab of the survey journey.

Depending on whether it's one-time or a recurring assignment, you can selecting one of these recurrence options:

- Never - Indicates the assignment is one-time and won't recur.
- Day - Indicates the assignment is on a daily basis.
- Week - Indicates the assignment is on a weekly basis. For example, every Monday.

- Calendar month - Indicates the assignment is on a monthly basis. For example, say you have set the recurrence to start on 20th September and set the recurrence value to 3, then the journey is assigned on 20th September, 20th October, and 20th November.
- Year - Indicates the assignment is every year.

Based on the start date and the frequency you specify, the period summary is automatically generated. This summary lists the start date and end dates and the active periods between those dates during which the survey will be assigned. If you don't want the survey to be assigned during a particular period, you can deselect that period.

The configuration you make on the Schedule Allocation tab has an impact when you assign the survey to people in the Assign Journey page. You can assign a survey only if the date falls in an active period in the schedule.

Once you configure the schedule it's recommended not to make any change to the frequency because this impacts the reporting.

Related Topics

- [Surveys in Journeys](#)

Configure a Survey in Journeys

You're configuring a survey journey template for new hires of Vision Corp to get their feedback on the onboarding process. You want to send this survey to new hires who join the organization from September to October.

Before You Start

- Create the questionnaire using the Journey Survey subscriber.
- Determine the period in which the survey needs to be assigned to persons.
- Note that you need to use the Journeys app to assign the journey. This example doesn't cover that.

Create the Onboarding Experience Survey Journey

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. Create the Onboarding Journey Experience Survey using the Survey category.
3. Click Add and enter details as detailed here. For other fields, use default values.

Field	Value
Name	Onboarding Journey Experience Survey
Status	Active
Country	All Countries
Category	Survey
Survey	General
Archive After Months	6

Field	Value
Purge After Months	6

- In the Configure Criteria section, click Add and then Edit.
- In the Condition Builder dialog box, click Create Group. Enter values as detailed here.

Field	Value
Attribute	Legal Employer
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Vision Corp – Tech

- Click OK.
- In the Tasks tab, click Add and enter details as detailed here.

Field	Value
Name	Share Your Feedback
Status	Active
Description	Optional
Task Type	Default is Survey
Questionnaire	Onboarding Experience

- Click Save and Close.
- In the Message tab, enter details as detailed here. For others, use the default values.

Field	Value
Title	Share Your Experience
Subtitle	Feedback survey
Completion Message	Thanks for your valuable feedback.

- Click OK and Save.

11. In the Scheduled Allocation section of the Schedule Allocation tab, enter the following values:

Field	Value
Start On	9/2/22
Repeat	Week
Repeat on This Day	Monday
End Recurrence	Number of occurrences
After this many occurrences	8
Number of Runs Per Period	Once per period

12. In the Reporting Attributes section, enter the following values:

Field	Value
Analysis Period	2 months
Threshold Score	5

13. Click **Generate** to generate the period summary. Review and adjust the start and end dates, if required.
14. Click **Save and Close**.

Related Topics

- [Surveys in Journeys](#)
- [How You Schedule Surveys in Journeys](#)

Enterprise Onboarding Checklists

An Enterprise Onboarding checklist template is a specific checklist that you create to onboard new hires either before, on, or after their joining date.

It contains a master checklist and step checklists. An Enterprise Onboarding step includes tasks that need to be performed in each phase of the onboarding process. The master checklist links steps in the onboarding process. You need to configure at least one step that needs to be linked to this master checklist. There's no maximum limit for the number of checklist steps that can be created. You can specify the sequence of the steps. For example, in your master checklist, you can configure a step titled Your First Day to include onboarding tasks that the employee needs to complete on their joining date. You can add one or more tasks that a new hire needs to perform before their first day, such as providing identity proofs.

Note: If you use Enterprise Onboarding checklist category here are some points that you need to consider:

- There can be only one active instance of the checklist or journey of this category.
- In a rehire process, if the rehired employee already has an in-progress enterprise onboarding category checklist from a previous employment, then another instance of an enterprise onboarding checklist won't be allocated to them.
- Only one action can be configured in the master enterprise onboarding category checklist.
- You can't assign a step checklist by itself. You need to assign the entire Enterprise Onboarding category checklist.
- You can't delete only the step checklist. When you delete an assigned journey, it will delete all the tasks of all the step checklists in that journey.
- You can't configure a task with a preceding task from another enterprise onboarding step template.
- You can't use task groups.
- You can't create recurring schedules.
- Notifications aren't sent when an enterprise onboarding step checklist is activated.
- You can't configure a reminder alert template for a task in a step checklist.
- You can configure nudges only for the Enterprise Onboarding journey, and not for step journeys.
- When you force close an assigned journey, it closes all the tasks of all the step checklists in that journey. It displays the tasks in the step checklist only when the criteria is met.
- In Journeys, tasks in all step checklists are displayed even when the step isn't yet active. However, these tasks remain disabled until activated. Whereas in enterprise onboarding, only the step name is visible. The tasks within the step display only when the step becomes active.
- You can associate multiple actions based on which the journey is assigned.
- You can assign the same enterprise onboarding checklist to individual journeys, the line manager and HR can see all individual journeys as deferred journeys on the Assigned Journeys tab. However, the employee can see the journey only when it becomes active.

Related Topics

- [Checklist and Journey Templates](#)

Create an Enterprise Onboarding Step Checklist

This example shows how to configure an Enterprise Onboarding Step checklist with onboarding tasks that new hires need to complete on their first day and within the first week.

The Enterprise Onboarding Step checklist is a child checklist comprising one or more tasks that you associate to high level steps in a master Enterprise Onboarding checklist.

In this example, you create two checklists one that includes tasks to be done on the first day and the second to include tasks to be done in the first week. The checklist is applicable for new hires located in the US. You use the Checklist Templates task to create and manage checklists.

Summary of Tasks

To create the checklists, you need to:

1. Enter general details
2. Create mandatory tasks and enable notifications to be sent when the task is completed
3. Provide other instructions for the tasks

Prerequisites

1. Create an eligibility profile Work_Location_US for workers in the US.

Entering General Details

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Checklist Templates
2. On the Checklist Templates page, click Create to open the Create Checklists page.
3. Create two separate checklists with values as detailed below:

Fields	Checklist 1	Checklist 2
Name	On Your First Day - Step 1	Your First Week - Step 2
Description	This checklist includes tasks to be completed on the first day.	This checklist includes tasks to be completed within the first week.
Category	Enterprise Onboarding Step	Enterprise Onboarding Step
Status	Active	Active
Date From	1-Jan-2018	1-Jan-2018
Date To	10-Jan-2021	10-Jan-2021
Country	All Countries	All Countries
Eligibility Profile	Work_Location_US	Work_Location_US
Category	Enterprise Onboarding Step	Enterprise Onboarding Step

Fields	Checklist 1	Checklist 2
Action Name	Hire	Hire
Allocation Criteria	When the action record becomes effective	When the action record becomes effective
Days for Initiation	0	1
Completion Criteria	When all mandatory tasks are completed	When all mandatory tasks are completed
Message	Hello, you're in step 1 of the onboarding process.	Hello, you're in step 2 of the onboarding process.

4. Click Save.

Creating Tasks

1. Click the Tasks tab and click Create.
2. Complete the fields, as shown in the table for each of the two high level steps. The tasks must be associated to the respective Enterprise Onboarding Step checklists created as prerequisites.
3. Create the tasks that need to be included in each of the checklists as shown in the table:

Field	Values for task included in On Your First Day - Step 1	Values for task included in Your First Week - Step 2
Task Names	Request Access Badge	Verify Your Personal Information
Description	Optional	Optional
Status	Active	Active
Eligibility Profile	Leave blank	Leave blank
Preceding Task	Leave blank	Leave blank
Mandatory	Yes	Yes
Target Duration	3 Days	1 Day
Performer	Worker	Worker

Field	Values for task included in On Your First Day - Step 1	Values for task included in Your First Week - Step 2
Owner	Area of Responsibility HR Representative	Line Manager
Action Type	Manual	Application Task Select the relevant application task from the list of values.
Notification and Reminders	When task is completed Owner	Leave Blank
Notes	Complete this task before the end of your first day.	Don't forget to update your details before the end of your first week.

4. Similarly, create one more task titled Provide Identity Proofs to include in On Your First Day - Step 1 and two more tasks titled Meet Your Team and Review Campus Map Directions to include in Your First Week - Step 2.
5. Click Save and Close.

Related Topics

- [Search for a Task](#)

Create an Enterprise Onboarding Checklist

This example shows how to configure an Enterprise Onboarding checklist that acts as a master checklist in the onboarding process.

When you create an Enterprise Onboarding checklist, the checklist tasks that you configure appear as high level steps or phases in the Onboarding home page. The high level steps link to an Enterprise Onboarding Step checklist comprising the actual onboarding tasks.

In this example, you create a master checklist and include two high level steps titled On Your First Day and Your First Week for new hires located in the US. When you create the step, you link it to On Your First Day - Step 1 and Your First Week - Step 2, the Enterprise Onboarding Step checklists that you created as a prerequisite. Further, you add instructions and notes that appear on the Onboarding home page.

Note: If you want the checklist to be automatically allocated based upon an action, the action needs to be configured in the master checklist which is of the category Enterprise Onboarding. Additionally, the same action needs to be configured in the first step checklist which is of the checklist category Enterprise Onboarding Step.

Summary of Tasks

To create the checklists, you need to:

1. Enter general information
2. Create a checklist of the category Enterprise Onboarding, add the steps as high level tasks and specify the sequence
3. Add a welcome message with instructions
4. Configure the content types for the dashboard

Prerequisites

1. Create two Enterprise Onboarding Step checklists titled On Your First Day - Step 1 and Your First Week - Step 2. In the On Your First Day - Step 1 checklist include two tasks titled Provide Identity Proofs and Request Identity Badge. In the Your First Week - Step 2 checklist include three tasks namely Verify Your Personal Information, Review Campus Map Directions, and Meet Your Team.

Entering General Details

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Checklist Templates
2. On the Checklist Templates page, click Create to open the Create Checklists page.
3. Complete the fields in the General tab as shown in the table:

Fields	Values
Name	New Hire Onboarding
Description	Onboarding checklist
Category	Enterprise Onboarding
Status	Active
Date From	1-Jan-2018
Date To	10-Jan-2021
Country	All Countries
Eligibility Profile	Leave blank
Action Name	Hire

Fields	Values
Allocation Criteria	When the action record becomes effective
Completion Criteria	When all mandatory tasks are completed

4. Click Save.

Creating the High Level Tasks and Specifying the Sequence

1. In the Tasks tab, click Add Task.
2. Create the tasks that need to be included in each of the checklists as shown in the table:

Field	Values to include for On Your First Day	Values to include for Your First Week
Names	On Your First Day - Step 1	Your First Week - Step 2
Description	Optional	Optional
Status	Active	Active
Eligibility Profile	Leave blank	Leave blank
Sequence	1	2
Action Type	Checklist	Checklist
Checklist Name	On Your First Day - Step 1	Your First Week - Step 2

3. Click Save and OK.
4. Click Save and Close.

Adding a Message

1. Click the Message tab and enter the title and message shown in the table:

Field	Value
Title	Welcome
Text	As a new employee, you're required to complete all onboarding tasks.

Field	Value

2. Click Add and specify details of the onboarding sponsor for workers to contact during the onboarding process. The contact details display on the workers Onboarding home page.
3. Click Save.

Configuring the Content Types for the Dashboard

1. In the Notes section, click Add and complete the fields as shown in the table:

Field	Value
Content Title	Orientation
Description	Check your email for the schedule
Content Status	Active
Content Type	Standard Note

2. In the What's Happening section, click Add and complete the fields as shown in the table:

Field	Value
Category	Insight
Content Title	Company Information
Status	Active
Content URL	https://www.oracle.com/index.html
Event Date	Leave blank
Image URL	Leave blank

3. Click OK.
4. Click Save.

Related Topics

- [Search for a Task](#)

How Checklists and Journeys are Assigned

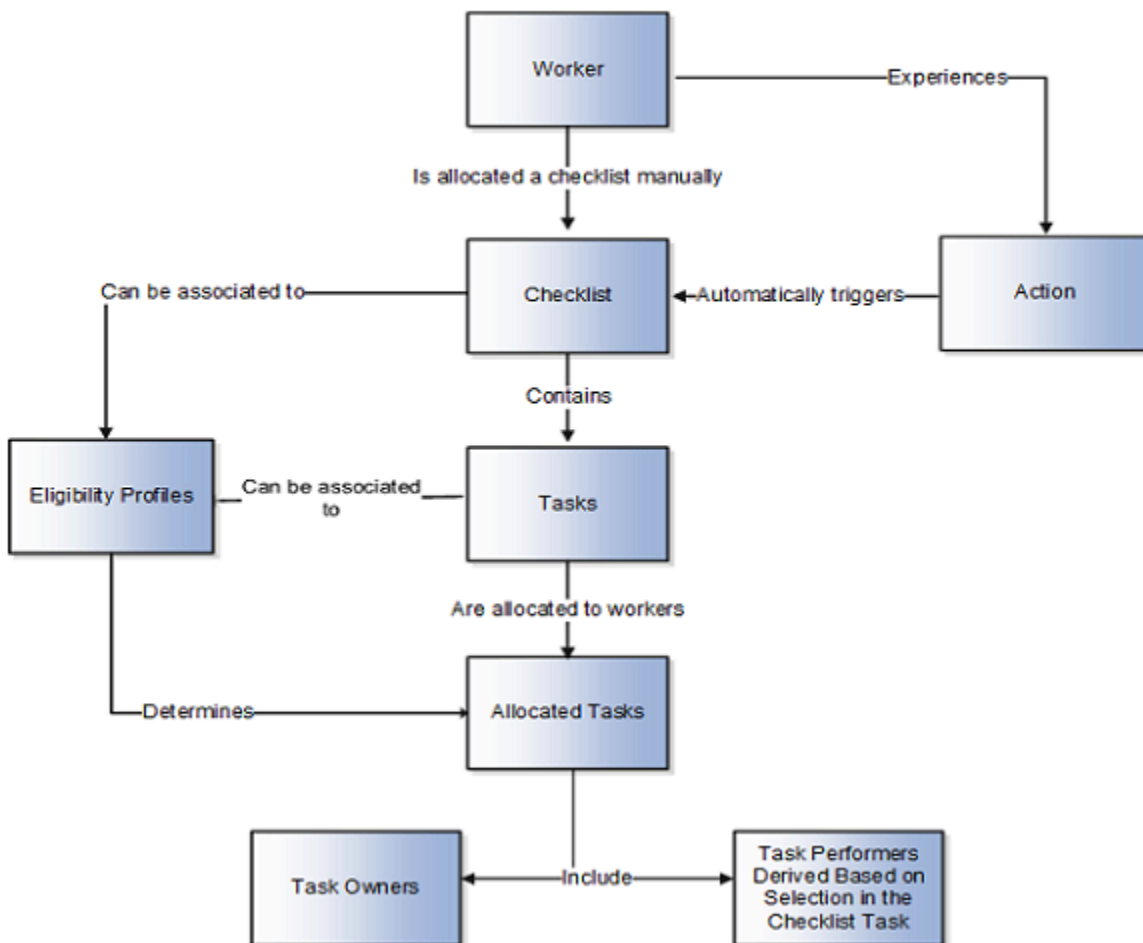
An assigned journey or allocated checklist is a specific instance of a checklist or journey template.

Automatic or Manual Allocation

If the checklist is associated with an action such as new hire or transfer, the checklist is automatically allocated to workers when they experience the action. If not, you must manually assign the checklist to workers. If you associate the checklist or task with eligibility criteria, they're allocated only if the worker meets the eligibility criteria. Task performers and owners are derived based on what you specify for each task in the checklist template.

The figure shows the tasks workers perform for automatically allocated checklists for which they're eligible.

Checklist is Allocated to Worker



Task Performers and Owners

Task performers access tasks allocated to them from either the Journeys App, Onboarding App, or the Checklist Tasks App, depending on the checklist allocated to them. They can also directly go to the task page using the URL in the task notification page. If you assign a task to multiple performers, one of the performers can claim the task by accessing the notification.

Note:

- If you allocate a checklist using HDL it doesn't send notifications.
- You can delete an allocated checklist using HDL.
- While allocating checklists using REST the only restriction is that eligibility evaluation happens at the checklist task level and not at the checklist level.

For more information on allocating checklists using HDL, see the HCM Business Objects guide.

Attributes that Determine Checklist or Task Allocation

This table lists the differences in checklist or task allocation based on the days for initiation, delay duration, and offset days values.

Points to Consider for Checklist Allocation	Days for Initiation	Delay Duration	Offset Days
Applicable at the checklist level?	Yes	No	No
Applicable at the task level?	No	Yes	Yes
Are there any dependencies?	Yes. This attribute is available only when the Allocation Criteria is set to When the action record becomes effective.	No	No
Does this attribute have a default value?	Yes, default value is 0.	No, default is null.	Yes, default value is 0
What values to configure?	Only days can be provided. Other units of measure aren't supported.	Days and unit of measure need to be provided. Supported units of measure are days, months, and weeks.	Only days can be provided. Other units of measure aren't supported.
Can the attribute value be negative?	Yes	No	Yes
How is the attribute used?	The attribute value is added to the effective date of the transaction	The attribute value is added to the checklist allocation date.	The attribute value is added to the checklist allocation date.

Points to Consider for Checklist Allocation	Days for Initiation	Delay Duration	Offset Days
	record (example, effective date of the transfer record).	<p>Note: If you specify delay duration for a task that has a preceding task, then the delay duration is calculated from the date on which the preceding task is marked as complete.</p>	
Which date is derived using this value?	Checklist activation date.	Task activation date.	Task offset date.
How is the derived date used?	The checklist becomes active on that derived date	<p>The task becomes active on that derived date.</p> <p>Note: This date doesn't determine the date on which these attributes are evaluated:</p> <ol style="list-style-type: none"> 1. Task eligibility profile 2. Task performer (line manager and area of responsibility) 3. Task owner (line manager and area of responsibility) <p>The attributes are always evaluated on the checklist allocation date.</p>	<p>These task attributes are evaluated on the checklist allocation date. However, the reference date used for evaluation is the task offset date.</p> <ol style="list-style-type: none"> 1. Task eligibility profile 2. Task performer (line manager and area of responsibility) 3. Task owner (line manager and area of responsibility) <p>For example, the checklist is allocated on 1-Jan-2021. Task A in that checklist has an offset days set to 10 days. The attributes are evaluated on 1-Jan-2021 (when the checklist is allocated). However, the reference date used for evaluation is the task offset date, which in this case would be 11-Jan-2021 (1-Jan-2021 plus 10 days).</p> <p>Note:</p> <ul style="list-style-type: none"> • If Offset Days isn't specified then the task allocation date is used as the reference date to evaluate the attributes. • This derived date doesn't determine when the task becomes active or visible on the user interface.
What displays on the user interface until the derived date?	<p>Workers don't see the assigned checklist until the derived date.</p> <p>Managers and HR specialists see the assigned checklist with the Deferred status.</p>	<p>Workers don't see the assigned task until the derived date.</p> <p>Managers and HR specialists see the assigned task with the date it will become active on. If Journeys is enabled, then this future start date isn't displayed on the page.</p>	There's no impact on the user interface.

Points to Consider for Checklist Allocation	Days for Initiation	Delay Duration	Offset Days
	They can delete or edit this deferred checklist using Allocate Checklists page. But they can't force complete this deferred checklist.	They can delete or edit this deferred task using Allocate Checklists page. But they can't complete this deferred task.	
What is the impact on notifications?	<p>Notifications are sent only when the checklist becomes active.</p> <p>Note: Notifications are triggered at UTC midnight when the checklist becomes active. The timing of triggering notifications isn't dependent on a user's time zone preferences.</p>	<p>Notifications are sent only when the task becomes active.</p> <p>Note: Notifications are triggered at UTC midnight when the task becomes active. The timing of triggering notifications isn't dependent on a user's time zone preferences.</p>	There's no impact on notifications.
What are the typical use cases?	<p>When you want to allocate the checklist only a few days before or after the effective date of the transaction.</p> <p>Example, a worker's hire date is 1-Apr-2021. However, the pending worker record is created on 1-Jan-2021. You want the worker to start preboarding tasks and the checklist to be active only 10 days before the hire date, which is 21-Mar-2021. In this case, you configure days for initiation as -10.</p>	<p>When you want the task performer to start a task a few days after the effective date of the transaction.</p> <p>Example, the Set Goals task needs to be active for the worker only 10 days after the hire date of 1-Apr-2021. In this case, you configure the task delay duration as 10 days. So the task will be active only on 11-Apr-2021 (1-Apr-2021 + 10 days).</p>	<p>When you want to evaluate the task performer or owner either few days before or after the effective date of the transaction.</p> <p>Example, a worker is being transferred on 17-June-2021. However, the Orientation Session for New Employee task needs to be performed by the HR representative of the new assignment 4 days after the transfer. In this case, you configure the task offset days as 4 days so that the new HR representative is evaluated as of 21-Jun-2021 (17-Jun-2021 + 4 days) and the task is assigned to them.</p>

Related Topics

- [Checklist and Journey Templates](#)
- [Enterprise Onboarding Checklists](#)
- [Considerations for Creating Templates](#)
- [Guidelines for Loading Allocated Checklists](#)
- [Examples of Loading an Allocated Checklist](#)

How Eligibility Profile, Task Performers and Task Owners are Determined

The date when the action becomes effective for certain checklist actions is predetermined.

Checklist Action	Date When Action Becomes Effective
<ul style="list-style-type: none"> Add Pending Worker 	Proposed start date of the pending worker
<ul style="list-style-type: none"> Add Assignment Add Temporary Assignment Add Global Temporary Assignment Change Location Change Manager Global Transfer Promote Transfer 	First day of the new active assignment
<ul style="list-style-type: none"> End Assignment Termination End Temporary Assignment End Global Temporary Assignment Termination 	Last day of the current active assignment

For example, in a checklist for the termination action let's see how the eligibility profile is evaluated and when task performers such as line manager and HR representative are notified of their tasks.

Action and Evaluation	Date
Terminate worker	27-Jun 2019
Last day of active assignment	27-Jun 2019
Inactive assignment start date	28-Jun 2019
Checklist eligibility evaluated, task owner and performer determined	27-Jun 2019

What Happens When Offset Days is Specified

You can specify offset days for a task to determine when the task should be evaluated and when task owners and performers should be determined. Say you create a checklist for the transfer action which is effective 17-Jun 2019. You have 3 tasks one each for the current manager, new manager, and HR representative. Let's see how the task allocation date changes for each task performer based on the offset values you specify:

Task Details	Task 1	Task 2	Task 3
Name	Complete Performance Appraisal	Set Development Goals	Orientation Session with New Employee
Task Performer	Line Manager	Line Manager	AoR (HR representative)
Offset Days	-3 days	1 day	4 days
Task allocated and notification sent to task performers on	14-Jun 2019	18-Jun 2019	21-Jun 2019
Task performer determined based on offset days	Current Line Manager	New Line Manager	New HR representative

Related Topics

- [How Eligibility Works With Other Objects](#)

Process to Update Assigned Checklist and Journey Attributes

You may want to include any checklist and journey or task related changes in already assigned journeys. You can do this using the **Update Assigned Journey Attributes Based on Modified Journey Template** process.

You can run this process in the Scheduled Processes area only for journeys and tasks that are in progress and not in terminal status. Based on the parameters you specify, the process updates those attributes in the assigned journey or task. You require the Run Global HR Processes function privilege to run this process manually.

Process Parameters

When running the process you need to specify the values for the parameters listed in this table.

Process Parameters	Details
Checklist Name	List of checklists that can be updated. The checklist names display as IDs in the ESS Process Details dialog box.

Process Parameters	Details
Task name	List of tasks that can be updated. The task names display as IDs in the ESS Process Details dialog box. You must provide a checklist name if you provide the task name parameter.
Person Numbers	Person number or comma separated values for person numbers. If you don't provide person numbers, the ESS process synchronizes attributes across all open allocations of that journey and task.
Configuration	Configuration comprises the checklist and task attributes enabled for synchronization on the Configurations tab in the Checklist Templates page. When you add a configuration, you need to enable it first and then enable some or all of the attributes that you want to synchronize.

Process Results

You can use the log files to validate the synchronization process. If you try to update a task that doesn't exist in the selected checklist, the process stops.

Points to Note

You can't use the ESS process to assign a new task that you add to a checklist template. Similarly, it can't be used to delete an assigned task if you delete the task from a checklist template. You will need to make such changes through the user interface, HDL, or REST API. You can't use the ESS process to update the Basic Esign, Embedded Learning, I9, OPA, Document, Questionnaire, and Configurable Form task types.

Any task related change that you make in these scenarios aren't synchronized:

- When you change the task type, for example, from Manual to Video.
- When you update the configuration of an existing Questionnaire and Configurable Form task.
- When you change the preceding task configured in a checklist.

Attributes Updated During Process Run

Attributes updated at the checklist, journey, and task level during the Update Assigned Journey Attributes Based on Modified Journey Template process are listed here.

Level	Tabs	Synchronized Attributes
Checklist	General	<ul style="list-style-type: none"> • Checklist Name • Description • Archive After Months • Purge After Months
	Message	<ul style="list-style-type: none"> • Title • Welcome Text • Background Image URL • Thumbnail Image URL • Template for Assigned Checklist • Combined Task Notification Template

Level	Tabs	Synchronized Attributes
		<ul style="list-style-type: none"> • Force Complete Notification Template • Contacts • All supported checklist display properties <p>Note: Display Name Format on Journey Card isn't synchronized.</p>
Task	General	<ul style="list-style-type: none"> • Name • Description • Sequence • Enable expiry • Target Duration • Required • Report Path • Signature Type • Template ID • Attachment • Comments • Attachments to Document Records • Attachments Are For • Document Type • Activation Criteria • OTBI Analytics Path • Analysis Parameters • Task Configuration • Application Task • Learning Item Title • URL • Notes • Complete • Mark as Not Applicable • Save as Draft • Add to Calendar • Activity Action 1 • Activity Action 2 <p>Note: Task Owner, Task Type, specific task types such as Basic Esign, and Embedded Learning aren't synchronized.</p>

Level	Tabs	Synchronized Attributes
	Notification and Reminders	<ul style="list-style-type: none"> • Notification Overrides <ul style="list-style-type: none"> ○ Notify Performer • Task Alert Templates <ul style="list-style-type: none"> ○ Template for Performer ○ Template for Owner ○ Template to Notify Performer on Task Expiry ○ Template to Notify Owner on Task Expiry ○ Template to Notify Performer About Task Marked Not Applicable ○ Template to Notify Owner About Task Marked Not Applicable ○ Template to Notify Performer of Force Closed Task ○ Template to Notify Owner of Force Closed Task • Reminder Template <p>Note: Enable reminder isn't synchronized.</p>
	Notes	Supported.
	Display Settings	All supported task display properties.

Related Topics

- [Process to Update Assigned Checklist and Journey Attributes](#)

FAQs for Allocation

Where can a performer view details of the person to whom the task is allocated?

If you don't have access to a worker, but are a performer for the worker's task, you can see the task and its details in your My Tasks tab in Journeys, and in Current Tasks if you use the Checklist Tasks app.

When does a checklist task get allocated to the task initiator?

When a task is allocated, the hierarchy followed is, it's first allocated to the task performer; If the performer isn't available, then it's assigned to the task owner, and if the task owner isn't available, it's allocated to the task initiator.

Can more than one Onboarding checklist be allocated to the same worker at the same time?

No, only one Enterprise Onboarding checklist is allocated automatically. In case another Enterprise Onboarding checklist is manually allocated with a specific Allocation Date, only the most recent checklist will be displayed on the Onboarding home page of the new hire.

Are checklists automatically allocated to pending workers created using HCM Data Loader ?

No. You need to either load the allocated checklist object for the worker using HCM Data Loader or use the Allocate Checklists page to manually allocate the checklist.

Task Types

Task types determine the type of checklist task, the task performer needs to complete.

These are the task types you can configure:

Task Type	What You Use it For	When is Task Complete	Example
Advanced Task	<p>Combine 3 task types into a single task. The task types you can combine are listed here:</p> <ul style="list-style-type: none"> • Document • External URL • Application Task • Video • Embedded Learning • Questionnaire • Configurable Form • Electronic Signature • Report <p>When configuring electronic signature, if you want the user to sign the document, you need to select the Report task type and provide the report path. Then specify the Document Type to indicate where the signed document needs to be saved.</p>	User clicks the Done or Complete button	Watch a video, complete a survey, and sign a document as part of onboarding.

Task Type	What You Use it For	When is Task Complete	Example
	See the topic, How You Create an Advanced Task		
Analytics	<p>Specify the OTBI report path and parameter to display tables, bars, and graphs. When setting up the task, you can specify the type of analysis parameters you want to pass at run time:</p> <ul style="list-style-type: none"> Name: The name of the attribute in the OTBI subject area along with the object name. For example, "Worker"."Assignment ID" or Worker". "Person ID" Type: Lists the supported attributes which are Person ID and Assignment ID. <p>Note: This task type is available only for Guided Journeys.</p>	User clicks the Done or Complete button.	<p>View the analysis displaying person checklist details in a guided journey task. The OTBI Analysis path for this example would be something like this:</p> <p>/shared/Custom/Human Capital Management/Person Checklist Details</p> <p>And the analysis parameters in this example would be:</p> <ul style="list-style-type: none"> Type = Person Id Name = "Worker"."Person ID"
Application Task	Select a task from a list of tasks that can be performed within the application itself. You can select the task based on the performer of the task.	User is taken to another page to do the task but revisits the task drill down page to mark the task as done or complete.	Update personal details.
Configurable Form	<p>Define configurable forms and capture additional details. Although the details will be captured using the form, the information won't be updated in the respective fields of the application.</p> <p>Note: This action type requires additional setup. Use the Checklist Descriptive Flexfields task to create a descriptive flexfield associated to PER_PERSON_ALLOCATED_TASKS_DFF.</p> <p>See these topics:</p> <ul style="list-style-type: none"> How You Create Configurable Forms Checklist Descriptive Flexfields 	User clicks the Complete button.	Fill forms related to corporate policy, tax.

Task Type	What You Use it For	When is Task Complete	Example
Document	Attach a document that workers can download, see, and read as part of their tasks.	User clicks the Done or Complete button.	Download insurance form, print (optional), fill up or enter details, scan (if printed) the form and upload as attachment.
Electronic Signature - DocuSign	<p>Create tasks where workers can electronically sign during the onboarding process.</p> <p>Allows users to electronically sign the document in DocuSign. Requires integration with third-party service provider, DocuSign.</p> <p>See the topic, Configure Electronic Signature Using DocuSign</p> <p>For more information on electronic signature using DocuSign, see the document Checklists - Integration with DocuSign (https://community.oracle.com/customerconnect/discussion/630999) on Customer Connect.</p>	User is taken to another page to do the task but revisits the task drill down page to mark the task as done or complete.	Sign a non-disclosure agreement.
Embedded Learn	<p>Include learning content to help a task performer in their journey. You can include these content subtypes:</p> <ul style="list-style-type: none"> • Document • Video 	User clicks the Done button after they view the complete video in an embedded learn video task or after they have clicked the See document link in an embedded learn document task.	Training video that an employee needs to watch as part of their new hire onboarding process.
External URL	<p>Define an external URL that workers will use to perform the task. You can create an URL that includes specific parameters or create the URL using the Manage Integration of Additional Applications task in Setup and Maintenance.</p> <p>See the topic, How You Configure the URL for External URL Task Type</p>	User is taken to another page to do the task but revisits the task drill down page to mark the task as done or complete.	Link to the benefits provider site.
I-9 Verification	<p>Enables users to update or verify personal details during I-9 employment eligibility verification (US specific only) using HireRight.</p> <p>See the topic, Integrate Checklist with HireRight for I-9 Employment Eligibility Verification</p> <p>For more information on I-9 integration, see the document Checklists - Integration</p>	User is taken to another page to do the task but revisits the task drill down page to mark the task as done or complete.	Verify employment eligibility during onboarding.

Task Type	What You Use it For	When is Task Complete	Example
	with HireRight (https://community.oracle.com/customerconnect/discussion/631000) on Customer Connect.		
Learn Community	Associate the learn community task type to the title of a predefined learning item.	User clicks the Done button.	Join a community for new hires.
Learn Enrollment	Associate the learn enrollment task type to any of these predefined learning items: <ul style="list-style-type: none"> • Course • Learning Journey • Offering • Specialization 	User clicks the Done button.	Enroll for a specialization in programming.
Manual Task	Create a task that workers need to perform outside of the application.	User clicks the Done or Complete button.	Introduce the new hire to the team.
Native Electronic Signature	<p>Create a task where workers can provide their consent by entering their name and email address. There are two ways you can configure this. You can specify the report path and document type to save the signed document in document records or keep it basic without configuring these fields.</p> <p>You can see the date on which the consent was provided. Only the name of the person providing their signature is validated against the logged in user's name. There's no validation for email address.</p> <p>See the topic, Configure Native Electronic Signature</p> <p>For more information on native electronic signature, see the document Checklists - Electronic Signature and Transfer to Document Records (https://community.oracle.com/customerconnect/discussion/630997) on Customer Connect.</p>	User clicks the Done or Complete button.	Sign employment agreement.
Oracle Process Automation	Enables users to automate business processes using the integration with Oracle Process Automation (OPA). See the topic, Integrate Checklists and Journeys with Oracle Process Automation.	User clicks the Done or Complete button.	Employee asset request, uniform request.

Task Type	What You Use it For	When is Task Complete	Example
Questionnaire	<p>Add a questionnaire to collect feedback from workers.</p> <p>Note: You use the questionnaire functionality in HCM to create a questionnaire and select HR Checklists as the subscriber.</p>	User clicks the Done or Complete button.	Onboarding survey, exit questionnaire, collect information.
Report	<p>Specify and include a link to a published BI report.</p> <p>Note: Ensure that you provide the user the required privileges to access the BI Publisher report.</p> <p>See the topic, How You Configure the Report Task Type.</p>	User is taken to another page to do the task but revisits the task drill down page to mark the task as done or complete.	Report that has all the employee details such as personal and assignment details for employee review.
Video	<p>Add a video using either an Embedded URL or a Media URL for a video.</p> <ul style="list-style-type: none"> • Embedded URL: Supports videos hosted on media servers that support an embed format. • Media URL: Supports videos hosted on media servers that don't support the embedded format. For example, Oracle Universal Content Manager (UCM). 	User clicks the Done or Complete button.	<p>Welcome video from the CEO to address new hires in the organization.</p> <p>Example of an Embedded URL on YouTube, <code>https://www.youtube.com/embed/ts15zsbk8VQ</code></p> <p>Example of Media URL and how you build the syntax of the URL: Link to access UCM: <code>https://<pod URL>/cs</code></p> <p>When adding a media file from UCM, the link is generic. Example: <code><generic internal URL>/cs/groups/fafusionimportexport/documents/digitalmedia/ytaw/mtu1/~edisp/ucmfa00155968.mp4</code></p> <p>You need to replace the part that says generic internal URL with your actual pod URL.</p> <p>The media URL for a video hosted in UCM will be something like this: <code><actual pod URL>/cs/groups/fafusionimportexport/documents/digitalmedia/</code></p>

Task Type	What You Use it For	When is Task Complete	Example
			<code>ytaw/mtu1/~edisp/ ucmfa00155968.mp4</code>

Note:

- You can configure Notifications, Reminders, and Notes for all task types.
- Performers can add attachments and comments for all task types if enabled.
- If a document type is configured for the task, the attachments are stored in Document Records.
- If a document type isn't specified, then the attachments are stored in Universal Content Manager and are accessible only from the completed checklist task.
- All attachments uploaded for a specific task are stored against the same document record created based on the document type configured for the task.
- Performers can download all task types as an `.ics` file to add to their calendar. The downloaded `.ics` file includes a link to the task and takes the performer directly to the task page. You can't modify the `.ics` file contents.
- For tasks of the type Application, External URL, Report, DocuSign, and I-9 Verification, Complete on the task drill down page is enabled only after the user goes to the task at least once.
- For tasks of the type Electronic Signature, Complete on the task drill down page is enabled only after the user clicks View Document at least once.

Tasks

You can configure tasks as optional or required. You can also configure tasks as having dependent tasks. For example, a task where the worker needs to request for their identity badge could have a preceding task where the worker needs to verify their personal information details. HR specialists and line managers can't send reminders on such dependent tasks. On the worker dashboard, such tasks are displayed with a locked icon.

When you send a reminder, the reminder is per task and not a single reminder for multiple tasks. Tasks that are incomplete in a particular step are automatically carried forward to the next step in the onboarding process.

Although you can specify task description this isn't visible to task performers or editable in the task pages.

Task Library

The task library is a repository of tasks from which you can select and add tasks to a checklist template or an assigned journey. You can create a task in the Task Library using either of these options:

- By navigating to Task Library on the Checklist Templates page and adding tasks directly.
- By clicking Add to Library for each task on the Tasks tab of a checklist template.

Any changes you do to the task details of a task in the task library won't be reflected in a task that's already added to a checklist template. When a task is added from the task library, eligibility profile isn't evaluated since tasks in the task library don't have eligibility profile associated.

You can't add tasks from a task library to a contextual or guided journey because tasks created in contextual and guided journeys are different. Not all task attributes are supported for tasks that are part of a contextual or guided journey.

Note: Enterprise Onboarding Step checklists that you create on the Tasks tab of an Enterprise Onboarding category checklist can't be added to the task library.

Related Topics

- [Questionnaires](#)

How You Create Tasks

Create, maintain, and view tasks used in checklist templates using the Checklist Templates task in the Setup and Maintenance work area.

You can create a task directly in a checklist that's assigned to a user when the checklist is triggered or create tasks in the task library that can be assigned manually by a line manager or HR specialist.

At the time of creating the checklist, you can specify if the task is required or optional. Based on whether you want the task to be available for use in a checklist immediately or later you set the status as Active or Inactive. You can set the task duration. The target end date is derived based on the duration entered.

Task Sequence

You can specify the sequence in which tasks must be displayed. This is set to Yes by default. You can disable this by modifying the **Order Tasks by Sequence** checklist property in the Display Properties tab. Task sequence only controls the display of tasks, it doesn't restrict the task performer from performing the tasks in any order.

Here's what you need to note if you use Journeys:

- If task sequence is enabled using display properties, the tasks always remain in the same position, regardless of their status.
- If task sequence isn't enabled, the tasks are ordered by in-progress tasks ordered by due date, followed by dependent tasks, then deferred tasks, then completed tasks.
- When you access a specific journey under My Journeys or Assigned Journeys, the journey tasks are displayed in sequence only in the context of the journey.

- The My Tasks tab doesn't show the tasks in the sequence that they are configured in a specific journey. This is because the tab contains tasks from multiple journeys.

Task Performer

Task performer is the person who carries out the task. You select one of the following performers:

- Worker - is the person who's the subject of the checklist.
- Line Manager - is the person who's the line manager of the worker's primary assignment as of the reference evaluation date. This date is the task allocation date or the date that's derived after applying the offset days.
- Area of Responsibility (AOR) - is the person or group of persons who have a specific responsibility for the worker's primary assignment as of the reference evaluation date. This date is the task allocation date or the date derived after applying the offset days. The performer name displays the responsibility type name and not the name of the persons who have that area of responsibility.

Note: Let's say the worker and the performer derived based on AOR end up being the same person, and a journey task is assigned to the performer. Then the task doesn't display in the Others' Task section.

If you are a task performer or owner, you don't have to enable the **Include in Work Contacts** option, unless the representative is truly a contact. However, when configuring the AoR, you must specify Usage option as Checklist for the representative to appear in the Journeys task. During journey allocation, the individuals with the selected responsibilities are identified and designated as task performers or owners, regardless of the work contact's flag.

- Initiator - is the person who initiated the original transaction which triggered the checklist or person who manually assigned the checklist.
- Specific user - It's recommended not to use this option as this will be decommissioned in the future.

If there are multiple performers for a task, then the task needs to be created for each performer by specifying the precedence to control the sequence.

Note: If you don't have access to a worker, but are a performer for the worker's task, then here's how you can act on the task:

- You can see the task in your My Tasks tab in Journeys, and in Current Tasks if you use the Checklist Tasks app.
- You can expand and view the details of that task.

Task Owner

Task owner is the person who owns the task. A task owner needs to take action in these scenarios:

- Act as the main contact for a task. The task owner's information displays in Contact Info section of the assigned task.
- Receive notifications when a task is assigned, reassigned, completed, updated, or deleted (you need to enable the notification setting for task owner in the Notifications and Reminders tab when configuring a task).
- Act as the alternate task performer if the performer to whom the task is assigned isn't valid (if the performer of the task is the line manager or area of responsibility who aren't available for that worker).

You can select one of the following owners:

- Line Manager - is the person who's the line manager of the worker's primary assignment as of the reference evaluation date. This date is the task allocation date or the date derived after applying the offset days.
- Area of Responsibility (AoR) - is the person or group of persons who have a specific responsibility for the worker's primary assignment as of the reference evaluation date. This date is the task allocation date or the date derived after applying the offset days. The performer name displays the responsibility type name and not the name of the person who has that area of responsibility.
- Initiator - is the person who initiated the original transaction which triggered the checklist or person who manually assigned the checklist
- Specific user - It's recommended not to use this option as this will be decommissioned in the future.

Note:

- In order for a task owner to be able to view or perform the task, you need to grant them the Access Journey by Worker duty role if you're using Journeys. If you aren't using Journeys, grant the task owner the Manage Person Allocated Checklist by Worker function privilege.
- A task owner can't access a person directly in the Journeys or Allocate Checklists flows. If you want them to have access to that person in these flows, you need to grant the appropriate person security profile to the task owner's role.
- When you use HDL or REST API to allocate a checklist through a user who doesn't have a person record, then nothing is shown in the Contacts Info section of the task. When such a task is assigned to new hires, the Contacts Info section appears blank. For more information on allocating checklists using HCM Data Loader, see the HCM Business Objects guide.

Task Type

Specify the type of task that should be performed, whether it requires the performer to go to an external website or can be performed in an internal application. For example, the task could require a new hire to enroll for benefits. You can use the available task types in any checklist category.

Note:

- All task types have the **Save as Draft** action. If there are mandatory fields in a task (for example, questionnaire or configurable form), you need to enter them all to use the **Save as Draft** action.
- Redwood pages that are built using the Visual Builder Studio (VBS) are currently not supported when the selected task type is Application Task. Even if the Redwood pages appear in the task configuration UI, you can't open them from Journeys.

Attachment and Comments

Enable attachments and comments when you create the task. If you enable Attachments, you can configure the document type you want the attachments to be stored against. In case you don't specify a document type, the attachments won't be stored in Document Records. In case you upload multiple attachments, they will be stored against the same document record for the specified document type.

Also, a checklist assignee or task performer can add attachments and comments when performing the task. By default, attachments are stored for the task performer but you can change that. Based on what you select, checklist assignee or task performer, attachments are stored in that person's document records. The attachments you can store are attachments added to an allocated task, BIP reports that are generated as part of the report task type, and signed documents generated as part of the native electronic signature task type. You can enforce adding attachments and comments by setting the display property to Yes for both **Make attachments required** and **Make comments required** on the Display Properties tab of a task.

Note: 1-9 documents will always be stored against the checklist assignee.

Notifications and Reminders

You can set task notifications and reminders to draw the attention of task performers to the tasks. You can also specify the frequency for these reminders. You can use predefined alert templates in your checklists to notify task owners and performers for events related to absence, health and safety, learning, person, recruiting, and talent. Task performers and owners access their tasks either from the Recent Notifications Alert or from the My Tasks section in their BPM worklist. Optionally, they can create a user view to filter the tasks in their worklist. For example, task owners may create a user view to only display those tasks that they own and not display tasks for which they're performers.

Notes

Include instructions and details for task performers on how and where to perform the task. Here are some points for you to consider:

- If you want to include images in the Notes section for a journey task, it's recommended that you host the image in an accessible location. Additionally, include the image URL in the Notes section instead of embedding the images. If you embed images directly in the Notes section, your table storage will increase rapidly.
- You can configure the URL that you specify in Notes section to open in a new window. To do this, you select URL as the link type, and then specify the protocol and URL in the Link Info tab. You then select New Window in the Target tab so that the URL opens in a new window.
- You can hide or change the default Notes header to something more meaningful for the task. If you hide the Notes header, the expand and collapse option is also hidden. This is applicable only for responsive pages and not for Journey pages.

Related Topics

- [Checklist and Journey Templates](#)
- [Enterprise Onboarding Checklists](#)
- [How Checklists and Journeys are Assigned](#)
- [Task Types](#)

Task Groups

A task group is a grouping of common tasks that you can reuse in multiple journey templates. For example, you can create a group of common tasks to use in various onboarding journeys.

You can configure a task group using the Task Groups tab on the Checklist Templates page.

Create Task Groups

Any user who has access to Checklist Templates can create task groups but if you want to restrict the access, you need to configure the role in Category Security. For example, if you add the HR specialist role, only users with that role can create task groups. Roles that you give access to can use Task Group to create a task group.

Configure Task Groups

A task group acts like the parent task to which you add child tasks. You can include one or multiple tasks and keep them as standalone, dependent, or a combination of both. You can also configure task groups that are dependent on each other.

You can specify the name and other details such as the eligibility profile and completion criteria at the task group level or at each specific task level. When you add tasks to a task group, you can either create a new task or add an existing task from the task library. After you create the task group, you select this task group from the Task Group Name drop-down list when adding it to journey template.

Track Usage

If you want to see where a particular task group is used, you can use the Usage tab on the Task Groups page. When you make a change to a task group, the changes reflect in all journey templates in which it is used. When a journey with a task group is assigned, the name of the task group doesn't display anywhere in the Journeys app. Assignees only see a sequence of tasks that they need to complete. The tasks display based on any activation criteria or dependency that you have configured on the setup side.

Create a Task Group

As a HR specialist, you need to create a task group that includes 3 common tasks that new hires need to do as part of their onboarding. You add this task group to an onboarding journey template that you created previously.

Before You Start

1. Create an onboarding journey template titled New Hire Onboarding for Vision Corp.
2. This example assumes you have created 2 tasks with sequence 1 and 2 respectively. Task 1 is Welcome the New Hire and task 2 is Sign the Confidentiality Agreement.

Create the Personal Information Task Group

1. Go to My Client Groups > Employment > Checklist Templates quick action or Setup and Maintenance > Checklist Templates task.
2. Click **Task Group** on the Checklist Templates page and then click **Create**.
3. Specify the name of the task group and click OK.
4. Enter values as indicated in the following table. For other fields, use the default values.

Field	Values
Name	Personal Information
Status	Active
Description	Task group to use in onboarding journeys.
Completion Criteria	All mandatory tasks completed

5. Click OK.
6. Click Save and then click the Tasks tab.
7. Click **Create** and then click **Create Task**. Enter details for Task 3 and repeat the same for Tasks 4 and 5.

Field	Task 3	Task 4	Task 5
Name	Watch the Video on Updating Personal Details	Update Personal Info	Update Contact Info
Status	Active	Active	Active
Sequence	3	4	5
Required	Yes	Yes	Yes
Preceding Task	Sign the Confidentiality Agreement	NA	NA
Target Duration	2 days	2 days	2 days
Performer	Worker	Worker	Worker
Owner	Initiator	Initiator	Initiator
Task Type	Video: Embedded URL: URL	Application Task: Personal Details	Application Task: Contact Info

8. Click **Save and Close**.

Include Task Group in New Hire Onboarding for Vision Corp Journey

1. In Checklist Templates, search for the New Hire Onboarding for Vision Corp journey template.

2. Open the template and click the Tasks tab.
3. Click **Create Task from Task Group**.
4. Enter values as indicated in the following table. For other fields, use the default values.

Field	Values
Name	Personal Information
Sequence	3
Required	Yes
Preceding Task	Sign the Confidentiality Agreement
Task Group Name	Personal Information

5. Click **Save and Close**.

When this journey is assigned, workers will see only the list of tasks based on the sequence. The name of the task group won't display in the Journeys app.

Related Topics

- [Task Groups](#)
- [Considerations for Creating Task Groups](#)

Considerations for Creating Task Groups

Here are some points you need to consider when creating a task group:

- You can configure task groups only on the setup side in the Checklist Templates page. This isn't possible in the Journeys app.
- You can't add a task group to an assigned journey or when creating a personal journey.
- You can't add a task group to a journey template that has the Processing Mode as BI Publisher based notification.
- Task groups that you reuse across journey templates work on the basis of reference. When you update a task group, the changes reflect in all journey templates where the task group is used.
- The Task Group name you configure doesn't display to users when a journey template that includes that task group is assigned to them in Journeys.
- A journey template can have multiple task groups. But you can't create a task group within a task group.
- You can't configure task dependency between tasks in one group and tasks in a different task group. However, you can configure dependency between 2 task groups, say you have 2 task groups – task group A and task group B, you can configure task group B to get activated only when task group A is completed.
- You can't assign a standalone task group to a user. A task group needs to be part of a journey template.
- A task group is supported as a part of a journey template in the following operations:
 - Export and Import functionality to export or import a task group.

- HDL support is scheduled for a future release.
- You can't create a task group in the following checklist categories:
 - Enterprise Onboarding
 - Enterprise Onboarding Step
 - Guided Journeys
 - Survey Journeys

Considerations When Using Tasks and Task Groups

Here are some differences you need to consider when creating tasks and task groups:

Considerations	Task	Task Group
Where to configure?	Checklist Template page > Task Library or in template > Tasks tab	Checklist Templates page > Task Group tab > Create
When to use?	Create tasks on a case by case basis.	Create task groups when you have common tasks that can be used in different templates. You can use multiple task groups in a journey template.
How to manage?	Manage as part of template or manage as part of task library.	Go to Task Groups and manage the tasks. Use the Usage tab to track where the task groups are used.
Is eligibility criteria supported?	Yes, supports eligibility criteria.	Yes, supports eligibility criteria.
Is task dependency supported?	Yes. Task dependency works based on a one to one mapping.	Yes, it is. <ul style="list-style-type: none"> • A task can be dependent on a task group. • A task group can be dependent on a task. • A task group can be dependent on a task group.
Can these features be used in all checklist categories?	Yes, you can create a task of any type.	No, task groups aren't supported in categories such as Survey and Guided Journeys.
Can this be created in the task library?	Yes, you can create and add tasks to the task library.	No, a task group type can't be created in or added to the task library.
How do users access the tasks?	Access the task when the journey is assigned.	Access the tasks of a task group as individual tasks on the journeys pages. The task group name is not visible anywhere on the assigned journeys page.
After a task is assigned, and if the task configuration is updated, will the changes be reflected in assigned journeys?	Yes, using the Update Assigned Journey Attributes Based on Modified Journey Template ESS process.	No, currently this isn't supported for task groups.

Related Topics

- [Task Groups](#)

How You Use Activation Criteria to Trigger Tasks

You can configure an Activation Criteria when you create a task. This causes the task to be activated when the criteria is met.

You can set the Activation Criteria on the Create Task page.

For example, say you have a task where employees need to respond with a Yes or No for their vaccination certificate. If they answer Yes, you can use the activation criteria to check for this response and trigger a dependent task where they can upload their vaccination certificate. If they answer No, you can use the activation criteria to check and trigger a dependent task where they respond to a Wellness check questionnaire. You can achieve this by renaming the Done button to Yes and the Not Applicable button to No. You can then configure Activation Criteria for the respective dependent tasks.

The activation criteria can be used in scenarios like these where you need to activate tasks based on the user's response:

- When the user responds to a task with either Done or Not Applicable.
- When the user responds to a specific segment with a specific response in a Configurable Form task.
- When the user responds to a specific question with a specific response in a Questionnaire task.

Configuring the Activation Criteria

At a high-level, this is how you configure the activation criteria:

1. Create a fast formula that includes conditions. The formula type needs to be Participant and Rate Eligibility.
2. Associate the fast formula to an eligibility profile.
3. Select the eligibility profile as the task activation criteria for the dependent task that needs to be activated if the condition is met.

You can only access these dependent task attributes in the fast formula:

- ACTUAL_END_DATE
- ALLOCATED_CHECKLIST_ID
- ALLOCATED_TASK_ID
- ATTRIBUTE_DATE1
- ATTRIBUTE_DATE2
- ATTRIBUTE_DATE3
- ATTRIBUTE_NUMBER1
- ATTRIBUTE_NUMBER2
- ATTRIBUTE_NUMBER3
- ATTRIBUTE1

- ATTRIBUTE2
- ATTRIBUTE3
- ATTRIBUTE4
- ATTRIBUTE5
- COMPLETED_BY
- DEP_ALLOCATED_TASK_ID
- FLEX_CONTEXT_CODE
- PERFORMER_PERSON_ID
- PERFORMER_USERNAME
- QUESTIONNAIRE_ID
- REOPEN_DATE
- STATUS
- TARGET_END_DATE

How the Activation Criteria is Evaluated

The activation criteria is evaluated based on the response of the user. It's unlike the task eligibility profile which is evaluated at the time of journey allocation.

All the dependent tasks are visible but grayed out. Once the activation criteria is evaluated, tasks that meet the criteria become visible and active. Tasks that don't meet the criteria won't be visible. A task that doesn't meet the activation criteria displays the criteria failure as the task status.

Note: If you reopen a task that's configured with an activation criteria, the activation criteria won't be re-evaluated again for the reopened task.

For more information on fast formulas, see the *Administering Fast Formulas* guide on Oracle Help Center.

Related Topics

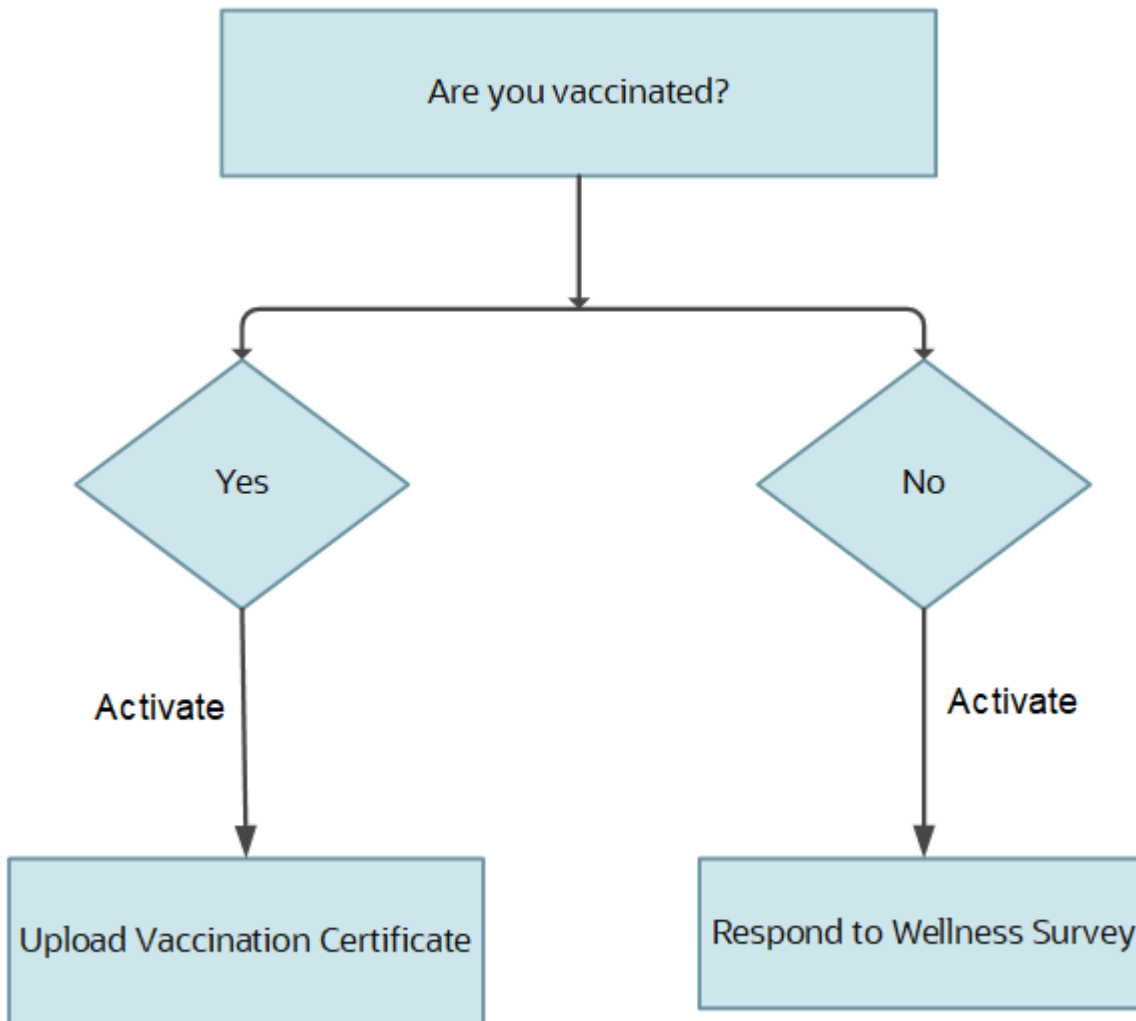
- [Eligibility Profiles](#)

Activate Tasks Based on Task Status

Let's take a look at how you can activate a dependent task based on the response provided by the user in a previous task.

This example assumes you have set up a task that asks users if they are vaccinated. You have renamed the task action labels Done to Yes and Mark as Not Applicable to No so that users can respond with a Yes or No. If the response is Yes, you want the condition to activate a task where they upload their vaccination certificate and if the response is No, you want the condition to activate a wellness assessment task.

This image illustrates the scenario when a task is activated based on a simple Yes or No response.



This sample formula checks for the status in the first task. If the response is Done or Yes, it activates the upload vaccination certificate task.

```
INPUTS ARE STATUS(text)
DEFAULT FOR L_STATUS IS 'REJ'
L_STATUS = STATUS
ELIGIBLE = 'N'
IF L_STATUS = 'COM' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```


This sample formula checks for the status in the first task. If the response is Not Applicable or No, it activates the wellness assessment task.

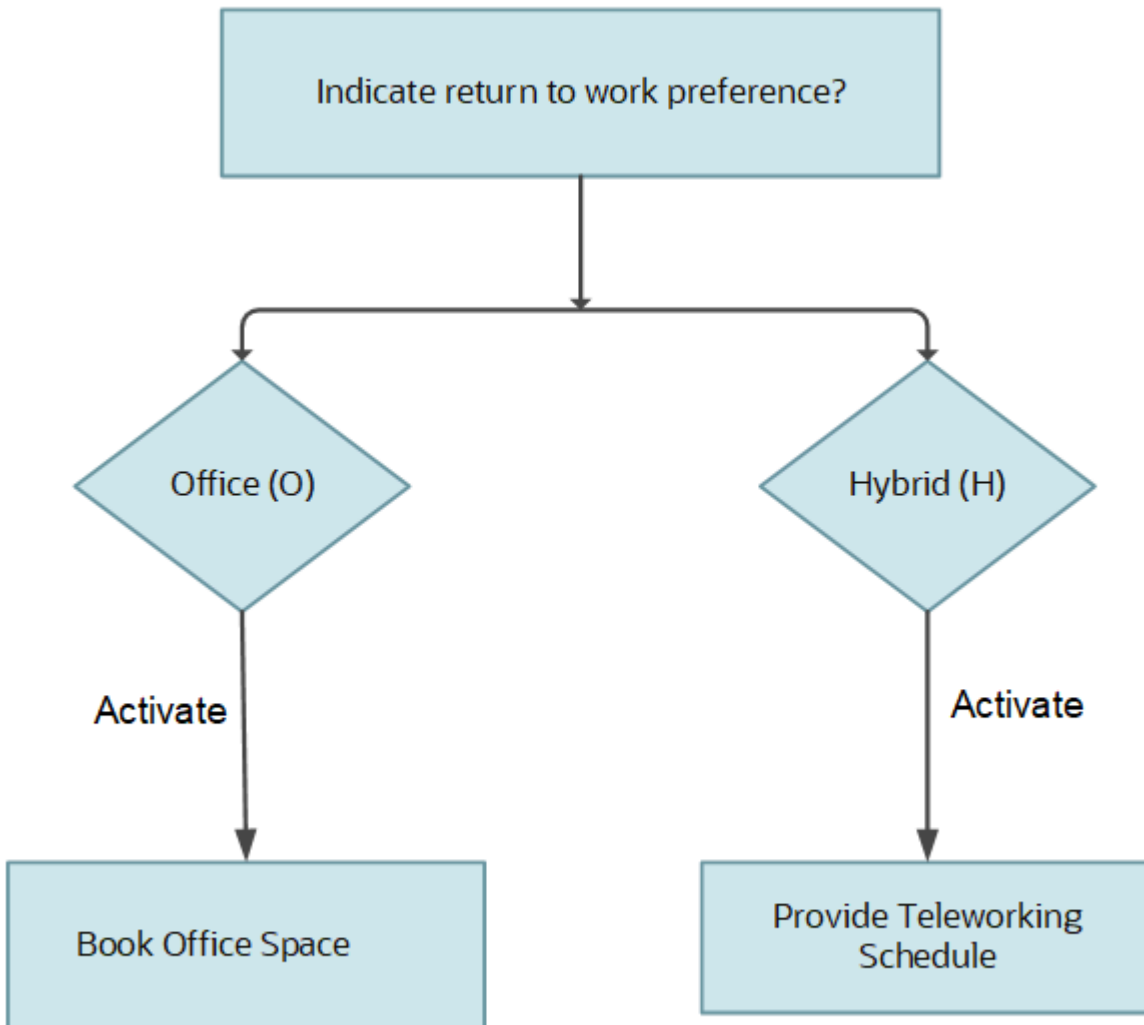
```
INPUTS ARE STATUS(text)
DEFAULT FOR L_STATUS IS 'COM'
L_STATUS = STATUS
ELIGIBLE = 'N'
IF L_STATUS = 'REJ' THEN
(
  ELIGIBLE = 'Y'
)
ELSE
(
  ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

Activate Tasks Based on Input to a Configurable Form

Let's take a look at how you can activate a dependent task based on the response provided by the user in a configurable form segment.

This example assumes you have set up a task that asks users what is their preferred work mode when they to return to work. You have configured a configurable form using the checklist descriptive flexfield to capture the response to the question. If the response is O (Office), you want the condition to activate a task where they book their office space and if the response is H (Hybrid), you want the condition to activate the task that records their remote working preference.

This image illustrates the scenario when a task is activated based on the user's response to a configurable form.



This sample formula takes the descriptive flexfield segment as input to branch to activate other tasks. If the response to that segment in a configurable form is O, it activates the book office space task.

```
INPUTS ARE ATTRIBUTE1(text)
DEFAULT FOR L_ATTR IS 'H'
ELIGIBLE = 'N'
L_ATTR = ATTRIBUTE1
IF L_ATTR = 'O' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

This sample formula takes the descriptive flexfield segment as input to branch to other tasks. If the response to that segment in a configurable form is H, it activates the task to store the remote working preference.

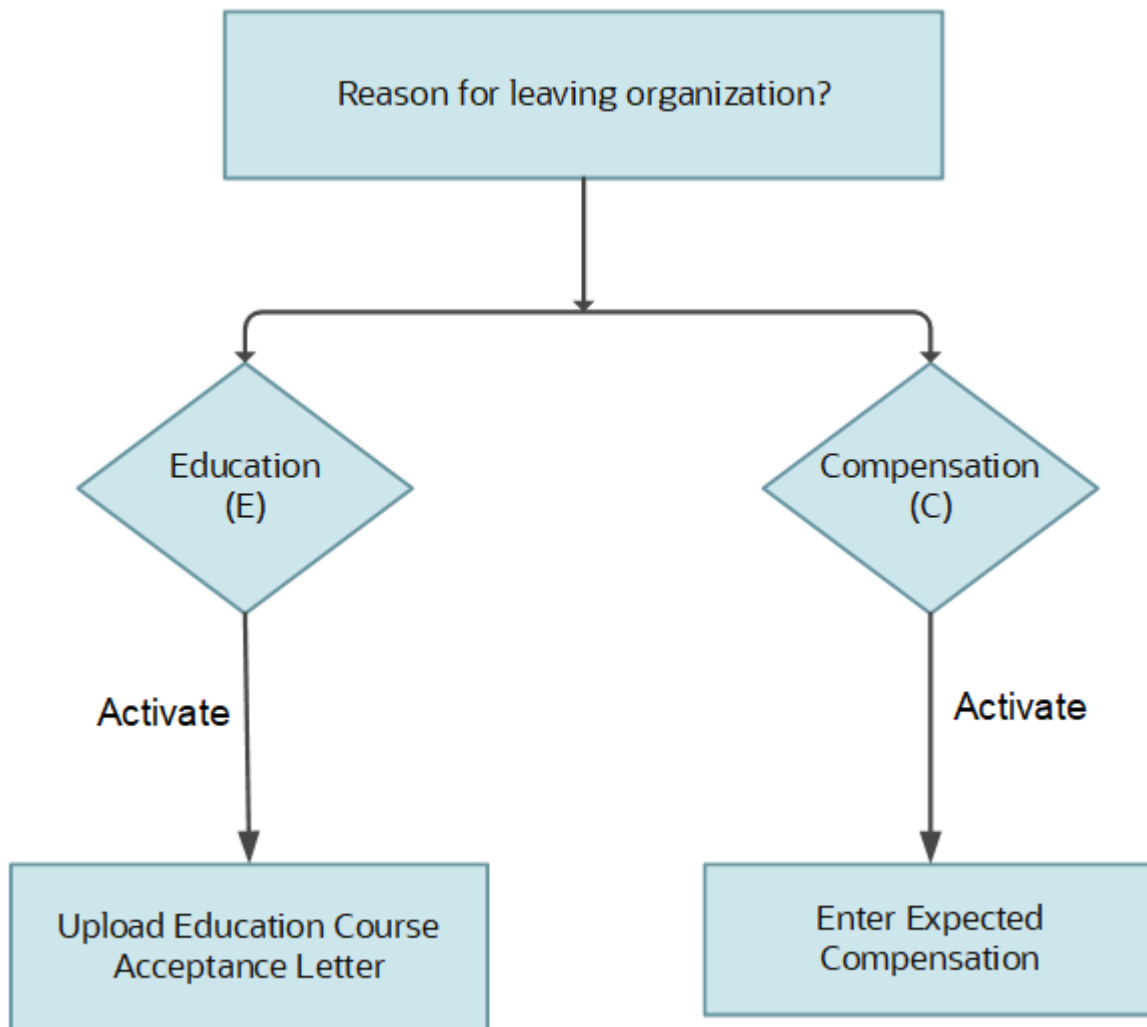
```
INPUTS ARE ATTRIBUTE1(text)
DEFAULT FOR L_ATTR IS 'O'
ELIGIBLE = 'N'
L_ATTR = ATTRIBUTE1
IF L_ATTR = 'H' THEN
(
  ELIGIBLE = 'Y'
)
ELSE
(
  ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

Activate Tasks Based on Input to a Questionnaire

Let's take a look at how you can activate a dependent task based on the response provided by the user to a specific question in a questionnaire.

This example assumes you have set up a questionnaire task that includes filling up a predefined exit survey at the time of offboarding. One of the questions in the questionnaire asks users to provide the reason for leaving the organization. If the response is E (Education), you want the condition to activate a task where upload their education course acceptance letter and if the response is C (Compensation), you want the condition to activate the task that records their expected compensation.

This image illustrates the scenario when a task is activated based on the user's response to a specific question in a questionnaire.



Define a Value Set

To retrieve the response to a question in a questionnaire, you need to create a value set. This sample value set query retrieves the response to the **Provide the reason why you are leaving this organization** question in the Exit Survey questionnaire.

1. Click + to create a value set.

2. In the Create Value Set page, enter these values:

Field	Values
Value Set Code	EXIT_REASON
Description	Value set to retrieve question response.
Module	Search and select Checklist Templates
Validation Type	Table
Value Data Type	Character

3. In the FROM Clause field, enter the following syntax:

```
fusion.per_allocated_checklists pac, fusion.per_allocated_tasks pat,
fusion.hrq_qstnr_participants hqp,
fusion.hrq_qstnr_responses hqr,
fusion.hrq_qstn_responses hqsr,
fusion.hrq_qstnr_questions hqq,
fusion.hrq_qstnr_sections_b hqs
```

4. In **Value Column Name**, enter `hqsr.answer_text`.

5. In **ID Column Name**, enter `hqsr.answer_text`.

6. In **WHERE Clause**, enter this syntax:

```
pac.allocated_checklist_id = pat.allocated_checklist_id
AND hqp.participant_id = pat.allocated_task_id
AND hqr.qstnr_participant_id = hqp.qstnr_participant_id
AND pat.questionnaire_id = hqp.questionnaire_id
AND hqsr.qstnr_response_id = hqr.qstnr_response_id
AND hqs.questionnaire_id = 2100 - This is the Questionnaire ID for 'Exit Survey' questionnaire.
AND hqs.qstnr_section_id = hqq.qstnr_section_id
AND hqq.question_id = 5920 - This is the Question ID for 'Provide the reason why you are leaving this
organization.' question.
AND hqq.qstnr_question_id = hqsr.qstnr_question_id
AND PAC.ALLOCATED_CHECKLIST_ID = :{PARAMETER.AllocatedChecklistId}
```

Note: This example uses the seeded Exit Survey questionnaire and the specific question **Provide the reason why you are leaving this organization** question in the questionnaire. You need to replace the questionnaire_id and question_id in the query provided in step 6 for the question that should be evaluated to trigger dependent tasks. These values are visible on the Questionnaires configuration page as Questionnaire Code and Question Code respectively. This query works only for a text field in a questionnaire.

This sample formula checks the response to a specific question 'Provide the reason why you are leaving this organization' in the seeded Exit Survey questionnaire to activate other tasks. If the response to that question is E, it activates the task where they can upload their education course acceptance letter.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS 'C'
ELIGIBLE = 'N'

ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'

QUERY = '|=AllocatedChecklistId='||ALLOCATED_CHECKLIST_ID_STR||''''
L_ATTR = GET_VALUE_SET('EXIT_REASON',QUERY)
```

```
IF L_ATTR = 'E' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

This sample formula checks the response to a specific question 'Provide the reason why you are leaving this organization' in the seeded Exit Survey questionnaire to activate other tasks. If the response to that question is C, it activates the task where they can provide their expected compensation.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS 'E'
ELIGIBLE = 'N'

ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'

QUERY = '|=AllocatedChecklistId='||ALLOCATED_CHECKLIST_ID_STR||''
L_ATTR = GET_VALUE_SET('EXIT_REASON',QUERY)

IF L_ATTR = 'C' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

How You Configure Task Expiry

You must specify the expiry duration for a task because it is required. If a task is not performed within the expiry period, then the task automatically moves to an expired (completion) status after that period.

How You Specify the Expiry

The option to specify the expiry is available for both required and optional tasks. You can't set a default value for the task expiry. However, you can use HCM Data Loader to update the task expiry for your existing tasks in the journey template.

You can set the task to expire either based on the task assignment date or task due date. For example, if you specify 10 days after task due date, it means the task will expire that many days after the due date.

If you want the task to expire based on the due date and you modify the due date for some reason, the task expiry is calculated again.

What Happens if Expiry is Configured

The Process HR Checklist and Tasks ESS process during the daily run evaluates tasks that have the expiry configured and moves the tasks to expired status. When this happens, the date of expiry displays along with Expired status and no further action is possible.

To notify task owners and performers when a task expires you can use these predefined alert templates Task Expiration for Owner (ORA_CHK_TASK_EXPIRED_OWNER) and Task Expiration for Performer (ORA_CHK_TASK_EXPIRED_PERFORMER) templates or a user-defined template in the Task Alert Templates section.

Note: To receive expiry alerts for a task, you need to navigate to the Notification and Reminders tab. Then, in the Notification Overrides section, select the **When task is completed** check box for Owner and Performer.

Examples of Task Delay Duration

You can delay the start of a task by specifying the number of days after which the task should be allocated to a task performer.

The delay duration along with other checklist allocation criteria you specify will determine when the task is allocated to a task performer.

Note: If you specify delay duration for a task that has a preceding task, then the delay duration is calculated from the day on which the preceding task is marked as complete. For example, you set Task A as the preceding task for Task B and Task B has a delay duration of 2 days. If Task A is completed on 19th July, Task B will be allocated and initiated on 21st July. Also, Task B will be listed in the Tasks Awaiting Allocation section.

In these examples let's see how the task allocation date changes based on the checklist allocation criteria and the delay duration.

Example 1

Allocate a checklist task to a task performer 2 days after the new hire record is created.

Allocation Criteria	Date
Create a new hire record	10-Jun-2019
New hire's Start Date	9-Jun-2019
Create a checklist template with action Hire and set checklist allocation criteria to Checklist manually allocated or record created and approved	
Create a task Verify Personal Information with performer as Worker	

Allocation Criteria	Date
Specify Delay Duration	2 days
Checklist task is allocated and task notification sent (10-Jun-2019 plus 2 days)	12-Jun-2019

Example 2

Allocate a checklist task to a task performer 2 days after the new hire record becomes effective.

Allocation Criteria	Date
Create a new hire record	10-Jun-2019
New hire's Start Date	9-Jun-2019
Create a checklist template with action Hire and set checklist allocation criteria to When the action record becomes effective and Days for Initiation as 4	
Create a task Verify Personal Information with performer as Worker	
Specify Delay Duration	2 days
Checklist task is allocated and task notification sent (10-Jun-2019 plus 4 days plus 2 days)	16-Jun-2019

Example 3

Allocate a checklist task to a task performer 5 days after a pending worker record is created.

Allocation Criteria	Date
Create a pending worker record	24-May-2019
Pending worker's proposed start date	3-Jun-2019
Create a checklist template with action Add Pending Worker and set checklist allocation criteria to Checklist manually	

Allocation Criteria	Date
allocated or record created and approved	
Create a task Submit Identity Proofs with performer as Worker	
Specify Delay Duration	5 days
Checklist task is allocated and task notification sent (24-May 2019 plus 5 days)	29-May 2019

Example 4

Allocate a checklist task to a task performer 5 days after a pending worker record is effective.

Allocation Criteria	Date
Create a pending worker record	24-May-2019
Pending worker's proposed start date	3-Jun-2019
Create a checklist template with action Add Pending Worker and set checklist allocation criteria to When the action record becomes effective and Days for Initiation as -2	
Create a task Submit Identity Proofs with performer as Worker	
Specify Delay Duration	5 days
Checklist task is allocated and task notification sent (3-Jun-2019 minus 2 days plus 5 days)	6-Jun-2019

Move Task Attachments to Document Records

You need new hires in your organization to submit copies of their educational certificates, birth certificate, and passport as part of the onboarding process. Instead of creating the document records manually, you use a checklist task and enable attachments in it.

So, when new hires complete the task and attach documents, the documents are automatically saved to their document records.

Before You Start

- Use the Document Types task to create the Education and Other Certificates document type. Set Restrict Update to Yes in the Document Record Preferences section. Restrict Delete is anyway set to Yes by default. The document is created as a document record for this document type.
- The attributes Document Name, Issued On are configured as **Relevant** and all other document type attributes as Not Required.

Create a Manual Task with Attachments Enabled

1. Navigate to My Client Groups > Quick Actions > Employment > Checklist Templates.
2. On the Create Checklist Templates page, enter details in the General tab.
3. Click Save and then click the Tasks tab.
4. Click Add and enter details for the task as detailed here. For other fields, use the default values.

Field	Values
Name	Submit your Certificates
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	3 days
Performer	Employee
Owner	Area of Responsibility, HR representative
Task Type	Manual
Attachments	Yes
Add Attachments to Document Records	Education and Other Certificates

Field	Values
Attachments Are For	Performer

5. Click **Save**.

When this task is allocated to new hires, they can go to the task page and upload their certificates. The documents become available as document records in the specified document type.

Note: If you reopen or remove a journey task that had a document record associated to it, that document record is deleted.

How Journey Attachments are Stored in Document Records

The database fields that are populated when attachments from different journey task types are stored in Document Records are listed in the following table:

DB Field Name	Attachments Enabled for Any Task Type with Document Record	Report with Document Record	Native Electronic Signature with Report and Document Record	I-9 Verification Status Task with Document Record
DOCUMENT_TYPE_ID	Configured in Journey Task setup	Configured in Journey Task setup	Configured in Journey Task setup	Configured in Journey Task setup
PERSON_ID	Person ID of the journey assignee.	Person ID of the journey assignee.	Person ID of the journey assignee.	Person ID of the journey assignee.
ASSIGNMENT_ID	Not populated	Not populated	Not populated	Not populated
DOCUMENT_NAME	Journey task name	Journey task name	Journey task name	I-9 completed form name as sent by HireRight
DOCUMENT_CODE	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time
ISSUED_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
RELATED_OBJECT_NAME	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS
RELATED_OBJECT_ID_COL	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID

DB Field Name	Attachments Enabled for Any Task Type with Document Record	Report with Document Record	Native Electronic Signature with Report and Document Record	I-9 Verification Status Task with Document Record
RELATED_OBJECT_ID	Value of allocated task ID	Value of allocated task ID	Value of allocated task ID	Value of allocated task ID
LAST_UPDATE_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
LAST_UPDATED_BY	Journey task performer	Journey task performer	Journey task performer	Journey task performer
CREATED_BY	Journey task performer	Journey task performer	Journey task performer	Journey task performer
CREATION_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
CREATION_SOURCE	ORA_DOR_API	ORA_DOR_API	ORA_DOR_API	ORA_DOR_API
ATTACHMENTS	Documents uploaded by user	Custom BI Report associated to journey task	Custom BI Report associated to journey task	Custom BI Report sent by HireRight
ATTACHMENT COUNT	<Number of documents uploaded by user>	1	1	1

Note:

- The following attributes aren't populated:
 - PUBLISH
 - PUBLISH_DATE
 - DOCUMENT_NUMBER
 - DATE_FROM
 - DATE_TO
 - ISSUING_COUNTRY
 - ISSUING_LOCATION
 - ISSUING_AUTHORITY
 - COMMENTS
 - Document Records DDF
 - Document Records DFF
- The process of creating document records through journey tasks is secured with the **Manage Person Documentation by Worker** privilege.
- If you have associated document types with your journey tasks, you must include the document types in the Document Type Security Profile of the journey task performer.
- You must not configure the Restrict Create option to **Yes** for document types that are associated with journey tasks.
- You must not enable approvals for document types that are associated with journey tasks.

Related Topics

- [Move Task Attachments to Document Records](#)

How You Configure the URL for an External URL Task Type

There are two methods available to configure the URL for an external URL task type.

You can use either of these methods:

- Provide a static URL
- Register the link to an application using the Manage Integration of Additional Applications feature in Setup and Maintenance.

Provide a Static URL

Provide the URL to an external portal. Additionally, you can include optional parameters using the format parameter name={parameter value}

You can use any of these optional parameters in your URL:

1. **TrustToken:** This is the bearer token. The client can send this token in the Authorization header when making requests to protected REST resources.
2. **AllocatedChecklistId:** Unique identifier of the checklist allocated to the person.
3. **AllocatedTaskId:** Unique identifier of the task within the checklist allocated to the person.
4. **PersonId:** Person identifier of the person to whom the checklist is allocated.

Use the prefix ? before the first optional parameter followed by '&' before additional parameters.

For example, the URL could be something like this:

```
https://www.oracle.com/sample.html?  
attribute1={TrustToken}  
&attribute2={AllocatedChecklistId}  
&attribute3={AllocatedTaskId}  
&attribute4={PersonId}
```

The data will be base64 encoded in the URL and needs to be decoded.

Open URL on Same Page

You can select the **Open URL on the same page** option when you configure the task. When you configure this option, you can access the external URL on the same journey page instead of a new browser window.

Note:

- The configuration option is available when you add an External URL task in the Task library.
- The configuration option isn't available for guided journeys. The external URL in a guided journey task will open in a new browser window.
- The configuration option isn't available when you create an External URL task type using Add Task in Journeys. The external URL in a journey task will open in a new browser window.
- Use the browser back button to return to your journey task.

Use Application Integration Link

You can register the link to an external application and give it a user-friendly Application Name and specify the Full URL for the site that you can use in multiple external URL tasks.

1. In the Setup and Maintenance work area, click Manage Setup Content from the Tasks panel tab.
2. On the Manage Setup Content page, click Manage Integration of Additional Applications.
3. On the Manage Integration of Additional Applications page, click **Actions** and then **Create**.
4. Enter the application details in the relevant fields. Ensure that the information you provide is complete and accurate.

- Begin the URL with `http://` or `https://`
- The Full URL should contain the context root.

For example, it should be `https://www.oracle.com/index` and not just `https://www.oracle.com`

5. Provide correct access credentials for the selected security policy.

Note: You can't edit the **Application Name** once you save the details.

6. Click **Save and Close**

You can use the **Application Name**, configured in the previous steps when configuring your External URL task type.

Use the following syntax for the URL `{application:<application_name>}`. For example, `{application:myOracleHome}` where `myOracleHome` is the configured application name.

If you have multiple tasks pointing to the same external site, you can use the same syntax as the URL for those tasks. When there is a change to the external site address, you must update the **Full URL** for the required Application Integration. You don't need to update individual journey tasks.

Related Topics

- [Manage Integration of Additional Applications](#)

How You Configure the Report Task Type

The Report task action type in a checklist enables task performers to view or download a BI Publisher report when performing the task.

For example, a Human Resources (HR) specialist can view all the data collected as part of the recruiting process or view the performance rating report during an exit interview.

Note: Make sure you provide task performers' access to the BI Publisher area otherwise they can't view the report.

What to Include in the Report Path

This is what you can include in the report

- Specify the BI Publisher report folder path followed by the report name concatenated with a "/".
- Include optional parameters in the format `parameter name={parameter value}`.
- Use the prefix "?" before the first parameter followed by "&" before additional parameters.

Note: Remove the + character in the report paths.

Here are checklist specific parameters you can include in the report path:

Parameter Name	Parameter Value	What it Does
P_ALLOCATED_TASK_ID	{AllocatedTaskId}	Passes the ID of the allocated task to the report.
P_ALLOCATED_CHECKLIST_ID	{AllocatedChecklistId}	Passes the ID of the allocated checklist to the report.

Note: You need to pass only the parameter as stated in the table. The `PersonId` is implicitly passed based on the Allocated Task ID or the Allocated Checklist ID.

Let's say you specify this in the report path: `/Samples/SalaryReport.xdo?P_ALLOCATED_TASK_ID={AllocatedTaskId}`, the application passes the current allocated task's ID to the report as a parameter which the report can use to filter the results.

Alternatively, if you specify this in the report path: `/Samples/SalaryReport.xdo?`

`P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}`, the application passes the current allocated checklist ID to the report as a parameter which the report can use to filter the results.

You can also use both the parameters. For example, `/Samples/SalaryReport.xdo?`

`P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}&P_ALLOCATED_TASK_ID={AllocatedTaskId}`

If you don't specify any parameters then the default layout and output format are used to render the report. For example, if you specify this: `/Custom/Reports/ChecklistCompletionReport.xdo` the application runs the report with the default options and generates the output in PDF format. Only PDF report output format is currently supported. If the Document Type is specified, the generated report is automatically created as a document record for that document type either in the task performer or checklist assignee's Document Records based on how you have configured it.

For more information on OTBI reports, see the Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports for HCM guide on the Oracle Help Center (<https://docs.oracle.com/en/cloud/saas/index.html>).

Related Topics

- [Overview of Transactional Business Intelligence](#)
- [How You Create and Edit Reports](#)

Electronic Signature

Configure Native Electronic Signature

You create a task of type Electronic Signature so that employees' can read and electronically sign a document. You want the signed document to be available in the employees' document records for future reference.

You make use of the enhanced capability in the native electronic signature checklist task to configure a name and password validation pattern to suit business requirements. Employees can use their display name, full name, or last name to electronically sign the document based on the configured name validation. The name is validated against the value of the name in the person record.

Before You Start

- Create Employment Agreement as the Document Type using the Document Types task. The signed document is created as an attachment to a document record for this document type.
- It's mandatory to configure these attributes as Relevant for the document type - Document Name and Issued On. And it's mandatory to configure all other document type attributes as Not Required.
- Set Restrict Update to Yes in Document Record Preferences. By default, Restrict Delete is also set to Yes.
- Create a Business Intelligence (BI) Publisher template for the document that needs to be electronically signed.

Create a Data Model

1. Navigate to Tools > Reports and Analytics > Browse Catalog > New > Data Model > + icon and then SQL Query.
2. Enter a name, select the data source as ApplicationDB_HCM and Type of SQL as Standard.
3. Enter the SQL query. Click OK.
4. Click **Parameters** and enter these supported parameters:

Parameter	Data Type	Meaning
P_ALLOCATED_TASK_ID	String	Allocated Task Identifier
P_ALLOCATED_CHECKLIST_ID	String	Allocated Checklist Identifier
P_PERSON_ID	String	Person Identifier
P_SIGNER_NAME	String	Name of the person signing the document
P_SIGNER_EMAIL	String	Email of the person signing the document
P_SIGN_DATE	String	Date when the document is signed
P_SIGNER_ADDRESS	String	IP Address of the person signing the document

5. Click **View Data**. Click **Save as Sample Data**.
6. Save the Data Model and make a note of the name.

Create a RTF Template and Associate to Data Model

1. Navigate to **Tools > Reports and Analytics > Browse Catalog > New > Report**.
2. Click **Cancel** in the **Create Report** dialog box and click **OK**.
3. Click the search icon adjacent to Data Model and select the data model created in the previous procedure.
4. In the Upload or Generate Layout section, click on Upload. Enter the layout name, select the template file (sample file at the end), Type = RTF Template, Locale = English. Click **Upload**.
5. Save the report.
6. Click **View Report** to review if the layout is correct.
7. Make a note of the report path, as that needs to be configured as part of the electronic signature task configuration.

Configure Electronic Signature Validation

1. In the Setup and Maintenance work area, go to the Checklist Integrations task.
2. On the Configure Checklist Integration page, click **Add**.

3. Enter sample values as indicated in this table. For others if not specified, use the default values.

Field	Sample Value
Integration Category	Electronic signature validation
Integration Type	Native electronic signature
Integration Code	This is a user-defined name for this integration and used during the native electronic signature task setup.
Country	United States
National Identifier Type	Social Security Number
E-Signature Validation Type	<p>Name and password</p> <p>Note: Based on the selected option, those attributes will be mandatory on the task page.</p>
Name Validation	Full name
Password Validation Pattern	<p>FFF111DDMMYY</p> <p>This requires you to enter the password in this format:</p> <ul style="list-style-type: none"> ○ F represents the first few letters from your first name, example, if the pattern specified is FFF and your first name is Marshal, enter Mar. ○ 1 represents the first few characters of your national identifier type, example, if the pattern specified is 111 enter A12 from your national identifier A12B7645. ○ DD represents the day in your date of birth, example, enter 05 if your date of birth is October 05, 1970. ○ MM represents the month in your date of birth, example, enter 10 if your date of birth is October 05, 1970. ○ YY or YYYY represents the year in your date of birth, example, enter either 70 or 1970 if your date of birth is October 05, 1970.
Enable E-Signature Validation	Checked

4. Click **Validate** to confirm the configuration details.

Note:

- The password instruction text on the task page will be displayed based on the password validation pattern configured.
- If an attribute that's configured in the password validation pattern is not present in the user's record, it will prevent them from completing the task.
- Only the name value is validated against the display name stored in the application.
- Name and Date Signed, Password and IP address of the user are always stored in the checklist table when using this task type.
- However, the IP address of the user signing the document is hidden on Allocate Checklists and Journeys pages to protect the confidentiality of the electronically signed document.
- If you reopen or remove a journey task that had a document record associated to it, that document record is deleted.
- Email ID is also stored in the same table, if provided by the user when completing this task.

For more information on the electronic signature task, see the document *Checklists - Electronic Signature and Transfer to Document Records* (<https://community.oracle.com/customerconnect/discussion/630997>) on Customer Connect.

Create a Task of Type Electronic Signature

1. Navigate to My Client Groups > Quick Actions > Employment > Checklist Templates.
2. On the Create Checklist Templates page, enter details in the General tab.
3. Click Save and then click the Tasks tab.
4. Click Add and enter details for the task as detailed here. For other fields, use the default values:

Field	Values
Name	Read and Sign Agreement
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes

Field	Values
Target Duration	1 day
Task Performer	Employee
Owner	Area of Responsibility, HR representative
Task Type	Electronic Signature
Signature Type	Electronic Signature
Validation Type	Optionally, select the Validation Type you configured in the previous step.
Report Path	<pre>/Custom/Human Capital Management/Onboarding/EsignDocumentReport.xdo? P_SIGN_DATE={SignDate} &P_SIGNER_NAME={SignerName}&P_SIGNER_ EMAIL={SignerEmail}&P_ALLOCATED_TASK_ID={AllocatedTaskId}&_xf=pdf</pre> <p>Note: If you specify the report path then the document type is mandatory. Also, only PDF format is supported.</p>
Document Type	Employment Agreement
Attachments Are For	Performer

5. Click **Save**.

When you assign this task to new hires, they can go to the task page, read the document and electronically sign it. The task can be set to complete only when they enter their name. The name the worker enters is validated against the full name stored in the application. The password entered by the worker is validated against the specified password validation pattern. Once that's done, the signed document becomes available as a document record in the specified document type. The electronically signed document is stored as an attachment in PDF format in the worker's Document Records under the specified document type.

This is what happens when the worker clicks View Document:

- If details haven't been entered, it displays the BIP template and the unsigned document to the employee.
- If details have been entered, it displays the BIP template and the signed document with the signature details which are merged (including date, time, and IP address).

- Even if View Document isn't clicked, the signed document is still moved to Document Records when the task is marked complete. After the worker signs the document, View Document is disabled.

For more information on BI Publisher reports, see Chapter 6, Reports Modification in the Oracle Human Capital Management Cloud Administering Analytics and Reports for HCM guide.

Related Topics

- [How You Configure the Report Task Type](#)
- [How Signed Document Data is Stored in Document Records](#)
- [Electronic Signature Task Configuration Options](#)
- [Create and Edit Report Layouts](#)
- [Modify Data Models](#)

How Signed Document Data is Stored in Document Records

When a user signs a document, the document is stored in Document Records. The details of the attributes populated in Document Records is shown in this table:

Attribute	In Document Records	Example	Comments
Document Type	Selected in Checklist Task	Employment agreement	As set up in Document Types FSM task.
Document Code	Auto-generated as a concatenation of: <ul style="list-style-type: none"> • Task Name • Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time 	Read and sign the document_2019-04-16 -17- 33-11	This will be unique for each document.
Document Name	Checklist task name	Read and sign the document	If the title is longer than the character limit, then the name is truncated accordingly.
From Date	Date when this task was marked as complete	31-May-2019	Provides the ability to track when the document record was created.

Related Topics

- [Electronic Signature Task Configuration Options](#)
- [Configure Native Electronic Signature](#)

Electronic Signature Task Configuration Options

This table summarizes the different configuration options for an electronic signature task type and the effects of the configuration.

Electronic Signature	Report Path Specified	Document Type Specified	Document Record Created	Task Interaction Details
Basic	No	No	No	<ul style="list-style-type: none"> View Document isn't available, since there's no associated report template. Basic electronic signature details (name, email, and date signed) are stored in the database and displayed on the completed task page. Since there's no document generated, there's no document record created.
Advanced	Yes	Yes	Yes	<ul style="list-style-type: none"> View Document displays the report with either the signature details populated or unpopulated based on the data entered by task performer. Basic electronic signature details (name, email, and date signed), IP address of signer are stored in the database and name, email, and date signed displayed on the completed task page. Once the task is completed, the signed document is available in Document Records against the document type specified in the task setup.

Related Topics

- [How Signed Document Data is Stored in Document Records](#)
- [Configure Native Electronic Signature](#)

Configure Electronic Signature Using DocuSign

You use the DocuSign signature type so that new hires can electronically sign the document during onboarding. DocuSign is your third-party service provider who manages electronic signatures.

Before You Start

1. Register and obtain a license from DocuSign. Note that this is a one-time activity.
2. Note down the account key and provider URL from the DocuSign site.
3. If you enable the `ORA_PER_CHECKLIST_DEFER_DOCUSIGN_CREATION` profile option (set the profile value to Y), you can defer the creation of the document to be signed in DocuSign until the time the performer initiates the DocuSign journey task.
4. If you enable the `ORA_PER_CHECKLIST_USE_OAUTH_IN_DOCUSIGN` profile option, you only need to enter the User ID provided by DocuSign instead of the User Name and Password. If you haven't enabled this profile option, note down and enter the user name and password from the DocuSign site.

Note:

- The account ID is available under Admin > Account > Billing and Usage > Plan.
 - Provider URL is dependent based on whether it is a staging or production environment. For example, `https://demo.docusign.net` is the profile value to be set to connect to the demo or stage DocuSign environments.
 - User name and password are available under Admin > Users and Groups > User.
5. Ensure the `ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN` profile option is set to Y in your production environment. After providing the User ID you obtain from DocuSign, you need to authorize and validate the authentication. This is a one-time activity.
 6. As per DocuSign, all authentication methods other than Auth 2.0 won't be supported after September 2022. Hence, it's recommended that you plan and migrate from the legacy authentication by enabling the profile options, latest by 22C.

Create a Template and Upload to DocuSign

1. In DocuSign, enter the basic template details such as Name and Description.
2. Upload the document (DocuSign supports many document formats) to the Envelope.
3. In the Add Recipients to the Envelope section, enter the role name `ORA_ESIGN_CHECKLIST` in the Recipient field to make it applicable to checklists (i.e. this is required for the document to be recognized in Oracle Cloud HCM as a document to be used in Checklists or Onboarding). Optionally, you can add a message to this template.
4. Click **Next**.
5. Include standard fields such as Full Name, Email, and Date Signed by dragging and dropping them on the document (that are supported in HCM) in the document as per your requirement.
6. Enter the custom fields for Company and Title (mapped to Legal Employer and Assignment Name respectively in HCM) as `ORA_LEGAL_ENTITY` and `ORA_JOB_TITLE` respectively. Optionally, you can add a text box with custom text or checkbox and other standard fields that DocuSign offers in the document. However, note that there aren't any delivered mapping to fields in HCM.
7. Click **Recipient Preview** to see how this document will appear to the end-user (on desktop, tablet, or mobile device).
8. Click **Save and Close**.
9. Note the template ID that is generated by navigating to the document template and clicking the Info (i) icon next to the document name.

Configuring the Manage Electronic Signature Task

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

- Offering: Workforce Deployment
 - Functional Area: Workforce Information
 - Task: HCM Electronic Signature Configurations
2. On the HCM Electronic Signature Configurations page, click Add.
 3. If you set the ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN profile option Y in your production environment, then these are the fields that display. Enter the details provided by DocuSign.

Field	Value
Module	Checklist
Account Key	Obtained from DocuSign
Provider URL	URL of the DocuSign production or demo server.
User ID	Obtained from DocuSign
Status	Set to Active to enable integration.

4. Click **Save**.

Note: For more information on the electronic signature task, see the document Checklists - Integration with DocuSign (<https://community.oracle.com/customerconnect/discussion/630999>) on Customer Connect.

Configure the Task Action Type

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Workforce Deployment
 - Functional Area: Workforce Information
 - Task: Checklist Templates
2. On the Create Checklist Templates page, enter details in the **General** tab.
3. Click Save and then click the **Tasks** tab.
4. Click **Add** and enter details for the task.
5. Select Electronic Signature as the Task Type and **Electronic Signature - DocuSign** as the Signature Type.
6. Enter the template ID that you obtained from the DocuSign site.

7. Click **Save**.

Here's what happens when you assign this task to new hires. They are automatically taken to the DocuSign site where they can read and electronically sign the document.

The signed document is saved and stored on the DocuSign site. It isn't available in HCM Cloud.

Note: Make sure that the email address in the person's record is set as Primary.

Attributes Sent from HCM to DocuSign

These are the attributes sent from HCM to DocuSign:

- Full Name: Name of the task performer signing the document.
- Email: Email address of the task performer signing the document.
- Date: Signed Date the signature is being provided.
- Company (ORA_LEGAL_ENTITY): Legal Employer of the task performer signing the document.
- Title (ORA_JOB_TITLE): Assignment Name of the task performer signing the document.

Related Topics

- [Considerations for Configuring DocuSign Envelopes](#)

Considerations for Configuring DocuSign Envelopes

When using an integration of Journeys with DocuSign, every checklist task that requires DocuSign electronic signature generates a corresponding envelope.

It's not recommended or feasible to combine and use a single envelope for all the DocuSign checklist tasks for a performer due to these considerations.

- You configure multiple tasks in a checklist; some of them may be related to providing an electronic signature using DocuSign.
- You configure tasks to appear in different phases of an Enterprise Onboarding checklist. This controls the tasks available to the performer based on where they are in their enterprise onboarding phase.
- You configure dependencies between tasks. For example, electronic signature of an employment agreement can happen only after the performer completes the task of providing their personal information. An electronic signature of a non-disclosure agreement can happen only after the I-9 verification. This controls the order and timing of when the user can complete a specific task.

If a single envelope is generated for all the electronic signature tasks, then this is what happens:

- When the user goes to DocuSign to sign the first such document, they will be able to see all the other electronic signature documents also as part of that single envelope. This overrides the configuration of different electronic signature tasks in different phases of enterprise onboarding or having dependencies between checklist tasks.
- When the user provides the electronic signature in DocuSign for even one document in that single envelope, the entire envelope is closed. This means the user will be unable to return to DocuSign and provide their electronic signature for the other documents, which are part of that single envelope.

Related Topics

- [Configure Electronic Signature Using DocuSign](#)

How You Decide Whether to Use Native E-Signature or DocuSign

This table shows the comparison between Native E-Signature and DocuSign.

Criteria	Native E-Signature	DocuSign
Is this included as part of my base service?	This signature type is native to the application and works with Journeys. This functionality gives you the capability to electronically sign a document and transfer the signed document to the worker's document records in Cloud HCM.	DocuSign is a third-party service provider that manages electronic signatures. This signature type allows new hires to electronically sign documents during onboarding using Journeys.
What's the user experience?	Users need to click the View Document button on the task page to read the document to be signed. They can provide their signing details, such as name and email address on the task page to complete the task. Once the user enters the data, the View Document button will invoke the associated BIP template, merge the signature details and display the signed document to the user.	Users need to navigate from the task page to the DocuSign site where they can read and electronically sign the document. The user needs to return to the Cloud HCM journey task page to mark the task as Complete.
What attributes are stored?	The Name, Date Signed, and IP address of the user are always stored in the checklist table when using this task type. The Email ID is also stored in the same table, if provided by the user when completing the task. The signing details are stored in the PER_ALLOCATED_TASKS table.	The document to be signed can be configured to include standard fields, such as Full Name, Email, and Date Signed. This includes custom fields for Company and Title that are mapped to the legal employer and assignment name respectively in Cloud HCM.
Is the signed document stored in document records?	Yes. A document record of the specified document type is created once the task is marked as complete. The signed document is stored as an attachment in PDF format in the document records for the specified document type.	No. The signed document is saved and stored on DocuSign. It is not available in the document records in Cloud HCM.

Configurable Forms

How You Create Configurable Forms

Use the Checklist Descriptive Flexfield task in the Setup and Maintenance work area to create a descriptive flexfield for use in a Configurable Form task.

Create a context within the descriptive flexfield representing the name of the form, for example, Onboarding Feedback. Create context specific segments and values to define the questions and responses respectively. When users create a task with the Configurable Form type, they can see the Onboarding Feedback option in the Configurable Form drop-down list and select it.

Note: Data you collect from configurable form is specific to that Descriptive Flexfield Context. If you want multiple configurable forms to use the same data, you must create a configurable form with a global DFF context.

Define Checklist Descriptive Flexfield Context and Segments

Use the Checklist Descriptive Flexfields task in Setup and Maintenance and select the PER_PERSON_ALLOCATED_TASKS_DFF to specify the context, context sensitive segment, and the values required to display at run time.

Activate Checklist Descriptive Flexfields

Activate the descriptive flexfield after you define the context and context sensitive segment values by deploying the flexfield. You must sign out and sign in to the application to see your descriptive flexfield.

Associate the Task Action Type to the Checklist Descriptive Flexfield

If the Task Type is Configurable Form, the form created using the checklist descriptive flexfield displays in the Configurable Form drop-down list when creating the task. At run time, the form appears as part of a task that workers need to complete.

Related Topics

- [Overview of Descriptive Flexfields](#)

Configure a Checklist Descriptive Flexfield

You want to create an onboarding satisfaction survey and add it as one of the tasks in a new hire checklist.

You create the survey as a context in the checklist descriptive flexfield and associate the survey with the task by setting the the task action type to Configurable Form.

Summary of Tasks

1. Create the context for the descriptive flexfield and add three context sensitive segments.
2. Deploy the flexfield.

3. Associate the descriptive flexfield with the task.

Creating the Descriptive Flexfield

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Checklist Descriptive Flexfields
2. On the Manage Checklist Descriptive Flexfields page, select PER_PERSON_ALLOCATED_TASKS_DFF and click Edit.
3. Click Manage Contexts.
4. In the Create Context section, enter values listed in the following table:

Field	Value
Display Name	Onboarding Survey
Description	Onboarding feedback survey
Context Code	Auto-populated but can be modified
API Name	Auto-populated but can be modified
Enabled	Checked

5. Click Save.
6. In the Context Sensitive Segment section, enter the values listed in the following table:

Field	Values for Segment 1	Values for Segment 2	Values for Segment 3
Display Name	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your onboarding experience.
Description	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your onboarding experience.
Context Code	Auto-populated but can be modified	Auto-populated but can be modified	Auto-populated but can be modified
API Name	Auto-populated but can be modified	Auto-populated but can be modified	Auto-populated but can be modified
Enabled	Checked	Checked	Checked

Field	Values for Segment 1	Values for Segment 2	Values for Segment 3
Data Type	Character	Character	Number
Table Column	ATTRIBUTE1	ATTRIBUTE2	ATTRIBUTE_NUMBER2
Value Set	PER_YES_NO	50 Characters	1 Number with No validation
Prompt	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your Onboarding experience.
Display Type	List of Values	Text Box	Text Box
BI Enabled	Checked	Checked	Checked

7. Click on Save and Close till you return to the Checklist Descriptive Flexfields page.
8. Click Deploy Flexfield.
9. Click OK and then Done.

Deploying the Flexfield

Deploy the flexfield that you created to make it available in the Tasks page.

1. On the Checklist Descriptive Flexfield page, click Deploy Flexfield.
2. In the Confirmation dialog box, click OK, and click Done.

You must sign out and sign in before you can see the changes you deployed at run time. The flexfield context and the associated segments automatically appear when you select the Configurable Form action type in the Create Task page.

Associating the Descriptive Flexfield with a Task

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Checklist Template
2. On the Checklist Template page, click Create.
3. Enter General checklist details and click Save.
4. Click the Tasks tab.
5. Click Add and then enter the details of the task.
6. Select Configurable Form as the task type.
7. Select the descriptive flexfield context Onboarding Survey from the Configurable Form drop-down list.
8. Complete details in other tabs.
9. Click Save and Close.

Related Topics

- [Checklist Descriptive Flexfields](#)

Checklist Descriptive Flexfields

You use the Checklist Descriptive Flexfields task in the Setup and Maintenance work area to create and manage checklist related flexfields. Review these checklist descriptive flexfields, and use them as appropriate to suit enterprise requirements.

Checklist Descriptive Flexfields

Here's the list of checklist descriptive flexfields in the application:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ALLOCATED_TASKS	PER_PERSON_ALLOCATED_TASKS_DFF	Person Allocated Task Attributes	For creating checklist task of the type Configurable Form.	Available for use.
PER_ALLOCATED_CHECKLISTS	PER_ALLOCATED_CHECKLISTS_DFF	Person Allocated Checklist Attributes	For person allocated checklist attributes.	Not available for use.
PER_CHECKLISTS_B	PER_CHECKLISTS_DFF	Checklist Attributes	For checklist attributes.	Not available for use.
PER_TASKS_IN_CHECKLIST_B	PER_TASKS_IN_CHECKLIST_DFF	Checklist Task Attributes	For checklist task.	Not available for use.

Parameters for Checklist Descriptive Flexfields

This table shows the parameters that you can use in the allocated tasks DFF (PER_PERSON_ALLOCATED_TASKS_DFF):

Parameter Name	Parameter Description	Data Type
ACTION_TYPE	Action type	Varchar2
ACTUAL_END_DATE	Actual end date	Date
ACTUAL_START_DATE	Actual start date	Date
ALLOCATED_CHECKLIST_ID	Allocated checklist identifier	Number
ALLOCATED_TASK_ID	Allocated task identifier	Number

Parameter Name	Parameter Description	Data Type
RESPONSIBILITY_TYPE	Responsibility type	Varchar2
STATUS	Status	Varchar2
TARGET_END_DATE	Target end date	Date
TARGET_START_DATE	Target start date	Date
TASK_IN_CHECKLIST_ID	Task identifier	Number

Note: Only ALLOCATED_CHECKLIST_ID and ALLOCATED_TASK_ID are supported in Journeys.

Example

This example illustrates how to use flexfield parameters to create a value set for an allocated checklist task flexfield segment. It shows how you can use descriptive flexfields (DFF) to get the legal employer details of the person to whom a checklist task is assigned.

1. Use the Checklist Descriptive Flexfields task to define the DFF (PER_PERSON_ALLOCATED_TASKS_DFF)
2. Define the value set to be used in the DFF. Use syntax as indicated in this sample:

```
FROM Clause: PER_ALLOCATED_CHECKLISTS C, PER_PERIODS_OF_SERVICE S, PER_LEGAL_EMPLOYERS L
Value Expression: L.NAME
WHERE Clause: C.ALLOCATED_CHECKLIST_ID = :{PARAMETER.ALLOCATED_CHECKLIST_ID} AND
C.PERSON_ID = S.PERSON_ID AND
S.PERIOD_TYPE = 'E' AND
S.PRIMARY_FLAG = 'Y'
AND S.LEGAL_ENTITY_ID = L.ORGANIZATION_ID
AND L.STATUS = 'A'
```

3. Save and deploy the DFF.
4. Sign in as an employee and view the allocated checklist task. The legal employer appears in the list.

Related Topics

- [Overview of Descriptive Flexfields](#)

How You Create an Advanced Task

The Advanced task type enables you to combine a maximum of 3 task types in a single task instead of creating separate tasks.

For example, you can combine a video, questionnaire, and e-signature task if you want a new hire to watch a video, answer a questionnaire, and electronically sign an agreement as part of their onboarding.

How You Combine Task Types

Determine which task types you need and select the check box next to each of the task types listed in the Create Tasks page. The order of the task types in the setup page and in an assigned task is the same. You can't change this order:

- Document
- External URL
- Application Task
- Video
- Embedded Learning
- Questionnaire
- Configurable Form
- Electronic Signature
- Report

If you enable Comments and Attachments, it appears after the last task in an assigned task. When you create an advanced task you can add it to your task library or add it from the task library to an assigned journey.

Note:

- You can't create an advanced task from the Journeys app.
- You can't use an advanced task in Guided Journeys.
- The DocuSign, I-9, and OPA task types aren't supported in an advanced task.
- You can't use the same task type as a combination, the task types need to be distinct. For example, you can create an advanced task by combining the Document and External URL task types. However, you can't combine two External URLs.
- If you use Electronic Signature as one of the tasks when configuring an advanced task, then you must configure Electronic Signature Validation by using the **Checklist Integrations** Functional Setup Manager (FSM) task.

What Happens When Tasks are Combined

You can't have different owners and performers for each of the tasks in an advanced task. You can have only a single owner or performer for the entire combined task. Not only that, some of the actions or sections are common when you combine the task types. Here's a list of the common actions and sections:

- Rename Action labels section in Display Properties. All action labels for all the task types being combined are listed.
- Done, Not Applicable, and so on.
- Comments and Attachments
- Notes Header and Notes section. Anything you want to add for all the sub-tasks needs to be part of the single notes section that appears right on top of the advanced task.

- Contact info section

Points to Consider

- An advanced task type is supported as part of a journey template in the following operations:
 - When you export and import a single checklist template.
 - When you use FSM to export and import checklist configuration.
 - When you duplicate a checklist template.
 - When you add tasks from the task library.
 - When you add tasks to the task library.
 - When you use HCM Data Loader (HDL).
- Consider the following scenario. You have created an advanced task using the following task types:
 - Questionnaire or Configurable Form
 - Electronic Signature or Report

In this scenario, you can't include the responses for the questionnaire or configurable form in the electronic signature document or report of the same advanced task. This is because the responses are not saved in the database until the advanced task is marked complete.

Related Topics

- [Create an Advanced Task](#)

Create an Advanced Task

You want to combine a video, questionnaire, and an e-signature task in a single task to include in an onboarding journey template.

You create an advanced task with these 3 task types and add them to the onboarding journey template for new hires in your organization.

Before You Start

- Create an onboarding journey template.
- Define a questionnaire with questions related to the onboarding process.
- Create a video on the organization's work culture.

Create the Complete Your Onboarding Journey Task

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. Search for and open the onboarding journey you created.
3. Click the **Tasks** tab.

4. Click **Add** and enter details as detailed here. For other fields, use default values.

Field	Values
Name	Complete Your Onboarding Journey
Status	Active
Description	Watch the video, complete the questionnaire, and sign the confidentiality agreement.
Task Type	Advanced
Video	Selected
Video Type	Embedded URL
URL	https://www.youtube.com/embed/ts15Zsbk8VQ
Questionnaire	Onboarding questionnaire
Electronic Signature	Selected
Signature Type	Electronic Signature – Native
Validation Type	DisplayNameOnly

5. Click **OK**.

Related Topics

- [How You Create an Advanced Task](#)

I-9 Process

Integrate with HireRight for I-9 Employment Eligibility Verification

In this example, you configure the settings that will enable your organization Oracle, US to integrate with HireRight, a third-party I-9 form verification service provider.

Since I-9 form verification is mandatory for employees in the US, this integration will enable you to include an I-9 verification task in new hire checklists for US based workers.

Before You Start

- Obtain a license and register with HireRight. This is a one-time activity.
- Note down the account code obtained from HireRight.

- All I-9 tasks in the same checklist should use the same HireRight integration account. If the ORA_PER_CHECKLIST_DEFER_I9_CREATION profile option is set to Y you can defer the creation of the I-9 document in HireRight till the time the employee accesses the task.
- When configuring I-9 integration, you need to use the primary email address of the employee. Although the default email type is Work Email, you can change that in the Employee Email Type field. Whichever email you use, you must ensure that the worker retains the same email until the time the I-9 process is completed. That is, if you specify Home Email as the I-9 email, the worker should also have Home Email and this should not change when the I-9 process is in progress.
- If you use I-9 in an enterprise onboarding category checklist, all the I-9 tasks should be configured within the same enterprise onboarding step category checklist template.
- The Person ID from Cloud HCM is sent to HireRight as the Client Applicant ID, and the Allocated Checklist ID is sent as Client Request ID.

Configure the Checklist Integrations Task

1. In the Setup and Maintenance work area, go to Checklist Integrations task.
2. On the Checklist Integrations page, click **Add**.
3. Enter the values as shown in the table. Note that some values are provided by HireRight. For others if not specified, use the default values.

Field	Values
Integration Category	I-9
Integration Type	HireRight
Integration Code	User-defined name for the integration, the code you enter here becomes available in the list of values when you configure the I-9 task.
Administrator User Reference	A valid user account in HireRight with administrator privileges to initiate the I-9 process, generate the employee web link, and check the verification status. You need to obtain this value from HireRight.
Web Service URL	Override the application defaulted URL with <code>https://api2.hireright.com:443/ws_gateway/HireRightAPI/v/1/2</code>
Update Status in HR	<p>Select one of these values to automate the completion of the I-9 HireRight journey tasks:</p> <ul style="list-style-type: none"> ○ Auto update I-9 status - Automatically updates the I-9 status in the work relationship. ○ Auto update I-9 status and task status - Automatically updates the I-9 status in the work relationship and the I-9 task status as completed. ○ Auto update task status - Automatically updates the I-9 task status as completed. ○ I-9 status update after manual task completion (default value) – I-9 status in the work relationship is updated only after you manually mark the task as complete. ○ Never update – I-9 status in the work relationship is never updated. <p>Note: If you have selected a value to automatically mark the task as complete, then you can't manually mark the same task as done.</p>

Field	Values
Account Code	You need to obtain this value from HireRight, this is the company account code.
Enable integration and send information to external service provider	Selected, indicates that attributes from HCM will be shared with HireRight

4. Click **Save**.

Validate the Integration

1. Click **Validate** to confirm that the integration works.
2. Click **Save**. The integration is successful if no errors are displayed.

Configure Attributes to Send to HireRight

These attributes are sent from HCM to HireRight. On the Checklist Integrations page, you can indicate which attributes shouldn't be sent.

- Worker First Name
- Worker Last Name
- Worker Email Address (not configurable and is always sent)
- Worker Address
- Worker Social Security Number
- Worker Date of Birth
- Hiring Manager First Name
- Hiring Manager Last Name
- Hiring Manager Email Address
- Worker Location Code
- Worker Location Name
- Worker Start Date
- User Reference for Section 2

Note: Earlier, the Primary Email value was the only value in the **User Reference for Section 2** field and the value was selected by default. The Person Identifier and Person Number values are now added in the field. If you plan to change the value in the field, you must let HireRight know of this change. This is to make sure that changes are in sync on the HireRight side as well.

For more information on HireRight integration, see the document Onboarding Checklists - Integration with HireRight (<https://community.oracle.com/customerconnect/discussion/631000>) on Customer Connect.

Related Topics

- [How You Use Multiple HireRight Accounts](#)
- [Seeded Lookups for HireRight eVerification Status](#)
- [Statuses Sent from HireRight to HCM](#)

Create Tasks for I-9 Process

You're creating an I-9 verification task for new hires in your organization based in the US. HireRight is your third-party service provider for the I-9 verification process.

The I-9 form has two sections that need to be validated by both employee and employer in HireRight. Additionally, the I-9 verification status is available once the two sections are completed. So, you create three tasks for each of the sections and assign it to the respective task performers.

You need these details for the task:

- Integration code obtained during the setup process. You can't create the tasks without this code.
- HireRight user accounts for HR representatives to verify documents, generate the web link, and check the processing status.
- To transfer the completed I-9 form into Document Records, configure a document type and associate it to the I-9 Verification Status checklist task. Additionally, the transfer must be enabled and configured on the HireRight side first.

Create I-9 Task for New Hire

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. On the Create Checklist Templates page, on the General tab select the checklist category and enter relevant details.
3. Click **Save** and then click the Tasks tab.
4. Click **Add** and enter details of the first task as detailed here. For other fields, use default values.

Field	Value
Name	Initiate I-9 Verification Process
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	1 day

Field	Value
Task Performer	Employee
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section 1- Employee
I-9 Configuration	Integration code from setup
Attachments	Selected
Comments	Selected
Notes	Complete this task before the end of the first day.

5. Click **Save**.

When this task gets assigned, new hires use their single sign on to go to the HireRight site and verify or update their details.

Note: The I-9 status in the HCM Work Relationship section won't be updated after the new hire completes Section 1 as they don't have the necessary privileges.

Create I-9 Task for Line Manager

Line managers can do this task only when the employee completes the section 1 task.

1. In the Task tab, enter these details for the second task. For other fields, use default values.

Field	Value
Name	Verify Employee Details for I-9 Verification
Description	Optional
Status	Active
Preceding Task	Initiate I-9 Verification Process

Field	Value
Required	Yes
Target Duration	6 days
Task Performer	Line Manager
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section 2 - Employer
I-9 Configuration	Integration code from setup
Attachments	Selected
Comments	Selected
Notes	Verify employee's details.

2. Click **Save**.

Note: If the task to complete I-9 Section 2 is configured with Line Manager as performer, the I-9 status in the HCM Work Relationship section may not be updated after they complete Section 2 as they might not have the necessary privileges. However, if a HR representative completes I-9 Section 2 and has the necessary privileges, then the I-9 status in the HCM Work Relationship section is updated.

Create I-9 Task for HR Representative

HR representatives can review the I-9 verification status any time.

1. In the Tasks tab, enter these details for the third task. For other fields, use default values.

Field	Values
Name	Review I-9 Verification Status
Description	Optional

Field	Values
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	10 days
Task Performer	Line Manager
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section Verification Status
I-9 Configuration	Integration code from setup
Attachments	Selected
Document Type	Completed I-9 Form
Comments	Selected
Notes	Check employee's I-9 verification status.

2. Click Save.

When you verify the completed form, you need to click **Upload to Document Records** to move the completed form to Document Records.

Note:

- It's recommended to configure I-9 Verification Status process task with performer as HR Representative as part of your template. This enables the HR representative to view the I-9 status of the new hire in Journeys or Checklists at any point during the I-9 process.
- If there's no document type configured in the I-9 Verification Status task, then Upload to Document Records won't be visible.
- If Section 1 and Section 2 of the I-9 Form aren't complete, then Upload to Document Records won't be visible.
- If there's a document type configured in the I-9 Verification Status task and this feature isn't enabled from HireRight, Upload to Document Records is visible but displays an error when the task performer clicks it.
- Only users with the PER_EDIT_WORK_RELATIONSHIP_DATA and PER_CHANGE_WORKER_ASSIGNMENT_DATA data privilege can update the I-9 status from the checklist.
- After the user marks the journey tasks corresponding to Section 1, Section 2, and the I-9 Verification Status as complete, the statuses are updated. Performers of Section 1 and Section 2 should mark the task complete only after completing the corresponding sections in HireRight.
- When the I-9 Verification Status task is marked as Complete, the appropriate I-9 verification status is updated in the Work Relationship section if the user completing it has the necessary privileges.
- If the E-verify process is enabled from HireRight, the appropriate status is updated in the Work Relationship section.
- If Update Status in HR is set to Yes in the Checklists Integrations configuration page, the I-9 Status, e-Verify Status, and I-9 Expiration values are automatically updated (based on the response sent from HireRight).

Statuses Sent from HireRight to HCM

The following table lists the statuses sent from HireRight to HCM

Status	Value
New	R – Ready to Verify
Sent to Employee	
Pending Employee	
Pending Employer	S- Submitted for Verification
Completed	V-Verified
Any status other than the above	I-Incomplete

Note: The values retrieved from HireRight are stored in the PER_PERIODS_OF_SERVICE table. The values are stored in these flexfield segments:

- PDS_INFORMATION1 (I-9 Status)
- PDS_INFORMATION_DATE1 (I-9 Expiration)
- PDS_INFORMATION5 (E-Verify Status)

The flexfield segments are available in the **United States Work Relationship Information** context of the PER_PPS_LEG_DDF flexfield.

Seeded Lookups for HireRight eVerification Status

The code for the e-verify statuses associated to the seeded lookup type ORA_HRX_US_EVERIFY_STATUSES (E-Verify Status from HireRight) is listed in this table.

Lookup Code	Meaning	Description
CASE_IN_CONTINUANCE	Case in Continuance	More time is needed to determine a final case result.
DHS_CONTINUANCE	DHS Case in Continuance	The employee has contacted DHS, but more time is needed to determine a final case result.
DHS_AUTHORIZED	DHS Employment Authorized	The employee's information matched the DHS records.
DHS_FINAL_NON_CONFIRM	DHS Final Non-Confirmation	E-Verify cannot verify an employee's employment eligibility even after the employee has contacted DHS.
DHS_NO_SHOW	DHS No Show	The employee did not contact DHS within the required eight federal government workdays.

Lookup Code	Meaning	Description
DHS_TENTATIVE_NON_CONFIRM	DHS Tentative Non-Confirmation	Information does not initially match DHS records.
DHS_IN_PROGRESS	DHS Verification in Progress	The case is referred to DHS for further verification.
DRAFT	Draft	The employee's information is in draft.
DUPLICATE_CASE	Duplicate Case	The employee's information already exists.
AUTHORIZED	Employment Authorized	The employee's information matched SSA or DHS records.
ERROR	Error	E-Verify is currently down.
FINAL_NON_CONFIRM	Final Non-Confirmation	E-Verify cannot verify an employee's employment eligibility.
INFO_REVIEW_REQ	Info Review Required	Review of the employee's info is required.
ADDITIONAL_VERIFICATION	Institute Additional Verification	Allow more time for DHS or SSA to provide the employment eligibility status.
PHOTO_MATCH_REQD	Photo Match Required	Indicates that the photo displayed on the E-Verify screen does not match the photo on the employee's document.
REVERIFY_REQUIRED	Re-verify Required	Review of the employee's info is required.
SCAN_UPLOAD	Scan And Upload	The employee needs to scan and upload some documents.
SSA_CONTINUANCE	SSA Case in Continuance	The employee has visited an SSA field office, but more time is needed to determine a final case result.
SSA_AUTHORIZED	SSA Employment Authorized	The employee's information matched SSA records.
SSA_FINAL_NON_CONFIRM	SSA Final Non-Confirmation	E-Verify cannot verify an employee's employment eligibility even after the employee has visited or contacted SSA.
SSA_INFO_REVIEW	SSA Info Review Required	Review of the employee's info is required.
SSA_REVERIFY_REQUIRED	SSA Re-verify Required	Review of the employee's info is required.
SSA_TENTATIVE_NON_CONFIRM	SSA Tentative Non-Confirmation	Information does not initially match SSA records.
TENTATIVE_NONCONFIRM	Tentative Non-Confirmation	Information does not initially match.

How You Use Multiple HireRight Accounts

If you have multiple HireRight accounts for your organization, you can plan and use those accounts to configure multiple journey integrations.

You can do this by using the unique Integration Code and the appropriate Account Code (provided by HireRight) in the integration. Then, when you configure the I-9 tasks, you can reference the appropriate integration code.

For example, you can configure two I-9 tasks that reference two integrations associated to locations A and B respectively. When creating the I-9 tasks in a checklist template, you associate the appropriate integration code for the task that's based on the criteria on which this task will get allocated.

Note: You can configure an Eligibility Profile and associate it to this task so that the task gets allocated to assignees in Location A and Location B respectively.

Oracle Process Automation

Integrate with Oracle Process Automation

Integration with Oracle Process Automation (OPA) enables you to extend journeys and create Process Automation tasks for automating certain business processes in your organization.

When assigned, the task performer can initiate and track the status of the request in their checklist or journey task. For example, asset request for a new hire.

Before You Start

- Purchase OPA to use with Checklist or Journeys. OPA is then automatically provisioned to your environments.
- Configure Oracle Identity Cloud Service.
- In OPA, configure and activate the process application you need to use. For more information on OPA, see this resource: <https://docs.oracle.com/en/cloud/paas/process-automation/user-process-automation/use-process-automation-fusion-based-oracle-cloud-applications.html#GUID-B6F7AC4B-E2BA-4FA4-AEC5-31EB2967FC29>

Configure the Checklist Integration Task

1. Define the integration in the Setup and Maintenance work area.
 - Go to the Checklist Integrations task and add a new integration.
2. On the Add Integration page, select **Process Automation** as the Integration Category.
 - Select **Structured process** as the integration type. This denotes a process that includes a start event, end event, and other elements required for the flow.
 - Enter a unique integration code.
 - Select a process from the **Process Name** drop-down list.
3. Validate to confirm connectivity to the application and process defined in Oracle Integration. Click **Save**.
 - Enable and send information for process automation integration.
4. Save the integration details.
5. Go to the **Checklist Templates** task and create a task of type **Process Automation**.
6. Select the **Process Configuration** to which the task needs to be associated.
7. For each OPA process, you must set up two tasks as follows:
 - A task with **Process Section 1 - Start Process** to initiate the process.

- o A task **Process Section 2 - Check Status** to see the status of the process.

8. Assign the checklist or journey. When the task performer clicks **Start**, the process is initiated.

For more information on Oracle Process Automation, see the Oracle Process Automation Administration and User Guides on Oracle Help Center.

Related Topics

- [Create Oracle Process Automation Tasks](#)
-

Create Oracle Process Automation Tasks

In this example, you are creating Oracle Process Automation (OPA) tasks for the worker uniform request process in your organization.

The OPA task includes two sub-tasks. The first task is to initiate the process request and a second to check the status. So, you create two separate tasks, include it in a checklist or journey, and assign it to the respective task performers.

Before You Start

- Create and activate the process application and processes in OPA.
- Configure and validate the integration in the Setup and Maintenance work area in HCM Cloud.

Create Task for Worker to Start Process

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. On the Create Checklist page, on the General tab select the checklist category and enter relevant details.
3. Click Save and then click the Tasks tab.
4. Click Add and enter details of the first task as detailed here. For other fields, use default values.

Field	Value
Name	Initiate Uniform Request
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	3 days
Task Performer	Worker
Owner	Initiator
Task Type	Process Automation

Field	Value
Process Section	Process Section 1- Start Process
Process Configuration	Uniform Request

5. Click **Save**.

When this task is assigned, the performer clicks **Start** to initiate the request.

Create Task for Area of Responsibility to Verify Status

The area of responsibility user can do this task only when the section 1 task completes.

1. In the Task tab, enter these details for the second task. For other fields, use default values.

Field	Value
Name	Check the Status of the Uniform Request
Description	Optional
Status	Active
Preceding Task	Initiate Uniform Request
Required	Yes
Target Duration	5 days
Task Performer	Area of Responsibility
Responsibility Type	Union representative
Owner	Initiator
Task Type	Process Automation
Process Section	Process Section 2 – Check Process Status
Process Configuration	Uniform Request

2. Click **Save**.

The performer can click **See Status** to verify the status of the task.

Related Topics

- [Integrate with Oracle Process Automation](#)

Personalizing Checklists and Journeys

Display Properties

You can control access to a checklist section or task action based on role. You can do this by specifying the display property at the checklist or task level on the Display Settings tab during checklist and task setup.

Let's say you don't want a line manager to mark a task as not applicable on behalf of an employee, you can restrict this by hiding that action at the task level for line manager.

Access Level

The access that each role has for a checklist section or task action displays by default. You can change this by specifying the values as indicated in this table. If you don't specify anything, the default access applies.

Values	What it Means
Show	Displays the section or action for the role at the checklist or task level.
Hide	Hides the section or action for the role at the checklist or task level.
Allow	Enables the role to take action at the checklist or task level.

You specify the access for these users:

- Assignee: User to whom the checklist is assigned.
- Line Manager: User who is the immediate line manager of the assignee.
- Other User: User other than the assignee and line manager.
- Initiator: User who initiates the transaction.

Note:

- The display property you set for initiator takes highest precedence, in case there are different properties set for the Assignee, Line Manager, and Other User.
- All display property values for the Initiator are the same as that of Other User except for the Order Tasks by Sequence property where the default value is Yes for the Initiator.

Configuration Level

You can see display properties at different levels during setup. Here's what you can configure at each level:

- Checklist: Controls access at the checklist level. What you specify here overrides the default. Specify the access for the checklist assignee, line manager, and others such as HR or IT users.

- **Task Type:** Controls access for a specific task type at the checklist level. The configuration is applicable to all tasks of that type in the checklist. You can override this at the individual task level.
- **Task:** Controls access at a specific task level. What you specify at the task level overrides what's configured at the checklist and task type level. Specify the access for the task performer, task owner, line manager, and other users.

The changes you make are specific to a checklist or task and not applied globally to all checklists and tasks. You can reset the settings anytime to revert to the default. Also, if you make changes after a checklist is allocated, the changes don't affect the allocated checklist or task. .

Access at the Task Level

At the task level, when you configure Task Access it determines what the role can do as part of the task.

Here's what Task Access determines:

- What the role can see on the task details page in the Configurable Form, Questionnaire, or Document task types. For example, if you don't want a line manager or HR specialist to fill a questionnaire or configurable form response on behalf of an employee or allow the line manager or HR specialist to view the responses provided by the employee to a Questionnaire or Configurable Form, you can set the task access to Hide for Line Manager or Other User
- What the role can do in these task types if you specify Hide for Task Access:
 - In the External URL, App Task, I-9, Report tasks the Go to Task button is hidden.
 - In DocuSign tasks, the Sign Here button is hidden.
 - In Native E-Sign tasks, the Complete button is hidden.
 - It has no impact on manual tasks since you can't restrict access for such tasks.

Note: You can restrict certain journey level actions for the initiator when they self-assign a journey.

Related Topics

- [Examples of Configuring Display Properties](#)
- [Display Properties for Checklists and Tasks](#)

How You Rename Task Action Labels

You can rename action labels to make them more meaningful for your business context in the Rename Action Labels section.

For example, you could rename the label **Not Applicable** to **No** in a task.

The **Rename Action Labels** section displays the current labels in both checklists and journeys. When you provide a new label, it reflects in both journeys and checklists task pages. You can rename an action label or link in all task types. If you want to translate labels, you can do that too.

The labels you can change will vary based upon the task type selected.

- For example, if the task type is External URL, you see the existing label **Go to website**, which you can change, as per your requirement.
- For example, if the task type is Application Task, you see the existing label **Go to application task**, which you can change, as per your requirement.

Related Topics

- [Display Properties](#)

Examples of Configuring Display Properties

Let's look at some examples of how you use the checklist display properties to restrict access to certain areas. You configure the display in the Display Properties tab.

Checklist Level

In an off boarding checklist, you want to restrict line managers from seeing tasks that need to be completed by other users. You hide the section that lists others' incomplete tasks only for line managers.

You can define the access level for each user as indicated in this table.

Field	Value
Checklist Property	Others' Incomplete Tasks
Property Type	Section
Assignee	Show
Line Manager	Hide
Other User	Show

Task Level

You configure a task of the type questionnaire to collect feedback from employees on their off boarding experience. You don't want this feedback to be visible to the line manager and other users. Therefore, you don't give access to this task to the line manager and other users.

You can define the access level for each user as indicated in this table.

Field	Value
Task Property	Task Access

Field	Value
Property Type	Section
Performer	Allow
Owner	Show
Line Manager	Hide
Other User	Hide

Let's see another example where you want to send reminders for the tasks assigned to an employee as part of their onboarding journey. You want to enable the **Send Reminder** button on the Employee tasks section only for those tasks for which you want to send a reminder. For example, you want to send a reminder to the employee to sign the confidentiality agreement and read and sign the ethics code of conduct. Additionally, you don't want to send a reminder to the employee to review campus map and directions.

To do this, configure the display settings as indicated in this table for these tasks:

- Sign the Confidentiality Agreement
- Read and Sign the Ethics Code of Conduct

Field	Value
Task Property	Send Reminder
Property Type	Action
Performer	Not Applicable
Owner	Show
Line Manager	Show
Other User	Show

Additionally, configure the display settings as indicated in this table for the Review Campus Map and Directions task:

Field	Value
Task Property	Send Reminder
Property Type	Action

Field	Value
Performer	Not Applicable
Owner	Hide
Line Manager	Hide
Other User	Hide

When you select multiple tasks to send reminders, the **Send Reminder** button will only display the count of tasks for which the Send Reminder display setting is set to Show. In this example, the count on the **Send Reminder** button will display 2 even if you have selected all these tasks to send reminders:

- Sign the Confidentiality Agreement
- Read and Sign the Ethics Code of Conduct
- Review Campus Map and Directions

This is because the Send Reminder display setting is set to Hide for the Review Campus Map and Directions task and the same setting is set to Show for the other 2 tasks.

Related Topics

- [Display Properties](#)

How You Configure the Background Image for a Journey

You can directly upload an image that displays in the thumbnail and background header of a journey.

You can upload an image from these places:

- When you create a checklist or journey template in Checklist Templates, you can use Upload in the Message tab.
- When you create a new journey, create a journey from an existing template, or edit a journey in the Journeys app. You can click Add to browse and upload the image in the Background image for this journey section.

The image you upload is stored in Universal Content Management (UCM) server as an attachment. After upload, you can adjust the size and preview the changes before saving the image. You can also add a new image, update or delete an existing image. Once saved, the image appears in a couple of places, like the thumbnail of the journey on the Explore and My Journeys tab and as the background header when you drill-down into the journey.

Say you already specified the Background URL and Thumbnail URL and then upload an image, then the image takes precedence. If you update the background image after you allocate a journey, you need to update the image in the journey template setup page and use the Update Assigned Journey Attributes Based on Modified Journey Template process to synchronize the changes.

When you upload an image, keep these points in mind:

- It's recommended that the image file size doesn't exceed 2MB when adding an image in the Journeys app. A huge file may result in performance issues.
- Ensure the dimensions are appropriate. The default size of the image cropper is 16x9.
- If you upload an image in .gif format, then you can't crop the image.
- During the export or import checklist process, image export and import isn't supported.

Related Topics

- [Overview of Checklists and Journeys](#)

How You Configure the Name Format Displayed on Journey Cards

You can configure the display of the checklist or journey name on the journey card in a specific format. This helps differentiate the instance each time you assign the same journey.

You can do this configuration in **Display Name Format on Journey Card** on the Message tab during journey template setup.

This table lists the supported tokens you can use in the display name:

Tokens	Description
{Name}	Journey name
{Instance}	Journey instance
{AllocationDate: <format>}	Format of the allocation date
{Comments:<count>}	Comments truncated to maximum characters of length

Example:

DISPLAY_NAME_FORMAT = {Name}{Instance} as of : {AllocationDate:MMM dd, YYYY} {Comments:16}

where Name = Vaccination Status, Instance = 1, Allocation Date = Oct 27, 2021 and Comments= First 16 characters of the comment which is Your vaccination details.

the Display Name on the journey card is= **Vaccination Status 1** as of : **Oct 27, 2021 Your vaccination**

If the characters in the comments exceed the count you specify, then the comments are truncated to the specified count.

Note: If you don't configure the format and an additional instance of the same journey is assigned, it displays the name in the format <Journey Name> (Instance Number)

Tip: You can also translate the static text in the Display Name Format on Journey Card using the translation editor icon on the setup page.

Notifications

How You Configure Notifications

When you assign a task, you can notify task owners and performers. You configure the notification for a task in the Notifications and Reminders tab.

Override Task Notifications

A notification is sent to the task performer every time you assign or reassign a task. You can deselect Performer in the Notification Overrides section to stop sending these notifications. However, for other task updates you must specifically configure the notifications that you want to send the task owner or performer.

Override Notification Templates

You can use predefined alert templates in your checklists to notify task owners and performers for events related to absence, health and safety, learning, person, recruiting, and talent. For checklists which are based on an employment action or which are non-event based, BIP notifications are sent. If you want, you can modify the checklists and replace the BIP notifications with alerts. You must create a custom alert template by copying the seeded alert template and associate the custom alert template to the appropriate notification for a journey or task.

Prevent Task Status Update from Notifications

It's possible that task performers may update the checklist task status directly from a task notification. To prevent that, you can specify Hide for either Mark as Complete or Mark a Task as Not Applicable when configuring task display properties in the Display Properties tab. This hides both these action buttons in the task notification.

Note:

- All checklist task notifications which require the task performer to mark the action as Complete or Not Applicable are in the Assigned status. When the performer acts on the task notification and clicks either Complete or Not Applicable, the task notification status changes to Complete. Similarly, all FYI checklist task notifications are in the Assigned status too, but the status of such FYI notifications changes to Complete only when the user explicitly clicks on Dismiss in the task notification.
- When an Area of Responsibility (AoR) is configured as a task performer and the AoR contains multiple members, action buttons aren't available in the email and bell notifications.

Send Task Notifications

Individual notifications are sent for tasks, by default. However, if you don't want users to receive individual notifications you can enable **Combine task notifications** on the Display Properties tab to send a single combined notification summarizing all the task notifications. If you enable this setting, both actionable and FYI notifications are summarized in the notification. However, if there are any task actions to do after the combined notification is sent for the day, those notifications are sent as separate (or individual) notifications.

Send Notifications on Checklist Allocation and Force Completion

The **Send notification on checklist allocation** setting on the Display Properties tab is enabled by default. This sends the checklist assignee a notification when a checklist of non-enterprise onboarding category is allocated. Since there's no default notification template associated for non-enterprise onboarding category checklists, you need to configure a custom alert and associate it in Template for Assigned Checklist on the Message tab.

When the **Send notification when checklist is force completed** setting is enabled it sends a notification to the checklist assignee when a checklist is force completed. Although you can't override the seeded template that's used to send this notification, you can modify the seeded template and use it

Configurations for Journey Notifications

This table shows the solutions for commonly asked questions related to journey notification configurations:

Configuration Query	Solution
How can I turn off journey task notifications?	<p>You can stop sending notifications to performers every time a task is assigned or reassigned. To do this, uncheck the When task is assigned or reassigned check box for Performer in the Notification Overrides section on the task configuration page.</p> <p>Note: Based on the configuration change, the task will not appear in the journey summary notification as well. If this is the configuration for all tasks in a journey, then no summary notification will be activated.</p>
How can I disable the journey welcome email notification?	You can uncheck the Send notification on checklist allocation check box under the Display Settings tab when configuring a journey.
Why is the LoV empty on the Notification Overrides section of the Notification and Reminders tab?	Earlier, as part of configuring notification overrides, the user had to select a value from the drop-down list. However, onboarding and journey enhancements were introduced from release 19C to improve and make it easy to configure notification overrides. As part of this, the list of values (LoV) was retained for backward compatibility.
Can I remove the Mark as Complete and Mark as Not Applicable buttons in the task notification?	<p>Yes, you can. If you specify Hide for either Mark as Complete or Mark as Not Applicable when configuring task display properties, both the action buttons don't appear on the task notification. The task notification in this case becomes an FYI notification instead of an action required notification.</p> <p>Note: If you remove the buttons using BPM for the task, the task won't get completed in BPM and the task status will always show as In Progress. Removal of the Mark as Complete and Mark as Not Applicable buttons from the BPM Workflow (AllocatedHumantask) is not a recommended action or a supported option. Both the buttons should be there in the AllocatedHumantask for notifications to be automatically removed from the worklist.</p> <p>Additionally, it is recommended not to modify the seeded AllocatedHumantask workflow as it will impact all journey tasks.</p>

Configuration Query	Solution
How are tasks displayed in the journey combined summary notification?	<p>Tasks are displayed in the journey summary notification based on when they are due, that is, the task due earliest is displayed first in the list. If there are no due dates configured for your tasks, then there is no definite order for listing the tasks in the combined notification.</p> <p>Note: This is applicable even if sequence is defined for the tasks.</p>
Why is the user not able to view journey task notifications?	<p>If the user has not inherited the following privileges through any custom role, then you need to grant the privileges to the user:</p> <ul style="list-style-type: none"> • Aggregate privilege: <ul style="list-style-type: none"> ○ Print Worker Portrait (ORA_PER_PORTRAIT_MAINTENANCE_DUTY) • Function privileges: <ul style="list-style-type: none"> ○ View Notification Details (PER_VIEW_NOTIFICATION_DETAILS) ○ Approve Transactions (PER_APPROVE_TRANSACTIONS)
How can I delay the welcome notification when an Enterprise Onboarding journey gets allocated?	<p>For more information, see the document How to delay Enterprise Onboarding Welcome Notification (https://community.oracle.com/customerconnect/discussion/490310) on Customer Connect.</p>
Why are notification reminders not being sent, even though they are configured at the task level?	<p>Task reminder notifications will be sent only when the task is configured with a target duration.</p>
How can I customize the reminder notification?	<p>If you are using Alerts-based notification, you can customize the ORA_CHK_TASK_REMINDER alert. If you are using BIP-based notifications, you can't customize because the reminder notification doesn't have an associated BIP template or data model.</p> <p>Note: Reminders are sent for each task individually and can't be combined.</p>
Why is the email notification for an offboarding journey not sent to the home email of the terminated worker?	<p>The journey notification for an offboarding journey will be sent to the home email only if the following conditions are true:</p> <ul style="list-style-type: none"> • The worker has no active assignment in the application when the journey notification is being activated. • The notification is activated after the termination date and the worker has no active assignments left.
Will a user who doesn't have a person record receive a journey task notification?	<p>Yes, such a user will only receive a bell notification, but not an email notification.</p>
How can I send the journey task notification to a person who isn't a user in the Cloud HCM application?	<p>Notifications to non-users aren't supported. You can explore building custom BI reports which can then be emailed to specific email IDs of the external persons or vendors.</p>
Can I enable only reminder notifications for journey tasks, even if other task notifications are disabled?	<p>Yes, you can.</p>

Configuration Query	Solution
How do journey and task notifications behave in different scenarios?	When a journey is deleted or a task is removed or reassigned, the task notification is withdrawn and the notification content is blank. When a journey is force closed, the task notification is withdrawn and the notification content displays the task status as Force Closed .

How You Use Predefined Alert Templates for Notifications

You can use predefined alert templates in your checklists to notify task owners and performers for checklists triggered based on events related to absence, health and safety, learning, person, recruiting, and talent.

You can create a copy of these templates and use them to override the default alert notifications.

- To override the default, in Setup and Maintenance, go to the Manage HCM Alerts task. Select the event alert for which you want to modify the template or add a new template. Click **Add Template** to create a template as per your requirements.
Note: You can only create new alert templates for delivered event alerts. You can't create new event alerts.
- You need to associate the custom alert template to the appropriate notification for a journey or task.
 - a. All journey level alert templates can be associated at Checklist Templates > Specific Template > Message tab.
 - b. All task level alert templates can be associated at Checklist Templates > Specific Task > Notifications and Reminders tab > Notification Template Overrides section.

Note:

- The predefined alert template Checklist Force Closed for Assignee is used for the alert that's sent when you enable **Send notification when checklist is force completed** in the Display Properties tab. You can't override the template for this. However, you can modify the predefined template, if required.
- If the processing mode is set to **Alerts based notification**, and the communication method is set to Worklist, then administrators can view generated alerts at Worklist > Administrative Tasks.
- The FUSION_APPS_HCM_SOA_APPID abstract role is used to initiate HR Checklist transactions. Therefore, HR Checklist transactions won't be displayed in the Transaction Console when data security is enabled for the Transaction Console. Instead, users can use the BPM Worklist to view HR Checklist transactions.
- The Transaction Console displays the **Checklist Action occurrence** and **Employment Checklist Allocated Task Composite** entries only for checklists having the processing mode as **BI Publisher based notification**. However, for checklists having the processing mode as **Alerts based notification**, the Transaction Console won't have an entry.
- If the alerts channel is disabled then alerts aren't sent.

Move Existing BIP Notifications to Alerts Based Notifications

You can change the processing mode when you configure a checklist template to use alerts-based notifications. You can do this by going to Checklist Templates > Message tab > Processing Mode. The processing mode options you can select are described in this table.

Processing mode	Description
BI Publisher based notification	This mode ensures SOA composites are used to allocate checklists and tasks to workers and notifications are sent using BIP based notifications.
Alerts based notification	This mode ensures ESS mechanism is used to allocate checklists and tasks to workers and notifications are sent using alerts.
Null or blank	This mode ensures SOA composites are used to allocate checklists and tasks to workers and notifications are sent using BIP based notifications.

For more information on alert templates for journeys, see the document Alert Templates for Event Based Journeys (<https://community.oracle.com/customerconnect/discussion/630996>) on Customer Connect.

Related Topics

- [How You Configure Notifications](#)

Features with Only Alerts-Based Notification Support

These journey types only send out alerts-based notifications:

- Contextual journeys
- Event-based journeys
- Personal journeys
- Survey journeys

These actions only send out alerts-based notifications:

- Force-complete journeys
- Journey assigned email

You can perform these actions only when the processing mode for the journey template is **Alerts based notification**:

- Associate different notification templates for each task and journey.
- Include task groups in the journey template.
- Personalize the task reminder notification.
- Select the Directs or Organization option for assigning journeys.

Notifications for Pending and Terminated Workers

All email notifications from Cloud HCM are sent to the user account email address. The user account email address is populated from the email address specified as Work in the person record.

Typically, pending workers don't have a corporate email address. Preboarding email notifications are sent only to the email address specified in the user account. So, for pending workers to receive email notifications on their Home email, you can enable either one or both of these profile options:

- ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL
- ORA_PER_USER_ACCOUNT_NOTIFY_HOME_EMAIL

This table shows the differences between the journey and user account notifications based on different criteria.

Criteria	Journey Notifications	User Account Notifications
What's the profile option code?	ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL	ORA_PER_USER_ACCOUNT_NOTIFY_HOME_EMAIL
What's the default value of the profile option?	N	N

Criteria	Journey Notifications	User Account Notifications
Which notifications are impacted?	Journey and task notifications	<p>Notifications that are a part of the password lifecycle process. The notifications are related to these events:</p> <ul style="list-style-type: none"> • Forgot username • New user created • Password expired • Password expiry warning • Password generated • Password reset confirmation • Password reset
Which home email is used?	<p>The one marked as H1 in the application.</p> <p>If there's more than one H1 email specified, the application uses the first H1 email returned in the search. It's better to use only one H1 email address for pending workers so that journey notifications are consistently sent to the same home email.</p>	<p>The one marked as H1 in the application.</p> <p>If there's more than one H1 email specified, the application uses the H1 email that is valid as of the system date and was created last in the application.</p>
How is the notification sent?	<p>If you set this site-level profile option to Y, journey email notifications are sent to the home email address of the journey assignee. Additionally, the email notification is sent to their user account email, if it exists.</p> <p>If there is no email of type H1 and no user account email, then no email notification is sent.</p>	<p>If you set this site-level profile option to Y, user account email notifications are sent to the home email address of the user.</p> <p>If there is no email of type H1, then the email notification is sent to the user account email. If there is no user account email as well, then no email notification is sent.</p>
Are there any dependencies?	<p>Yes. The journey and task email notifications are sent to the home email. The notifications are sent if the user meets these conditions on the date the journey and tasks are assigned:</p> <ul style="list-style-type: none"> • Has only an active pending worker work relationship. • Has only terminated work relationships. <p>That is, no active work relationships of type employee or contingent worker.</p> <p>In all other cases, the email notification is sent to the user account email. If there is no user account email, then no email notification is sent.</p> <p>Note: A worker can't take any action (mark complete or not applicable) from the notification they receive on the home email. This is because such emails aren't actionable and won't have actionable links.</p>	<p>Yes. The user account email notifications are sent to the home email. The notifications are sent if the user meets these conditions on the system date:</p> <ul style="list-style-type: none"> • Has only an active pending worker work relationship. • Has only terminated work relationships. <p>That is, no active work relationships of type employee, contingent worker, or nonworker.</p> <p>In all other cases, the email notification is sent to the user account email. If there is no user account email, then no email notification is sent.</p>

FAQs for Notifications

What notification templates are available for checklists?

There are different checklist notification templates available.

The checklist notification templates you can use, are listed here:

- **ChecklistWelcomeReport** (**ChecklistWelcomeDataModel**): Triggered to the worker only when checklist of the category Enterprise Onboarding is allocated.
- **TaskActionRequiredReport** (**TaskNotificationDataModel**): Triggered for all task types when an action needs to be performed by the user.
- **TaskFYIReport** (**TaskNotificationDataModel**): Triggered for all task types as an information only notification.
- **ChecklistTaskCombinedNotificationReport** (**ChecklistTaskCombinedNotificationReportDataModel**): Triggered to send combined notifications (both actionable and FYI) for checklist tasks per performer, per day, per checklist.
- **ChecklistTaskPerformerFYIReport** (**TaskNotificationDataModel**): Sends report without the **Complete** and **Not Applicable** actions buttons if **either** of the buttons are disabled using the **Display Properties** feature.

Can checklist notifications be configured according to my organization's requirements?

Yes, for more information see [Configuring Checklists Notifications Using Report: Worked Example](#).

Related Topics

- [Configure Checklist Notifications Using Reports](#)

How can I send an email communication to new hires?

You can't send emails to new hires from the Onboarding application. You can however explore the Alerts Composer functionality to meet email notification requirements.

What happens to existing notifications when you enable Journeys?

Existing notifications continue to be triggered. If the journeys profile `ORA_PER_JOURNEYS_ENABLED` is enabled, you are directed to the appropriate Journeys pages.

If the profile isn't enabled, you will continue to be directed to the respective responsive Onboarding and Checklists pages.

Can I move from BIP based notifications to alerts based notifications?

Yes, you can. For more information, see the topic [How You Configure Notifications](#).

Why aren't workers able to see checklist task notifications?

The workers may not have the required privileges to view the notifications.

Check and enable these profile options for BIP notifications

- BIP_EMAIL_NOTIFICATION_HCM
- BIP_EMAIL_NOTIFICATION_HCM_PER
- BIP_ONLINE_NOTIFICATION_HCM
- BIP_ONLINE_NOTIFICATION_HCM_PER

After you enable these profile options, the checklist needs to be allocated to the person to view the changed data in the notifications.

Ensure these privileges are granted to workers if they haven't inherited these through any custom role:

Aggregate Privilege

1. Print Worker Portrait (ORA_PER_PORTRAIT_MAINTENANCE_DUTY)

Function Security Privilege:

1. View Notification Details (PER_VIEW_NOTIFICATION_DETAILS)
2. Approve Transactions (PER_APPROVE_TRANSACTIONS)

How You Use Nudges to Send Journey Reminders

You can configure a nudge to send an email notification to remind the employee or manager when their journey or task isn't complete.

You configure nudges for the Journeys module in the Nudge Configuration work area. After you configure a nudge, the **Process HCM Nudges** ESS process identifies the person to whom the journey or task reminder needs to be sent.

This table lists the nudge reasons that you can configure and how each nudge feature works:

Reason to Nudge	Purpose of Nudge	Nudge Evaluation Criteria
Journey not completed	Remind the employee or manager to complete their journey.	Nudge is generated <n days after journey assigned date> if the journey isn't completed. The placeholder n signifies the configurable value defined by the user when configuring the nudge.
Task in journey not complete	Remind the employee or manager to complete a specific task in their journey.	Nudge is generated <n days after journey task assigned date> if the specific task isn't complete.
Journey has overdue tasks	Remind the employee or manager to complete the overdue tasks in their journey.	Nudge is generated <n days after journey assigned date> if the journey has overdue tasks.
Journey not started	Remind the employee or manager to start their journey.	Nudge is generated <n days after journey assigned date> if the journey isn't started.

Points to Note

- It's recommended that you enable the **Schedule Nudge Plan** check box when you create the nudge plan. By doing this, you can avoid manually scheduling journey reminders.
- The nudges can only be sent through the email channel to the employee and line manager.
- For the **Task in journey not complete** nudge, the nudge email is only sent to the journey assignee and their manager. This is done even if the performer is someone other than the journey assignee or their manager.
- You can obtain the journey and task code that are used to configure nudges from the checklist template page.
- You can configure nudges only for the Enterprise Onboarding journey, and not for step journeys.
- Nudges by design are supported for employees and contingent workers only.
- Nudge email alerts are only sent to the work email addresses of the recipient. They won't be displayed in the worklist or bell notifications for the recipient.

Configure a Nudge to Send Journey Reminders

You can configure a nudge to send an email notification to remind the employee or manager for one of these nudge reasons:

- Journey not completed
- Task in journey not complete
- Journey has overdue tasks
- Journey not started

For example, you can configure a nudge to send a reminder when the journey isn't completed. To do this, follow these steps:

Create Nudge Plan

1. On the Home page, click the **My Client Groups** tab.
2. Click the **Nudge Configuration** quick action under the Employment category.
3. Click **Add** and enter the nudge plan details.
4. Select the **Schedule Nudge Plan** check box.

Note: It's recommended that you select the check box when you create the nudge plan. By doing this, you can define the period for which the nudge needs to be scheduled.

5. Set the status to **Active**, and then click **Save**.

Configure Nudge Type

1. Click **Add** in the Nudges section.
2. Select **Journeys** in the Module list.
3. Select **Journey not completed** in the Reason list.
4. Edit the default configuration name, as applicable.
5. Set the status to **Active**.
6. Enter the journey code.

Note: You can obtain the journey code from the checklist template page.

7. In the **Number of Days After Journey Is Assigned** field, enter the number of days after the journey assigned date by when the nudge must be triggered.

Enter Channel Details

1. Click **Add** in the Channels section.
2. Select **Email** in the Channel Type section. The Active check box is selected by default.
3. Select the recipient type (**Employee** or **Line manager**).
4. Select the content source.
5. Enter the email title and content based on the content source you selected.
6. Click **OK**.
7. Click **Save and Close**.

Schedule Nudge Period

1. Click **Add** in the Schedule section.

Note: This section is displayed only if you selected the **Schedule Nudge Plan** check box while creating the nudge plan.

2. Enter these details:
 - a. Select the date when you want email notification to start.
 - b. Select the frequency that you want to repeat the notification (**Day**, **Week**, **Calendar month**, or **Year**). Based on the value you select, you need to specify the details. For example, if you select **Week**, you need to select the day of the week that you want to repeat.
 - c. Select the value for ending the recurrence of the notification (**Specific date** or **Number of occurrences**). If you select **Specific date**, you need to select the end date of the recurrence. If you select **Number of occurrences**, you need to enter the value for the number of occurrences after which the recurrence will end.
 - d. Select the number of runs per nudge period (**Once per period** or **Every day of the period**).

Period Summary

1. Verify the period details in the Period Summary section.
2. If you don't want to send the email notification for a particular period, you can make the period inactive by editing the period to clear the **Active** check box. The application will skip sending the email notification for the inactive period and will continue with next period.

Preboarding

How You Enable Sending Notifications to Personal Email

All email notifications from HCM cloud are sent to the user account email address. User account email address is populated from the email address specified as Work in the person record.

This configuration is applicable to both checklists and journeys.

Typically, pending workers don't have a corporate email address. Preboarding email notifications are sent only to the email address specified in the user account. So, for pending workers to receive email notifications on their Home email, you can implement one of these options:

- Use the `ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL` profile option. By default, this profile option is set to N. If you set this site-level profile option to Y, checklist email notifications will be sent to the pending worker's home email address in addition to their user account email address. The home email used in this case is the one marked as H1 in the application. Here's how the notifications are sent:
 - If the profile option is set to Y and the pending worker has both home and user account email addresses specified, then the notification is sent to both the email addresses.
 - If the person has an active employee or contingent worker assignment on the date the task is initiated, the notification is always sent to the user account email and isn't sent to their home email.
 - If there's more than one H1 email specified, the application uses the first H1 email returned in the search. It's better to use only one H1 email address for pending workers so that checklist notifications are consistently sent to the same home email.

Note: A worker can't take any action (mark complete or not applicable) from the notification they receive on the home email, since such emails aren't actionable and won't have actionable links.

- Specify the pending worker's home email address as their work email address in their person record.

Note: After the pending worker becomes an employee, you will need to replace the user account email address, in the Security Console, to the corporate email address from the personal email address.

If a worker is terminated and has no active work relationship with the enterprise, then the notification will be sent to the worker's personal email address.

How You Enable Access for Preboarding

You must give the necessary access to new hires so that they can access their preboarding tasks before their start date. There's no separate work area for preboarding. They do these tasks in the Onboarding work area.

Provide Access

When you create a pending worker, their user credentials are automatically generated. Based on how you configure the email template in the Security Console, a notification with the credentials goes to either the new hire or their manager. If the manager gets the notification, they can forward the details to the new hire.

Note: Since a pending worker work relationship is created as nonprimary by default, the user account process doesn't retrieve the assignment details including the manager details for the pending worker. As a result, the manager notifications for a pending worker aren't generated.

You need to do either of these additional tasks if you use the Single Sign-on (SSO) mode for authentication:

- Enable the SSO Chooser feature, which allows pending workers to be authenticated.
- Create an SSO account in the corporate LDAP and share the details with the new hires.

If you use VPN or IP allow listing for authentication, you need to give necessary privileges to pending workers so that they can access the application.

Grant Roles

You need to grant new hires the Pending Worker role that contains the Manage Onboarding by Worker privilege. Alternatively, you may create a custom role that's a copy of the pending worker role and add more privileges.

Here's an example to illustrate how you can create a custom role that's a copy of the Pending Worker role and grant access to document records for pending workers so that they can attach and upload documents.

1. Copy the existing pending worker role.
 - a. In Tools > Security Console, click **Copy Role** for the existing pending worker role and select **Copy top role and inherited roles** and then click **Copy Role**.
 - b. In the Copy Role: Basic Information page, enter the role name Pending Worker Document Records.
 - c. Enter the role name without spaces in the Role Code field.
 - d. Add the required description.
2. Add the required functional security privileges, data security policies, aggregate privileges, duty roles and submit the role.
 - a. In Setup and Maintenance, search for the Manage Data Role and Security Profiles task. Search for the role that you created and assign the security privileges and submit the role.

Privilege Type	Privileges and Policies
Functional Security Privilege	<ul style="list-style-type: none"> - Access Quick Actions - Use REST Service -HR Document Types List of Values
Data Security Policies	<ul style="list-style-type: none"> - Public Person
Aggregate Privileges and Duty Roles	<ul style="list-style-type: none"> - Attachments User - Manage Person Documentation by Worker - Use REST Service - HCM Countries List of Values Duty Role - Use REST Service - HR Document Types List of Values

3. Assign the pending worker document records role to users.
4. Run the Retrieve Latest LDAP Changes process to make the new role available in HCM. Use the Scheduled Processes work area to run the latest changes.
5. When a user with the previously assigned custom pending worker role signs into the application, they should now be able to add document records.

Related Topics

- [Examples of Location-Based Access in Oracle HCM Cloud](#)

Deep Links in Journeys

You can use deep links to open specific Journeys pages without navigating through the menu structure. Users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation.

Parameters

You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them. This table summarizes the different parameters used across multiple deep links.

Parameter	Type	Description
tab	String	The tabs that appear on the Journeys app.
searchTerm	String	Search string. Search terms will vary based on the tab being referenced.
pageName	String	The only values supported are exploreJourneys, myJourneys and journeyDetails.
category	String	Category of the checklist. For example, ONBOARD, ORA_PERSON, ORA_SURVEY and so on. If category parameter isn't passed, journeys of all categories are displayed.
subCategory	String	Lookup code for the Survey Subcategory lookup. These are the only values supported for the subcategory parameter when the category parameter is ORA_SURVEY. <ul style="list-style-type: none"> ORA_CHK_TOUCHPOINT_SURVEY ORA_CHK_GENERAL_SURVEY
status	String	These are the only values supported for the Status parameter. <ul style="list-style-type: none"> ORA_OPEN - indicates all open assigned journeys. ORA_CLOSED - indicates all completed assigned journeys. <p>If Status parameter isn't passed, both open and completed assigned journeys display.</p>
journeyCode	String	Unique alphanumeric identifier for the journey template. This is auto generated based on the journey name when the journey template is created and displayed in the checklist template page.
journeyId	Number	Unique numeric identifier for the journey template.

Parameter	Type	Description
checklistCode	String	Unique alphanumeric identifier for the checklist template. This is auto generated based on the checklist name when the checklist template is created and displayed in the checklist template page.
checklistStatus	String	<p>These are the only values supported for the Status parameter.</p> <ul style="list-style-type: none"> ORA_OPEN - indicates all open assigned journeys. ORA_CLOSED - indicates all completed assigned journeys. <p>If Status parameter isn't passed, both open and completed assigned journeys display.</p>

Deep Links by Use Case

This table lists the deep links by use case. Replace the <server_host> with details of your pod.

Deep Link	Purpose	Parameters
<code>https://<server_host>/hcmUI/hcm/vp/journey?tab=<tab_name></code>	<p>Go to a specific tab in Journeys.</p> <p>For example, create a landing page deep link that shows all journey templates on the Explore tab</p>	<p>tab=<tab_name></p> <ul style="list-style-type: none"> tab=explore tab=myJourneys tab=myTasks tab=assignedJourneys tab=activity
<code>https://<server_host>/hcmUI/hcm/vp/journey?tab=<tab_name>&searchTerm=<search_term></code>	<p>Land on a specific tab with the search prepopulated with the searchTerm parameter value.</p> <p>For example, create a landing page deep link that shows all journey templates on the Explore tab where journey name starts with 'Onboard'.</p>	<p>searchTerm=<search_term></p> <ul style="list-style-type: none"> For Explore tab, searchTerm parameter value supports journey name For My Journeys tab, searchTerm parameter value supports journey name For My Tasks tab, searchTerm parameter value supports task name For Assigned Journeys tab, searchTerm parameter value supports journey name or person name For Activity tab, searchTerm parameter value supports journey name <p>Note: This parameter works only in conjunction with the tab parameter.</p>

Deep Link	Purpose	Parameters
<p>1 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=exploreJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=exploreJourneys&category=<Category_Code></p> <p>2 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=exploreJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=exploreJourneys&category=<Category_Code></p>	<p>Land on a specific tab with journeys filtered by a specific category or a sub-category.</p>	<p>pageName=exploreJourneys</p> <p>Note: This pageName parameter works only in conjunction with parameter of category=<Category_Code> or subCategory=<Subcategory_code></p>
<p>1 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code></p> <p>2 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code></p> <p>3 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code></p> <p>4 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&category=<Category_Code></p> <p>5 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&journeyCode=<Journey_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&journeyCode=<Journey_Code></p> <p>6 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&journeyCode=<Journey_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=myJourneys&journeyCode=<Journey_Code></p>	<p>Directly list assigned journeys of a specific category, sub-category, journey code and statuses for the signed-in user on the My Journeys tab.</p>	<p>pageName=myJourneys</p> <p>Note: This pageName parameter works only in conjunction with parameters of category=<Category_Code> or subCategory=<Subcategory_code> or status=<Status_Code> or journeyCode=<Journey_Code></p>
<p>1 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=journeyDetails&journeyCode=<Journey_Code>">https://<server host>/hcmUI/hcm/vp/journey/journey-redirect?pageName=journeyDetails&journeyCode=<Journey_Code></p>	<p>Directly view details of a specific journey and use the allowed actions to assign the journey to themselves or to others</p>	<p>pageName=journeyDetails</p> <p>Note: This pageName parameter works only in conjunction with parameter of journeyCode=<Journey_Code></p>
<p>1 <a href="https://<server host>/hcmUI/hcm/vp/journey/journey-details?journeyId=<Journey_id>">https://<server host>/hcmUI/hcm/vp/journey/journey-details?journeyId=<Journey_id></p>	<p>Directly view details of a specific journey and use the allowed actions to assign the journey to themselves or to others.</p>	<p>journeyId=<Journey_id></p>
<p>1 <a href="https://<server host>/hcmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklistCode">https://<server host>/hcmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklistCode</p> <p>2 <a href="https://<server host>/hcmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklistCode;checklistStatus=<Status_Code>">https://<server host>/hcmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklistCode;checklistStatus=<Status_Code></p>	<p>View the latest assigned journey of a specific recurring journey or survey</p>	<p>checklistCode=<Journey_Code></p> <p>checklistStatus=<Status_Code></p>

Considerations for Importing a Journey Template Configuration

Here are some points you need to consider when importing a journey template xml:

What are you importing?	What you need to do before importing
Enterprise Onboarding journey category	First import the step journeys (journeys of the category Enterprise Onboarding Step) in the destination environment with the same names as in the XML file.
Journey that has an eligibility profile associated to it	Ensure that the eligibility profiles are available in the destination environment with the exact same names.
Journey that has tasks of the type Electronic Signature – Native	Configure the document to be signed in the destination environment with the exact same name and residing in the same path as in the XML file.
Journey that has tasks of the type Electronic Signature – DocuSign	Configure the DocuSign integration in the destination environment with the exact same name as in the XML file.
Journey that has tasks of the type Questionnaire	Configure the questionnaires with the exact same codes in the destination environment.
Journey that has tasks of the type Document	Attach the document again to the task in the destination environment because the documents associated with the task won't be imported into the destination environment.
Journey that has tasks of the type Report	Configure the report in the destination environment with the same name and residing in the same path as in the XML file.
Journey that has tasks of the type I9 configuration	Configure the I9 codes in the destination environment with the same names as in the XML file.
Journey that has tasks of the type Configurable Form	Configure the Descriptive Flexfield (DFF) Context in the destination environment with the same context name as in the XML file. You can then create the segments for the context after importing.

How You Analyze Journey Errors

You can analyze and collect diagnostic data for journey errors.

If your journey has errors, use this procedure to analyze and collect diagnostic data for it:

1. Upload the step-by-step screenshots of the journey issue into a Microsoft Word document named STEP_BY_STEP_ACTIONS.docx.

2. Run the HCM Checklist Error Analysis Report to analyze any issues for the journey and upload the report to the service request. To do this, follow these steps:
 - a. On the application Home page, click the **Settings and Actions** icon (user name or image) in the global header region, and then click **Run Diagnostics Tests** in the Troubleshooting area. The Diagnostic Dashboard page is displayed.
 - b. Search for the **HCM Checklist Error Analysis Report** test name in the **Search for Tests** section. Select the test name check box from the search result and click **Add to Run**. This will add the test to the **Choose Tests to Run and Supply Inputs** section.
 - c. Add the input parameters by clicking the **Click to Supply or Edit Input Parameters** icon under the **Input Status** column in the **Choose Tests to Run and Supply Inputs** section. A dialog box is displayed that allows you to enter the input values you want.
 - d. Select the check box under the **Include** column for the Checklist Category. Search and select the journey category for which you want to run the report in the box under the **New Value** column.

Note: The Checklist Category is a user-extensible lookup. If you have defined custom lookup codes, then you need to enter the lookup code in the box.
 - e. Select the check box under the **Include** column for the Checklist Name. Enter the assigned journey name for which you want to run the report in the box under the **New Value** column.

Note: Ensure that there are no blank spaces when you enter the parameters. The Checklist Category, Checklist Name, and Person Number are required input values.
 - f. Select the check box under the **Include** column for the Person Number. Enter the person number for whom the journey is allocated in the box under the **New Value** column.
 - g. Click **OK** in the dialog box.
 - h. Enter a relevant run name, such as the person number for whom you're running the report in the **Run Name** box, and then click **Run**. Click **OK** in the Test Run Submitted dialog box.
 - i. Click the **Display Latest Test Run Status Information** icon in the Diagnostic Test Run Status section.
 - j. Expand the folder with the run name that you entered in step 2h. Verify if the **Completed** status is displayed under the **Execution Status** column for both the folders.
 - k. Click the **View Test Results** icon under the **Report** column for the **HCM Checklist Error Analysis Report** folder. The error report for the journey is displayed. Scroll down and check the details, such as profile options and journey tasks.
 - l. Save the report in a location on your computer.

Note: Right-click the report and then click **Save Page As**. Ensure that the Save as type is **Web Page, complete**. Ensure that the report you save is in HTML or MHTML format.
 - m. Review the report to verify that no data is truncated.
3. Export the journey template. To do this, follow these steps:
 - a. On the application Home page click the **My Client Groups** tab.
 - b. Click **Show More** under QUICK ACTIONS.
 - c. Click the **Checklist Templates** quick action in the Employment area.
 - d. Search and select the journey. From the **Actions** drop-down list, click **Export**.
 - e. Save the journey in the same location on your computer that you saved the error report. You can save the journey with the person number in case you have multiple reports.
4. You can now upload the STEP_BY_STEP_ACTIONS.docx file, along with the exported journey template and HCM Checklist Error Analysis Report to the service request.

13 Document Records

Document Types and Categories

You use document records to create and manage documents such as medical certificates, licenses, and visas. You can create your own document types to supplement the predefined document types, categories, and subcategories.

Use the Document Records task from Quick Actions, person spotlight, My Team work area, or person smart navigation to create and maintain document records for a person.

The system document type displays on the setup page after you create the document type. Here are the attributes you can configure for a document type:

Field	What You Use it For
System Document Type	Read-only field that's displayed when the document type is saved.
Document Type Level	Specify whether the document type you want to create is at the person or assignment level. The default type is Person. If you specify Person, the assignment ID isn't populated for document records.
Type	Categorize the document. You can translate the document type using the Translation Editor icon.
Description	<p>Compose and format content using the built-in rich text format when you create or edit a document type. The character limit of the field is 4000 characters. The formatted content is displayed in the read-only Description field on the responsive Document Records page and plugin region for the document type. You can view the read-only Description field when you create or edit a document record.</p> <p>Note: If you add an image in the Description field, it will take up the 4000 character limit specified for the field. Instead, you can use the Reference Info (document type attachments) field to add the image.</p>
Expiration Notification Period	<p>Specify an expiration period for this document type. This is an information-only field and doesn't determine any automatic notification.</p> <p>Note: This field must be populated in the Document Type Setup page to display the document records in the Document Expiry report.</p>
Minimum Attachments	<p>Specify the number of attachments users should include for the document record.</p> <p>You can control the display of the Attachments section on the Document Records page by entering a numeric value in the Minimum Attachments field. If you enter a value of -1, the Attachments section is hidden. You can use this feature to restrict users from uploading attachments to document types that don't need supporting documents.</p> <p>Here are a few points to consider about the feature:</p> <ul style="list-style-type: none"> • It's only applicable for transactions done using the UI. • It's not applicable when you use HCM Data Loader and REST API.

Field	What You Use it For
	<ul style="list-style-type: none"> • If there are existing attachments and the attribute value is set to -1, then the Attachments section is read-only and you can't update the attachment. You can only view the attachment in read-only mode. • Even if you set the value of the Minimum Attachments attribute to -1: <ul style="list-style-type: none"> ○ You can still use the Add from Attachment feature to prefill Document Record attributes by scanning an attachment. ○ It allows attachments to be automatically uploaded as part of the Generate Letter feature, but the Attachments section will be read-only. • You can enable this feature even for existing document types.
Report Path	<p>Specify the path of the BI publisher template that enables a report or letter to be generated when creating a document record for the document type.</p> <p>For example, <code>/Custom/Human Capital Management/Document Records/Visa Application.xdo</code></p>
Country	<p>Indicate the country the document type applies to. Default is All Countries.</p> <p>When workers create a document record this displays as a read-only field. It isn't available for selection and can't be updated once the document type is created. It also doesn't restrict selection of a document type by matching any assignment information of the worker.</p>
Category	<p>Group documents into meaningful categories at a higher level. For example, absence. You can use the DOCUMENT_CATEGORY lookup type to define new document categories and subcategories</p> <p>When workers create a document record this displays as a read-only field. It isn't available for selection when creating the document record and can't be updated after the document type is created.</p>
Subcategory	<p>Further group documents into subcategories. For example, general or medical. Define document categories as values for the DOCUMENT_CATEGORY lookup type and document subcategories as extended lookup values for the selected category.</p> <p>This is read-only. It isn't available for selection when creating a document record and can't be updated after the document type is created.</p> <p>The subcategory that you specify for a document type will be displayed in the Document Type LoV when you add or mass download document records. You can use the subcategory value to accurately search and filter the document type.</p> <p>Note: It's recommended that you select a value for the Subcategory attribute when configuring a document type to further classify document records.</p>
Tags	<p>Classify and group document types during creation and editing. These tags are used as a starting point:</p> <ul style="list-style-type: none"> • Employment • Identification • Legal <p>However, you can add additional values to the ORA_PER_DOC_TYPE_TAGS lookup type.</p> <p>You can also classify and group related document types under the same tag for higher-level reporting and filtering on the Document Records landing page.</p>

Field	What You Use it For
Status	<p>Indicate whether new document records can be created for this document type.</p> <p>Note: Document records of this type can be viewed, edited, and deleted even if the status of the document type is inactive.</p>
Approval Required	<p>Indicate whether document records created for this document type need approval. If you set this attribute to No, document records won't go through document approval.</p>
Allow Multiple Occurrences	<p>Indicate whether multiple records of this document type can be created for the person.</p> <p>Note: This check is performed against the individual assignments of the person and not against the person. This allows you to create a document record per assignment instead of one document record per person.</p> <p>For example, if you have the following configuration in the Document Type Information page:</p> <ul style="list-style-type: none"> • Document Type: Employment Agreement • Document Type Level: Assignment • Allow Multiple Occurrences: No <p>In a situation where you have 2 assignments titled A1 and A2 and you need to upload a signed copy of the Employment Agreement for each assignment. With the above configuration, it's possible to create 2 document records of the same type (one document record per assignment) even when the Allow Multiple Occurrences option is set to No.</p>
Publish Required	<p>Indicate whether documents are available from a specified date or immediately. If this is set to Yes, it displays as a required field in the Add Document Record flow. You can edit the publish date using REST, HDL, or HSDL.</p> <p>Note: If the publish date is in the future, the document record won't display on the Document Records list page until that date. However, users having the View Unpublished Document Records privilege can select Show in the Future Published field to see such document records.</p> <p>See the topic, Make Document Records Available from a Specific Date</p>
Enable Document Delivery Preferences	<p>Indicate delivery preferences for the document.</p>

Use these tabs to configure other information for the document type:

- Document Record Preferences - includes document record attributes, settings for restricting and archiving, and flexfield preferences.

These are the archive options:

- **Archive Criteria Basis:** By default this LoV is blank. You can select either the Creation Date, From Date, To Date, or Issued On.
- **Archive After Days:** By default this field is blank. It's a mandatory field where you enter a number that's greater than 0 and less than or equal to 18000. For example, if you enter 2, the document records will be archived 2 days after the date selected for **Archive Criteria Basis**.
- **Purge After Days:** By default this field is blank. It's a mandatory field where you enter a number that's greater than 0 and less than or equal to 18000. For example, if you enter 2, the document records will be purged 2 days after the archive date.

Flexfield preferences: You can configure display preferences for the document record flexfield (global and context) for each document type and configure the default value for the document record flexfield context.

These are some points to consider when you configure the preferences:

- The configuration for the context attributes of the document record flexfield is optional.
 - By default, the context attributes of the document record flexfield have a value of null.
 - The context attribute fields of the document record flexfield are displayed as read-only or are hidden based on the configuration done for the document type in the Add Document Records and View Document Records pages.
 - It is recommended that you don't make the context attribute of the document record flexfield as mandatory if you set it as **Hide** or **Read only**. Else, the user will see an error message when adding or editing a document record.
 - The context preferences of the document record flexfield are applicable only when adding or editing a document record from the UI. They don't apply when adding or editing document records using HCM Data Loader or HCM Spreadsheet Data Loader.
 - The existing page Composer customizations always take precedence. You need to remove the existing customizations and configure the document record flexfield preferences accordingly.
 - It's recommended that you configure the document record flexfield preferences instead of using page composer personalization.
 - You can export and import the context attributes of the document record flexfield by using Functional Setup Manager (FSM).
- Additional Information - includes flexfield information, if configured.
 - Document Delivery Preferences - includes delivery preferences, if enabled.
 - Attachments - includes reference files for a document type that workers can use when creating a document record of that type. You can optionally add titles for the document type attachments that you upload in the Reference Info section when you add or edit a document record. The URL or file name that you enter is defaulted in the Title field, you can change the title. These are some points to consider when you add a title:
 - The title won't be displayed in the Reference Info section of the document record when viewed on a mobile device.
 - Titles are not supported for attachments that are added as part of a document record. For such attachments, only the file name or URL is displayed.
 - The Title field has a limit of 80 characters. If the file name is more than 30 characters, the first 30 characters are defaulted in the Title field. You can manually update the document title up to 80 characters.

For more information, see these documents on Customer Connect:

- Document Records - Frequently Asked Questions and Troubleshooting Guide (<https://community.oracle.com/customerconnect/discussion/630975>)
- Document Records - How to Store BI Report Output as DOR Using HCM Extracts (<https://community.oracle.com/customerconnect/discussion/630994>)
- Document Records - Controlling Security of Document Records (<https://community.oracle.com/customerconnect/discussion/630973>)
- Document Records - Generate Letter from Document Record for Specific Doc Type (<https://community.oracle.com/customerconnect/discussion/630980>)
- Document Records - Document Records Approvals - Frequently Asked Questions (<https://community.oracle.com/customerconnect/discussion/630977>)
- Document Records - Personalization-Frequently Asked Questions and Troubleshooting Guide (<https://community.oracle.com/customerconnect/discussion/630979>)

Related Topics

- [Restrict Management of Document Records](#)
- [Document Type Descriptive Flexfields](#)
- [How You Set Preferences for Document Delivery](#)
- [Document Type Security Profiles](#)

Restrict Management of Document Records

You can restrict the creation, update, and deletion of document records post approval for a document type. By default, the preferences for document records aren't restricted. To access the document record preferences, use the Document Types task in the Setup and Maintenance work area.

These are the restrict options:

- **Restrict Create:** By default, No is selected. You can restrict document records for the document type from being created by selecting Yes.
- **Restrict Update:** By default, No is selected. You can restrict document records for the document type from being updated by selecting Yes.
- **Restrict Delete:** By default, No is selected. You can restrict document records for the document type from being deleted by selecting Yes.

The following table describes the different combinations that you can select for the document record preferences.

Restrict Create	Restrict Update	Restrict Delete
No	No	No
No	No	Yes
No	Yes	Yes (option disabled)

Restrict Create	Restrict Update	Restrict Delete
Yes	Yes (option disabled)	Yes (option disabled)

When you click Yes for the Restrict Create option, the application automatically selects Yes for the Restrict Update and Restrict Delete options. Additionally, the Restrict Update and Restrict Delete options are disabled. When you click Yes for the Restrict Update option, the application automatically selects Yes for the Restrict Delete option. Additionally, the Restrict Delete option is disabled and the Edit and Delete buttons are not visible when accessing a document record of the document type. When you click Yes for the Restrict Delete option, the Delete button is not visible when accessing a document record of the document type.

Note: Here are some points to be considered:

- The process of creating document records through journey tasks is secured with the **Manage Person Documentation** by Worker privilege.
- If you've associated document types with your journey tasks, you must include the document types in the Document Type Security Profile of the journey task performer.
- You must not configure the Restrict Create option to Yes for document types that are associated with journey tasks.
- You must not enable Approvals for document types that are associated with journey tasks.

Exclude Roles from Restriction

You can enter specific roles that you want to exclude in the **Roles Excluded from Restriction** field even if the following restrict options are enabled for the document type:

- Restrict Create
- Restrict Update
- Restrict Delete

For example, you may need to exclude certain roles for business reasons while restricting all other roles in the organization.

These examples explain how the role exclusion works:

- You have enabled the Restrict Create option for a document type and have excluded certain roles from the restriction. In this case, users having these excluded roles can still create a document record when they select the document type in the Add Document Record page.
- You have enabled the Restrict Update option for a document type and have excluded certain roles from the restriction. In this case, the Edit button will still be enabled for users having these excluded roles when they view the document record.

- You have enabled the Restrict Delete option for a document type and have excluded certain roles from the restriction. In this case, the Delete button will still be enabled for users having these excluded roles when they view the document record.
- John has two roles, employee and HR specialist. Sandra has only the employee role. You have enabled the Restrict Update option to Yes for the Visa document type and have excluded the HR specialist role for the same option. With this configuration, Sandra can't edit the Visa document record. However, John can since he has the HR specialist role which is excluded from the Restrict Update option.

Here are some points to consider while excluding roles using the **Roles Excluded from Restriction** field:

- The field has a character limit of 4000 characters (including commas).
- You need to enter the role codes (for example, ORA_PER_HUMAN_RESOURCE_SPECIALIST), and not role titles, in the field. If there is more than one role, separate them using commas. Ensure that you don't include a space after the commas.
- By default, the value for the field is null.
- The field will be enabled only when the restrict option is set to Yes.
- A document type LOV displays document types based on your document type security profile:
 - When **Restrict Create** option is enabled but no roles are specified in the **Roles Excluded from Restriction** list, you'll not receive an error message, and the LOV won't display the document types.
 - When **Restrict Create** option is enabled but roles are specified in the **Roles Excluded from Restriction** list, you'll receive an error message if your role is not included in the Roles Excluded from Restriction list.
- You can export and import the document type exclusion configuration by using Functional Setup Manager (FSM). The configuration supports HCM Data Loader and HCM Spreadsheet Data Loader.
- If you have made changes to the add, edit, and delete buttons using page composer, it is recommended that you evaluate the changes and use the role exclusion configuration option wherever applicable.

Configure Labels for Standard Document Type Attributes

You can configure new labels for the standard document record attributes based on the document type by using the translation editor on the Document Type Setup page. For example, you can configure these new labels for the passport document type:

Existing Attribute Label	New Attribute Label
Name	Passport Name
Number	Passport Number
Issuing Comments	Passport Issuing Comments
Start Date	Passport Start Date
End Date	Passport End Date
Issued Date	Passport Issued Date

Existing Attribute Label	New Attribute Label
Issuing Authority	Passport Issuing Authority
Issuing Country	Passport Issuing Country
Issuing Location	Passport Issuing Location

These steps show how you can configure new labels for the passport document type:

1. Navigate to the Setup and Maintenance work area.
2. In the Tasks panel drawer, click **Search**.
3. Search and click the **Document Types** task name.
4. Search for the passport document type.
5. Click the passport link in the Search Results area.
6. In the Edit Document Type page, click the **Translation Editor** icon (globe icon).
7. In the Edit Translations dialog box, for the US source language, enter the new labels for name, number, issuing comments, from date, to date, issued date, issuing authority, issuing country, and issuing location. Click **OK**.
8. Click **Submit**.
9. Click **Yes**, and then click **OK**.

Here are some points to consider when you configure new labels for document record attributes:

- You can configure the labels only by using the translation editor available on the Document Type Setup page.
- By default, the new labels have a null value and therefore, the seeded labels are used.
- The character limit for each new label field is 200 characters.
- You can export and import the label configuration by using Functional Setup Manager (FSM).
- You can create and update the labels by using HCM Data Loader and HCM Spreadsheet Data Loader.
- If you have changed the labels by using page composer, it is recommended that you evaluate your changes and use the translation editor configuration option wherever applicable.

Document Type Lookups

This topic identifies lookups related to document records. Review these lookups, and update them as appropriate to suit enterprise requirements. You review these lookups in the Setup and Maintenance work area.

Document Types Lookups

Here's a list of the document types lookups that are available:

Lookup type	Description	Configuration Level
DOCUMENT_CATEGORY	Categorizes a document.	Extensible
DOCUMENT_STATUS	Status of a document record.	User

Note: DOCUMENT_STATUS isn't available for use.

Document Records Profile Options

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage profile options. You can configure these document record-related profile options as required, to meet your enterprise requirements:

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_HCM_SENSITIVE_DATA_VIEW_AUDIT_ENABLED	Mobile-Responsive Sensitive Data View Audit Enabled	N	If this is set to Y, you can monitor users who have accessed data on the Document Records and Mass Download of Document Records pages by using the Sensitive Data Access Audit page.
ORA_PER_DOR_ASG_LVL_DELETE_ON_CANCEL_WR	Cancel of Non-Global Transfer Work Relationship	No	If this is set to Yes, then this is what happens in this process: <ul style="list-style-type: none"> • If there are multiple assignments in the work relationship and the assignments have document records, then the document records associated with the assignments are deleted. • When document records are being deleted, the document records pending transactions are discarded from the approval process.
ORA_PER_DOR_ASG_LVL_DELETE_ON_DELETE_ASG	Delete Assignment Level Document Records During Delete Assignment Enabled	No	If this is set to Yes, then this is what happens in this process: <ul style="list-style-type: none"> • All document records associated with the assignment are deleted. • Document records pending approval are discarded from the approval process.
ORA_PER_DOR_ASG_LVL_MOVE_ON_CHANGE_LE	Move Assignment Level Document Records During Change Legal Employer Enabled	N	If this is set to Yes, then this is what happens in these processes: <ul style="list-style-type: none"> • Global Transfer <ul style="list-style-type: none"> ○ When document records are moved from source to destination assignment, document records pending approval aren't moved. However, users can move the document records manually

Profile Option Code	Profile Display Name	Default Profile Value	Description
			<p>using HDL, HSDL or REST, post approval.</p> <ul style="list-style-type: none"> ○ Only document records from the source assignment are moved. ○ If there are multiple assignments in the source work relationship and the assignments have document records, then the document records associated with a non-source assignment continue to be associated with the original assignment • Cancellation of Global Transfer Work Relationship ○ When document records are moved from destination to source assignment, document records pending approval aren't moved. The pending transactions are discarded from the approval process. ○ If there are multiple assignments in the destination work relationship and the assignments have document records, then the document records associated with a non-destination assignment are deleted. ○ If there are multiple assignments in the destination work relationship and the assignments have document records, then the document records associated with a non-destination assignment are deleted.
ORA_PER_DOR_ATTACHMENT_SCAN	Document Record Attachment Scan Enabled	Yes	If this is set to Yes, the Add (Add from Attachment) action is enabled on the Document Records page. To disable the action, you must set the profile option to No.
ORA_PER_DOR_FILE_DOWNLOAD_MAX_SIZE	Document Records File Download Maximum Size	5 MB	You can increase the profile value to enable larger files to be included in the download of document records.
ORA_PER_DOR_SOA_WAIT_IN_MINS	Document Records Post Approval Commit Wait Time	0	<p>This is what you can specify:</p> <ul style="list-style-type: none"> • Specify the time to wait in minutes to commit document record transaction data after it's approved. Value can be between 1 and 59.

Document Type Descriptive Flexfields

You use the Document Type Descriptive Flexfields task in the Setup and Maintenance work area to create and manage the flexfields. Review these flexfields and use them as appropriate to suit enterprise requirements.

Here's the list of document type descriptive flexfields

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
HR_DOCUMENT_TYPES	PER_DOCUMENT_TYPE_DFF	Document Type Descriptive Flexfield	For capturing organization specific information for document types.	Available for use.
HR_DOCUMENT_TYPES	PER_DOCUMENT_TYPE_LEG_DDF	Document Type Developer (legislative) Flexfield	For capturing legislation specific information for document types.	Available for Oracle Localization use.

Parameters for Document Type Descriptive and Developer Flexfields

This table shows the parameters that you can use in the document type DFF (PER_DOCUMENT_TYPE_DFF) and document type DDF (PER_DOCUMENT_TYPE_LEG_DDF):

Parameter Name	Parameter Description	Data Type	Supported in DFF	Supported in DDF
CATEGORY_CODE	Document type category code	Varchar2	Yes	Yes
LEGISLATION_CODE	Document type legislation code	Varchar2	Yes	Yes
SYSTEM_DOCUMENT_TYPE	System document type	Varchar2	Yes	Yes

Related Topics

- [Overview of Descriptive Flexfields](#)

Document Record Descriptive Flexfields

You use the Document Records Descriptive Flexfields task in the Setup and Maintenance work area to create and manage the flexfields. Review these flexfields and use them as appropriate to suit enterprise requirements.

Document Records Descriptive Flexfields

Here's the list of document records descriptive flexfields in the application:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
HR_DOCUMENTS_OF_RECORD	PER_DOC_OF_RECORD_LEG_DDF	Documents of Record Legislative Information	For capturing legislation specific information for document records.	Available only for Oracle Localization use.
HR_DOCUMENTS_OF_RECORD	PER_DOCUMENTS_OF_RECORD_DFF	Documents of Record Attributes	For capturing organization specific information for document records.	Available for use.

Parameters for Document Records Descriptive and Developer Flexfields

This table shows the parameters that you can use for the document record DFF (PER_DOCUMENTS_OF_RECORD_DFF) and document record DDF (PER_DOC_OF_RECORD_LEG_DDF):

Parameter Name	Parameter Description	Data Type	Supported in DFF	Supported in DDF
PERSONID	Person identifier for whom the document record is created.	Number	Yes	Yes
ASSIGNMENTID	Assignment identifier of the worker.	Number	Yes	Yes
SYSDOCTYPEDFF	Document type context	Varchar2	Yes	No
SYSDOCTYPE	Document type context	Varchar2	No	Yes

Related Topics

- [Overview of Descriptive Flexfields](#)

Configure Flexfield Parameters in Value Sets for Document Records

You want to use the person ID as an input parameter when creating a value set for a document record flexfield segment.

Business Requirement: Meg is an employee at Vision Corporation. She needs to create some document records for her contacts, for example, her spouse and mother. She should be able to easily select the name of the contact for whom she is creating the document record.

Summary of Tasks

1. Define a segment for the PER_DOCUMENTS_OF_RECORD_DFF Document Records Descriptive Flexfield (DFF).
2. Define a value set that will display the contact values based on the person ID of the employee (Meg).

Defining a Segment for the DFF

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Document Records Descriptive Flexfields
2. On the Document Records Descriptive Flexfields page, select the Documents of Record Attributes row and click **Edit** on the **Actions** menu.
3. Click the **Create (+)** icon in the Global Segments area and create a segment by entering these values:
 - o Name: Contact
 - o Description: Displays the list of contacts for an employee.
 - o Data Type: Number

Note: You need to create the segment under the GLB_BIRTH context code.

Defining a Value Set for the DFF

1. Click **Create Value Set**.
2. In the Create Value Set page, enter these values:
 - o **Value Set Code:** EMP_CONTACT
 - o **Description:** Value set containing the contacts of the employee.
 - o **Module:** Search and select Global Human Resources
 - o **Validation Type:** Table
 - o **Value Data Type:** Character

3. In the **FROM Clause** field, enter the following syntax:

```
PER_CONTACT_RELSHIPS_F CR, per_person_names_f_v ppnf
```

4. In the **Value Column Name** field, enter **ppnf.display_name**.
5. In the **ID Column Name** field, enter **ppnf.person_id**.
6. In the **Start Date Column Name** field, enter **to_date(null)**.
7. In the **End Date Column Name** field, enter **to_date(null)**.
8. In the **WHERE Clause** field, enter the following syntax:

```
CR.PERSON_ID = :{PARAMETER.PERSONID}
and CR.CONTACT_PERSON_ID = ppnf.person_id
and trunc(sysdate) between CR.effective_start_date and CR.effective_end_date
and trunc(sysdate) between ppnf.effective_start_date and
```

```
ppnf.effective_end_date
```

9. Click **Save and Close** three times to return to the Document Records Descriptive Flexfields page.
10. Click **Deploy Flexfield**.
11. Click **OK**, and then click **Done**.

Log in as Meg and create a document record of type Birth. The contacts for Meg appear in the flexfield segment LOV. She can then select the contact for whom she wants to create the document record.

Defaulting a Value in a Flexfield Segment

When you use a value set, the display will always be a LOV, even if there is only one value in the value set. For scenarios where you want to default a single value in the specific flexfield segment, you need to select SQL as the default type value for the initial default.

This is a sample SQL to default a person number:

1. To default the selected worker's person number:

```
select person_number
from per_all_people_f
where sysdate between effective_start_date and effective_end_date
and person_id = :{PARAMETER.PERSONID}
```

2. To default the logged in user's person number:

```
select person_number
from per_all_people_f
where sysdate between effective_start_date and effective_end_date
and person_id = HRC_SESSION_UTIL.GET_USER_PERSONID
```

Create and Default Context for Descriptive Flexfield Based on Document Type

When you create a document record, the flexfield segments are displayed based on the context selected for the document type. You can configure the flexfield context for a document type such that it's automatically selected when you create a document record.

This example shows how you can do so.

To automatically populate the context, you must enter a context code for the document flexfield that exactly matches the internal document type.

The internal document type is generated as follows:

- Document type is valid for a specific country: The internal document type is derived as country code_document type name, all in uppercase. The spaces and hyphens in the document type name are replaced with underscores. For example, if the document type name is Loan Request and the document type is valid for India only, the internal document type takes the value IN_LOAN_REQUEST.
- Document type is global: The internal document type is derived as GLB_document type name. For example, if the document type name is Loan Request and the document type is valid for all countries, the internal document type takes the value GLB_LOAN_REQUEST.

Consider the following example where you want to default a flexfield context based on the document type.

Business Requirement

You want to configure a custom loan request form using the Document Records functionality. You want to configure the following attributes as part of this custom loan request form:

1. Loan Start Date
2. Loan Type
3. Loan Reason
4. Loan Value
5. Employee Guarantee 1
6. Employee Guarantee 2

Summary of Tasks

1. Configure a document type.
2. Define the descriptive flexfield (DFF) for document records.
3. Define six segments for the PER_DOCUMENTS_OF_RECORD_DFF Document Records DFF.
4. Verify that the context value is automatically defaulted and all segments configured for the context are automatically displayed.

Configure a Document Type

Configure a document type with Type = Loan Request. To do this, follow these steps:

1. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Workforce Information
 - o Task: Document Types
2. In the Search Results area, click the **Create** icon.
3. In the Document Type Information page, enter these values:
 - o **Type:** Loan Request
 - o **Description:** Loan request for employees.
 - o **Country:** Search and select India
 - o **Category:** Benefits
4. Click **Submit**, and then click **Yes**.
5. Click **OK**, and then click **Done**.

Define the DFF for Document Records

Define the PER_DOCUMENTS_OF_RECORD_DFF descriptive flexfield. To do this follow, these steps:

1. In the Setup and Maintenance work area, go to the following:
 - o **Functional Area:** Workforce Information
 - o **Task:** Document Records Descriptive Flexfields
2. On the Document Records Descriptive Flexfields page, click **Edit** on the **Actions** menu.
3. Verify that the **Derivation Value** field in the Context Segment area is configured with the **SYSDOCTYPEDFF** value.
4. Click **Manage Contexts**.
5. In the Search Results area, click the **Create** icon.

6. In the Create Context page, enter these values:

- **Display Name:** Loan Request
- **Context Code:** IN_LOAN_REQUEST

7. Click **Save and Close**.

Important: Ensure that the context code is the same as the System Document Type.

Note: System Document Type is an internal code. Its value is derived by the application using the following logic:

- If document type is for a specific country then the document type will be CountryCode + '_' + Document Type Name converted to upper case, where spaces () and hyphens (-) in the Document Type Name are replaced with underscores (_)
- If document type is for all countries (global) then the document type will be 'GLB' + '_' + Document Type Name converted to upper case, where spaces () and hyphens (-) in the Document Type Name are replaced with underscores (_)

For example, in this case since document type (Loan Request) is specific for the country India, the document type will be IN_LOAN_REQUEST

If this document type was defined for all countries (global), then the document type would be GLB_LOAN_REQUEST.

8. Search the IN_LOAN_REQUEST context code in the Manage Contexts page.

9. In the Search Results area, select the Loan Request row, and click **Edit** on the **Actions** menu.

Define Segments for the Document Records DFF

Create the following segments as per the business requirement for the context you created:

1. Loan Start Date
2. Loan Type
3. Loan Reason
4. Loan Value
5. Employee Guarantee 1
6. Employee Guarantee 2

To do this, follow these steps:

1. In the Context Sensitive Segments area, click the **Create (+)** icon.
2. In the Create Segment page, enter these values:
 - **Name:** Loan Start Date
 - **Data Type:** Date
 - **Display Type:** Date/Time
3. Click **Create Value Set**.
4. In the Create Value Set page, enter these values:
 - **Value Set Code:** CZ_DATE
 - **Module:** Search and select Global Human Resources

- o **Value Data Type:** Date
5. Click **Save and Close**.
 6. Repeat steps 1 through 5 by using values from this table for the remaining segments:

Name	Data Type	Display Type	Value Set Code	Value Data Type
Loan Type	Character	List of Values	Loan_Type	Character
Loan Reason	Character	List of Values	Loan_Reason	Character
Loan Value	Number	Text Box	15 Number	Number
Employee Guarantee 1	Character	Text Box	10 Characters	Character
Employee Guarantee 2	Character	Text Box	10 Characters	Character

7. Click **Save and Close** three times to return to the Document Records Descriptive Flexfields page.
8. Click **Deploy Flexfield**. During the deployment process, validate the messages for any errors or warnings.
9. Click **OK**, and then click **Done**.

Verifying Automatic Default of Flexfield Context Based on Document Type

1. Log in as an employee and create a document record of type Loan Request. Notice that the context value will be automatically defaulted and all segments configured for the context will be automatically displayed.
2. If you change the document type, the appropriate context value will again be defaulted and all segments for the corresponding context code will be displayed automatically.

Generate Letter from Document Record for a Specific Document Type

You're creating a document type that employees can use to create a document record for generating a letter to submit for their visa processing. You create the document type and additionally specify a BI publisher report path to generate the letter.

Create a document descriptive flexfield context that includes the fields required in the letter. You then associate this context with the document type you created.

You can generate a letter when you create a document record using any of these methods:

- Document Records flow
- HCM Data Loader (HDL)
- HCM Spreadsheet Data Loader (HSDL)
- REST API

- Plugin sections in responsive Employment and Salary flows

Before You Start

1. Use the seeded `DocumentReport.xdm` data model to create your own BI template for the letter that needs to be generated. Only one template can be used per document type. The draft and approved letters are based on this template.
2. Create an RTF template and associate this template to the data model. Note down the report path and specify the path when you create the document type.
3. Ensure users have access to the report, if necessary add or modify permissions.

Creating the Document Descriptive Flexfield for Visa Application Document Type

1. In the Setup and Maintenance work area, go to the Document Records Descriptive Flexfields task.
2. On the Document Records Descriptive Flexfields page, select **PER_DOCUMENTS_OF_RECORD_DFF** and click **Edit**.
3. Click **Manage Contexts**.
4. In the Create Context section, enter values as shown in the table. For others use the default values:

Field	Value
Display Name	Letter for Visa Application
Description	Letter for visa application
Context Code	Auto-populated but can be modified
API Name	Auto-populated but can be modified
Enabled	Checked

5. Click **Save**.
6. In the Context Sensitive Segment section, create the required segments and fields that you want to include in the visa application letter.
7. Click on **Save and Close** till you return to the Document Records Descriptive Flexfields page.
8. Click **OK** and then **Done**.

Deploying the Flexfield

1. On the Document Descriptive Flexfield page, click **Deploy Flexfield**.
2. In the Confirmation dialog box, click **OK**, and click **Done**.

You must sign out and sign in to see the changes you deployed at run time. The context is available when workers select the visa application document type.

Configuring the Visa Application Document Type

1. In the Setup and Maintenance work area, go to the Document Types task.
2. On the Document Types page, click **Create**.
3. In the Create Document Type page, enter values as shown in the table. For others use the default values:

This two-column table with twelve data rows lists the fields and the corresponding values that you need to enter.

Field	Value
Type	Visa Application
Description	The passport details entered should be valid for a period of 6 months from the date of travel.
Country	All Countries
Category	Employment
Subcategory	Blank
Status	Active
Expiration Notification Period	Blank
Approval Required	Yes
Allow Multiple Occurrences	Yes
Minimum Attachments	0
Publish Required	No
Report Path	/Custom/Human Capital Management/Document Records/VisaApplication.xdo Note: When you seed the data model and report, the following roles must be added to the report, data model, and the folders containing the data model and report along with roles and users: <ul style="list-style-type: none"> ○ Web Services Application Identity for HCM ○ Batch Loader Enterprise Scheduler Job Application Identity for HCM

4. In the Attributes section, specify if each attribute is relevant or required.

5. Click **Submit**.

Note: When a report path is configured for a Document Type, by default **Restrict Update** and **Restrict Delete** are set to Yes and can't be edited in the Document Record Preferences section. When workers enter the document record details and click **View Document**, this is what happens, it will get the associated BIP template, merge the data entered by the worker and display the draft letter. After review, they can submit it for approval. After the request is approved, the final letter is generated. This final version in PDF format is stored in the worker's document records for this document type. After the letter is approved and generated, View Document won't be available in the Document Records page.

Note:

- Workers need to enter all mandatory values and the minimum number of attachments required, before clicking **View Document**. Otherwise, a validation error displays.
- If the report path isn't specified, **View Document** won't be visible to workers.
- Only PDF format is supported.
- Even if approval isn't enabled for the document type, clicking **View Document** still displays the letter with a watermark. The letter is available without the watermark after the document record is added to the worker's record.
- Even if the worker doesn't click **View Document** but submits the document record, it goes through approval (if approvals are enabled) and the final letter is generated.
- After the letter is approved and generated, **View Document** won't be available in the Document Records page for this document record.

Generate Letter Based on Document Record Source

You can enable letter generation for the document record sources by configuring appropriate values in the **Letter Generation Configuration Based on Document Record Source** EFF context. To do this, follow these steps:

1. Navigate to the Setup and Maintenance work area.
2. Search for and click the **Manage Enterprise HCM Information** task.
3. For the **Letter Generation Configuration Based on Document Record Source** EFF context, select the document record source.

Note: Values in the **Document Record Source** column will be populated from the `ORA_PER_DOR_SOURCE` lookup. Only supported values are displayed in the list.

4. In the **Generate Letter** column, select the **Yes** or **No** value.
5. Click **Done**.

Note: If the report path is configured for the document type, then the letter is generated by default. Additionally, the letter is stored as an attachment in the person's document record. In case of the Document Record plugin section, the letter generation and storage happens when the parent transaction is approved and committed.

For more information on generating letters from document records, see the document Document Records - Generate Letter from Document Record for Specific Doc Type (<https://community.oracle.com/customerconnect/discussion/630980>) on Customer Connect.

For more information on OTBI reports, see the Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports for HCM guide on the Oracle Help Center (<https://docs.oracle.com/en/cloud/saas/index.html>).

Move Deleted Document Records to Archive Table

You can configure settings to archive the deleted document records instead of permanently deleting them when you create or edit a document type. When the archive setting is enabled, the deleted document records for the document type are moved to the HR_DOCUMENTS_OF_RECORD_ARCHIVE table.

Archive Settings

These are the fields used to archive the deleted document records:

- **Archive Criteria Basis:** By default this LoV is blank. You can select either the Creation Date, From Date, To Date, or Issued On.
- **Archive After Days:** By default this field is blank. It's a mandatory field where you enter a number that's greater than 0 and less than or equal to 18000. For example, if you enter 2, the document records will be archived 2 days after the date selected for **Archive Criteria Basis**.

Enable Archive Settings for the Document Type

1. Navigate to the Setup and Maintenance work area.
2. In the Tasks panel drawer, click **Search**.
3. Search and click the **Document Types** task name.
4. Click the **Create** icon in the Search Results area.
5. Enter the document type and select the category.
6. Under the **Document Record Preferences** tab, select the value for **Archive Criteria Basis**.

Note: Ensure that you have selected the relevant attributes in the **Attributes** area to match the selected value for the **Archive Criteria Basis**.

7. Enter the value for **Archive After Days**.
8. Click **Submit**.

Run the Archive Document Records Process

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**.

3. In the **Name** drop-down list, search and select the **Archive Document Records** process.
4. In the **Process Details** dialog box, search and select the document type parameter for whose document records you want to archive.
5. Click **Submit**, and click **OK** in the Confirmation dialog box. Note the process ID.

Points to Consider

- By default, the Archive Criteria Basis isn't selected in the Document Type setup page, and therefore the deleted document records aren't moved to the HR_DOCUMENTS_OF_RECORD_ARCHIVE table.
- To select the Archive Criteria Basis (Creation Date, From Date, Issued On, and To Date), you need to select the matching attributes from the Attributes area under the Document Record Preferences tab. If the matching attributes aren't selected, you will receive a validation error.
- When you enable the archive setting, the document records are deleted from the HR_DOCUMENTS_OF_RECORD table and moved to the HR_DOCUMENTS_OF_RECORD_ARCHIVE table. The attachments for the document records, if any, will continue to be stored in the FND_ATTACHMENTS table and not moved or deleted.
- The archive settings work for document records that are deleted using the Document Records page, HCM Data Loader, HCM Spreadsheet Data Loader, and REST API.
- The archived document records in the HR_DOCUMENTS_OF_RECORD_ARCHIVE table will be marked with the archive date.

Related Topics

- [How You Configure Archiving and Purging for Document Records](#)
- [Archive and Purge Document Records](#)

How You Configure Archiving and Purging for Document Records

You can archive and purge the document records for a document type by enabling the archive and purge settings for the document type and running the Archive Document Records process.

When you run the process, all document records that match the archive criteria will be archived. The archiving process involves moving the document records from the HR_DOCUMENTS_OF_RECORD table to the HR_DOCUMENTS_OF_RECORD_ARCHIVE table. After the document records are archived, they will be removed from the HR_DOCUMENTS_OF_RECORD_ARCHIVE table based on the purge settings enabled for the document type.

Archive and Purge Settings

These are the fields used to archive and purge the deleted document records:

- **Archive Criteria Basis:** By default this LoV is blank. You can select either the Creation Date, From Date, To Date, or Issued On.
- **Archive After Days:** By default this field is blank. It's a mandatory field where you enter a number that's greater than 0 and less than or equal to 18000. For example, if you enter 2, the document records will be archived 2 days after the date selected for **Archive Criteria Basis**.

- **Purge After Days:** By default this field is blank. It's a mandatory field where you enter a number that's greater than 0 and less than or equal to 18000. For example, if you enter 2, the document records will be purged 2 days after the archive date.

Enable Archive and Purge Settings for the Document Type

1. Navigate to the Setup and Maintenance work area.
2. In the Tasks panel drawer, click **Search**.
3. Search and click the **Document Types** task name.
4. Click the **Create** icon in the Search Results area.
5. Enter the document type and select the category.
6. Under the **Document Record Preferences** tab, select the value for **Archive Criteria Basis**.

Note: Ensure that you have selected the relevant attributes in the **Attributes** area to match the selected value for the **Archive Criteria Basis**.

7. Enter the values for **Archive After Days** and **Purge After Days**.
8. Click **Submit**.

Run the Archive Document Records Process

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the **Name** drop-down list, search and select the **Archive Document Records** process.
4. In the **Process Details** dialog box, search and select the document type parameter for whose document records you want to archive.
5. Click **Submit**, and click **OK** in the Confirmation dialog box. Note the process ID.

Points to Consider

- To select the Archive Criteria Basis (Creation Date, From Date, To Date, and Issued On), you need to select the matching attributes from the Attributes area under the Document Record Preferences tab. If the matching attributes aren't selected, you will receive a validation error.
- You can only purge document records that are archived.
- The document record ID in the HR_DOCUMENTS_OF_RECORD_ARCHIVE table will be the same as the document record ID in the HR_DOCUMENTS_OF_RECORD table. This ensures that the attachments continue to be available for the archived document records as well.
- The archived document records in the HR_DOCUMENTS_OF_RECORD_ARCHIVE table will be marked with the archive date.
- The archive setting fields are available in HCM Data Loader and HCM Spreadsheet Data Loader.
- The archive setting fields and the HR_DOCUMENTS_OF_RECORD_ARCHIVE table will be made available in OTBI for reporting purposes in a future update.
- When the **Remove Person Information** process is run, it removes document records from the HR_DOCUMENTS_OF_RECORD and HR_DOCUMENTS_OF_RECORD_ARCHIVE tables. The archive settings for document records don't apply to the **Remove Person Information** process.

Related Topics

- [Move Deleted Document Records to Archive Table](#)
- [Archive and Purge Document Records](#)

Set Document Record Availability

You can view document records using the Document Records task from Quick Actions, person spotlight, My Team work area, or person smart navigation. Additionally, you can specify a date from when the document records for a document type can be viewed.

To do this, follow these steps:

Creating the Document Type

1. In the Setup and Maintenance work area, go to the Document Types task.
2. In the Search Results area, click the **Create** icon. The Create Document Type page is displayed.
3. In the Document Type Information area, click **Yes** for the **Publish Required** option when you enter the details. This displays Publish Date as a required field for workers on the Add Document Record page.
4. Select the restrict options for the document record and attachment preferences, and click **Submit**.
5. Click **Yes**, and then click **OK**.

Note:

- You can change the Publish Required option to Yes. To make the change, you need to ensure that all document records of the document type have the publish date populated.

Creating Document Records using HDL

Enter the attribute values as shown in the following table when you create the document records using HCM Data Loader.

Attribute	Value
Publish	Y
Publish Date	Date you want to publish the document records. For example, 2017/12/01.

Note:

- You can update the attribute values through HSDL and REST.
- You need to populate the publish date using HCM Data Loader before you change the publish date to Yes.

For more information about loading document records using HCM Data Loader, see the HCM Business Objects guide.

Related Topics

- [Restrict Management of Document Records](#)
- [Guidelines for Loading Document Records](#)

Document Type Attributes You Can Change

After you create document records for a worker, you can change the values for the document type attributes. This table describes the update values and the conditions for updating the values:

Attribute	Update Value	Condition for Update
Allow Multiple Occurrences	Yes to No	There should be no existing document records corresponding to the document type.
Expiration Period	Null to Not Null	To Date must be Not Relevant or Required. Note: If To Date is updated to Not Relevant, the Expiration Period must be Null.
Publish Required	No to Yes	There should be no existing document records corresponding to the document type.
<ul style="list-style-type: none"> • Document Name • Document Number • From Date • To Date • Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments 	<ul style="list-style-type: none"> • Not Relevant (N) to Required (R) • Required (R) to Not Relevant (N) 	There should be no existing document records corresponding to the document type.
<ul style="list-style-type: none"> • Document Name • Document Number • From Date • To Date • Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments 	<ul style="list-style-type: none"> • Relevant (Y) to Not Relevant (N) 	There should be no existing document records corresponding to the document type. If any such records exist, the corresponding attribute value must not be null for all those records.
<ul style="list-style-type: none"> • Document Name 	<ul style="list-style-type: none"> • Relevant (Y) to Required (R) 	There should be no existing document records corresponding to the document type. If any

Attribute	Update Value	Condition for Update
<ul style="list-style-type: none"> • Document Number • From Date • To Date • Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments 		such records exist, the corresponding attribute value must be null for all those records.
Document Type	Delete	There should be no existing document records corresponding to the document type. Note: If a seeded document type is deleted, it will appear in the next environment update.

Control Access to Document Records

You can control a worker's access to document records by giving the appropriate access. You can grant either the view or manage access to document records based on the document type.

You can restrict access to selected document types by granting view access only for those document types. On the Document Records page, workers can view all document records for which they have view and manage access. They can edit and delete those document records for which they have manage access.

Example

Let's say you want a worker to view all document records but manage documents of type adoption and birth. Here's how you do it:

1. Create a document security profile by including the document types (adoption and birth) that require manage access.
2. Create a custom role for the worker with the View Person Documentation aggregate privilege.
3. Assign the document security profile created in step 1 to the delivered employee role (that contains Manage Person Documentation by Worker aggregate privilege).
4. Assign the delivered and custom employee roles to the user.

For more information about controlling access to document records, see the Oracle Human Capital Management Cloud Securing HCM guide on the Oracle Help Center (<https://docs.oracle.com/en/cloud/saas/index.html>).

For more information on controlling security of document records, see the document Document Records - Controlling Security of Document Records (<https://community.oracle.com/customerconnect/discussion/630973>) on Customer Connect.

Methods of Creating Document Records

You can identify the method used to create a document record from the HR_DOCUMENTS_OF_RECORD table. The table contains an attribute which stores the method used.

The attribute isn't displayed on the Document Records page. Additionally, the attribute is auto-populated and can't be updated using HCM Data Loader or REST API.

This table describes the attribute values:

Attribute	Description
Deep link	Document records created by using a deep link.
Document records	Document records created from the Document Records page.
HCM data loader	Document records created by using HCM Data Loader (HDL).
HCM spreadsheet data loader	Document records created by using HCM Spreadsheet Data Loader (HSDL). Note: Currently, the document records will store the method similar to HDL.
HCM Extract	Document records created by using HCM Extract.
REST API	Document records created by using REST API.
Attachment scan	Document records created by scanning an attachment.
Document records API	Document records created by using document records API.

Document Records Available in Other HCM Flows

You have two options to upload attachments to responsive employment flows:

- **Comments and Attachments section:** In this section, the attachments are associated with the approval workflow. The attachments have a lifecycle of archive and purge after which the attachments are no longer accessible.
- **Document Records section:** In this section, the attachments are stored in the worker's document records. The attachments are not automatically archived or purged.

You can enable both the sections to be used together or independently. If you don't want to permanently store the attachments, you must use the Comments and Attachments section. However, if you want to store the attachments in the employee's document records, you must enable and use the Document Records section. You can add document records specific to a responsive employment business process by enabling the Document Records plug-in section. However, if you don't want the employee to upload any attachment during a transaction, you must disable both the sections using HCM Experience Design Studio.

Here are a few scenarios where you may enable the Document Records plug-in section:

- When hiring a new person, the HR specialist may want to add document records such as offer or contract letter, birth certificate, educational certificates, and previous work experience letters.
- When a person is being terminated, the HR specialist may want to add the resignation letter and clearance emails by different teams such as finance, security, and IT assets.
- When promoting an employee, the line manager or HR specialist may want to add a justification letter or a recommendation letter.

HCM Employment Flows

You can enable the Document Records plug-in section in these HCM employment flows:

- Add Assignment
- Add Contingent Worker
- Add Pending Worker
- Add a Nonworker
- Change Assignment
- Change Location
- Change Manager
- Change Working Hours
- Create Work Relationship
- Direct Reports
- Edit Pending Worker
- Hire an Employee
- Local and Global Transfer
- Promote
- Resignation
- Termination
- Transfer
- Work Relationship

The Document Records plug-in section is hidden out-of-the-box. To enable this section in the responsive employment flow, you must use HCM Experience Design Studio.

When you create a document record by using the Document Records section of the employment flow, these values are populated:

Document Record Attribute	Populated Value
PERSON_ID	Person ID of the worker.
ASSIGNMENT_ID	Assignment ID of the worker.

Document Record Attribute	Populated Value
	<p>Note:</p> <ul style="list-style-type: none"> The ID is populated only if the document type is assignment-based. In case of employment transactions, such as global transfer and add assignment, the assignment ID is that of the target assignment.
RELATED_OBJECT_NAME	PER_ACTION_OCCURRENCES
RELATED_OBJECT_ID_COL	ACTION_OCCURRENCE_ID
RELATED_OBJECT_ID	Value of the action occurrence ID
LAST_UPDATE_DATE	Date when the employment transaction was committed.
LAST_UPDATED_BY	User who submitted the employment transaction.
CREATED_BY	User who submitted the employment transaction.
CREATION_DATE	Date when the employment transaction was committed.
CREATION_SOURCE	ORA_DOR
PUBLISH	Y
PUBLISH_DATE	Effective date of the employment transaction.

For setup information about HCM Responsive User Experience, see the following white paper on My Oracle Support (<https://support.oracle.com>): HCM Responsive User Experience Setup Information (Doc ID 2399671.1)

HCM Flow - Document Type Mapping

By default, all document types that are part of the user's document type security profile appear in the Document Type list of values when creating a document record in an employment flow.

Note: For flows, such as Add Contingent Worker, Add a Nonworker, Add Pending Worker, and Hire an Employee, if the signed-in user has manage access to a document type, then the list of values displays those document types.

If you want to permit only specific document types for an employment flow, you need to configure the mapping of the employment flow with the document type using the HCM Flow and Document Type Mapping section on the HCM Enterprise Information page. To do this, follow these steps:

1. In the Setup and Maintenance work area, search and select the Manage Enterprise HCM Information task.
2. Click **Edit**, and then click **Update**.
3. In the Update Enterprise dialog box, select the effective start date and the action reason, and then click **OK**.
4. Navigate to HCM Flow and Document Type Mapping section.
5. Click the **Add Row (+)** icon.
6. Select the HCM flow and the document type.
7. Repeat steps 5 and 6 to configure additional mappings.

8. Click on **Submit**, and then click **Yes** in the warning dialog box.
9. Click **OK** in the confirmation dialog box, and then click **Done**.

Note:

- There's no date-effective mapping of the Document Type and HCM Flow. The mapping as of the date of the transaction is used.
- The mapping only applies to update flows. When you correct an existing employment transaction (for example, Correct Employment Details), the Document Type LoV displays all the values irrespective of the mapping configuration.

Points to Consider

- You can attach new document records when adding a pending worker. However, these document records won't be displayed when you edit or convert the pending worker. Nonetheless, you can add more document records as part of the Edit Pending Worker and Convert Pending Worker flows.
- You can attach new document records when using Resignation and Termination flows. However, these document records won't be displayed when you view or correct the termination.
- You can't have different document types mapped for different variations of the Local and Global Transfer flow. For example, Transfer, Global Transfer, and Global Temporary Assignment support the same document types.
- When the employment transaction is deleted (for example, Transfer is deleted), the document records created as part of the transaction are retained. They won't be deleted automatically.
- Existing document records for the person won't be displayed in the Document Records section on the Employment flow pages.
- The Document Records section won't be available in the read-only Employment Info page. You must use the Document Records quick action to view all existing document records for the worker.
- The approval process of the employment flow apply when document records are added as part of the employment flow. When the employment flow is approved, the document records are moved to the worker's document records.
- The document records approval flow won't be applicable for the Document Records plug-in section.
- The document records attributes can't be added to the approval payload of the employment flow when configuring the approval rule for the employment flow.
- The BIP data models for the employment flow approval notifications include the document records data set. However, the BIP templates for employment flow approval notifications don't include the Document Records section out-of-the-box. You need to modify the RTF templates to include the document records information by using the newly defined data set in the corresponding data model.
- Attachments in notifications only display the name and can't be downloaded. An approver can click Edit to view and download the attachments.
- The effective date of the employment transaction works as the publish date for the document records created as part of the employment transaction.
- If the document type configuration is modified such that it makes the pending document records data invalid, then the employment transaction which is pending approval and contains such document records, fails.

Restrict Document Types During Mass Download of Document Records

By default, all document types that are part of the user's document type security profile will appear in the Document Type list of values when the user submits a request to mass download document records.

You can restrict the list of document types that can be mass downloaded from the employment flow by configuring the HCM Flow and Document Type Mapping on the Manage Enterprise HCM Information setup page. This mapping applies only to the Mass Download of Document Records page.

To configure the document type mapping for the Mass Download of Document Records flow, follow these steps:

1. In the Setup and Maintenance work area, search and select the **Manage Enterprise HCM Information** task.
2. Click **Edit**, and then click **Correct**.
3. Navigate to the **HCM Flow and Document Type Mapping** section.
4. Click the **Add Row (+)** icon.
5. Search and select the **Mass download document records** flow and the document type.
6. Repeat steps 4 and 5 to configure any additional mapping.
7. Click **Submit** and then click **Yes** in the warning dialog box.
8. Click **OK** in the confirmation dialog box, and then click **Done**.

Deep Links for Document Records

You can use deep links to open responsive pages for document records without navigating through the menu structure.

When you add deep links to a business intelligence report or a company website, users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation. You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them.

You can use these parameters in the document records deep links:

- Category
- Documents of Record ID
- Document Type ID
- Document Type Read Only - should be passed if you pass pMode as CREATE. It can either be Y or N.
- Mode - mode of the document records page, this can be either Create, View, or List
- Person ID
- Person Number
- System Document Type

Note:

- You must not click deep links that require parameters directly on the deep links page.
- If you try to access a document type in a deep link for which you don't have access or the document type is inactive, you will receive an exception.
- If the Document Records (DOCUMENT_RECORDS_ANY,NONE) deep link is used without the Person ID or Person Number parameter, then the person ID of the logged in user will be defaulted.
- If the logged in user doesn't have an associated person record, then a blank page is displayed when the user clicks the deep link.
- If the document type is passed in the deep link during Create mode and the Allow Multiple Occurrence Flag for the document type is true, then the deep link will open the create page with the passed document type.
- If the document type is passed in the deep link during Create mode and the Allow Multiple Occurrence Flag for the document type is false, then the following conditions are true:
 - If a document record exists, the deep link will open the record in Edit mode.
 - If no document record exists, the deep link will open the create page with the document type populated.

This table lists Document Records deep links that are available in the Deep links work area.

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Document Records (DOCUMENT_RECORDS_ANY,NONE)	Opens the Document Records page of a person without person search Note: This is same for both HR specialists and managers.	Y	pPersonId: unique identifier of the person. pPersonNumber: number that uniquely identifies the person. Note: Either pPersonId or pPersonNumber is required. pDocumentTypeId: unique identifier of the document type of a specific document record.	pPersonId: PERSON_ID column in PER_PERSONS or PER_ALL_PEOPLE_F tables pPersonNumber: PERSON_NUMBER PER_ALL_PEOPLE_F tables pDocumentTypeId: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL pSystemDocType: SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			<p>pSystemDocType: unique identifier of system document type of a specific document record</p> <p>Note: You can pass the pDocumentTypeld or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page.</p> <p>pMode: mode of document records page</p> <p>It can have three values.</p> <p>CREATE: To open Add Document Records page</p> <p>VIEW: To open the document record of the specified type, if it exists. Else, opens the list view.</p> <p>LIST: To open the Document Records list page.</p> <p>Note: If you don't pass pMode, then LIST is passed as Default mode.</p> <p>pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can have two values Y or N and N is the default value.</p> <p>If it's Y then the document type field is read-only on the Add Document Records page, else it's editable.</p> <p>pCategory: unique identifier code, and not meaning of the document category of a specific document record.</p>	<p>pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table</p> <p>pDocumentsOfRecordId: DOCUMENTS_OF_RECORD_ID column in HR_DOCUMENTS_OF_RECORD table</p>

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			<p>Note: This parameter is applicable only for the LIST mode.</p> <p>pDocumentsOfRecordId: unique identifier of the document record.</p> <p>Note: This parameter is applicable only for the VIEW mode. When you pass this parameter value, the person related or document type related parameter won't be used. This is because the pDocumentsOfRecordId parameter is already based on the person and document type.</p>	
<p>Document Records (MANAGER_DOCUMENT_RECORDS,NONE)</p>	<p>This deep link is for managers. It displays the person search page where managers can search for their directs and open the Document Records page.</p>	<p>Y</p>	<p>pDocumentTypeId: unique identifier of the document type of a specific document record.</p> <p>pSystemDocType: unique identifier of system document type of a specific document record</p> <p>Note: You can pass the pDocumentTypeId or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page.</p> <p>pMode: Mode of Document Records page.</p> <p>It can have three values:</p> <p>CREATE: To open Add Document Records page</p> <p>VIEW: To open the document record of the specified type, if it exists. Else, open the list view</p> <p>LIST: To open the Document Records list page</p>	<p>pDocumentTypeId: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL</p> <p>pSystemDocType :SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL</p> <p>pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table</p>

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			<p>Note: If you don't pass pMode, then LIST is passed as Default mode.</p> <p>pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can have two values Y or N and N is the default value.</p> <p>If it's Y then the document type field is read-only on the Add Document Records page, else it's editable.</p> <p>pCategory: unique identifier code, and not meaning of the document category of a specific document record.</p> <p>Note: This parameter is applicable only for the LIST mode.</p>	
<p>Document Records (HR_DOCUMENT_RECORDS, NONE)</p>	<p>This deep link is for HR specialists. It displays the person search page where the HR specialist can search his organization and open the Document Records page.</p>	<p>Y</p>	<p>pDocumentTypeld: unique identifier of the document type of a specific document record.</p> <p>pSystemDocType: unique identifier of system document type of a specific document record</p> <p>Note: You can pass the pDocumentTypeld or pSystemDocType parameter. If you don't pass either parameter, all document types will be displayed on the Document Records page.</p> <p>pMode: mode of Document Records page.</p> <p>It can have three values:</p> <p>CREATE: To open Add Document Records page</p> <p>VIEW: To open the document record of the</p>	<p>pDocumentTypeld: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL</p> <p>pSystemDocType :SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL</p> <p>pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table</p>

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			specified type, if it exists. Else, open the list view LIST: To open the Document Records list page Note: If you don't pass pMode, then LIST is passed as Default mode. pDocTypeReadOnly: should be passed if you pass pMode as CREATE. It can have two values Y or N and N is the default value. If it's Y then the document type field is read-only on the Add Document Records page, else it's editable. pCategory: unique identifier code, and not meaning of the document category of a specific document record. Note: This parameter is applicable only for the LIST mode.	
Document Records (DOCUMENT_RECORDS, NONE) Note: It's recommended that you don't use this deep link because it will be obsoleted in future. It is currently retained because of backward compatibility.	Opens the Document Records page of the signed-in user.	Y	NA	NA
Create Document Record (EMP_CREATE_DOCUMENT_RECORDS, NONE)	Displays the Create Document Records page of the signed-in user.	N	NA	NA

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
<p>Note: It's recommended that you don't use this deep link because it will be obsoleted in future. It is currently retained because of backward compatibility.</p>				
Document Delivery Preferences (EMP_DOC_DELIVERY_PREF,NONE)	Opens the Document Records page of the signed-in user.	N	NA	NA
Document Delivery Preferences (MGR_DOC_DELIVERY_PREF,NONE)	This deep link is for managers. It displays the person search page where the manager can search for their directs and open the Document Delivery Preferences page.	N	NA	NA
Document Delivery Preferences (HR_DOC_DELIVERY_PREF,NONE)	This is for HR specialists. It displays the person search page where the HR specialist can search for their organization and open the Document Delivery Preferences page.	N	NA	NA
Mass Download of Document Records (MASS_DOWNLOAD_DOCUMENT_RECORDS,NONE)	This is for HR specialists and HR analysts and opens the Mass Download of Document Records page.	N	NA	NA

This table lists the target audience and security requirements for different Document Records deep links.

Note:

- Replace instances of pod.oraclecloud.com with your pod name.
- Replace the PersonNumber and PersonID with the actual person number and ID. In the examples these are indicated with sample values.

Deep Link	Audience	Security Requirements	Examples
Document Records (DOCUMENT_RECORDS_ANY,NONE)	Employee, Manager, HR	<p>Functional Security:</p> <ul style="list-style-type: none"> • Manage Person Documentation by Worker • Manage Person Documentation by Manager 	<p>List mode with person number</p> <p><code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonNumber</code></p> <p>1. List mode with person ID</p>

Deep Link	Audience	Security Requirements	Examples
		<ul style="list-style-type: none"> Manage Person Documentation View Person Documentation Data Security: <ul style="list-style-type: none"> Manage Person Documentation View Person Documentation 	<pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson.</pre> <p>2. List mode with person number and document type ID</p> <pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson.</pre> <p>3. List mode with person number and system document type</p> <pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson.BIRTH</pre> <p>4. List mode with person ID and system document type</p> <pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson.ADOPTION</pre> <p>5. List mode with person ID and category</p> <pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPerson.DOC</pre>
Document Records (MANAGER_DOCUMENT_RECORDS,NONE)	Manager	Functional Security: <ul style="list-style-type: none"> Manage Person Documentation by Worker Manage Person Documentation by Manager Manage Person Documentation View Person Documentation Data Security:	Without Parameters <pre>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE</pre> With Parameters

Deep Link	Audience	Security Requirements	Examples
		<ul style="list-style-type: none"> • Manage Person Documentation • View Person Documentation 	<ol style="list-style-type: none"> 1. List mode with system document type (pSystemDocType) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH</pre> 2. View mode with system document type (pSystemDocType) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMode=VIEW</pre> 3. View mode with system document type (pSystemDocType) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys PASSPORT;pMode=VIEW</pre> 4. Create mode pMode (equal to CREATE) system document type (pSystemDocType) <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pMo</pre> 5. Create mode pMode (equal to CREATE) with system document type <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&bjKey=pSys BIRTH;pMode=CREATE</pre> 6. Create mode pMode (equal to CREATE) with system document type (pSystemDocType)

Deep Link	Audience	Security Requirements	Examples
			<p>and <code>pDocTypeReadOnly</code> parameter</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=MANAGER_ DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMode=CREATE;pDocTypeRea</pre> <p>7. List mode with category (<code>pCategory</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=DOCUMENT_ RECORDS_ ANY&action=NONE&objKey=pCatego DOC</pre>
<p>Document Records (HR_DOCUMENT_RECORDS,NONE)</p>	<p>HR</p>	<p>Functional Security:</p> <ul style="list-style-type: none"> Manage Person Documentation by Worker Manage Person Documentation by Manager Manage Person Documentation View Person Documentation <p>Data Security:</p> <ul style="list-style-type: none"> Manage Person Documentation View Person Documentation 	<p>Without Parameters</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE</pre> <p>With Parameters</p> <p>1. List mode with system document type (<code>pSystemDocType</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH</pre> <p>2. View mode with system document type (<code>pSystemDocType</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMODE=VIEW</pre> <p>3. View mode with system document type (<code>pSystemDocType</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE&objKey=pSys PASSPORT;pMode=VIEW</pre>

Deep Link	Audience	Security Requirements	Examples
			<p>4. Create mode <code>pMode</code> equal to (CREATE)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE;pMode=CREA</pre> <p>5. Create mode <code>pMode</code> equal to (CREATE) with system document type (<code>pSystemDocType</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE&objKey=pSys BIRTH;pMode=CREATE</pre> <p>6. Create mode <code>pMode</code> equal to (CREATE) with system document type (<code>pSystemDocType</code>) and (Doc Type Read Only)<code>pDocTypeReadOnly</code> parameter</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=HR_DOCUMENT_ RECORDS&action=NONE&objkey=pSys BIRTH;pMode=CREATE;pDocTypeRea</pre> <p>7. List mode with category (<code>pCategory</code>)</p> <pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=DOCUMENT_ RECORDS_ ANY&action=NONE&objKey=pCategor DOC</pre>
<p>Document Records (DOCUMENT_RECORDS,NONE)</p>	<p>Employee, Manager, HR</p>	<p>Functional Security:</p> <ul style="list-style-type: none"> • Manage Person Documentation by Worker • Manage Person Documentation by Manager • Manage Person Documentation • View Person Documentation <p>Data Security:</p> <ul style="list-style-type: none"> • Manage Person Documentation • View Person Documentation 	<pre>https:// pod.oraclecloud.com/ fscmUI/faces/deeplink? objType=DOCUMENT_ RECORDS&action=NONE</pre>

Deep Link	Audience	Security Requirements	Examples
Create Document Record (EMP_CREATE_DOCUMENT_RECORDS, NONE)	Employee, Manager, HR	<p>Functional Security:</p> <ul style="list-style-type: none"> Manage Person Documentation by Worker Manage Person Documentation by Manager Manage Person Documentation View Person Documentation <p>Data Security:</p> <ul style="list-style-type: none"> Manage Person Documentation View Person Documentation 	<p>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_CREATE_DOCUMENT_RECORDS&action=NONE</p>
Document Delivery Preferences (EMP_DOC_DELIVERY_PREF, NONE)	Employee, Manager, HR	<p>Functional Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences View Person Document Delivery Preferences <p>Data Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences View Person Document Delivery Preferences 	<p>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_DOC_DELIVERY_PREF&action=NONE</p>
Document Delivery Preferences (MGR_DOC_DELIVERY_PREF, NONE)	Manager, HR	<p>Functional Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences View Person Document Delivery Preferences <p>Data Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences View Person Document Delivery Preferences 	<p>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MGR_DOC_DELIVERY_PREF&action=NONE</p>
Document Delivery Preferences (HR_DOC_DELIVERY_PREF, NONE)	Employee, Manager, HR	<p>Functional Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences View Person Document Delivery Preferences <p>Data Security:</p> <ul style="list-style-type: none"> Manage Person Document Delivery Preferences 	<p>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOC_DELIVERY_PREF&action=NONE</p>

Deep Link	Audience	Security Requirements	Examples
		<ul style="list-style-type: none"> View Person Document Delivery Preferences 	
Mass Download of Document Records (MASS_DOWNLOAD_DOCUMENT_RECORDS,NONE)	HR	Functional Security: <ul style="list-style-type: none"> Mass Download Document Records Data Security: <ul style="list-style-type: none"> Manage Person Documentation View Person Documentation 	<code>https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MASS_DOWNLOAD_DOCUMENT_RECORDS&action=NONE</code>

Related Topics

- [Deep Links](#)

How You Set Preferences for Document Delivery

You typically define delivery preferences for documents that are delivered periodically from employers to workers, for example, payslips, or year end tax statements. You can select default delivery methods for a document type, including online and paper, and specify other delivery related preferences.

You set these preferences using the Document Types task in the Setup and Maintenance work area.

These are the key attributes required for setting document delivery preferences:

Attribute	Description
Delivery Method	Select default delivery methods for a document type, including online and paper, and specify other delivery related preferences.
Online Delivery Consent Required	Specify whether worker consent is required for delivering documents online-only. If you set the Online Delivery Consent Required option to Yes and Initial Consent Granted to No, then the Delivery Method is automatically selected as Paper and the option is disabled for edit; the option is automatically deselected (while still disabled) when you set Initial Consent Granted to No again.
Allow Person Level Overrides	Enable workers to override the delivery preferences for their document records. Note: If this isn't enabled, delivery preferences for the document type is displayed in read-only mode in the Document Delivery Preferences page.
Document Delivery Default Overrides	Set default delivery preferences on the document type and override the preferences on associated work structures. Delivery preference is derived based on the preference set at these levels: <ul style="list-style-type: none"> Document Type (lowest precedence)

Attribute	Description
	<ul style="list-style-type: none">• Payroll Statutory Unit or Legal Employer• Department• Location• Person (highest precedence)

FAQs for Document Records

Can I change the Document Type setting from Person to Assignment?

Yes, you can. But, you must populate the assignment ID for all document records for that document type. Otherwise, such document records will be at the person level.

You can update the document record and add the assignment ID only using HSDL, HDL, or REST.

Can I create an approval rule for document records using flexfields?

Yes, you can using descriptive flexfields (DFF) and developer descriptive flexfields (DDF) in the Approval Setup tab in Transaction Console.

Note: The flexfield segments won't display the user configured segment names. You have to use the appropriate segment based on your flexfield configuration.

Can I configure different approval rules while adding, updating, or deleting document records?

Yes, the transaction type can be identified using the ATTRIBUTE3 property of the TRANSACTIONAPPROVALREQUEST payload.

For example:

- `TRANSACTIONAPPROVALREQUEST.ATTRIBUTE3 == "ADD"`
- `TRANSACTIONAPPROVALREQUEST.ATTRIBUTE3 == "EDIT"`
- `TRANSACTIONAPPROVALREQUEST.ATTRIBUTE3 == "DELETE"`

How can I restrict certain file formats from being uploaded?

You can use the **Manage Attachment File Formats** setup task in the Setup and Maintenance work area. Using this task, you can configure the file formats that you want to restrict from being attached.

14 Redwood User Experience Setup

Profile Options for Redwood User Experience Setup

Redwood is the new user experience in Oracle HCM applications. Many pages and flows have been recreated in the Redwood toolset Visual Builder Studio (VBS) to improve the user experience by creating cohesiveness through the application.

Some of the Redwood pages are enabled, by default. You will need to enable the respective profile options for other pages to get the Redwood user experience. In addition, you also need to enable the ORA_HCM_VBCS_PWA_ENABLED profile to enable the HCM Redwood pages. However, we recommend you evaluate your business requirements before enabling the Redwood experience.

This table lists the profile options to enable or disable the Redwood experience for the following pages in Global Human Resources.

Page	Profile Option Code	Default Value	Navigation
Collective Agreements	ORA_PER_COLLECTIVE_AGREEMENTS_REDWOOD_ENABLED	No	My Client Groups → Collective Agreements
Departments	ORA_PER_DEPARTMENTS_REDWOOD_ENABLED HRC_ELASTIC_SEARCH_ENABLED ORA_PER_ORACLE_SEARCH_DEPARTMENTSLOV_ENABLED	No N N	My Client Groups → Departments
Document Delivery Preferences	ORA_PER_DOCUMENT_DELIVERY_PREFERENCES_REDWOOD_ENABLED	Yes	Me → Document Delivery Preferences My Team → Document Delivery Preferences My Client Groups → Document Delivery Preferences
Eligible Jobs	ORA_PER_ELIGIBLE_JOBS_REDWOOD_ENABLED	No	Me → Eligible Jobs My Team → Eligible Jobs My Client Groups → Eligible Jobs
Employment Contracts	ORA_PER_EMPLOYMENT_CONTRACTS_REDWOOD_ENABLED	No	My Team → Employment Contracts My Client Groups → Employment Contracts

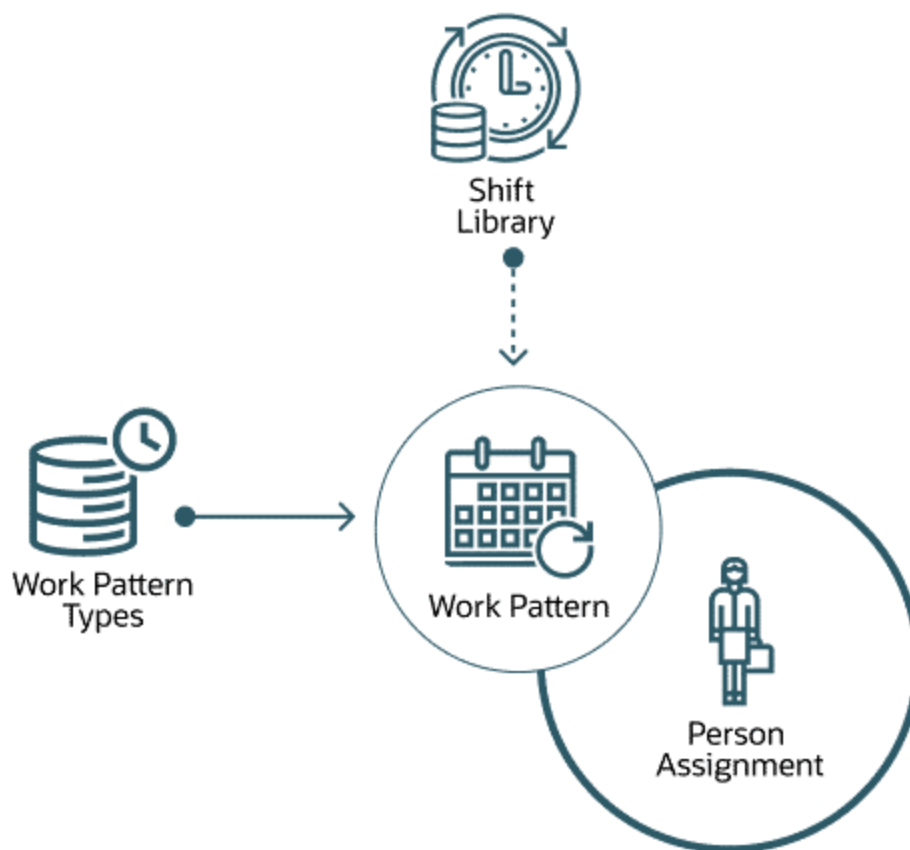
Page	Profile Option Code	Default Value	Navigation
Employment Info	ORA_PER_EMPLOYMENT_INFO_REDWOOD_ENABLED	No	Me → Employment Info My Team → Employment Info My Client Groups → Employment Info
Jobs	ORA_PER_JOBS_REDWOOD_ENABLED HRC_ELASTIC_SEARCH_ENABLED ORA_PER_ORACLE_SEARCH_JOBSLOV_ENABLED	No N N	My Client Groups → Jobs
Job Families	ORA_PER_JOB_FAMILIES_REDWOOD_ENABLED	Yes	My Client Groups → Job Families
Locations	ORA_PER_LOCATIONS_REDWOOD_ENABLED HRC_ELASTIC_SEARCH_ENABLED ORA_PER_ORACLE_SEARCH_LOCATIONSLOV_ENABLED	No N N	My Client Groups → Locations
Person Identifiers for External Applications	ORA_PER_PERSON_IDENTIFIERS_FOR_EXT_APP_REDWOOD_ENABLED	No	My Team → Person Identifiers for External Applications My Client Groups → Person Identifiers for External Applications
Positions	ORA_PER_POSITIONS_REDWOOD_ENABLED HRC_ELASTIC_SEARCH_ENABLED ORA_PER_ORACLE_SEARCH_POSITIONSLOV_ENABLED	No N N	My Client Groups → Positions
Seniority Dates V3	ORA_PER_SENIORITY_DATES_REDWOOD_ENABLED	Yes	My Team → Seniority Dates My Client Groups → Seniority Dates
Share Data Access	ORA_PER_SHARE_DATA_ACCESS_REDWOOD_ENABLED	No	Me → Share Data Access My Team → Share Data Access My Client Groups → Share Data Access

Page	Profile Option Code	Default Value	Navigation
Pending Workers	ORA_PER_PWK_DASHBOARD_ REDWOOD_ENABLED	No	My Team → Pending Workers My Client Groups → Pending Workers

15 Workforce Scheduling

Overview of Workforce Scheduling

You can create libraries of shifts and work pattern types in Oracle Fusion Cloud Workforce Scheduling. HR specialists and line managers can then use them when they create work patterns for worker assignments.



Shifts in Workforce Scheduling

A shift is a defined block of work used to create work patterns. It includes a name, work duration, and start time. It can include a total break duration. The work and break durations determine the total duration.

For example, you create the Union Day shift with a start time of 8:00 a.m. The work duration is 8 hours, the total break duration is 60 minutes, and the calculated total duration is 9 hours. Work patterns that use this shift could include two 15-minute paid coffee breaks and one 30-minute unpaid meal break.

To help people more quickly find appropriate shifts, shifts can include a category, such as Day, Evening, or Night.

Create shifts using the Shifts quick action under **My Client Groups > Schedules**. Manage the Category choice list using the Manage Common Lookups task and the ORA_HTS_ENT_SHIFTS_CATEGORY lookup type.

Tip: Any reports that you create that include shift start times, end times, and work durations will show the values in only minutes because that's how they're stored. Only the applicable Redwood pages include calculations to convert stored minutes over 59 into hours and minutes.

Work Pattern Types in Workforce Scheduling

Work pattern types identify the shift period type, such as duration, start and end times, or flexible days and times, to use in work patterns. They also identify the type and nature of any included breaks.

For example, breaks can occur at a fixed time, any time during a specified range, or any time during the shift. And they can be paid or unpaid.

You create work pattern types using the Work Pattern Type task in the Setup and Maintenance work area.

Work Patterns in Workforce Scheduling

To identify the shift framework for a worker during a specific cycle, create a work pattern for their work assignment. The shifts can have specific start and end times or durations for specific days. Or they can be flexible. This framework is used to determine the worker's actual schedule.

Here's an example of a work pattern for Kris's Shelf Stocking assignment. The pattern is for a 2-week cycle and has shifts with start and end times.

- For week 1, Kris works Monday, Wednesday, and Friday from 8:00 a.m. to noon and Tuesday, Thursday, and Saturday from noon to 4:00 p.m. All of the shifts include a 15-minute paid break that Kris can take any time during the shift.
- For week 2, Kris works from 2:00 p.m. to 8:00 p.m. Tuesday, Wednesday, and Thursday. Kris also gets a 15-minute paid coffee break at 4:00 p.m. and a 30-minute unpaid meal break at 6:00 p.m.

Here's an example for the same assignment and cycle, but with shifts that have flexible days and times.

- For week 1, Kris can work Monday, Wednesday, and Friday for 4 hours between 6:00 a.m. and noon and Tuesday, Thursday, and Saturday between noon and 8:00 p.m. All of the shifts include a 15-minute paid break that Kris can take any time during the shift.
- For week 2, Kris can work for 6 hours between 10:00 a.m. to 8:00 p.m. Tuesday, Wednesday, and Thursday. Kris can take a 15-minute paid coffee break between noon and 3:00 p.m. and a 30-minute unpaid meal break between 5:00 p.m. and 7:00 p.m.

To create a work pattern, use the Work Patterns quick action under Schedules. On the Work Patterns page, search for and select a specific work assignment to see the existing inactive and active work patterns. You can also add other work patterns here.

Tips

A worker's work assignment can have only one work pattern active at a time and work pattern dates can't overlap. The work assignment can have gaps between when one work pattern ends and another pattern starts.

The fields that you see when adding shifts depend on the selected work pattern type. For example, start and end times types include time fields while duration types don't. You can add existing shifts to the work pattern or create the appropriate shift while you're creating the work pattern.

For flexible work patterns, the days or days and times are when the person needs to be available to work that assignment. You don't have to schedule them to work on all the specified days and at all of the specified times. For example, Kris's manager schedules Kris to work the week 1 pattern on Mondays and Fridays from 9:00 a.m. to noon. They don't schedule Kris to work at all on Wednesdays.

16 Workforce Records

Overview of Workforce Records

In the Setup and Maintenance work area, most of the setup tasks for workforce details are in the Workforce Information functional area. If you create an implementation project, these tasks are in the Define Workforce Records task list.

You define a person's name format, name style, availability, employment values, and document types as a part of the Workforce Information functional area. You define other workforce related tasks such as person number generation methods using the Manage Enterprise HCM Information task.

The Workforce Information functional area and the Define Workforce Records task list cover tasks in the following areas:

Area	Includes
Availability	Calendar events, work schedules and assignment, work shifts and workday patterns
Person Record Values	Person lookups, flexfields, profile options, person name formats and style, and person types
Employment Record Values	Employment lookups, flexfields, profile options, and assignment statuses
Documents	Document lookups, flexfields, and document types
Processes for Person Search	Settings for person search processes

Related Topics

- [Person Number Generation Methods](#)

Directory and Organization Chart Lookups

This topic identifies common lookups that are Directory and My Team-related and have user configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements.

You review lookups using the Manage Common Lookups task in the Setup and Maintenance work area.

Directory and Organization Chart Lookups

Lookup Type	Description	Configuration Level
ORA_HRL_DIR_ADV_SEARCH_SORT	Sort options displayed for sorting workers in the Directory Advanced Search page.	User

Lookup Type	Description	Configuration Level
ORA_HRL_DIR_ORG_CHART_SORT	Sort options for displayed sorting workers in the Organization Chart page.	User
ORA_HRL_ORG_PRINT_ATTR_GEN	Attributes that can be selected by a general user when printing the organization chart.	User
ORA_HRL_ORG_PRINT_ATTR_ADMIN	Attributes that can be selected by an administrator when printing the organization chart.	User
ORA_HRL_ORG_PRINT_FORMAT_ADMIN	File formats that can be selected by an administrator when printing the organization chart.	User

My Team Lookups

Lookup Type	Description	Configuration Level
ORA_HRL_MYTEAM_OVERVIEW_SORT	Sort options displayed for sorting workers in the My Team Overview page.	User
ORA_HRL_MYTEAM_POS_SORT	Sort options displayed for sorting positions in the My Team page.	User

Overview of Work Schedules

How You Configure and Assign Work Schedules

To define worker schedules, you configure calendar events and work schedules using these tasks in the Setup and Maintenance work area. They're part of the Workforce Deployment offering, Workforce Information functional area.

Task	Description
Manage Availability Lookups	Use lookup codes to define geographical locations for area 1 through area 4, such as United Kingdom (area1), England (area2), and London (area3). Add the codes to the ORA_PER_GEOGRAPHIC_TREE_NODES lookup to create these location lookups. Use the PER_CAL_EVENT_CATEGORY lookup type to define calendar event categories beyond the delivered Public holiday category.
Manage Geography Trees	Create the geographic tree and tree versions. Add the geographic tree nodes to the tree versions. Also, audit, activate, and flatten the tree versions.
Manage Calendar Events	Create calendar events, such as May Day, Thanksgiving, and Boxing Day, to include and exclude at various levels of the organizational or geographical hierarchy.
Manage Locations	Update locations, as appropriate, to override calendar events for default geographic hierarchies. For example, a team in Bangalore is working with a team in France. During the project, you want the Bangalore team to also observe the French public holidays. This task is part of the Workforce Structures functional area.

Task	Description
Work Shifts	Create work shifts, such as Day Office and Night Home.
Work Workday Patterns	Create workday patterns using the work shifts. For example, create a weekly work pattern with the Day Office shift starting on Monday and ending on Wednesday. The Night Home shift starts on Thursday and ends on Friday.
Eligibility Profiles	Create profiles that automatically identify who's eligible for a particular work schedule. For example, you want to identify people in the Support department.
Work Schedules	Create work schedules made up of work patterns, calendar events, exceptions, if any, and eligibility profiles.
Work Schedule Assignment Administration	Assign the work schedules to the appropriate workforce structures, such as assignment, position, job, department, or location.
Work Schedule Assignment	Change the work schedule assignment for a specific person. This task is in the Person Management work area, on the Tasks panel tab after you find the specific person.

Related Topics

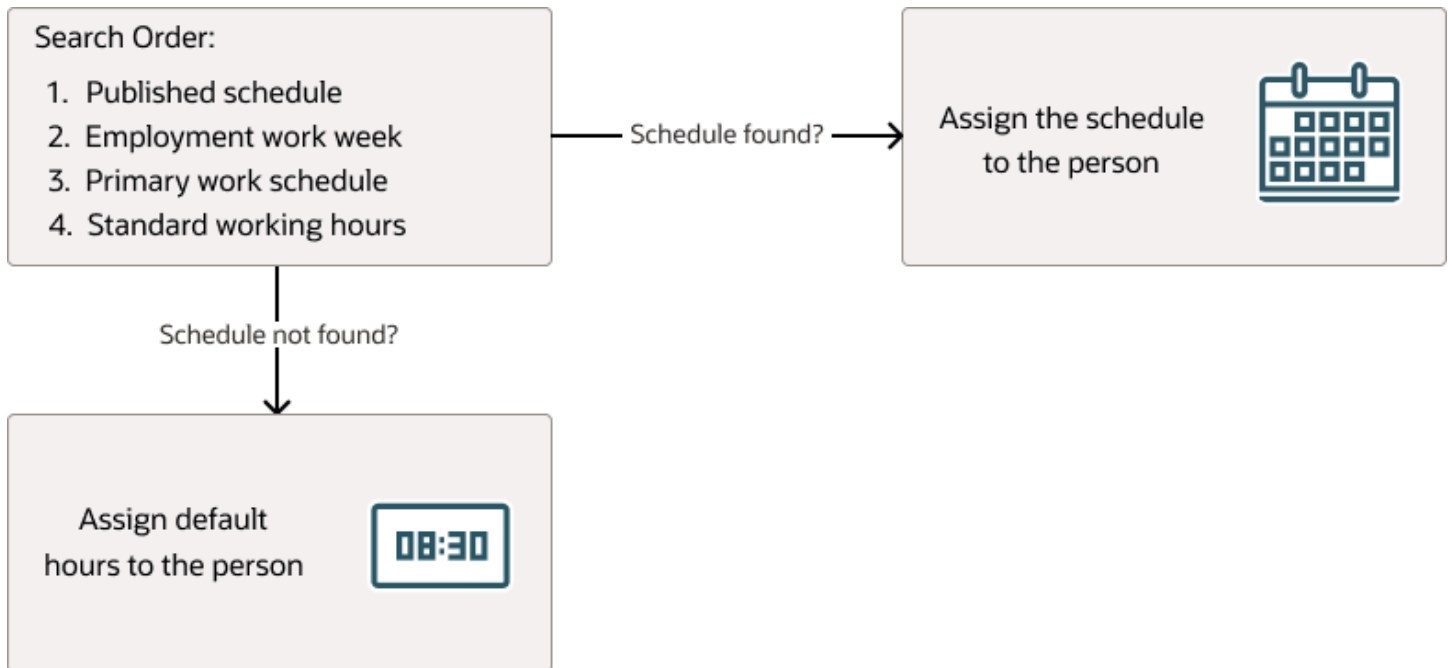
- [How an Individual's Schedule Is Identified](#)

How an Individual's Schedule Is Identified

You can set up an individual's work time in different ways. So, the process that identifies a person's official schedule for a selected time period uses the individual's current schedule or work hours. It also considers applicable calendar events, work schedule resource exceptions, and absence entries.

Search Order

This flow chart shows you the order that the process searches for someone's schedule, before applying it to the assignment.



Published Schedule (Workforce Management)

The process builds the published schedule using the employment work week, primary work schedule, or standard working hours for each person. It can also build it using published schedules from other scheduling applications. The published schedule shows applicable calendar events and absences.

Employment Work Week

The person's employment record can include the setup for their employment work week. Schedules that the process builds from the work week also show applicable calendar events and absences.

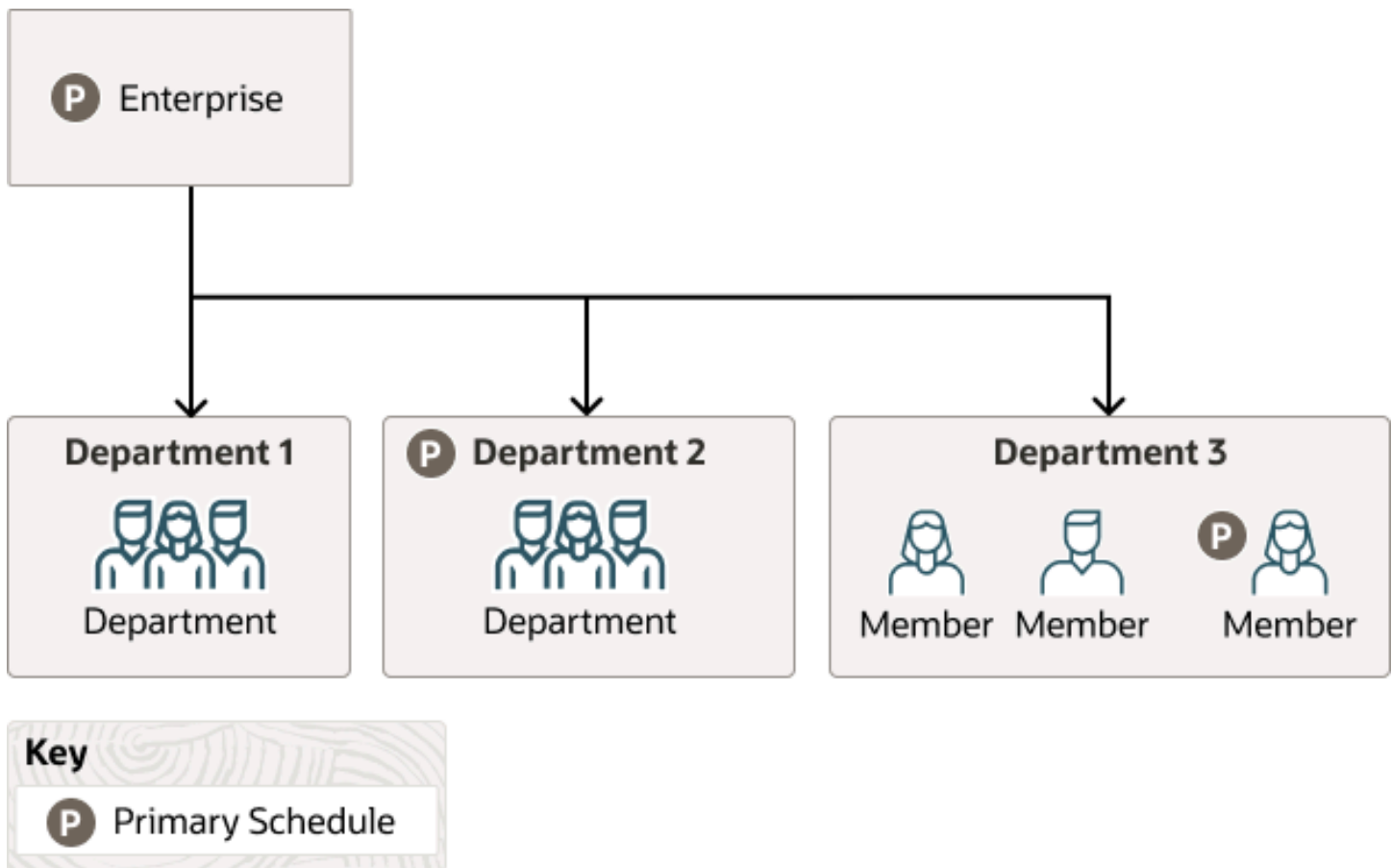
Primary Work Schedule

The primary work schedule links to one of these levels. Schedules that the process builds from the work schedule also show assigned calendar events and resource exceptions, and applicable absences.

1. Primary assignment of the person
2. Position
3. Job
4. Department
5. Location
6. Legal Employer

7. Enterprise

The process moves through the schedule hierarchy in the specified order and stops as soon as it finds a primary schedule. This example hierarchy shows primary work schedules associated with three levels.



Departments 1 and 3 don't have primary schedules. So, the primary schedule at the enterprise level applies to everyone, with one exception. A person in department 3 has a schedule for their primary assignment. That primary assignment schedule applies instead of the enterprise-level schedule. Department 2 has a primary schedule, and it applies to everyone in that department.

The calendar events and resource exceptions that exist in the primary work schedule affect everyone's schedules, regardless of level. Any absences they report during the selected time period also affect the individual's schedule.

Standard Working Hours

The person's primary assignment includes their standard working hours. Schedules built with these hours also show applicable calendar events and absences.

Default Hours

If the process doesn't find a schedule, it uses the default hours 8:30a to 5:00p.

Calendar Events and Geographic Hierarchy

People Covered by a Calendar Event

You specify whether the people covered by a calendar event get identified using an organization or a geographic hierarchy.

For example, the calendar event covers everyone in an enterprise or a specific department. Or, the calendar event covers everyone in a specific country, state or province, or city.

By default, a calendar event covers everyone in the hierarchy nodes you include in the coverage. But, the event covers people assigned work schedules only if you add the event or calendar event category as an exception in the work schedule.

Related Topics

- [Geographic Hierarchy Decides Calendar Event Coverage](#)
- [Organization Hierarchy Decides Calendar Event Coverage](#)

Geographic Hierarchy Decides Calendar Event Coverage

A calendar event applies to people's work assignments according to their geographic location when the event uses the geographic hierarchy.

For example, in the UK you want to identify January 2 as a holiday in Scotland but not in England, Wales, or Northern Ireland.

You create geographic hierarchies using the Manage Geography Trees task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area. You link the geography hierarchy to calendar events when you set the calendar event Hierarchy Type to Geographic.

Related Topics

- [People Covered by a Calendar Event](#)

Organization Hierarchy Decides Calendar Event Coverage

A calendar event applies to people's work assignments according to their position in an organization when the event uses the organizational hierarchy.

For example, you want the Annual Sales Team Outing calendar event to apply to everyone in and below the Sales department in the organization hierarchy. You don't want it to apply to people in the Research department.

You create the organization hierarchy using the Manage Organization Trees task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area. You link the organization hierarchy to calendar events when you set the calendar event Hierarchy Type to Organization.

Related Topics

- [People Covered by a Calendar Event](#)

Basic Process to Create a Calendar Event Using a Geographic Tree

Here's the basis process to create calendar events using a geographic tree:

1. Add the country, state, and city level nodes in the Geographic Tree Nodes lookup.
 - Note:** You add this lookup only when you want to create calendar events for states and cities.
2. Create a geography tree based on the delivered tree structure HCM Geography Tree Structure and add a tree version.
3. Add geographic tree state and city nodes.
4. Audit, activate, and row-flatten the tree version.
5. Create calendar events for the country, state, and city level nodes.
6. Optionally, override the default geography hierarchy, as appropriate.
7. Sign in as a covered individual to confirm that the calendar events are part of their schedule.

Related Topics

- [People Covered by a Calendar Event](#)
- [Geographic Hierarchy Decides Calendar Event Coverage](#)
- [How do I create a calendar event category?](#)

Add India and UK Nodes to the Geographic Tree Nodes Lookup

You're adding the IN and UK country nodes to the ORA_PER_GEOGRAPHIC_TREE_NODES lookup so that you can use them to create calendar events.

The IN node includes the Telangana and Karnataka state nodes and the Hyderabad and Bangalore city nodes. The UK node includes the England and Scotland state nodes and the London and Edinburgh city nodes. Use the Manage Availability Lookups task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

1. On the Manage Availability Lookups page, click **ORA_PER_GEOGRAPHIC_TREE_NODES**.
2. In the ORA_PER_GEOGRAPHIC_TREE_NODES: Lookup Codes section, add the India and UK lookup codes, as shown in this table. The lookup code should be a unique short code for the country, state or province, or city.

Lookup Code	Meaning
GL	Global
IN	India
IN_TELA	Telangana, India

Lookup Code	Meaning
TELA_HYD	Hyderabad, Telangana
IN_KARN	Karnataka, India
KARN_BAN	Bangalore, Karnataka
UK	United Kingdom
UK_ENG	England, United Kingdom
ENG_LON	London, England
UK_SCOT	Scotland, United Kingdom
SCOT_EDIN	Edinburgh, Scotland

3. Click **Save and Close**.
4. On the Manage Availability Lookups page, click **Done**.

Related Topics

- [Create a Geographic Tree and Tree Version for India and UK](#)

Create a Geographic Tree and Tree Version for India and UK

You're creating a geographic tree version for India and UK that you can use when you create calendar events.

Before you start

Make sure all of the geographic nodes that you need are in the ORA_PER_GEOGRAPHIC_TREE_NODES lookup type.

Use the Manage Geography Trees task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

1. Create a geographic tree.
 - a. On the Manage Trees and Tree Versions page, Actions menu, select **Create Tree**.
 - b. On the Create Tree: Specify Definition page, in the Name field, enter **Enterprise Locations**.
 - c. In the **Code** field, enter **ENT_LOC**.
 - d. Click **Next**.
 - e. On the Create Tee: Specify Labels page, click **Next**.
 - f. On the Create Tree: Specify Access Rules page, click **Submit**.

2. Create a geographic tree version.
 - a. On the Manage Trees and Tree Version page, select the tree that you just created, **Enterprise Locations**.
 - b. On the Create icon menu, select **Create Tree Version**.
 - c. On the Create Tree Version: Specify Definition page, in the Name field, enter **Enterprise Locations Version 1**.
 - d. In the Effective Start Date field, select **January 1** of this year.
 - e. Click **Next**.
 - f. On the Confirmation dialog box, click **OK**.
3. Add the root node.
 - a. On the Create Tree Version: Specify Nodes page, click the **Create** icon.
 - b. On the Add Tree Node dialog box, in the Data Source field, select **Geographic Tree Calendar Top Scores Data Source**.
 - c. In the Available Nodes field, select **Global** and move it to the Selected Nodes field. You select **Global** because the first node in a geographic tree must be the root node.
 - d. Click **OK**.
4. Add the country-level nodes.
 - a. On the Create Tree Version: Specify Nodes page, select **Global**.
 - b. Click the **Create** icon.
 - c. On the Add Tree Node dialog box, in the Data Source field, select **Geographic Tree Territory Code Data Source**.
 - d. In the Available Nodes field, select the **GB United Kingdom** and **IN India** country level nodes and move them to the Selected Nodes field.
 - e. Click **OK**.
5. Add the state-level nodes.
 - a. On the Create Tree Version: Specify Nodes page, expand the **Global** node.
 - b. Select a country node, such as **GB United Kingdom**.
 - c. Click the **Create** icon.
 - d. On the Add Tree Node dialog box, in the Data Source field, select **Geographic Tree Calendar Events Data Source**. Now you can define the state-level nodes.
 - e. In the Available Nodes field, select **England, United Kingdom** and **Scotland, United Kingdom**, and move them to the Selected Nodes field.
 - f. Click **OK**.
 - g. Repeat steps b through f to add the Telangana and Karnataka state-level nodes for India.
6. Add the city-level nodes.
 - a. On the Create Tree Version: Specify Nodes page, expand the **GB United Kingdom** node.
 - b. Select **England, United Kingdom**.
 - c. Click the **Create** icon.
 - d. On the Add Tree Node dialog box, in the Data Source field, select **Geographic Tree Calendar Events Data Source**.
 - e. In the Available Nodes field, select **London, England** and move it to the Selected Nodes field.
 - f. Click **OK**.
 - g. On the Create Tree Version: Specify Nodes page, click **Submit**.
 - h. On the Confirmation dialog box, click **OK**.
 - i. Repeat steps a through h to add the Hyderabad city-level node to the Telangana, India node. Repeat them again to add the Bangalore city-level node to the Karnataka, India node.

Related Topics

- [Add India and UK Nodes to the Geographic Tree Nodes Lookup](#)
- [Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version](#)

Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version

You're auditing, activating, and row-flattening the India and UK geographic tree version you want to use to create calendar events.

Before you start

Make sure that the Enterprise Locations geographic tree exists and has the Enterprise Locations Version 1 tree version. Use the Manage Geography Trees task to confirm it exists or to create it.

Use the Manage Geography Trees task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

1. Audit the tree version.
 - a. On the Manage Trees and Tree Versions page, expand the geographic tree that you created.
 - b. Select the **Enterprise Locations Version 1** tree version.
 - c. On the Actions menu, select **Audit**.
 - d. On the Trees Audit Result page, click **Online Audit**.
 - e. On the Confirmation dialog box, click **OK**.
 - f. On the Tree Audit Result page, click **Done**.
2. Activate the tree version.
 - a. On the Manage Trees and Tree Versions page, ensure that the tree version that you created, Enterprise Locations Version 1, is still selected.
 - b. On the Actions menu, select **Set Status Active**.
 - c. On the Confirmation dialog box, click **OK**.
3. Row-flatten the tree version.
 - a. On the Manage Trees and Tree Versions page, ensure that the tree version that you created, Enterprise Locations Version 1, is still selected.
 - b. On the Actions menu, select **Flatten > Row Flattening**. Flattening the tree version makes tree retrieval and display faster.
 - c. On the Row Flattening page, click **Online Flattening**.
 - d. On the Confirmation dialog box, click **OK**.
 - e. On the Row Flattening page, click **Done**.
 - f. On the Manage Trees and Tree Versions page, click **Done**.

Related Topics

- [Create a Geographic Tree and Tree Version for India and UK](#)

Create the May Day Calendar Event for India

You're creating the May Day calendar event for India.

Before you start

Make sure that the Enterprise Locations geographic tree exists. Use the Manage Geography Trees task to confirm it exists or to create it.

Use the Manage Calendar Events task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

1. On the Manage Calendar Events page, click the **Create** icon.
2. On the Create Calendar Event page, complete the fields, as shown here.

Field	Value
Name	May Day
Short Code	MD_HYD
Category	Public Holiday
Start Date	5/1/18 12:00 AM
End Date	5/2/18 12:00 AM

3. In the Coverage section, Hierarchy Type field, select **Geographic**.
4. In the Hierarchy field, select **Enterprise Locations**.
5. In the Coverage Source section, expand the hierarchy and select the **India** nodes.
6. Click **Include**.
7. Click **Submit**.
8. On the Confirmation dialog box, click **OK**. On the Manage Calendar Events page, you can see that the May Day calendar event got created.
9. On the Manage Calendar Events page, click **Done**.

Related Topics

- [People Covered by a Calendar Event](#)
- [How an Individual's Schedule Is Identified](#)
- [Create a Geographic Tree and Tree Version for India and UK](#)
- [Audit, Activate, and Row-Flatten the India and UK Geographic Tree Version](#)
- [How You View WFM Team Schedules](#)

Override the Default Edinburgh Geography Hierarchy with Hyderabad

You're overriding the default geographic hierarchy for a team of project managers in Edinburgh, Scotland working with developers in Hyderabad.

During the project, you want the Edinburgh team members to observe the same public holidays as their Hyderabad teammates. Use the Manage Locations task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area.

1. On the Manage Locations page, search for the person's location, for example, using the name **Edinburgh**.
2. In the Results in Table section, select **Edinburgh**.
3. On the Edit menu, select **Update**.
 - a. On the Update Location dialog box, select the action reason, such as **Seasonal Closure**.
 - b. Click **OK**.
4. Click **OK**.
5. Click **Save**.
6. On the Confirmation dialog box, click **OK**.
7. Click **Submit**.
8. On the Warning dialog box, click **Yes**.
9. On the Manage Locations page, click **Done**.

Related Topics

- [People Covered by a Calendar Event](#)
- [Create the May Day Calendar Event for India](#)

Calendar Events FAQs

What's a half day calendar event?

An event that divides the duration shift on the specified day in half. It shows the person's availability to work for only the first half of the day. You can add half-day events to elapsed work schedules.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)

What's a calendar event message?

A message that appears on the calendars of people covered by a calendar event.

For example, a message about a Spanish public holiday could appear on the calendars of people working in Spain. It lets people working in other countries know why people in Spain are unavailable on that date. You create calendar event messages using the Planned Schedule task in the Time Management work area.

Why didn't a calendar event message appear on the calendars of everyone in an organization or location?

If you use work schedules and a calendar event covers a person, you need to include the calendar event as a schedule exception.

Otherwise, even though the person belongs to the organization or location covered by the calendar event, no calendar event message appears on their calendar. You add the calendar event exception to their primary work schedule or schedule assignment.

How do I create a calendar event category?

Add lookup codes to the PER_CAL_EVENT_CATEGORY lookup.

Use the Manage Availability Lookups task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

How can I view calendar events I created?

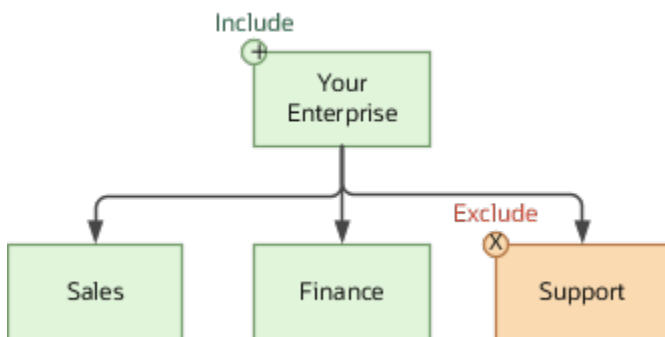
Sign in with credentials for someone who would have the calendar event. Then, open their calendar in the Time and Absences work area and go to the appropriate month, week, or day.

Calendar Event Setup Examples

Example of Including and Excluding Calendar Event Coverage in a Hierarchy

You want to apply the New Phone System Training calendar event to everyone in your enterprise except those people working in the Support department.

When an event applies to most of a hierarchy, it's most efficient to include the whole hierarchy in the coverage. Then, you can exclude the exceptions. So you include your enterprise, which also includes the departments in that organization hierarchy, such as Sales and Finance. Then, you exclude the departments that the calendar event doesn't apply to, such as the Support department.



You can also include and exclude geographic hierarchy levels the same way.

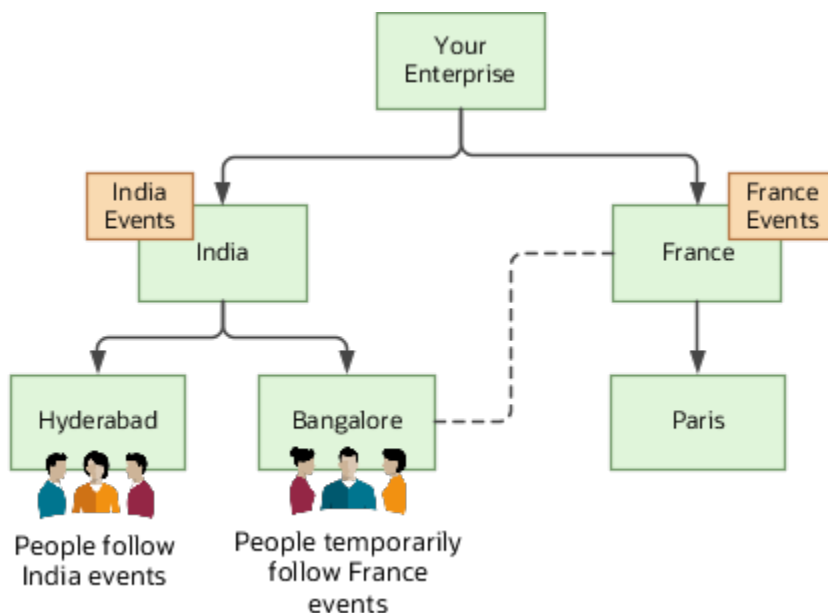
Examples of Overriding Calendar Event Coverage for Specific Geographic Locations, Levels, and Individuals

You set up public holidays and other calendar event for people at your India and France locations using a geographic hierarchy. You also set up regional holiday events for Hyderabad and Bangalore.

You override geographic coverage for locations and levels using the Manage Locations task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Structures functional area. You override geographic coverage for individuals on their Employment page.

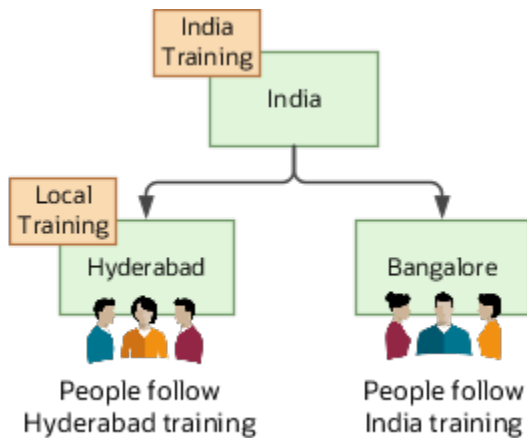
Specific Geographic Locations

For 6 months, your people in Bangalore work closely with their counterparts in Paris on a critical project. During this time, you want the people in Bangalore to follow the calendar events you set up for France. On the Manage Locations page, edit the location information for Bangalore, and set the geographic hierarchy to France, as shown here.



Specific Geographic Levels

You're providing training on a new phone system to people in your India offices. People in Hyderabad have a regional holiday at that time, so you schedule their training for the next week. On the Manage Locations page, edit the location information for each person, setting the geographic hierarchy to Hyderabad instead of India. This edit links each person with calendar events defined exclusively for their Hyderabad location, as shown here.



Specific Individuals

Some individuals in Bangalore are working closely on a project with their French counterparts for a year. During the project, you want these individuals in Bangalore to follow the calendar events for the France location. For each individual, open their Employment page and set the geographic hierarchy to France.

Related Topics

- [Geographic Hierarchy Decides Calendar Event Coverage](#)

Examples of Overriding the Calendar Event Name or Category in a Hierarchy

You can create a calendar event using the name or category that makes sense to the most people in the organization or geography. You can then override the name or category at lower levels of the hierarchy, as appropriate.

Calendar Event Name

You set up the May Day calendar event for all locations in your enterprise. But, you want people in France to see the event as Labor Day.

1. On the Calendar Event page, select the **France** location node on your geographical hierarchy.
2. To enter a new name for the event, click the **Override** icon.

Calendar Event Category

You linked the Good Friday calendar event with the Public Holiday event category and applied the coverage to all departments in your enterprise. But for your finance department, you want to change the event category to a voluntary holiday.

1. On your organization hierarchy, select the **Finance** node.
2. To select a different category, click the **Override** icon.

Related Topics

- [People Covered by a Calendar Event](#)
- [Organization Hierarchy Decides Calendar Event Coverage](#)

Work Schedules

Work Schedule Types Supported by Oracle HCM Cloud Applications

You define availability details for a period using work schedules. Oracle Fusion Cloud HCM applications support only time and elapsed work schedules.

You create these schedules using the Work Schedules task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Note: For people with multiple assignments, assign work schedules of the same type to their assignments so that absence durations calculate correctly.

Time

A time work schedule has a fixed work day pattern and anyone assigned the schedule is available for specific hours each day. For example, you want an 8-hour schedule for 5 days of the week. You create a time work schedule that starts at 8:00a and ends at 5:00p, Monday through Friday.

Elapsed

An elapsed work schedule doesn't have fixed start or end times for anyone assigned the schedule. Instead, they're available for a specific number of hours each day--a specific duration. For example, everyone works 8 hours a day, Monday through Friday. Some people might start work at 9:00a and others at 11:00a. Some people might work in 2-hour bands with an hour or more of nonwork time between. And some people might work during the night. It doesn't matter as long as they work their assigned duration.

Related Topics

- [Exception Options in Work Schedules](#)
- [Basic Process to Create a Work Schedule](#)

Exception Options in Work Schedules

When you create a work schedule, you can include exceptions, such as public holidays or training sessions. You then use these exceptions to identify people's availability to work.

Calendar Event

A calendar event is an exception for a single event on 1 or more consecutive days, such as a public holiday or training event.

Calendar Event Category

A calendar event category is an exception for all calendar events that make up the event category. For example, the events **New Year's Day**, **Good Friday**, and **Easter Monday** make up the category **UK Public Holidays**.

Resource Exception

A resource exception is an exception for everyone assigned the work schedule. For example, everyone assigned the Night Shift schedule get scheduled to attend a training event, so they aren't available to do their regular work.

People can see the Work period exceptions for themselves and their team on the Time and Absences work area calendar. They need to select either or both of the **Employment schedule** and **My schedule** display options. They can't see any off period, or nonwork, exceptions.

Related Topics

- [How do I change exceptions in individuals' work schedules?](#)

Basic Process to Create a Work Schedule

Here's the basic process to create a work schedule.

1. Create calendar events.
2. Create shifts.
3. Create a weekly work pattern made up of one or more shifts.
4. Create a work schedule made up of a weekly work pattern and calendar event, or calendar event category exceptions.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [Basic Process to Create a Calendar Event Using a Geographic Tree](#)
- [Assign the Weekly Day Office, Night Home Work Schedule](#)
- [Change the Weekly Day Office, Night Home Work Schedule of an Individual](#)

Create the Day Office and Night Home Time Shifts

You're creating two shifts for a support department in India. The day shift is Monday through Wednesday from 9:00a to 5:00p. The night shift is Thursday and Friday from 5:00p to 1:00a.

Use the Work Shifts task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

1. On the Work Shifts page, Create icon menu, select **Create Time Shift**.
2. On the Create Time Shift dialog box, complete the fields for one of the shifts, as shown here:

Field	Day Value	Night Value
Name	Day Office	Night Home
Start Time	9:00a	5:00p
Category	Work from office	Work from home
Duration	8 Hours	8 Hours
Shift Detail Type	None	None

3. Click **Save and Close**. After you complete the second shift, skip to step 5.
4. Repeat steps 1 through 3 to create the second shift.
5. On the Work Shifts page, click **Done**.

What to do next

Create the Weekly Day Office, Night Home Work Pattern, Create the Weekly Day Office, Night Home Work Schedule, and Assign the Weekly Day Office, Night Home Work Schedule

Related Topics

- [Basic Process to Create a Work Schedule](#)

Create the Weekly Day Office, Night Home Work Pattern

You're creating a weekly work pattern that uses the Day Office and Night Home shifts for a support department in India.

Before you start

Create the Day Office and Night Home Time Shifts

Use the Work Workday Patterns task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

1. On the Work Workday Patterns page, Create icon menu, select **Create Time Workday Pattern**.
2. On the Create Time Workday Pattern dialog box, in the Name field, enter **Weekly Day Office, Night Home**.
3. In the Length of Days field, enter **7**.
4. Add the two workday pattern details by completing these steps twice.
 - a. In the Workday Pattern Details section, click the **Add Row** icon.
 - b. Complete the fields for one of the patterns, as shown here:

Field	Day Office Value	Night Home Value
Start Day	1	4
End Day	3	5

Field	Day Office Value	Night Home Value
Shift Name	Day Office	Night Home

- Click **Save and Close**.
- On the Work Workday Patterns page, click **Done**.

What to do next

Create the Weekly Day Office, Night Home Work Schedule and *Assign the Weekly Day Office, Night Home Work Schedule*

Related Topics

- [Basic Process to Create a Work Schedule](#)

Create the Weekly Day Office, Night Home Work Schedule

You're creating the work schedule that uses the Weekly Day Office, Night Home workday pattern for a support department in India. The work schedule includes public holiday exceptions.

Before you start

Create the Day Office and Night Home Time Shifts and *Create the Weekly Day Office, Night Home Work Pattern*. Also create the India_Support_Team eligibility profile to identify everyone in the India support department. Use the Eligibility Profiles task.

Use the **Work Schedules** task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

- On the Work Schedules page, click **Create**.
- On the Create Work Schedule page, complete the general fields, as shown here.

Field	Value
Name	Weekly Day Office, Night Home
Category	Work
Type	Time
Effective From Date	January 1 of the current year
Effective To Date	December 31 of the current year

- Add the pattern by completing the fields, as shown here.

Field	Value
Sequence	1
Name	Weekly Work Pattern

4. Add the exception by completing the fields, as shown here.

Field	Value
Type	Calendar event category
Name	Public holiday

5. Add the India_Support_Team eligibility profile.
6. Click **Submit**.
7. On the Work Schedules page, click **Done**.

What to do next

Assign the Weekly Day Office, Night Home Work Schedule

Related Topics

- [Basic Process to Create a Work Schedule](#)

Assign the Weekly Day Office, Night Home Work Schedule

You're assigning the Weekly Day Office, Night Home work schedule to everyone who works in a support department in India.

Before you start

Create the Day Office and Night Home Time Shifts, Create the Weekly Day Office, Night Home Work Pattern, and Create the Weekly Day Office, Night Home Work Schedule.

Use the Work Schedule Assignment Administration task in the Setup and Maintenance work area. It's part of the Workforce Deployment offering, Workforce Information functional area.

Here's what to do

1. On the Work Schedule Assignment Administration page, search for and click **Weekly Day Office, Night Home**.
2. On the Edit Work Schedule Assignment Administration: Weekly Day Office, Night Home page, in the Resource Assignments section, click the **Add Row** icon.
3. Complete the fields, as shown here:

Field	Value
Resource Type	Department
Name	Support IN
Start Date	January 1 of the current year
End Date	December 31 of the current year
Primary	Yes

4. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

6. On the Work Schedule Assignment Administration page, click **Done**.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [How do I change exceptions in individuals' work schedules?](#)
- [Basic Process to Create a Work Schedule](#)
- [Change the Weekly Day Office, Night Home Work Schedule of an Individual](#)

Change the Weekly Day Office, Night Home Work Schedule of an Individual

You need to modify the work schedule for Vijay Singh because he's scheduled to attend the Advance Communication Skills training on February 8. His schedule needs to indicate that he's unavailable on that day.

1. Click **Navigator > Person Management**.
2. On the Person Management: Search page, search for and click **Vijay Singh**.
3. On the Tasks panel tab, click **Work Schedule Assignment**.
4. On the Work Schedule Assignment page, click the **Add Row** icon.
5. In the Schedules section, complete the fields, as shown here:

Field	Value
Name	Weekly Day Office, Night Home
Start Date	January 1 of the current year
End Date	December 31 of the current year
Primary	Yes

6. In the Exceptions section, click the **Add Row** icon.
7. Complete the fields, as shown here:

Field	Value
Type	Resource Exception
Name	In the choice list, click Create . Then, create a resource exception called Advanced Communication Skills that starts and ends on February 8.
Availability	Off Period

8. Click **Submit**.

Related Topics

- [Work Schedule Types Supported by Oracle HCM Cloud Applications](#)
- [Exception Options in Work Schedules](#)
- [How do I change exceptions in individuals' work schedules?](#)
- [Basic Process to Create a Work Schedule](#)
- [Assign the Weekly Day Office, Night Home Work Schedule](#)

Work Schedules FAQs

What's a primary work schedule?

The schedule used to identify an individual's work availability.

For example, you assign two schedules for different time periods to someone's primary work assignment. So that those schedules identify the person's work availability for those time periods, you need to set both schedules to Primary. If you assign only a single work schedule, that schedule automatically identifies the person's work availability.

You manage work schedules using the Work Schedule Assignment task in the Person Management work area.

How do I change exceptions in individuals' work schedules?

You can change how the exceptions affect that person's work availability when you assign a schedule to someone using the Work Schedule Assignment page.

For example, you added a calendar event as an exception that affects everyone. But, a designated person needs to remain available to handle critical customer queries. So, you change the person's work availability for that exception.

17 Set Up Connections

Set Up Connections

You need to configure profile options to set up Connections.

As a prerequisite you need to enable unified sandboxes and the Workforce Deployment offering to view Connections.

Set Connections Profile Options

1. Navigate to **Setup and Maintenance > Manage Administrator Profile Values** to review and configure the following profile options.

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
HCM_RESPONSIVE_PAGES_ENABLED	Mobile-Responsive HCM Pages Enabled	Global Human Resources	Global Human Resources	Site	Y
HCM_CONNECTIONS_ENABLED	HCM_CONNECTIONS_ENABLED	Global Human Resources	Global Human Resources	Site	Y

Configure Oracle Search

1. Navigate to **Setup and Maintenance > Manage Administrator Profile Values** to review and configure the following profile options.

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
ORA_FND_SEARCH_EXT_ENABLED	Enable/Disable Search Ext Framework	Oracle Middleware Extensions for Applications	Oracle Middleware Extensions for Applications	Site	Yes
HRC_ELASTIC_SEARCH_ENABLED	HRC: Enable Elastic Search	HCM Common Architecture	Search Framework	Site	Y
PER_SEARCH_LOGIN_EVENT_PUB	PER: User Login Event Publication for Search	Global Human Resources	Security	Site	NONE

2. Navigate to **Tools > Scheduled Processes** to run this ESS process multiple times for the listed indices.

Job Name	Parameter Name	Parameter Value
ESS job to create index definition and perform initial ingest to OSCS	Index Name to Reingest	fa-hcm-person
		fa-hcm-profile-tag

Note: You need to run the initial data ingestion process at these times.

- After release version upgrade
- After P2T (production-to-test) process

Also, if you change the person name format and ran the **Apply Name Formats to Person Names, Keywords and LDAP** job set, then you must reingest the **fa-hcm-person** index.

Profile Options Considerations for Connections Search

The following profile option settings may impact the Connections search functionality. You may want to review these profile settings before setting up Connections.

Profile Option Name	Purpose	Default Value
PER_WORKER_SEARCHES_PERSON_NUMBER_SEARCH_ENABLED	Enables search by person number.	N
PER_PERSON_INDEX_FUZZY_SEARCH_ENABLED	Enables fuzzy search on person names and allowing up to 2 spelling differences.	Y
PER_WORKER_SEARCHES_LEADING_EMAIL_SEARCH_ENABLED	Enables a focused search on the work email if the search terms entered appears to be an email address.	Y
PER_WORKER_SEARCHES_LEADING_EMAIL_LOCAL_PART_SEARCH_ENABLED	Enables a focused search on the work email local part (before the @) if the search terms entered are alphabetic characters separated by a period.	Y

Roles Required for Connections

The Connections functionality is secured and requires that your custom employee and contingent worker role inherit the 'HCM Connections REST Services' privilege.

In addition, to use the About Me panel, custom roles need to include the `ORA_HRT_REST_SERVICE_ACCESS_TALENT_PERSON_PROFILES` aggregate privilege.

The `ORA_HRT_REST_SERVICE_ACCESS_TALENT_PERSON_PROFILES` is included with following duty roles, by default.

- `ORA_PER_CONNECTIONS_DUTY`
- `ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_INTEGRATION_SPECIALIST_JOB`
- `ORA_HRT_ACCESS_SKILLS_CENTER`

The `ORA_PER_CONNECTIONS_DUTY` is included, by default, in the following job roles -
`ORA_PER_CONTINGENT_WORKER_ABSTRACT` and `ORA_PER_EMPLOYEE_ABSTRACT`

After adding the privileges, you must regenerate the grants for the data role.

Running Oracle Search initial data ingestion process requires `FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV` function privilege. The privilege is available in the `ORA_FND_APPLICATION_ADMINISTRATOR_JOB` or `ORA_FND_APPLICATION_DEVELOPER_JOB` job roles, by default.

18 HR Help Desk Classic Configuration

HR Help Desk Classic Documentation

The classic HR Help Desk application is used to create and submit HR Help Desk service requests (HRHD SRs). Oracle introduced Redwood Help Desk in release R13.22.07 (21C).

If you are implementing or using the classic version of HR Help Desk, the documentation is located in the appendixes of the new Redwood Help Desk guides.

Related Topics

- [Implementing Redwood Help Desk](#)
- [Using Redwood Help Desk](#)

