Oracle Fusion Cloud Human Resources

Implementing Global Human Resources

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Get Help

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

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

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

Learn About Accessibility

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

Share Your Feedback

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

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

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.	• Overview of Geographies
	Select Address Style and Address Validation	Check the address style and address validation for your country.	• 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.	• 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.	• Enterprise Structures
	Manage Legal Addresses	Create legal addresses for all organizational units of the enterprise before you create legal entities.	• What's a legal address?
	Manage Legislative Data Groups	Define at least one legislative data group for each country your enterprise operates in.	• 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.	• 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.	• 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.	• 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)	• 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.	• 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.	• 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.	• Locations
	Manage Departments	Create organizational units assigned to an employee, cost center, or for data security	• Departments • Departments and Cost Centers
	Manage Jobs	Define a job and its attributes.	• Jobs
	Manage Actions	Define actions to track changes to Human Capital Management (HCM) records, such as changes to employment and assignment records, for example, assignment	• 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			
• Offering: Workforce Deployment • Functional Area: Workforce Information	Manage Person Types	Define person types to maintain information for a group of people in your enterprise.	• Person Types
	Manage Person Name Formats	Configure the predefined person name format types according to your choice.	• Person Name Formats
	Managing Person Name Styles	Define the person name components for a country	• Person Name Styles
	Assignment Statuses	Define assignment status that changes according to changes in HR and payroll statuses.	• 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.

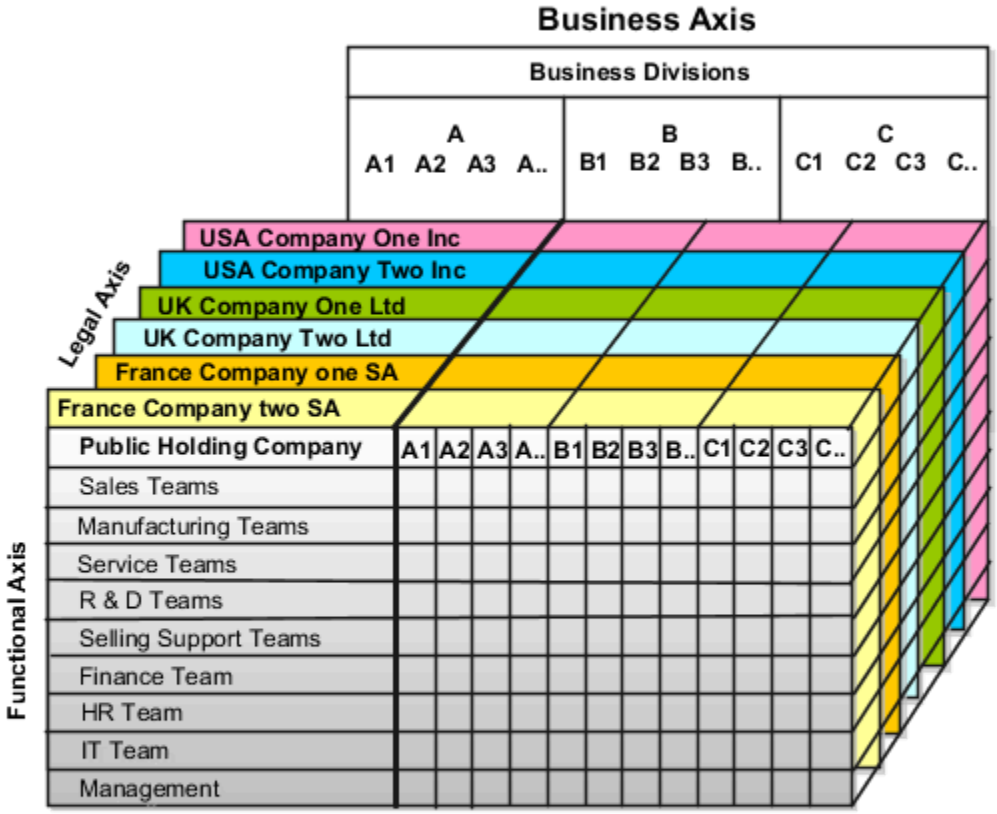
- Legal
- Managerial
- Functional

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.

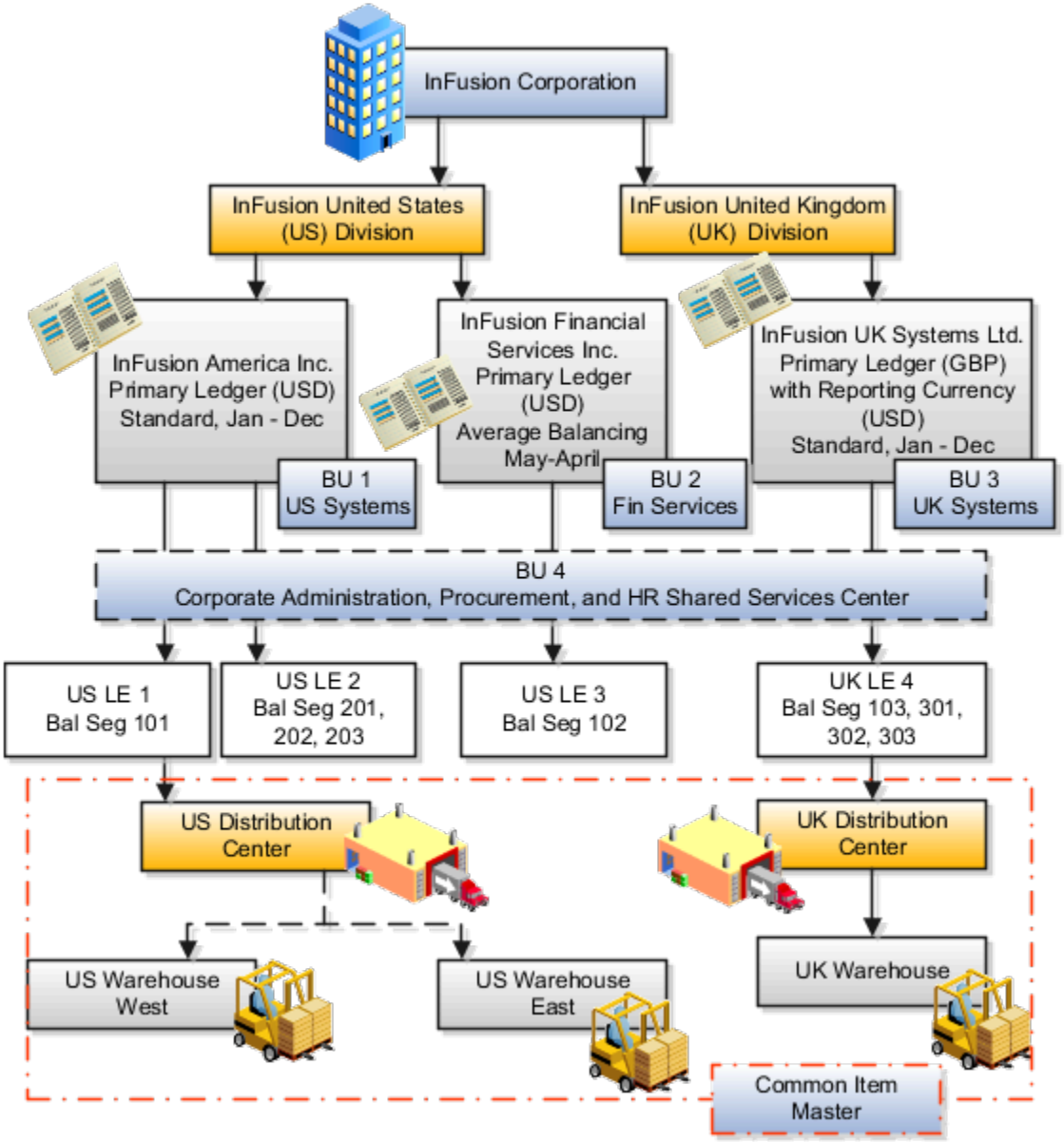
- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you want to achieve proper statutory reporting?
- Your managers need reports that show profit 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									○
BSV = 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.

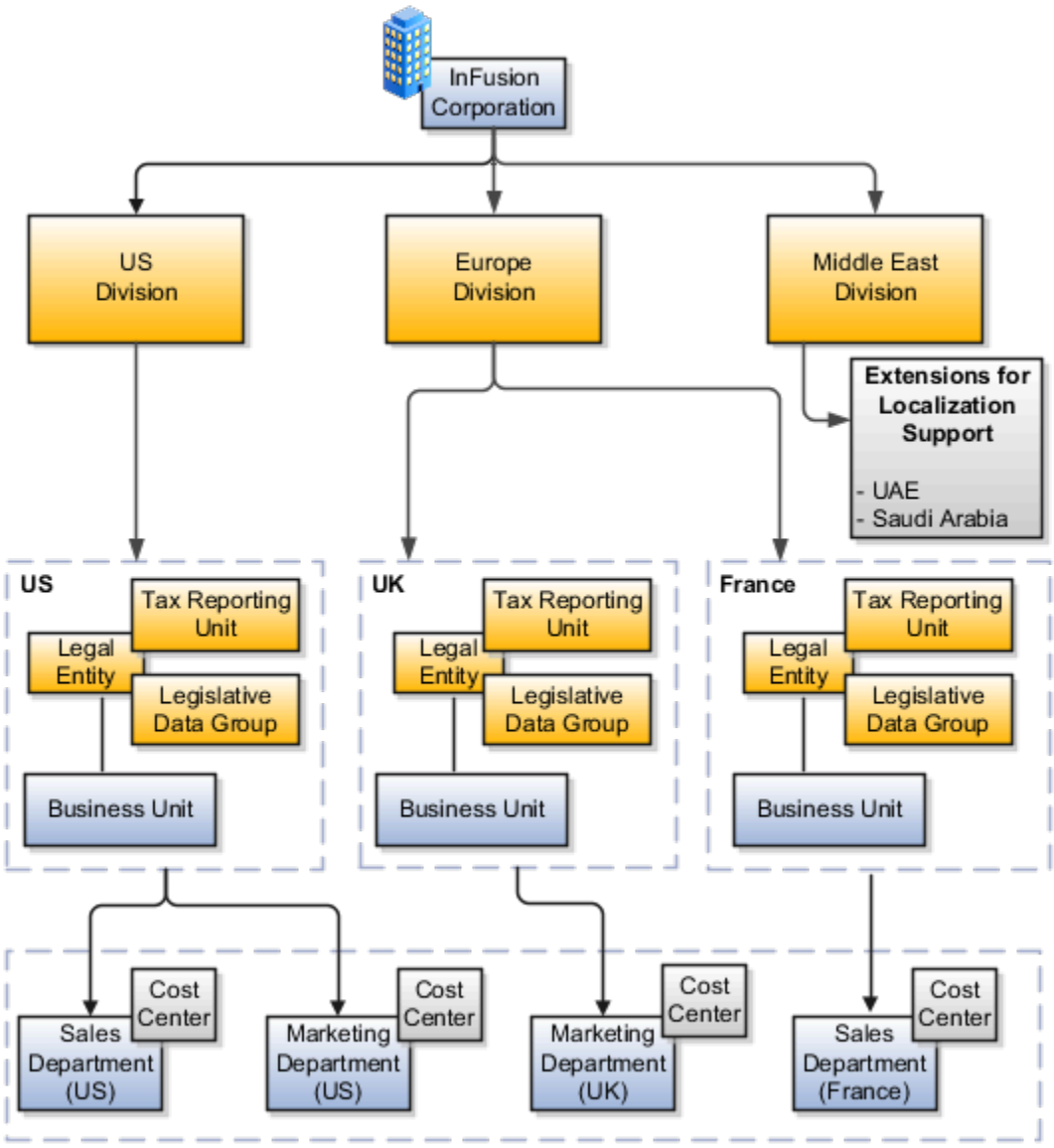
InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

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 then 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
- How do I update existing setup data?

Create Legal Entities, Registrations, and Reporting Units

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

Legal Entity

Create a legal entity by following these steps:

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

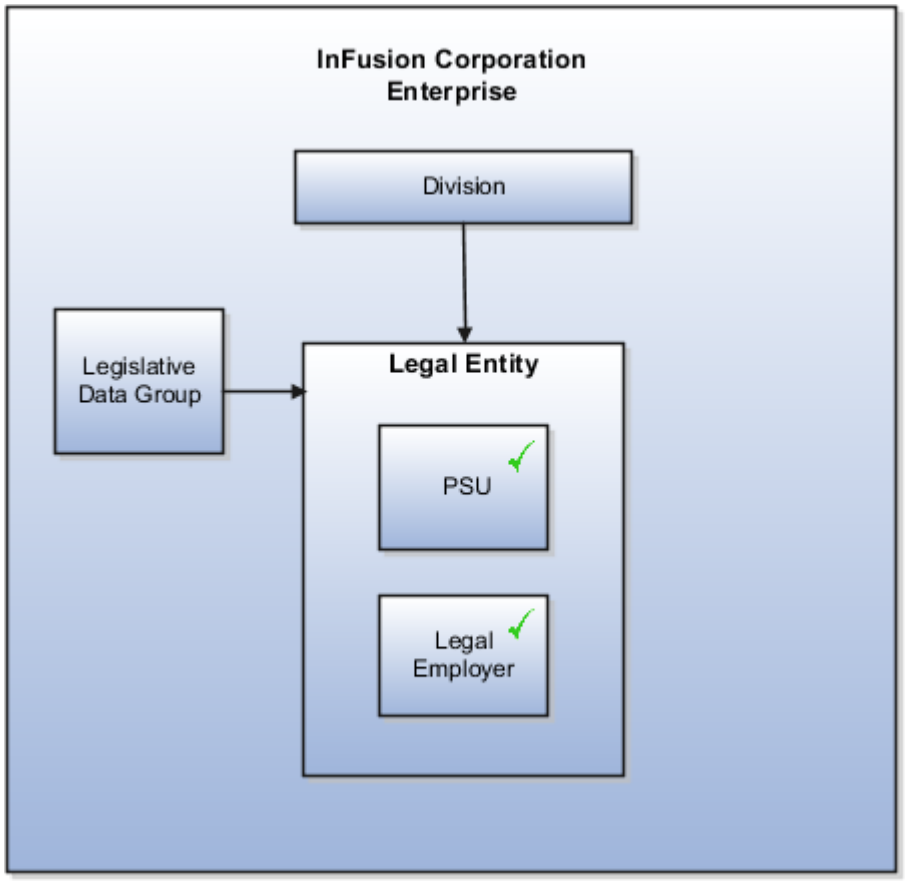
- Simple Configuration
- Multiple Legal Employers and Tax Reporting Units
- One Payroll Statutory Unit and Two Tax Reporting Units
- One Payroll Statutory Unit with Several Tax Reporting Units
- Multiple Payroll Statutory Units with Several Tax Reporting Units

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.



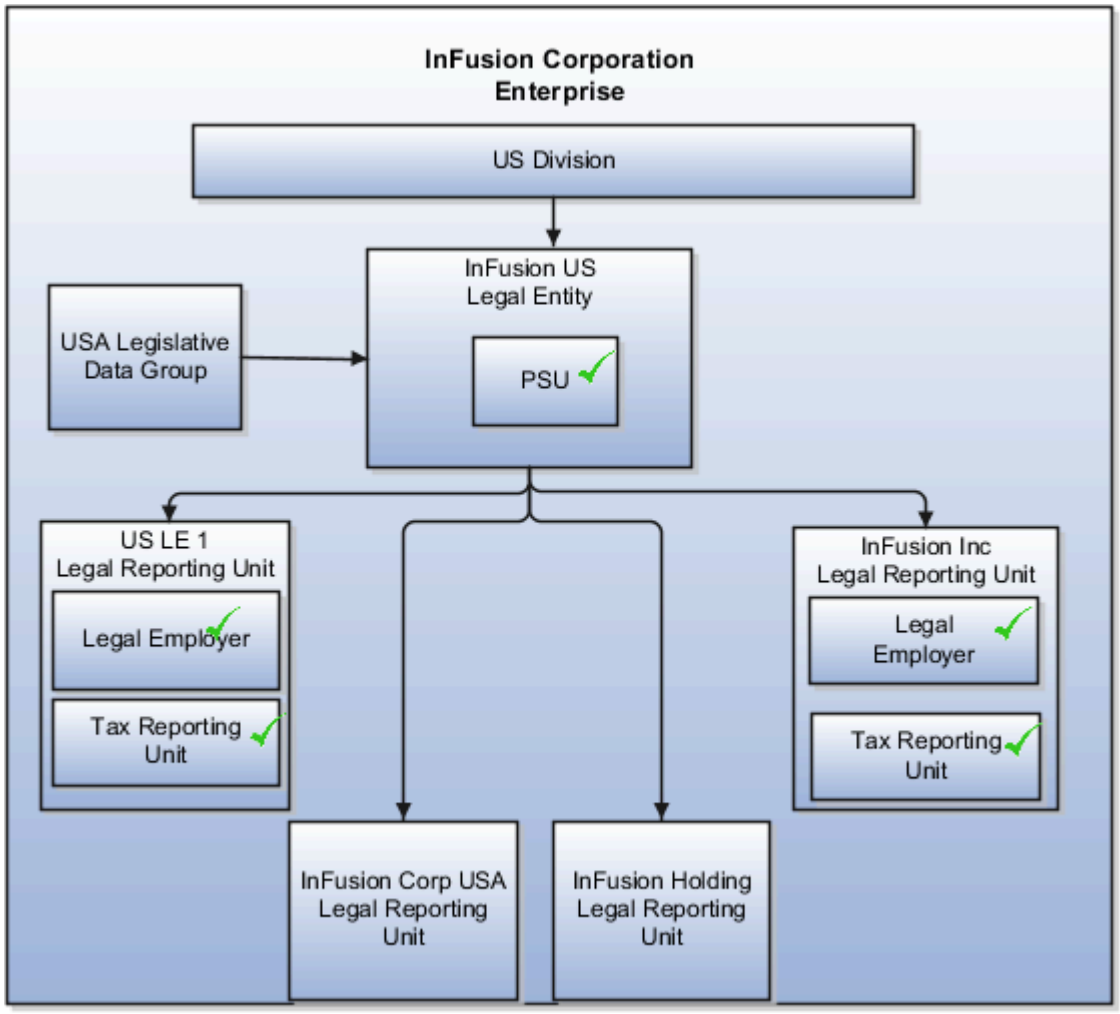
Multiple Legal Employers and Tax Reporting Units

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.

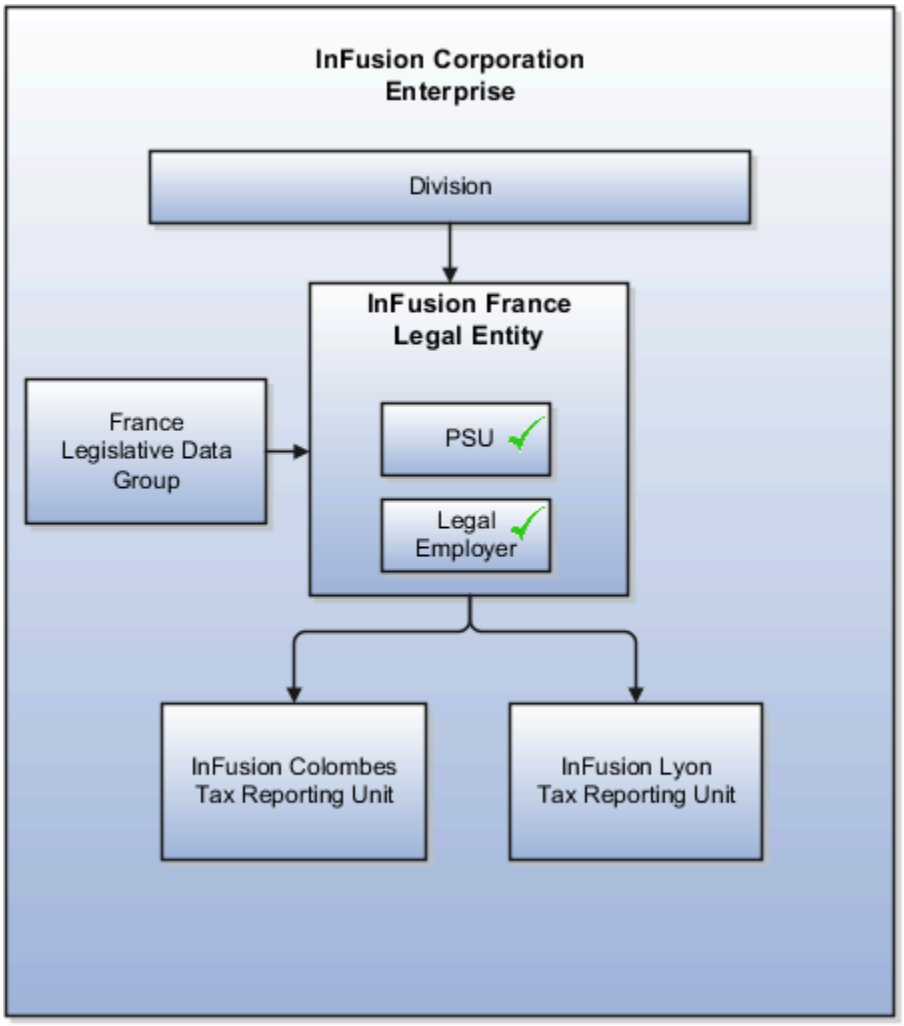


One Payroll Statutory Unit and Two Tax Reporting Units

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.

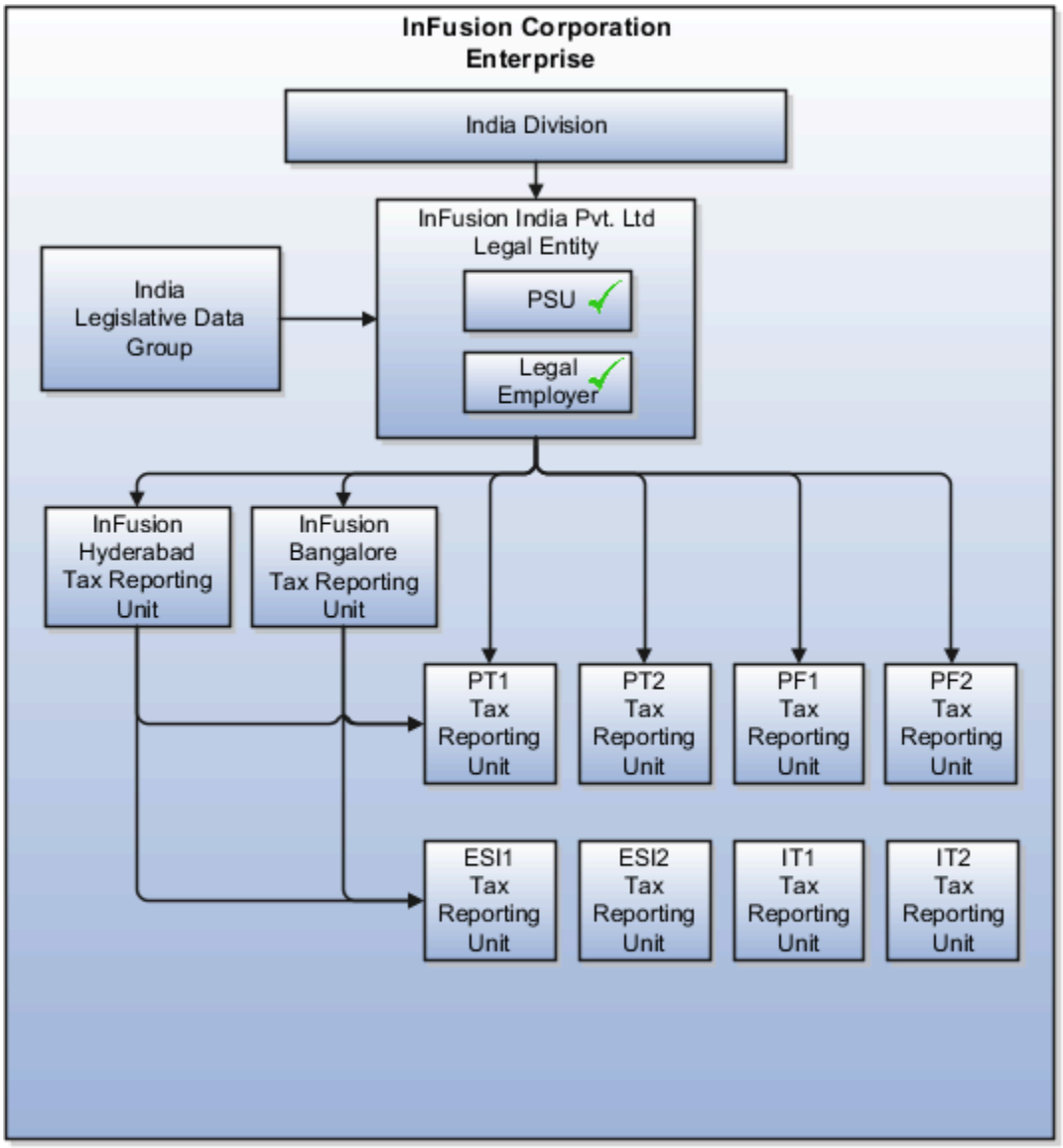


One Payroll Statutory Unit with Several Tax Reporting Units

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.

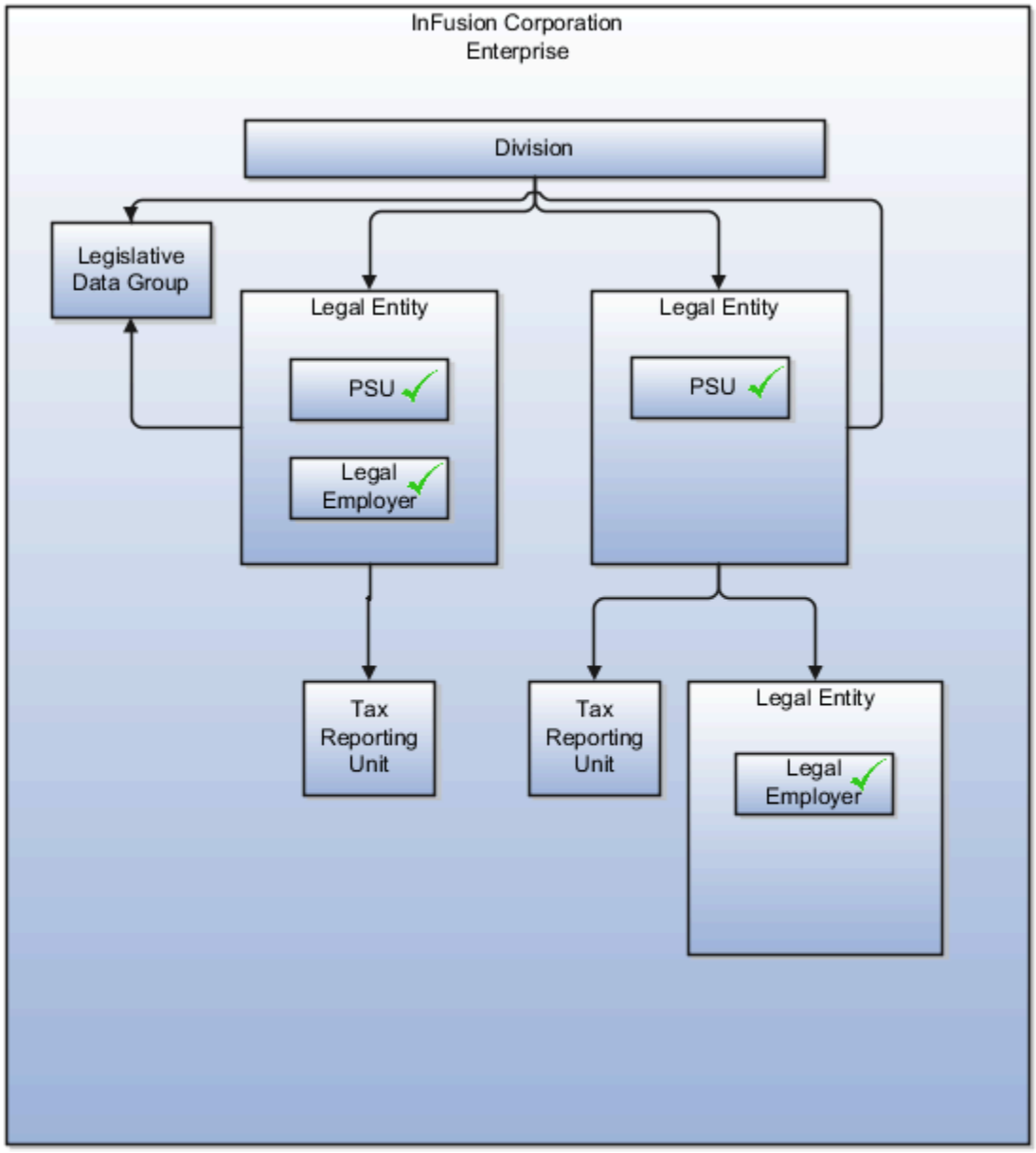


Multiple Payroll Statutory Units with Several Tax Reporting Units

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.

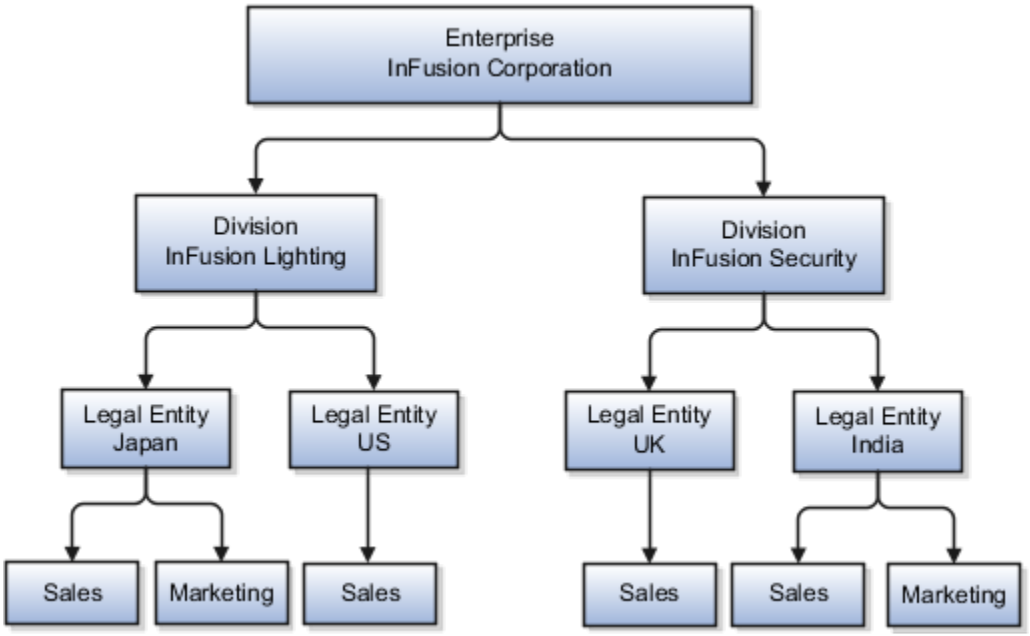
Business Unit Set Assignment

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:

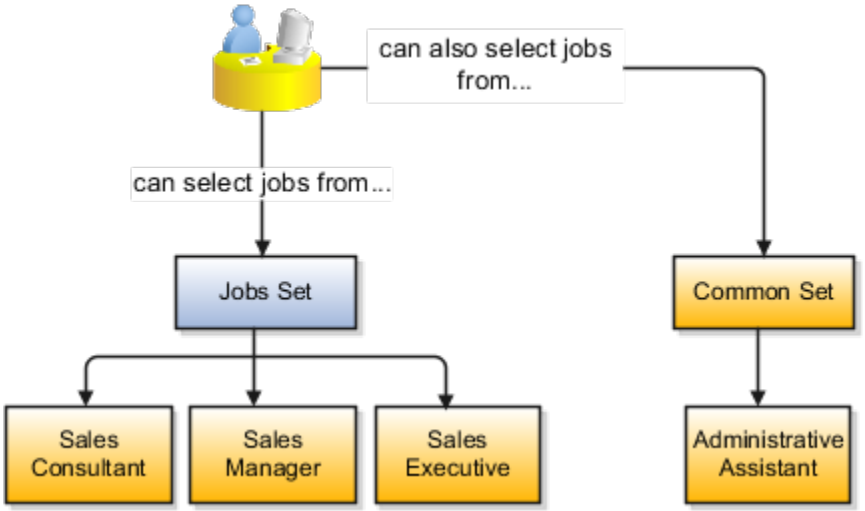
Business Unit	Default Set Assignment	Set Assignment Overrides
Sales_Japan	Sales_Japan_Set for grades, departments, and locations	Jobs set for jobs
Marketing_Japan	Mktg_Japan_Set for grades, departments, and locations	None
Sales_US	Sales_US_Set for grades, departments, and locations	Jobs set for jobs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

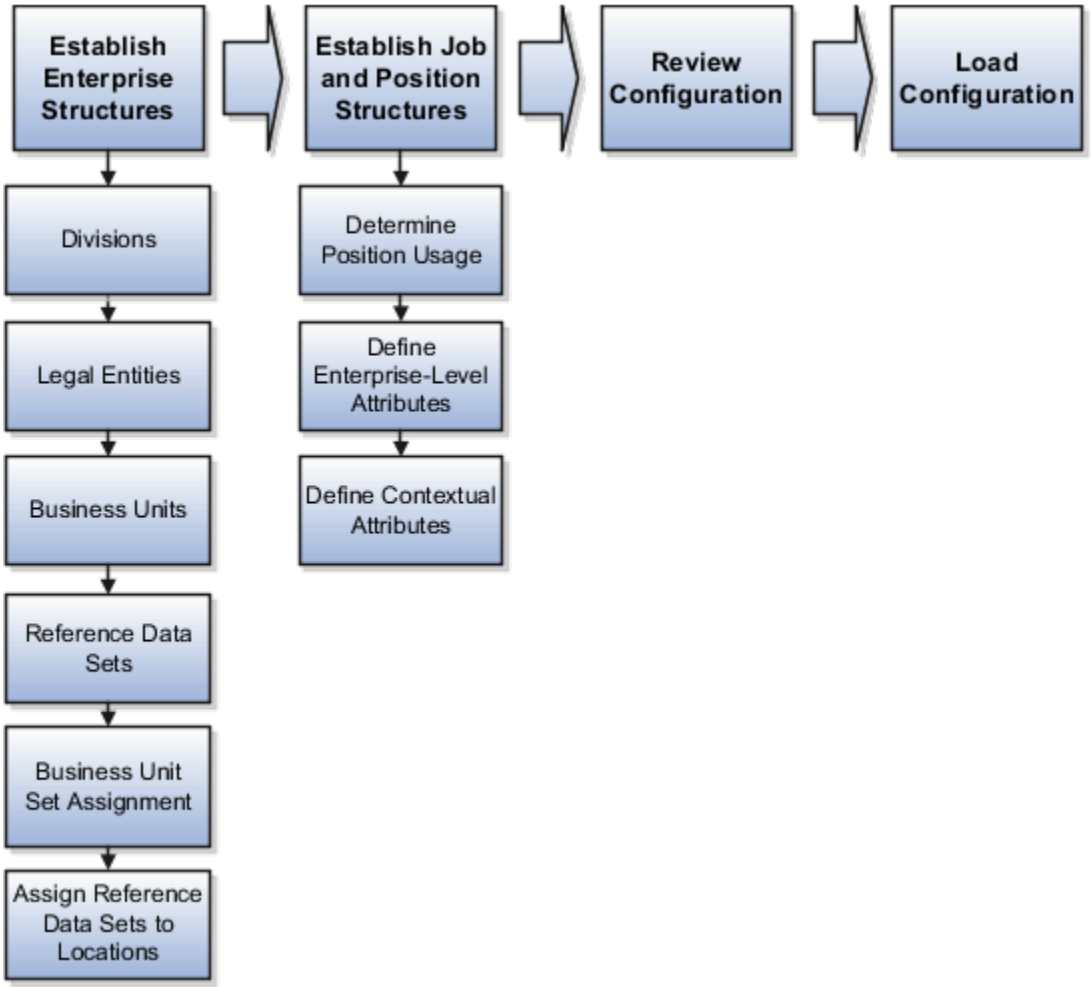
4 Enterprise Structures Configurator (ESC)

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	• Manage Legal Entities • Manage Legal Entity HCM Information • Manage Legal Reporting Unit HCM Information

Business Object	Task
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.

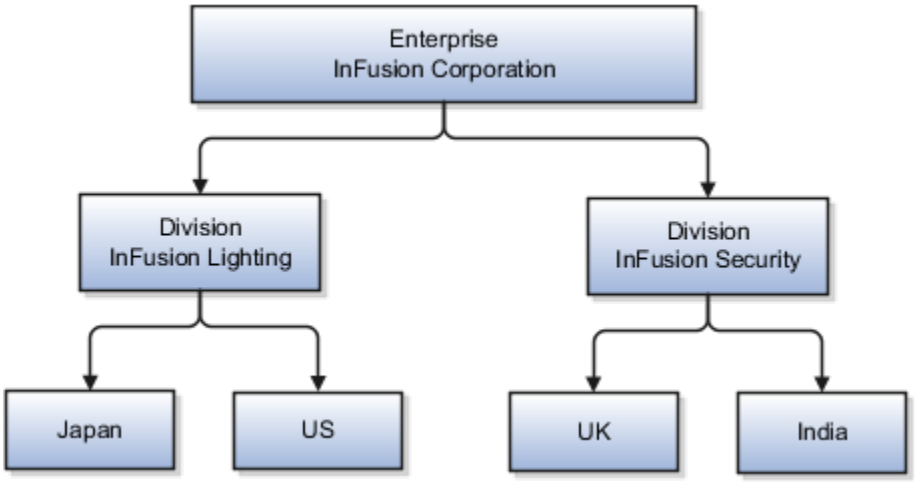
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically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

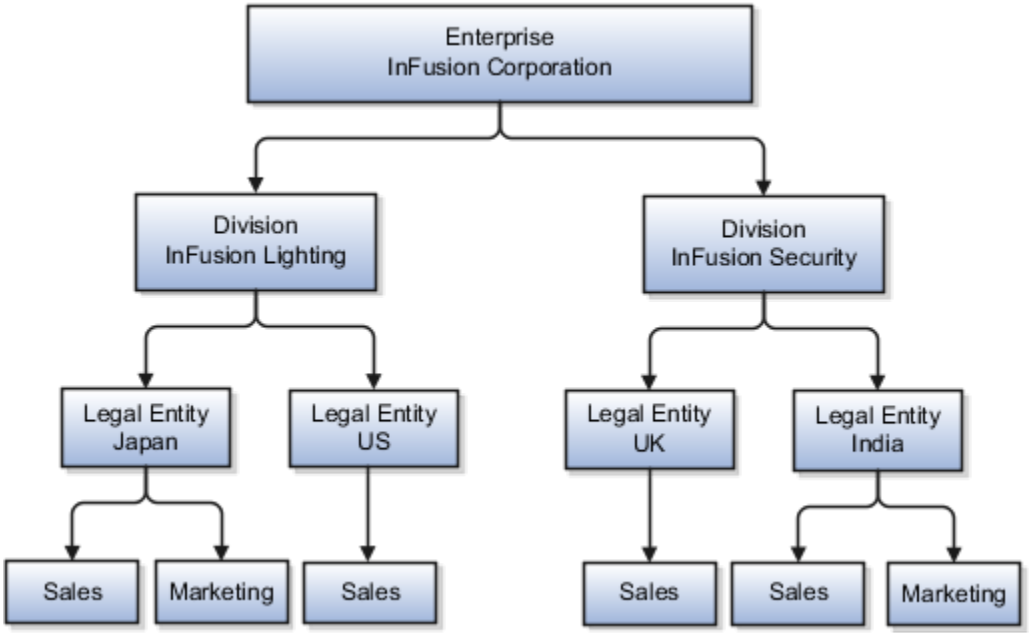
the application displays a table listing both components. You select the check boxes at the intersections of the two components.

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	• US • UK • Japan • India
Country and Division	• InFusion Lighting: Japan • InFusion Lighting: US • Infusion Security: UK • Infusion Security: India

Business Unit Level	Suggested Business Units
Country and business function	• Sales: Japan • Marketing: Japan • Sales: US • Sales: UK • Marketing: India • Sales: India
Division	• InFusion Lighting • InFusion Security
Division and Legal Entity	• InFusion Lighting: Japan • InFusion Lighting: US • Infusion Security: UK • Infusion Security: India
Division and Business Function	• InFusion Lighting, Sales • InFusion Lighting, Marketing • InFusion Security, Sales • InFusion Security, Marketing
Business Function	• Sales • Marketing
Legal Entity	• Legal Entity: Japan • Legal Entity: US • Legal Entity: UK • Legal Entity India
Legal Entity and Business Function	• 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, 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 business verticals, create a division for each such business using the Manage Divisions task. Then use the Manage Departments task to classify the division as a department.

Related Topics

- Model Your Financial Reporting Structure

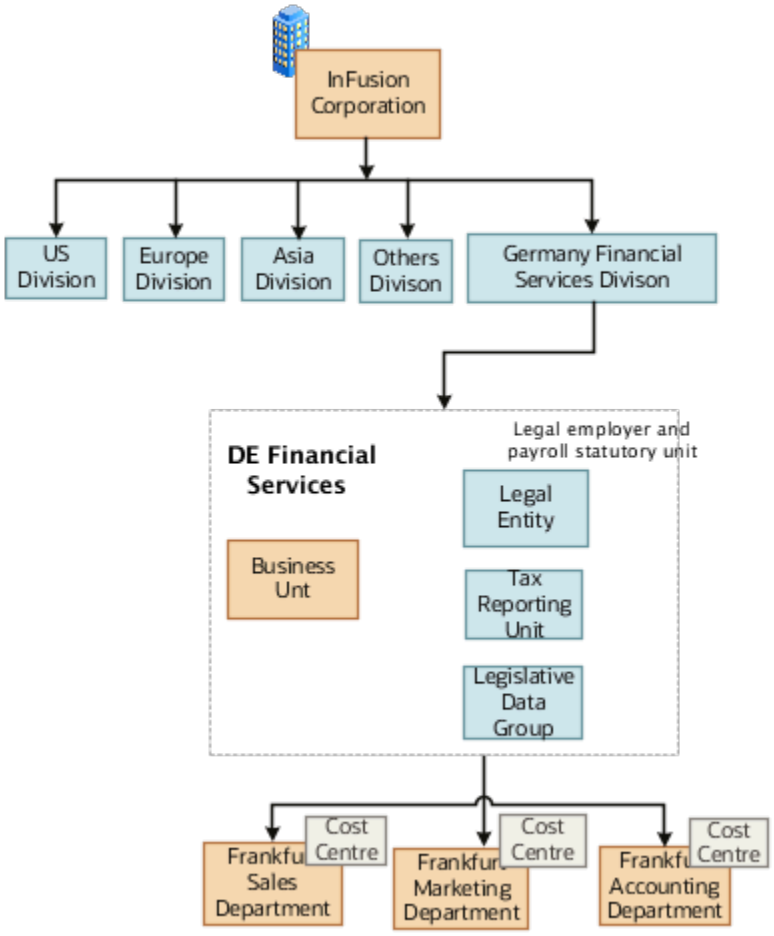
How You Configure Your Enterprise Structure After an Acquisition

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**.

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

Creating a Legislative Data Group

1. 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.
2. On the **Manage Legislative Data Groups** page, click **Create**.
3. 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

4. Click **Submit**.

Creating Legal Entities

1. In the **Setup and Maintenance** work area, locate the **Manage Legal Entity** task. Click **Go to Task** to open the **Manage Legal Entity** page.
2. On the **Manage Legal Entity** page, click **Create**.
3. 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.

Related Topics

- Can I view the address details of the location on the Redwood pages for organizations?
- Can I select an existing organization when I'm creating a new organization in Redwood?
- Can I view the Other Classifications section on the Redwood pages for organizations?

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.

Decision to Consider	In This Example
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.
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?	Define a legal entity for each registered company or some other entity recognized by law. Using the legal entity, you can: • Record assets • Record liabilities • Record income • Pay transaction taxes • Perform intercompany trading In this case, you only need one legal entity. 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. **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.
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.

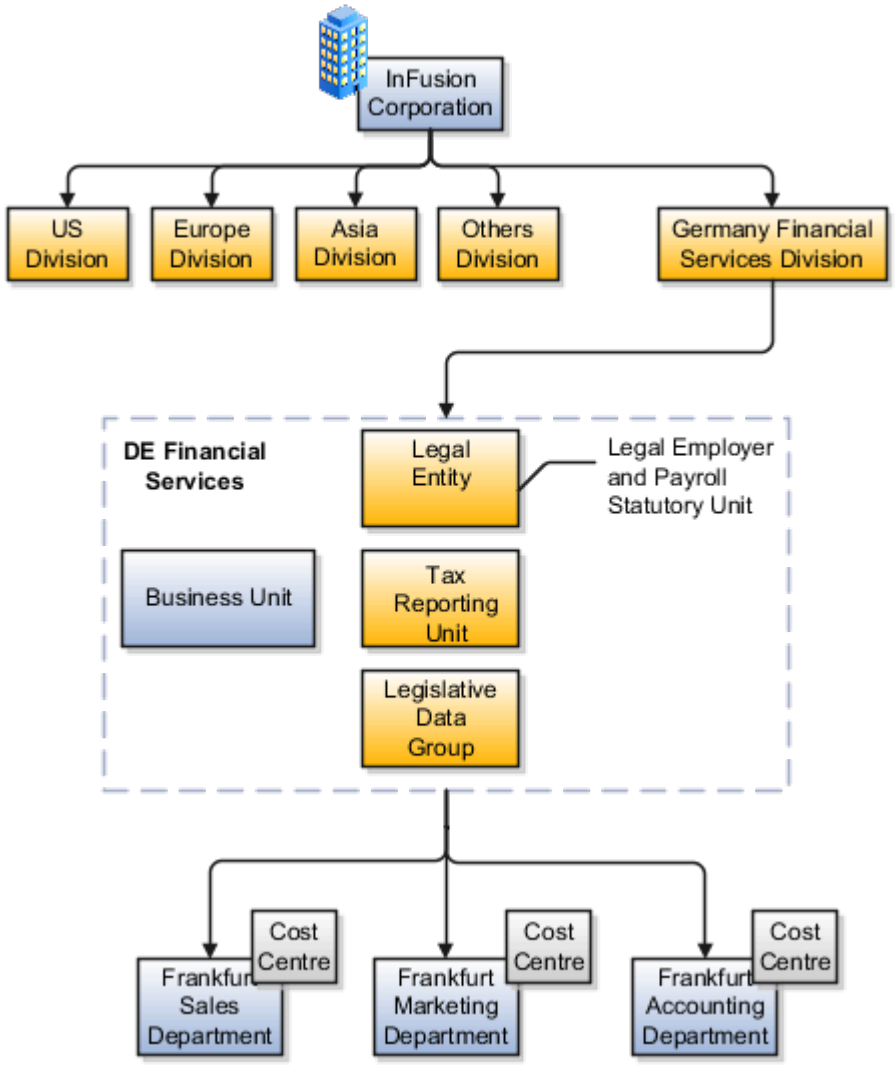
Resulting InFusion Enterprise Structure

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.



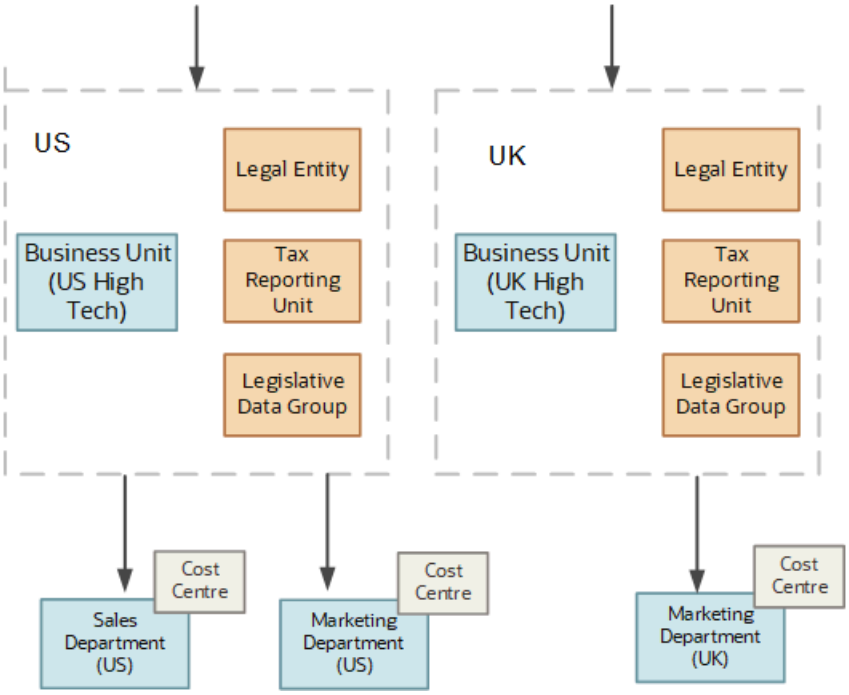
Departments

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
- Can I view the address details of the location on the Redwood pages for organizations?
- Can I select an existing organization when I'm creating a new organization in Redwood?
- Can I view the Other Classifications section on the Redwood pages for organizations?

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:.
    - Offering: Workforce Deployment
    - Functional Area: Financial Reporting Structures
    - 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:
    - Offering: Workforce Deployment
    - Functional Area: Financial Reporting Structures
    - 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:.
    - Offering: Workforce Deployment
    - Functional Area: Financial Reporting Structures
    - 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:
    - Offering: Workforce Deployment
    - Functional Area: Financial Reporting Structures
    - 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.

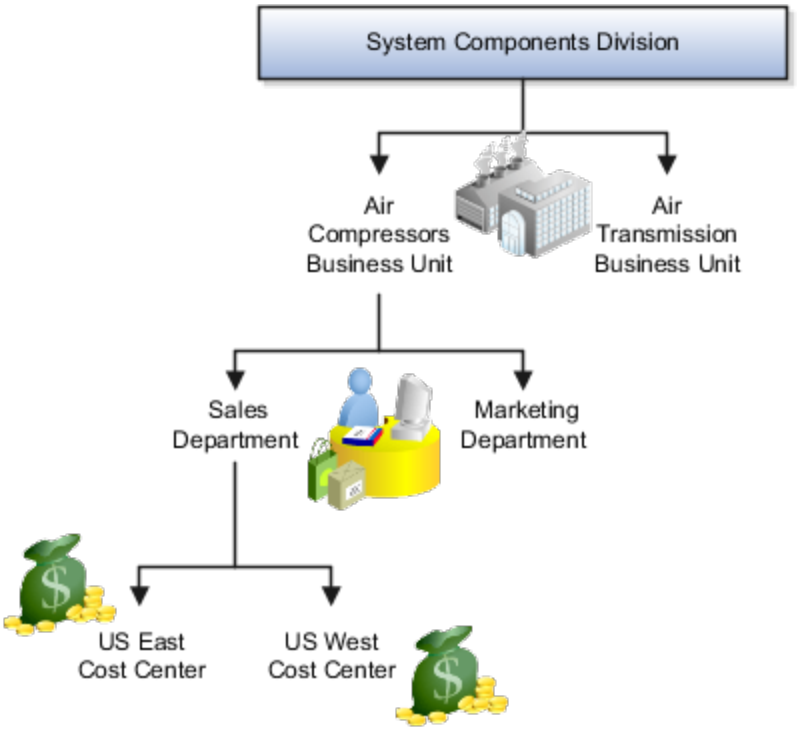
In addition, you must classify departments as project expenditure organizations to enable associating them to project expenditure items. Both project owning organizations and project expenditure organizations can be used by Oracle Subledger Accounting to derive accounts for posting Oracle Fusion Cloud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

> **Note:** On the Redwood department pages, the **Title** field appears by default and it's not controlled by the profile option.

Here's how the Department Title is displayed in the Departments LoV:

- On the Redwood Employment flows, the Department Title is displayed in the Departments LoV by default.
- On the responsive Employment flows, the Department Title isn't displayed in the Departments LoV by default. Use the **Search Configuration** option in the HCM Experience Design Studio to enable the Department Title in the Departments LoV.

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**.

Associate Legal Employers with a Department

You can now associate multiple legal employers with a department using the **Legal Employers That Share This Department** extensible flexfield (EFF) context. If you have enabled Oracle Search for Departments LoV, this will help in filtering the departments based on the selected legal employer, on pages that will implement this feature in the future.

Here are some key points to note:

- You can associate multiple legal employers with a department, but you can't associate the same legal employer twice with the same department.
- You can associate the same legal employer with different departments.
- You can delete the legal employer - department association.
- This legal employer - department mapping is copied when you duplicate a department.
- You can associate legal employers when creating, updating, or correcting a department.
- The legal employer list of values will display all active and inactive legal employers configured. There isn't any filtering for only active legal employers.
- Legal employers are listed in the ascending order of legal employer name.
- A department must have at least one associated legal employer, for the department to be filtered based on a legal employer.
- You can associate departments with legal employers using classic Manage Department page but you can use the department filtering only on Redwood pages because this feature is delivered for REST LOVs only.
- You can also use HCM Data Loader (HDL) to associate legal employers with a department.
- The department - legal employer association is also migrated when you migrate your Department configuration using the Functional Setup Manager (FSM) export/import functionality.
- An extra parameter is added on the REST departmentsLovV2 as follows:
  - LegalEmployerId in findByWord finder.
- If you have enabled Oracle Search for Departments LoV, only pages that have implemented this feature will demonstrate this additional filtering.

In this example, Vision Enterprise has 3 legal employers: Vision Corporation, Vision US, and Vision Consulting, associated with multiple departments in the US. You want to filter departments associated with Vision Corporation.

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

Associate Vision Corporation with the Administrative Computing Department

1. Go to **My Client Groups > Quick Actions > Workforce Structures**.
2. Click the **Manage Departments** task.
3. In the Manage Departments page, click **+Create**.
4. On the Create Department page, in the Department Details section, enter the required details to create a department.

Field	Value
Effective Start Date	8/25/21
Name	Administrative Computing
Title	Admin Computing

5. In the Organization Information EFF: Department Details section, click **Add** in the **Legal Employers That Share This Department** section to associate the Vision Corporation legal employer with this department.
6. Select **Vision Corporation** from the **Legal Employer** list.

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

7. Click **OK**.
8. Click **Submit**.

Related Topics

- Departments
- Configure Extensible Flexfields
- Guidelines for Loading Organizations
- Departments List of Values V2
- Extending HCM Redwood Applications Using Visual Builder Studio

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
- Can I view the address details of the location on the Redwood pages for organizations?
- Can I select an existing organization when I'm creating a new organization in Redwood?
- Can I view the Other Classifications section on the Redwood pages for organizations?

Worker Union Management

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

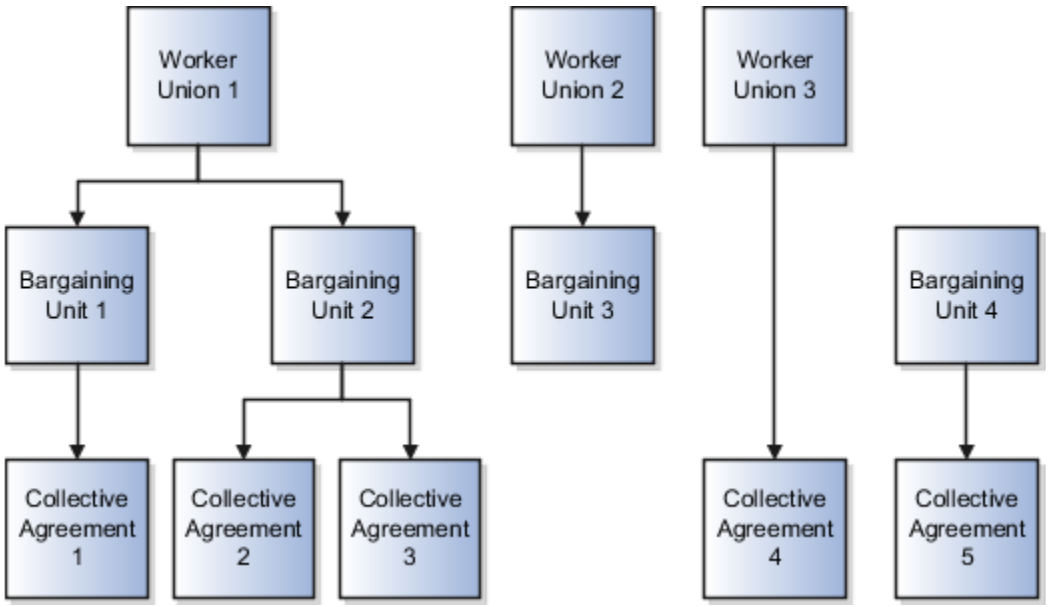
- Worker Unions
- Bargaining Units
- Collective Agreements

Worker Unions

The worker union is a HCM organization. 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.

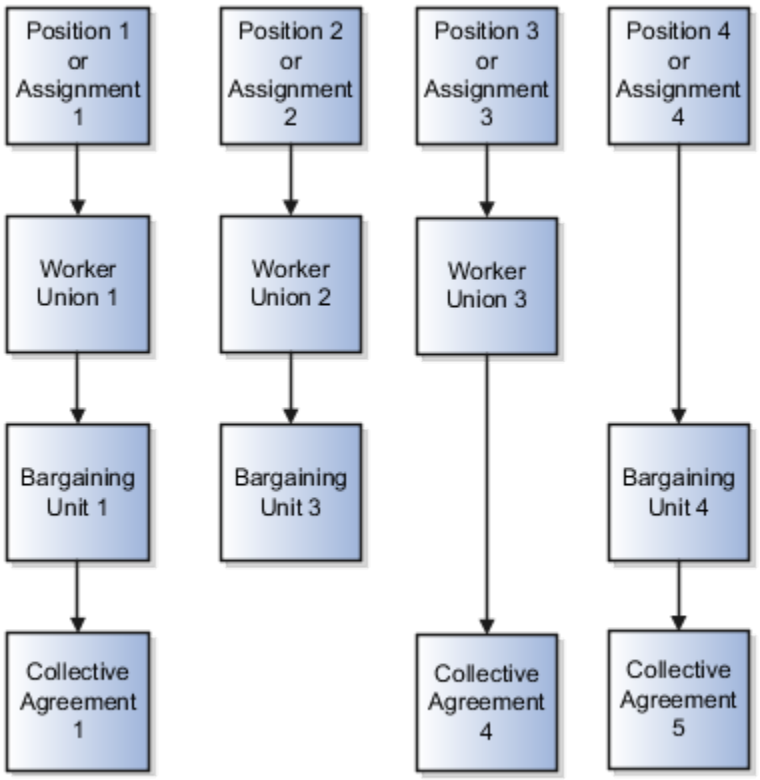
You can optionally associate worker unions with their affiliated bargaining units. The values in the Bargaining Unit and Location fields are filtered to match the country you selected. You can add more than one work union contact and enter the contact details, such as contact name, union title, work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

Attribute	Linking Object	Filter Conditions
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. • 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	**Note:** The LOV is filtered to show only those values that match the country of the legal employer on the worker assignment. 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. If you select a union without selecting a bargaining unit, the LOV is filtered this way: • 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). If you select a bargaining unit without selecting a union, the LOV is filtered this way: • 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). If you select a union and a bargaining unit, the LOV is filtered this way: • 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
Collective Agreement	Position	As there is no legislation context available on for a position, the LOV isn't filtered based on the collective agreement country. If you don't select a union or bargaining unit, the collective agreement LOV is filtered to show all active collective agreements as of the position start date. If you select a union without selecting a bargaining unit, the LOV is filtered this way: • 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). If you select a bargaining unit without selecting a union, the LOV is filtered this way: • 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). If you select a union and a bargaining unit, the LOV is filtered this way: • 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
		Note: • The global collective agreement values can be used on a position by configuring the following profile option: o Code: ORA_PER_ALLOW_GLOBAL_CAGR_ON_POSITIONS o 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.

Related Topics

- Can I view the address details of the location on the Redwood pages for organizations?
- Can I select an existing organization when I'm creating a new organization in Redwood?
- Can I view the Other Classifications section on the Redwood pages for organizations?

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.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_COL_AGREEMENTS_F	PER_COL_AGREEMENTS_DFF	Collective Agreements Attributes	For storing additional information regarding collective agreements.	Available for use.
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.

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

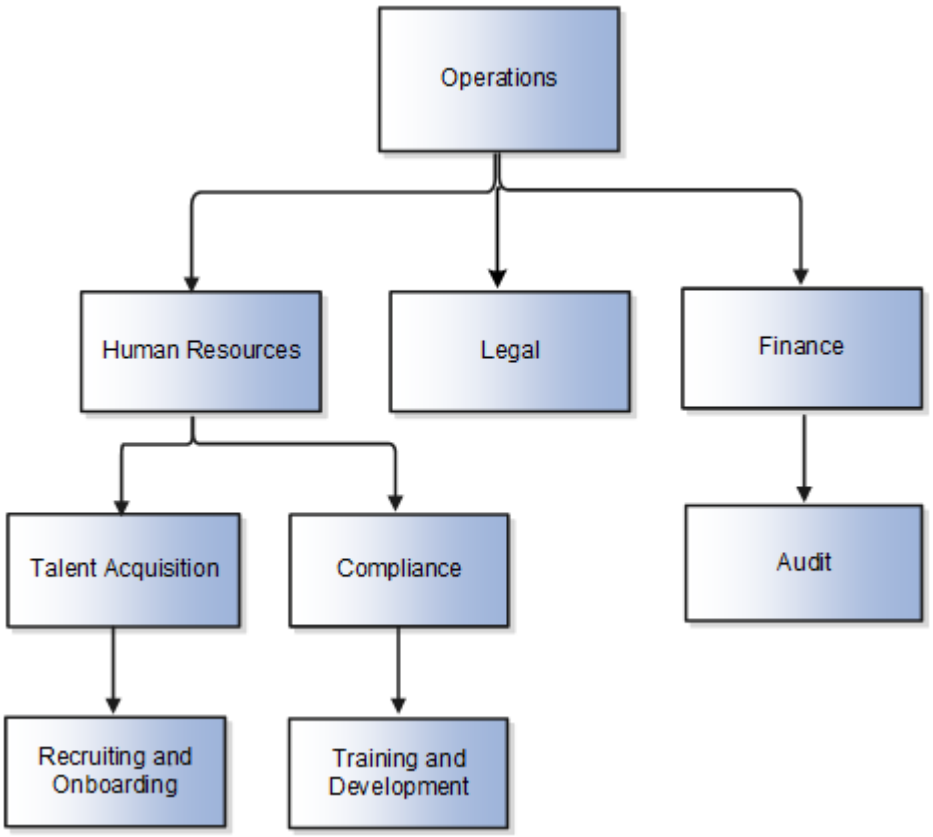
A department tree is a hierarchical representation of your departments. You can create versions of department trees but only one tree version is active at a time. A department can’t be added more than once in the same tree version.

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

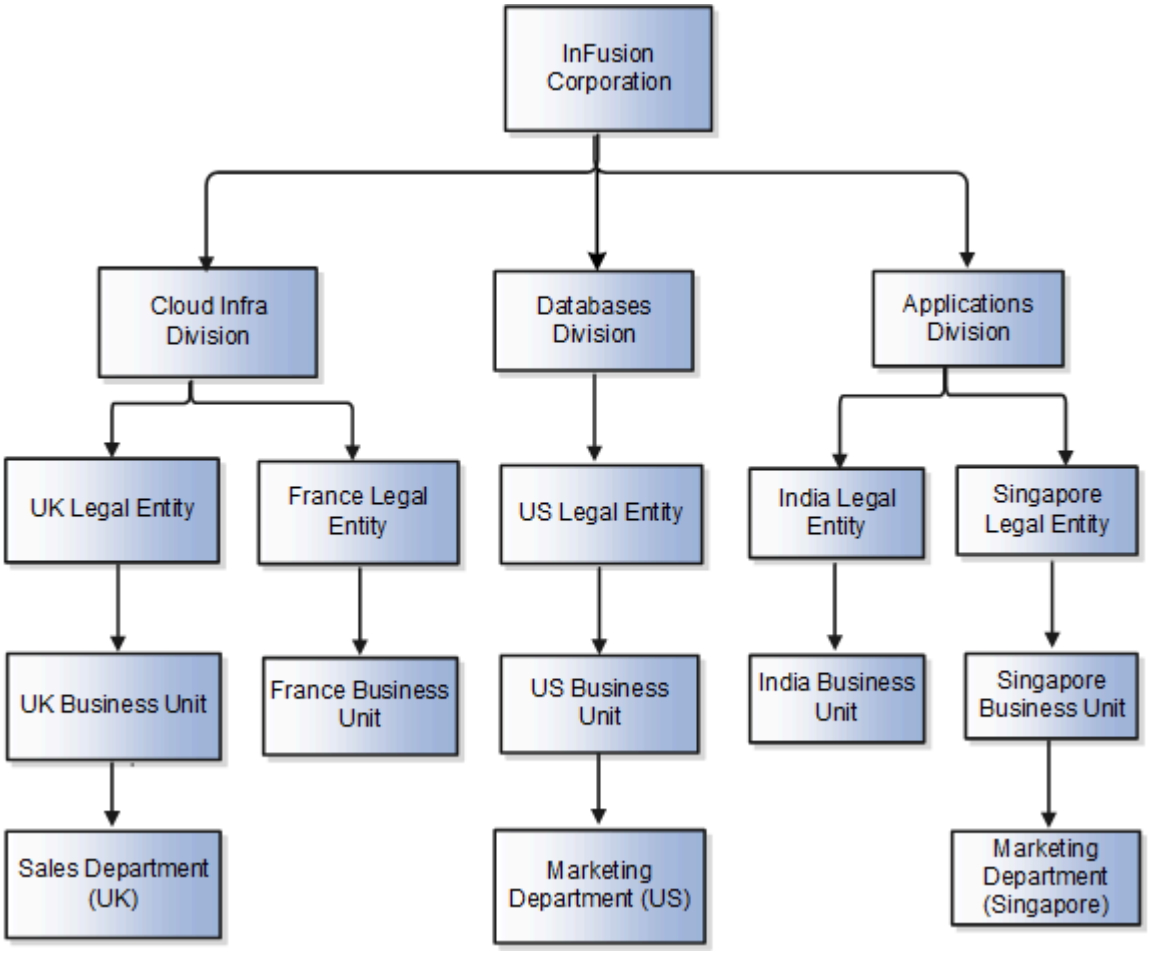
An organization tree is a hierarchical representation of your various organizational entities. You can select any organization including divisions, legal employers, business units, departments, and so on to create your organization tree. You can create versions of organization trees but only one tree 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

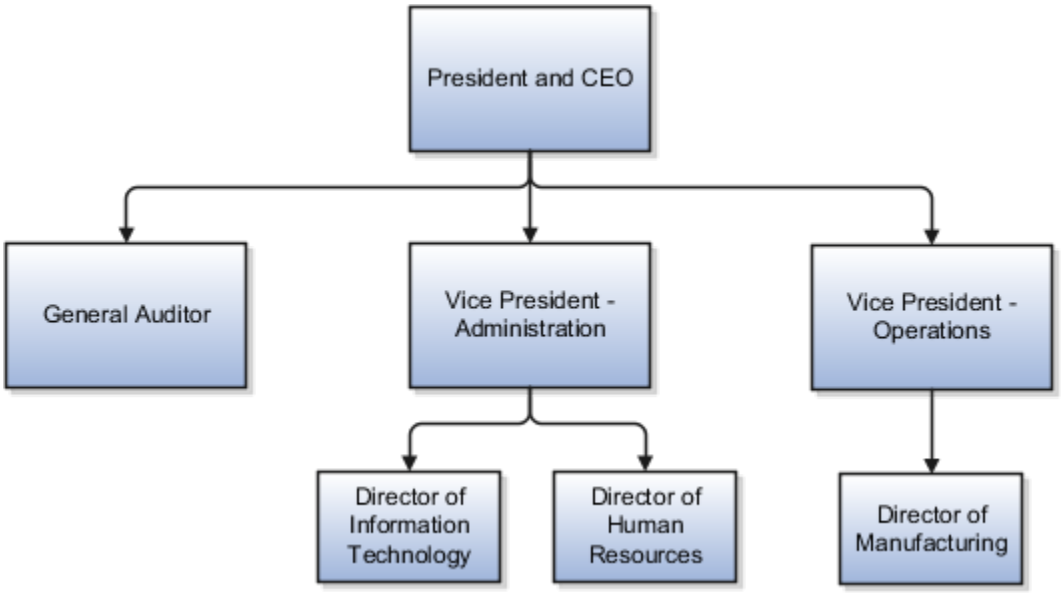
You can create multiple position trees using the predefined position tree structure in the Workforce Structures work area. You can then create multiple versions to establish reporting relationships among positions. Position trees can have only one top node.

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.

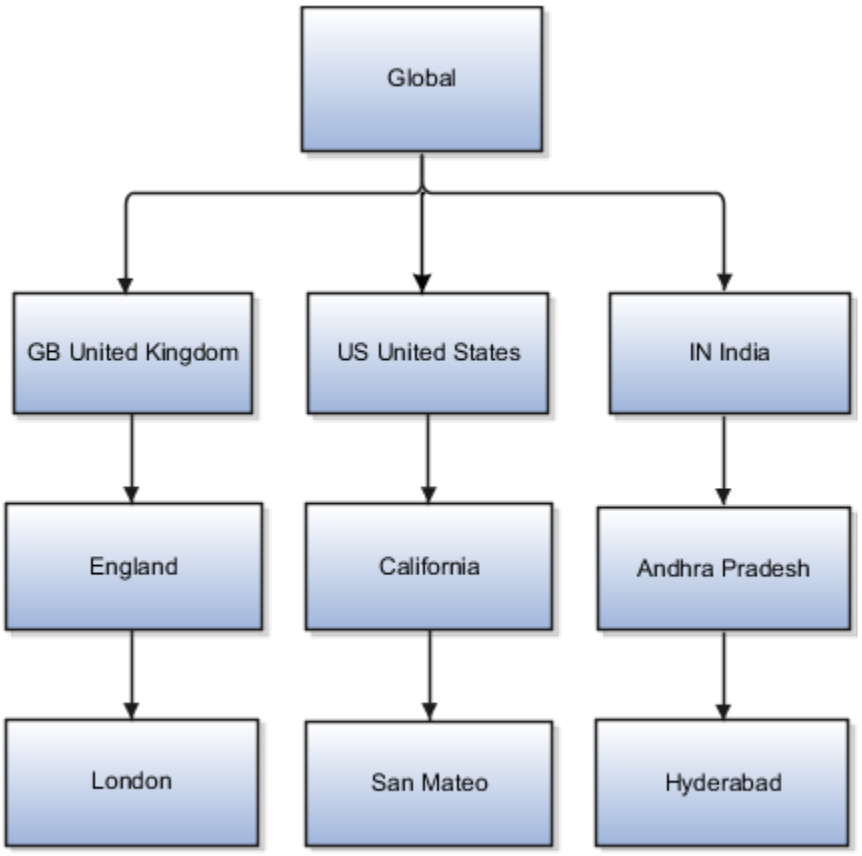
Calendar Events

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, 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.

Related Topics

- Can I select an existing organization when I'm creating a new organization in Redwood?
- Can I view the Other Classifications section on the Redwood pages for organizations?

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.

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.

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 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.

6 Locations

Locations

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

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

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

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

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

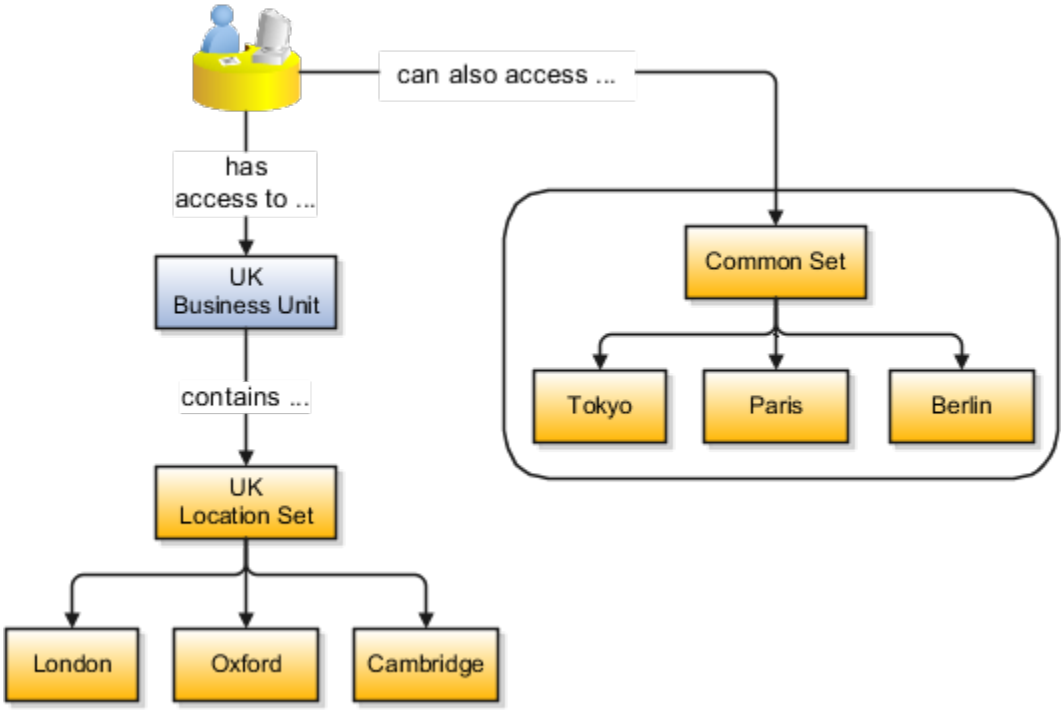
Location Sets

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

Note the following:

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

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



Upload Locations Using a Spreadsheet

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

To use this option:

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

You can upload the spreadsheet multiple times to accommodate revisions.

Update Location Details

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

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

Related Topics

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

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

6. 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.
7. Select **Vision Corporation** from the **Legal Employer** list.

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

8. Click **OK**.
9. Click **Submit**.

Related Topics

- Filter Locations Based on Legal Employers

FAQs for Locations

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

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

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

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.

7 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.

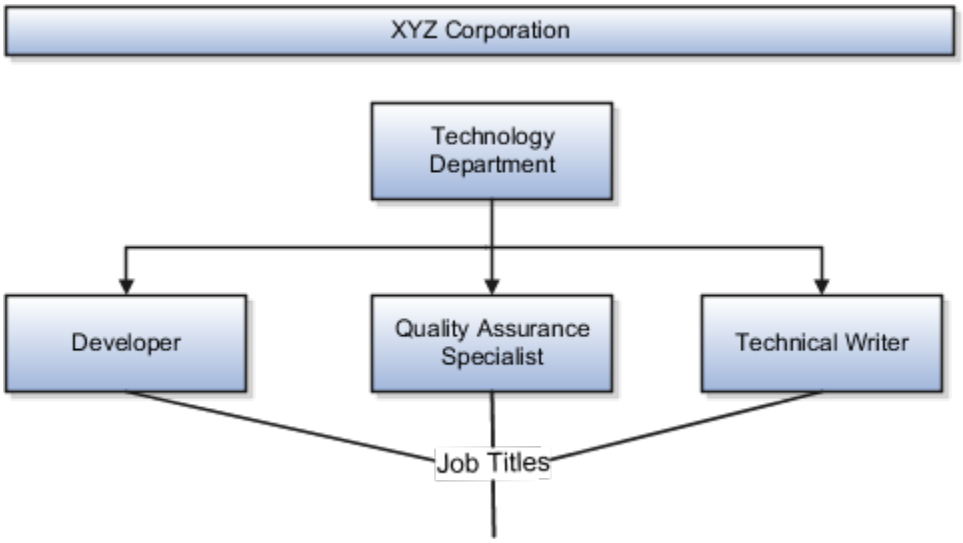
Software Industry

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

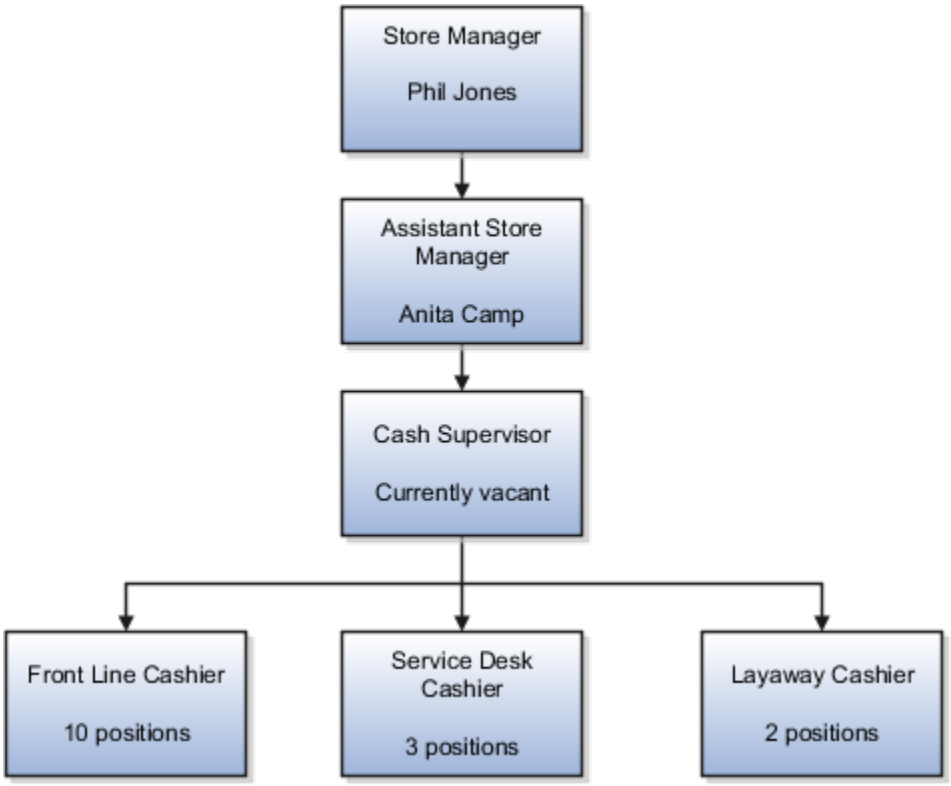
ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of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

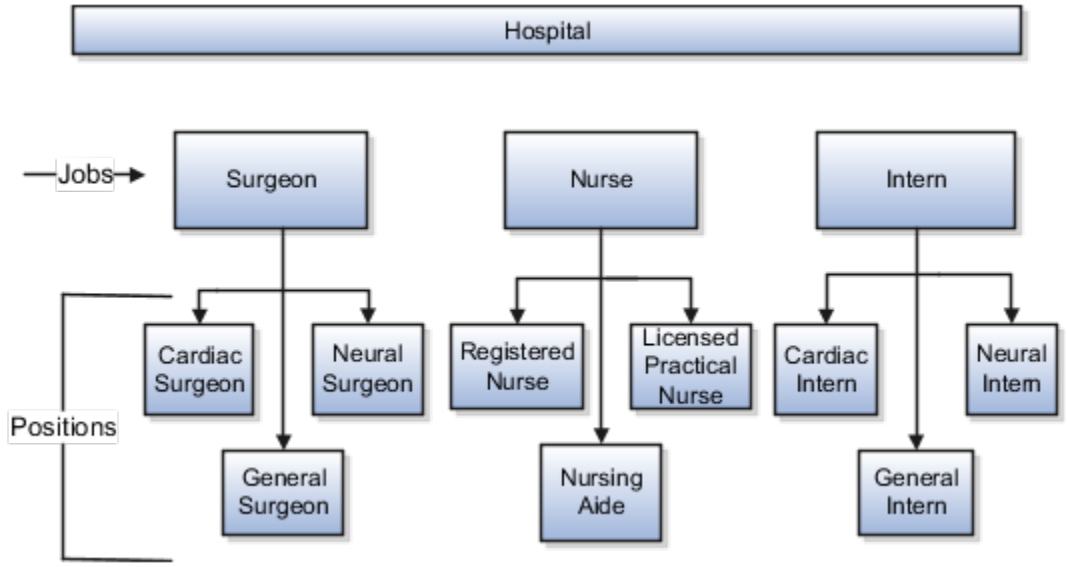


Health Care Industry

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

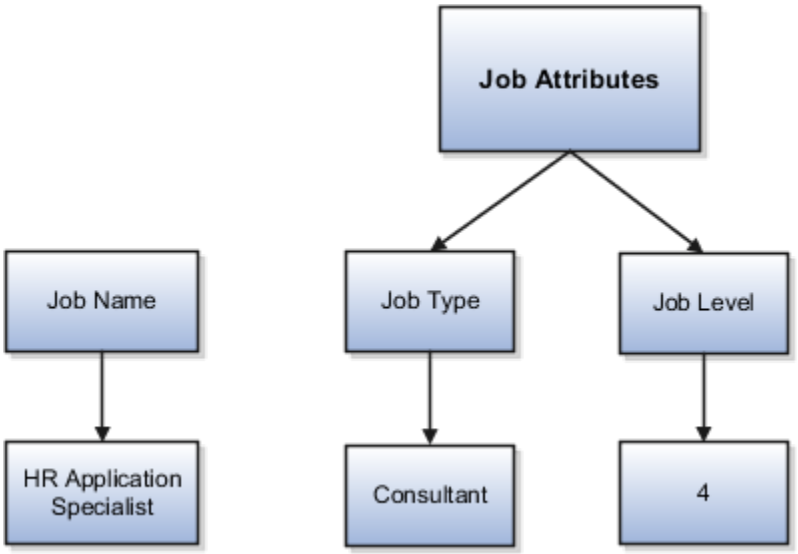
When you define a job, you enter a value for the name of the job. To make job names more specific, set up attributes to identify additional details about the job. This includes the nature of the work that is performed or the relative skill

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.



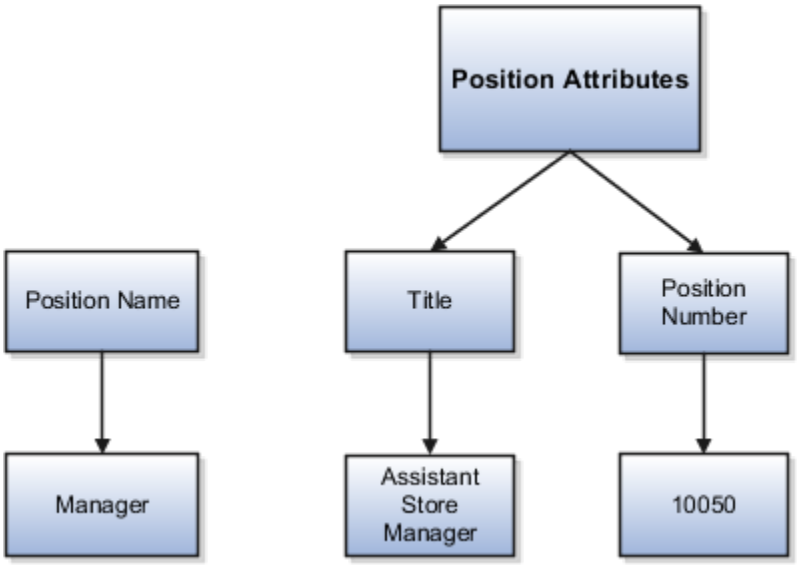
Enterprise-Level Position Attributes

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.

Scheduling Group Attribute for Jobs

You can use scheduling groups to group similar jobs for the purpose of workforce scheduling.

For example: In healthcare, the skill set of a Registered Nurse or RN may include multiple jobs in HCM such as Registered Nurse (RN), Charge Nurse (CN), and Certified Nurse Assistant (CNA). A staffing need for an RN can be fulfilled by any one of these different jobs defined in HCM.

Scheduling group is an optional attribute that you can add to jobs. It's defined as a lookup, and it's supported by the ORA_PER_SCHEDULING_GROUP lookup type. You can define the lookup values according to your requirement by using the **Manage Common Lookups** task.

Here are some more details about this attribute:

- Scheduling group isn't a required attribute.
- Its default value is blank.

- In the Job Duplicate flow, the value of this field is copied from the source job.
- You can upload data for this attribute using HCM Data Loader (HDL) and HCM Spreadsheet Data Loader (HSDL).
- The Scheduling Group attribute is also migrated when you migrate your job configuration using the export and import functionality in Functional Setup Manager (FSM).
- You can make date-effective updates and correct the existing value of this attribute.
- The Scheduling Group attribute is added to the **ManageJobs** data model. You can add this attribute to the **UpdateJobReport**, **CreateJobReport**, and **DTDeleteJobReport** reports by customizing the BIP templates, if required.

Associate Legal Employers with a Job

You can associate multiple legal employers with a job using the **Legal Employers That Use This Job** extensible flexfield (EFF) context. If you have enabled Oracle Search for Jobs LoV, this will help in filtering the jobs based on the selected legal employer, on pages that will implement this feature in the future.

Here are some key points to note:

- You can associate multiple legal employers with a job, but you can't associate the same legal employer twice with the same job.
- You can associate the same legal employer with different jobs.
- You can delete the legal employer - job association.
- This legal employer - job mapping is copied when you duplicate a job.
- You can associate legal employers when creating, updating, or correcting a job.
- The legal employer list of values will display all active and inactive legal employers configured. Filtering isn't done for only active legal employers.
- Legal employers are listed in the ascending order of legal employer name.
- Jobs are first filtered based on the set. And thereafter, if an association exists, they're filtered based on the legal employers.
- A job must have at least one associated legal employer, for the job to be filtered based on a legal employer.
- You can associate jobs with legal employers using both classic and responsive job pages but you can use the job filtering only on Redwood pages because this feature is delivered for REST LOVs only.
- You can also use HCM Data Loader (HDL) to associate legal employers with a job.
- The job - legal employer association is also migrated when you migrate your Job configuration using the Functional Setup Manager (FSM) export/import functionality.
- An extra parameter is added on the REST jobsLovV2 as follows:
    - LegalEmployerId in findByWord finder.
- If you have enabled Oracle Search for Jobs LoV, only pages that have implemented this feature will demonstrate this additional filtering.

In this example, Vision Enterprise has 3 legal employers Vision Corporation, Vision US, and Vision Consulting associated with multiple jobs in the US. You want to filter jobs associated with Vision Corporation.

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

Associate Vision Corporation with the Assistant Trainer Job

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

Section	Field	Value
When and Why	When does this job start?	8/25/21
Job Details	Name	Assistant Trainer
Job Details	Code	ASST_TRAINER

6. In the Additional Info section, click **Add** in the **Legal Employers That Use This Job** section to associate the **Vision Corporation** legal employer with this job.
7. Select **Vision Corporation** from the **Legal Employer** list.

   > **Note:** As a prerequisite, the legal employer must already exist.

8. Click **OK**.
9. Click **Submit**.

Related Topics

- Jobs
- Configure Extensible Flexfields
- Guidelines for Loading Jobs
- Jobs List of Values V2
- Extending HCM Redwood Applications Using Visual Builder Studio

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 StudioIn 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

View Details of Associated Profiles and Open Profiles Pages from Redwood Job or Position Pages

On the read-only, create, and edit pages for jobs and positions in Redwood, you can see a read-only view of all the associated profiles. You can view all the profile details without leaving the job or position page.

This feature is available only in the Redwood job and position pages.

The **Associated Profiles** section of the job or position page shows all the profiles associated with a job or position. For each of the associated profiles, an individual **Profile details** link is displayed. When you click the link for an associated profile, a panel drawer opens, showing the entire details for that particular associated profile.

> **Note:** The **Associated Profiles** read-only section appears in the view, create, and edit pages for jobs and positions. If you add an associated profile to this section while creating or editing a job or position, the **Profile details** link for the profile that you're adding will appear only after you click the **Save** button for that profile.

You can also open the job profiles and position profiles search pages from within a view-only job or position page respectively in Redwood. All the profiles associated with that particular job or position will show up by default on the profiles page. If you clear this search by closing the **Job Name** or **Position Name** filter chip, you will see a list of all the available job profiles or position profiles respectively.

You can create or edit a profile on the profile page, and then associate it with the same job or position, or with any other job or position. Clicking the Back arrow will take you back to the same view page.

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.

Field	Description

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**.
6. 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	○ Request a New Position ○ Duplicate Position
Update	PER_POS_UPD	○ Update Position ○ Correct Position ○ Request a Position Change

7. On the **Edit Action** page, click **Continue** in the Action section.
8. Click **Associate**.
9. Select the action reason you created.
10. Enter a start date for the association.
11. Select the roles you want to associate.
12. 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 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

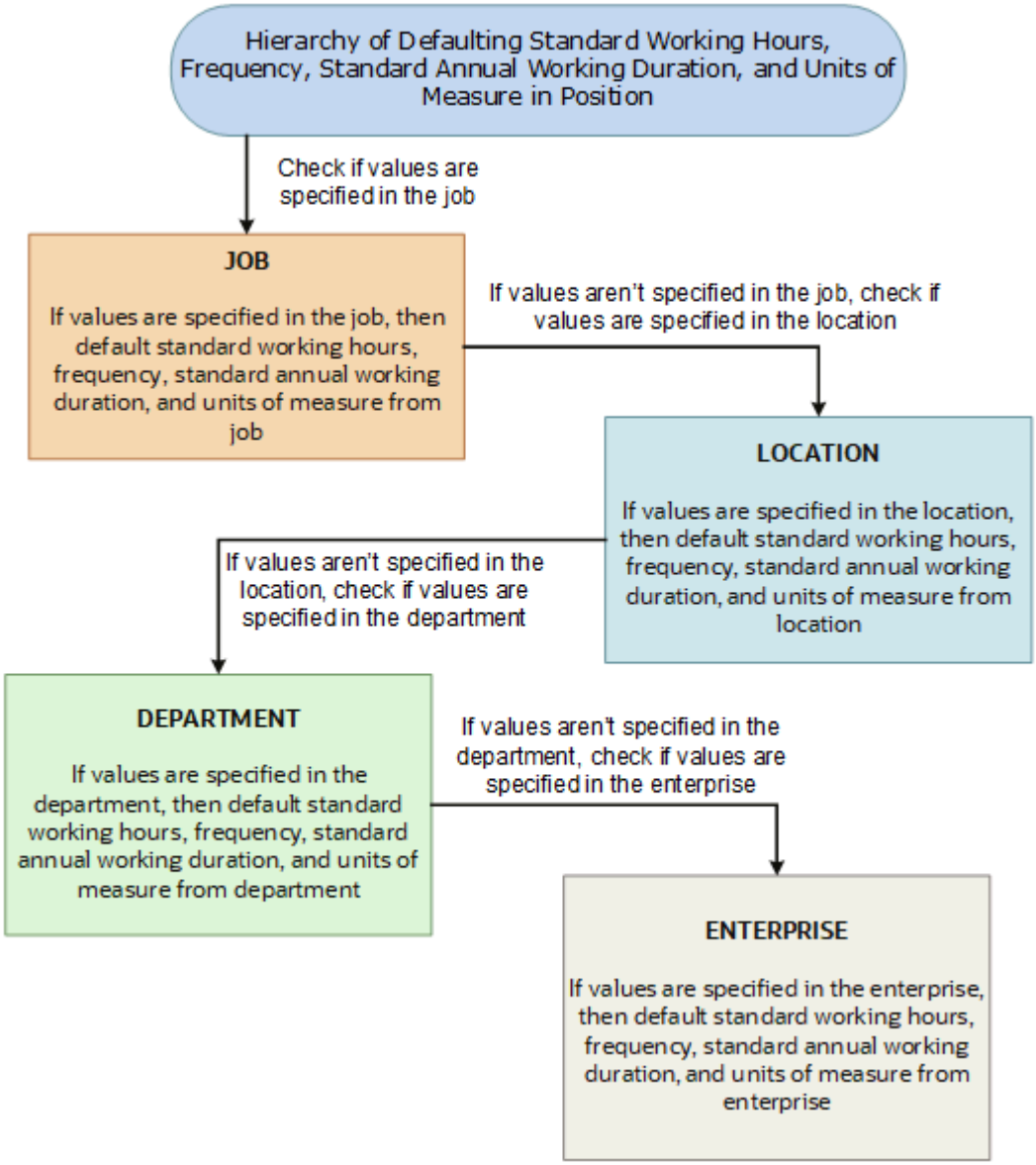
The Full-Time Equivalent (FTE) is the number of hours worked by a worker on a full-time basis and is typically used to determine the workload.

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 Budgeting

Position Budgeting helps to capture the budgetary values and to enforce them while creating or updating budgets for positions. You can now define a budgetary period and measure your activity against these values.

You can define the position budget for full-time equivalent (FTE), Headcount, and Budget Amount at the following levels in an enterprise:

- Business Unit
- Department
- Location
- A combination of any two or all three of the above

A position budget table, budget configuration options, and a mechanism to load and store position budgets using HDL is provided. You can use this budget information to alert the users when they exceed the position budget. You can load budget definitions by using the PositionBudget.dat file in HDL. Once the budget data is loaded in the application, the validations for FTE, headcount, and budget amount take effect when a position is created or updated.

The budget values that you load in the budget table are applicable for a specified set of budget allocation criteria. These budget values are cumulative, and they include the total budget values across all positions that match the budget allocation criteria defined at the enterprise level. This overall budget can be utilized by a single position or multiple positions. The budget allocation criteria can be business unit, department, location, or a combination of these three.

Before You Begin

1. Set the ORA_PER_POSITION_BUDGETING_ENABLED profile option to **Y** to enable position budgeting.
2. Add the **Position Budgeting Configuration** extensible flexfield context to the **Associated Context and Pages** section as follows:
    a. Navigate to the Setup and Maintenance work area.
    b. Search for and click the **Manage Extensible Flexfields** task.
    c. Search for and edit the **Organization Information EFF** flexfield.
    d. On the Edit Extensible Flexfield: Organization Information EFF page, in the Category section, expand **Organization**.
    e. Select **Enterprise** and scroll down to the Enterprise Details section.
    f. On the Associated Contexts tab, click **Select and Add**.
    g. In the **Select and Add: Contexts** dialog box, search for and select **Position Budgeting Configuration**.
    h. Click **Apply**.
    i. On the Pages tab, in the Enterprise Details: Associated Contexts Details section, click **Select and Add**.
    j. In the **Select and Add: Contexts** dialog box, search for and select **Position Budgeting Configuration**.
    k. Click **Apply**.
    l. Click **Save and Close**.
    m. Redeploy the flexfield.

Configure Position Budgeting

Before you start defining position budgets, you need to configure the following position budgeting settings on the Manage Enterprise Information page.

Attribute	What you need to do	What happens when you configure this attribute	Example behavior
Allocate By	Select your budget level as Business Unit, Department, Location, or a combination of these attributes. For example: • Business Unit and Department • Business Unit, Department, and Location	Whenever you define position budgets, you must ensure that the definition adheres to the Allocate By values that have been specified at the enterprise level.	Let's say Allocate By has been selected as Business Unit and Department at the enterprise level. But in the budget table, the data is loaded using only the Business Unit. A validation is done during the HDL load to check whether there's a mismatch between what was selected at the enterprise level and what's being loaded in HDL.
Budget Amount Currency	Select the currency to use for Amount-based budgeting.	The currency in the budget section of a position will get defaulted to the currency selected at the enterprise level.	USD is defined as Budget Amount Currency on Enterprise. The currency on Position UI will also be defaulted as USD and the attribute is made as read-only.
Budget Period Start Day	Day of the month when the budget period starts.	This start day will be used to identify the Budget Period Start Date and the Budget Period End Date while loading the data.	Assuming that the Budget Period starts on April 1, the Budget Period Start Day will be 1 and the Budget Period Start Month will be April. That means the end date of the period is March 31.
Budget Period Start Month	Month of the year when the budget period starts.	This start month will be used to identify the Budget Period Start	Assuming that the Budget Period starts on April 1, the Budget Period

Attribute	What you need to do	What happens when you configure this attribute	Example behavior
		Date and the Budget Period End Date while loading the data.	Start Day will be 1 and the Budget Period Start Month will be April. That means the end date of the period is March 31.
Convey FTE Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.
Convey Headcount Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.
Convey Amount Overshoot As	Configure whether you want warning or error as the validation.	If you select Error here, then the user won't be able to proceed if the budget is exceeded. If you select Warning here, then the user will be able to proceed even if the budget is exceeded, by clicking Allow.	Depending on what you configure at the enterprise level, the user will see an error or warning.

Position Budget Checks Performed at the Position and Worker Assignment Levels

This table shows what happens at the position and worker assignment levels when a position budget isn't configured on the Enterprise HCM Information page.

When Position Budgeting Isn't Configured

Level	Outcome
Position	**Outcome:** No budget checks are performed for the FTE, Headcount, and Budget Amount attributes, and their limits aren't validated.
Worker Assignment	**Use Case 1:** The **Apply Incumbent Validation** checkbox is deselected on the Enterprise HCM Information page. **Outcome:** No validation of FTE and Headcount is performed at the worker assignment level. **Use Case 2:** The **Apply Incumbent Validation** checkbox is selected on the Enterprise HCM Information page. **Outcome:** Here's how the FTE and Headcount of the position on the worker assignment are checked:

Level	Outcome
	• If overlap of headcount is allowed for the position associated with the assignment: Warning is displayed if the open FTE or Headcount is exceeded. • If overlap of headcount isn't allowed for the position associated with the assignment: Users need to select a different position that has unutilized FTE or Headcount.

This table shows the position budget checks at the position and worker assignment levels after you configure the position budgets on the Enterprise HCM Information page.

> **Note:** You must set the **ORA_PER_POSITION_BUDGETING_ENABLED** profile option to Y to enable position budgeting.

When Position Budgeting Is Configured

Level	Action or Outcome
Enterprise HCM Information	Configure the values in the Position budgeting section.
HCM Data Loader	Load the budget data using the PositionBudget.dat file.
Position	Errors and warnings are displayed based on the position budget validation in these flows: • Request a New Position • Request a Position Change • Add Position • Update Position
Worker Assignment	**Use Case 1:** The **Apply Incumbent Validation** checkbox is deselected on the Enterprise HCM Information page. **Outcome:** No validation of FTE and Headcount is performed at the worker assignment level. **Use Case 2:** The **Apply Incumbent Validation** checkbox is selected on the Enterprise HCM Information page. **Outcome:** Here's how the FTE and Headcount of the position on the worker assignment are checked: • If overlap of headcount is allowed for the position associated with the assignment: Warning is displayed if the open FTE or Headcount is exceeded. • If overlap of headcount isn't allowed for the position associated with the assignment: Users need to select a different position that has unutilized FTE or Headcount.

Example of Position Budget Definition

The following table shows an example of a budget definition. Let's assume the following:

- The budget is being utilized for only 1 position.
- Error is selected for the Convey Headcount Overshoot As field in the enterprise configuration.
- Warning is selected for the Convey FTE Overshoot As and Convey Amount Overshoot As fields in the enterprise configuration.

Budget Definition

Business Unit	Department	Location	Allocated FTE: FTE allocated for the budgetary period. Sum of FTE of all applicable positions must not exceed this value.	Allocated Headcount: Headcount allocated for the budgetary period. Sum of headcount of all applicable positions must not exceed this value.	Allocated Amount: Amount allocated for the budgetary period. Sum of amount of all applicable positions must not exceed this value.
Vision Corporation Enterprise	Cardiology	Vision University	700	200	200,000
Vision Corporation Enterprise	Cardiology	Redwood Shores	200	100	100,000
Vision Corporation Enterprise	General Surgery	Redwood Shores	50	50	300,000

Examples of Budget Definition for One Position

In these two examples, let's assume that the budget is being utilized for only 1 position with a combination that matches row 1 of the Budget Definition table: Business Unit as Vision Corporation Enterprise, Department as Cardiology, and Location as Vision University. When the user enters the FTE, Headcount, and Budget Amount for the position that they're creating, the remaining allocation for FTE, Headcount, and Budget Amount is calculated as follows:

Remaining Allocation = Allocated Value - Value Entered by User

> **Note:** The amount by which a budget is exceeded is shown as a negative value in the corresponding **Remaining Allocation** field.

Example 1

This table shows the budget definition and user input for the first example.

Example 1 for Budget Definition and User Input for One Position

Parameter	FTE	Headcount	Budget Amount
Allocated Value	700	200	200,000
Value Entered by User	690	220	250,000
Remaining Allocation	10	-20	-50,000

An error message is displayed, indicating that the Headcount has exceeded the budget. That's because Error is selected for the Convey Headcount Overshoot As field in the enterprise configuration.

A warning message is displayed, indicating that the Budget Amount has exceeded the budget. That's because Warning is selected for the Convey Amount Overshoot As field in the enterprise configuration.

The Remaining FTE Allocation has a positive value, which means that it hasn't exceeded the budget.

Example 2

This table shows the budget definition and user input for the second example.

Example 2 for Budget Definition and User Input for One Position

Parameter	FTE	Headcount	Budget Amount
Allocated Value	700	200	200,000
Value Entered by User	730	200	190,000
Remaining Allocation	-30	0	10,000

A warning message is displayed, indicating that the FTE has exceeded the budget. That's because Warning is selected for the Convey FTE Overshoot As field in the enterprise configuration.

The Remaining Headcount Allocation value is 0 and the Remaining Budget Amount Allocation has a positive value, which means that they haven't exceeded the budget.

Example of a Budget Definition for Multiple Positions

Let's assume that multiple positions exist for the combination of Business Unit, Department, and Location specified in row 1 of the Budget Definition table. When a user enters the FTE, Headcount, and Budget Amount for the position they're creating, the remaining allocation is calculated by considering the cumulative utilization of the budget specified in the Budget Definition table.

In such cases, the remaining allocation for FTE, Headcount, and Budget Amount is calculated as follows:

Resulting Cumulative Value = Current Cumulative Utilized Value + Value Entered by User

Remaining Allocation = Allocated Value – Resulting Cumulative Value

This table shows an example.

Example of Budget Definition for Multiple Positions

Parameter	FTE	Headcount	Budget Amount
Allocated Value	700	200	200,000
Current Cumulative Utilized Value	600	195	160,000
Value Entered by User	110	10	40,000
Resulting Cumulative Value	600 +110 = 710	195 + 10 = 205	160,000 + 40,000 = 200,000
Remaining Allocation	700 – 710 = -10	200 – 205 = -5	200,000 – 200,000 = 0

An error message is displayed, indicating that the Headcount has exceeded the budget. That's because Error is selected for the **Convey Headcount Overshoot As** field in the enterprise configuration.

A warning message is displayed, indicating that the FTE has exceeded the budget. That's because Warning is selected for the **Convey FTE Overshoot As** field in the enterprise configuration.

The Remaining Budget Amount Allocation value is 0, which means that it hasn't exceeded the budget.

Approval Rule for Position Budgeting

You can create an approval rule to route the transaction for approval when any of the values exceed the budget. Use these attributes to create approval rules:

- FTE Over Budget Percentage
- Headcount Over Budget Percentage
- Amount Over Budget Percentage

For example, you can create an approval rule indicating that if the percentage is within a certain limit, route the approval notification to the regular approver, else route to different approvers.

The approval notification also displays the remaining position budget details for approvers to review before approving.

Key Points about Position Budgeting

Here are some key points about position budgeting:

- **Allocate By** on enterprise can't be changed if budget definitions already exist.
- When the ORA_PER_POSITION_BUDGETING_ENABLED profile option is set to **No**, you can't load the budget data using HDL.
- When the ORA_PER_POSITION_BUDGETING_ENABLED profile option is set to **Yes**, you can load the budget data using HDL only if budget data doesn't exist already for the provided budget period.
- A budget period is currently for one calendar year.
- Budgetary Year will be an input in the HDL file and will be used along with the Budget Period Start Day and Budget Period Start Month segments on the enterprise to identify and populate the Budget Period Start Date.
- Budget Period End Date is always one calendar year after the Budget Period Start Date.
- If you update your budget definition in between the budget period, then only the allocations can be modified.
- The current budget period's budget definition won't be rolled over automatically to the next calendar year.
- Budget definition data for a maximum of 2 budget periods can exist in the table at any given point in time - Past and Current, Current and Future, or only Current.
- If the budget table has data for 2 budget periods at a given point of time, then you need to delete the budget data for one period in order to load the third period's budget definitions.
- **Budget Amount Currency** on the position will be defaulted from the Budget Amount Currency specified at the enterprise level, and it won't be editable.
- If the **Budgeted Position** flag is enabled on the position and **Allocate By** includes Location, then the **Location** field on the position will be required.
- For calculating the remaining budget values, only those active and budgeted positions will be considered, which have an approved hiring status or a frozen hiring status with at least 1 incumbent as of the budget period end date. While calculating the remaining balance, the position type isn't considered, irrespective of whether the type is Single, Shared, or Pooled.
- Validation will be applicable on all Redwood and responsive position pages.
- Validations and calculations of remaining allocations will take place only if a budget definition is present for the calendar year in which the current date falls.
- The **Remaining Budget**, **Remaining FTE**, and **Remaining Headcount** attributes are available only on the position details section of Redwood UIs.

- If the allocation for the next budget period is less than what you're already utilizing in the current budget period, then once the next budget period starts, you will start seeing the warnings or errors while creating or editing the positions. For example: In FY 2022-23, the allocation for FTE is 200 and you have utilized 150. In the next FY 2023-24, if the new allocation for FTE is 120, then the FTE will be over budget by 30. So, you will see warnings or errors while creating or editing positions.
- Approval notifications will always display the remaining balance percentage for the proposed changes of FTE, Headcount, or Budget Amount.
- Enterprise configuration related to budgeting is also migrated when you migrate your enterprise configuration using the Functional Setup Manager (FSM) export and import functionality.
- Position budget data isn't migrated using the export and import functionality in Functional Setup Manager (FSM).
- Database Items (DBI) and User Entities (UE) aren't yet available for position budget data.

Position Costing for Redwood Positions Pages

You can manage the position costing information in the newly added Costing region in the Redwood Position pages and processes. The Costing region is hidden by default. You need to enable it using business rules.

The costing information can be managed when creating or updating a position, or while requesting a new position or requesting a position change.

The costing of position is specific to a legislative data group. You need to have access to the legislative data group to add or modify the costing of the position. The changes to the position costing are within the context of a legislative data group.

To update an existing position costing, search for and click the position on the Positions search page. On the position page, go to the Costing region. Open the costing record that you want to update, and click Update Record in the Select an action drop-down list. Modify the data as required. Click +Add to add another costing LDG. Click Save.

To delete an existing position costing, on the position page, open the costing record and click Delete Record in the Select an action drop-down list.

Note: If you delete a date effective record for a position, the costing doesn’t get deleted.

Similarly, you can add the position costing information and modify the position costing in the Costing step of the Request a New Position and Request a Position Change processes respectively.

Here are some key points about position costing:

- You can't create costing for a position if no cost allocation structure is attached to the legislative data group.
- You can't create costing when costing exists in a future date.
- The total percentage of cost allocations must be between 0 and 100. If it's less than 100, a warning message is displayed, stating that the remaining allocation goes to Default Account, and you can proceed further after you confirm. If the total percentage of cost allocations is above 100, an error message is shown, and you can’t proceed further until you correct it.
- If you enter a percentage and don't enter any costing segments, an error message is displayed.
- Position costing isn’t a child of the position. It’s a separate object on its own. So whatever operations you’re doing on the position won’t impact the costing.

- A position has its own effective start date and effective end date, and position costing has its own effective start date and effective end date. The position dates and the position costing dates are different and independent of each other.
- If costing is already existing for a position, all the costing records that lie between the effective start date and effective end date for the position are displayed in the Position Costing section.
- When you duplicate a position, the costing data won't be copied to the duplicated position. You need to add the costing data manually.
- Position costing can also be managed from the position costing pages of payroll. Any changes made in payroll will reflect here and vice versa.

Related Topics

- Jobs
- Extending HCM Redwood Applications Using Visual Builder Studio

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 **Note:** Only if the mapping is defined for the assignment flexfield.	N/A	N/A	N/A	Yes
Manager from Position Hierarchy	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
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 employment flows.
- Line manager is defaulted from the position hierarchy in employment flows, and when you run the Synchronize Person Assignment from Position process.
- Line manager is defaulted from the position in 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.
- The assignment FTE is recalculated when you change the standard working hours, and the FTE and working hours are selected attributes for synchronization.
- FTE is calculated based on the position working hours in 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.

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 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	• Promotion • Organization Change
Update Position	• 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.

Field	Description
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.

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

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.

Note: You can open the existing HCM Position Hierarchy from the Redwood Positions read-only page by clicking the **HCM Position Hierarchy** option in the **Actions** drop-down menu.

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:

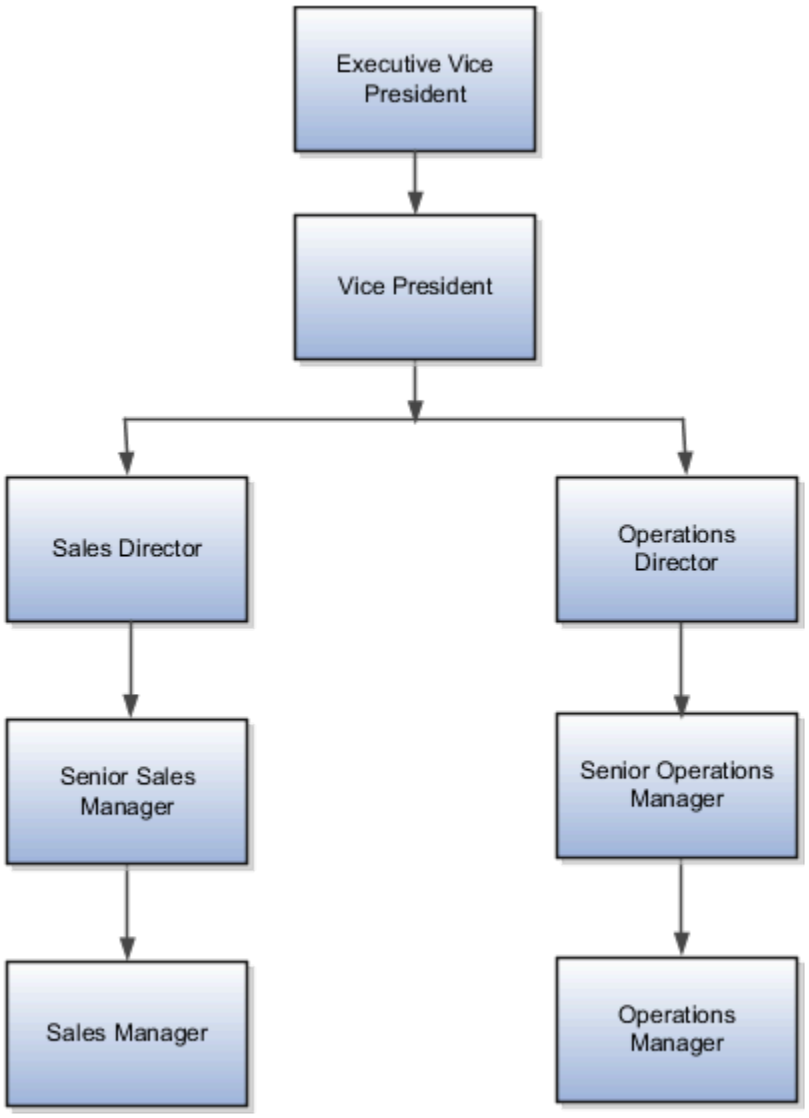
- Add child positions under a position either by creating a new position or by selecting an existing position as the child.
- Create a copy of an existing position by specifying a new name and code. The rest of the information is copied from the original position to the copy. You can change any information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

Parent Position Isn’t Defaulted for Professional Users

In the Request a New Position process and the Create Position page, the parent position is defaulted to the parent position of the currently logged in user.

This helps managers as they often create a position in their team. A line manager requests a new position from the **My Team** tab. In the **Position details** step of the process, the parent position is defaulted from the logged-in user.

For the professional user, it's less likely that the new position is within their own team. So the parent position isn't defaulted in the **Request a New Position** process if it's opened from the **My Client Groups** tab. The parent position is blank, and you need to select a value from the drop-down list.

Similarly, when a professional user creates a new position from the **Positions** quick action, the parent position isn't defaulted. In the New Position page, the parent position is blank, and it's not defaulted to the parent position of the currently logged in user. You need to select the parent position from the drop-down list.

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

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:

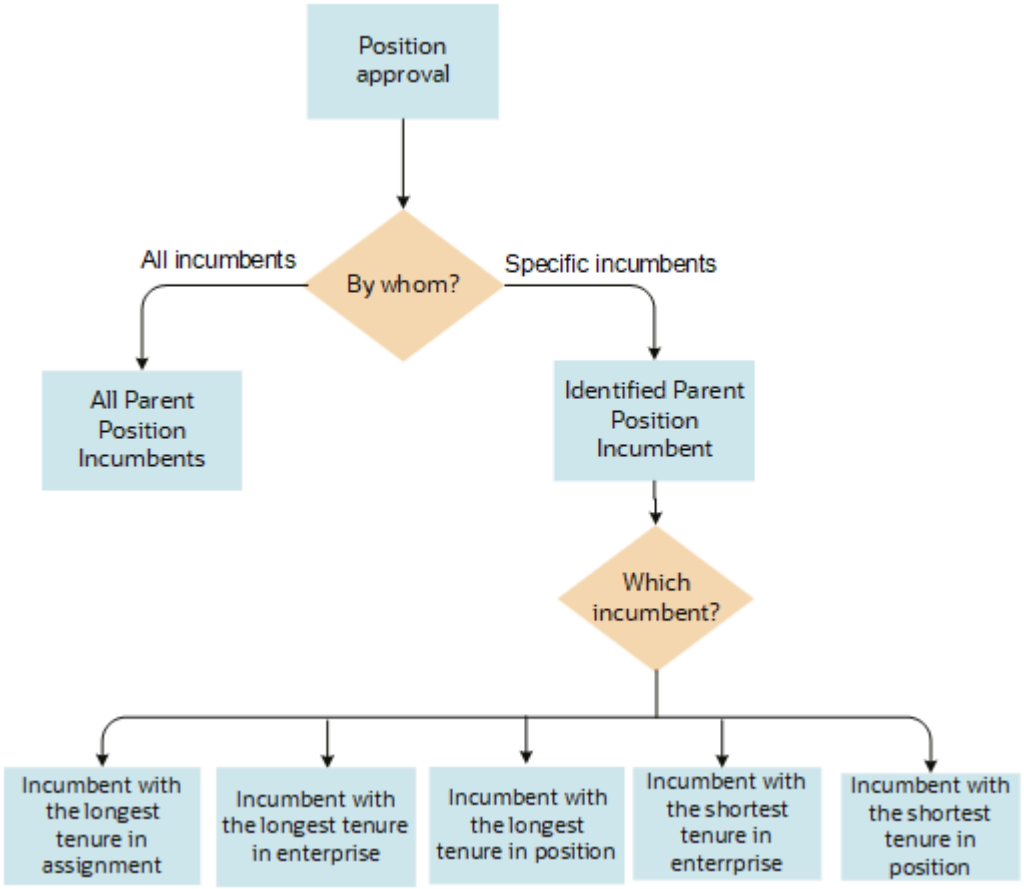
- Create Position
- Edit Position
- Request New Position
- Request Position Change

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	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: • Longest tenure in assignment • Longest tenure in enterprise • 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, Bob Price 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
Bob Price	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

Employee	Action	Date	Position	Status	Tenure	Comments
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, Bob Price 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
Bob Price	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, Bob Price 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
Bob Price	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.

8 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.

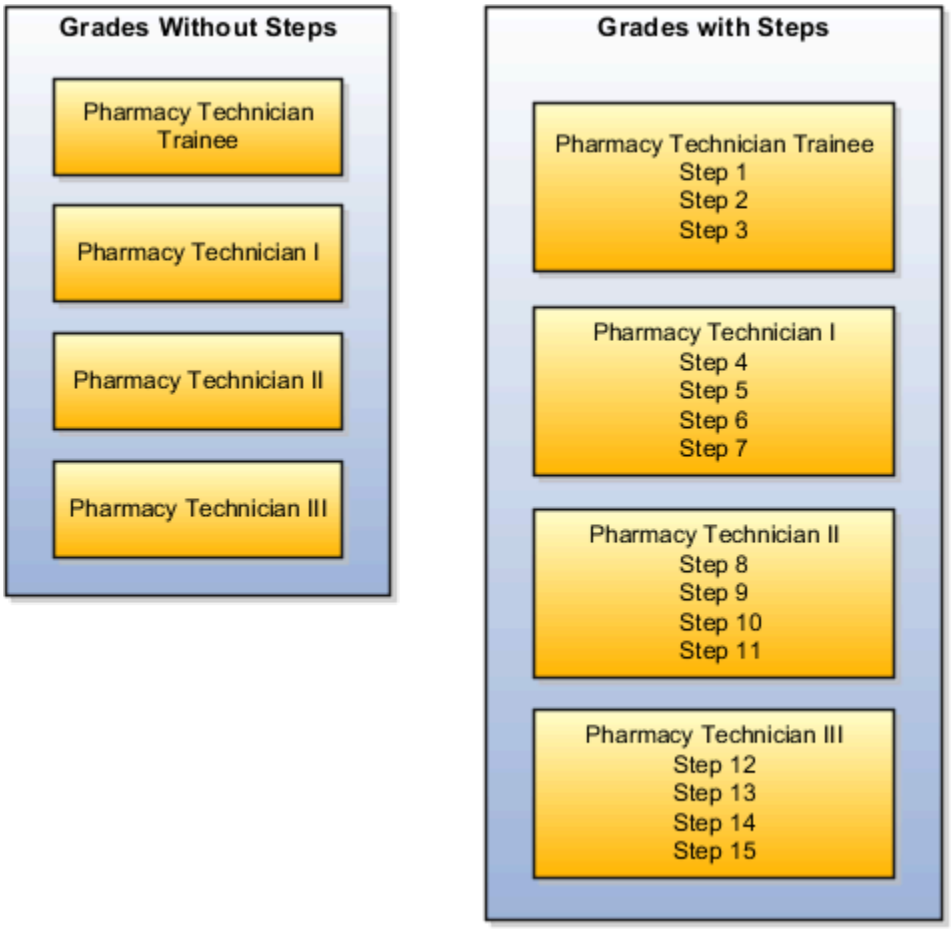
Grades and Sets

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

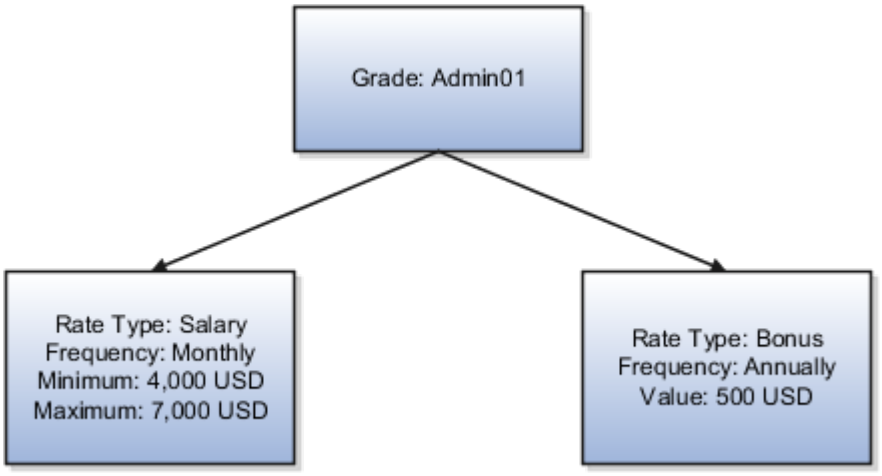
Grade rates contain the pay values that are related to each grade.

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.

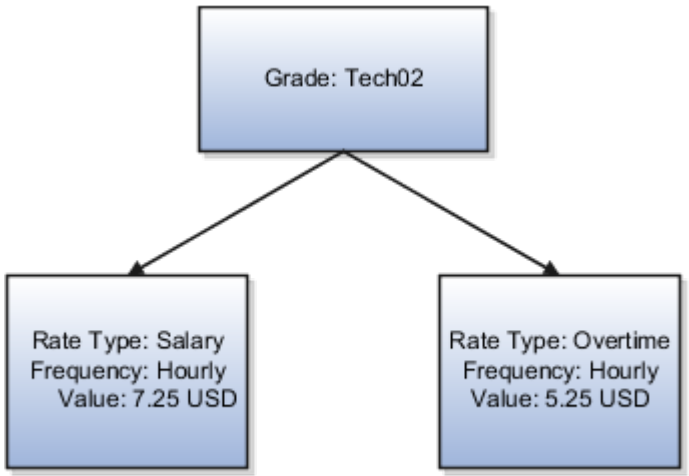
Note the following:

- 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 valuesBonus 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 amountOvertime 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

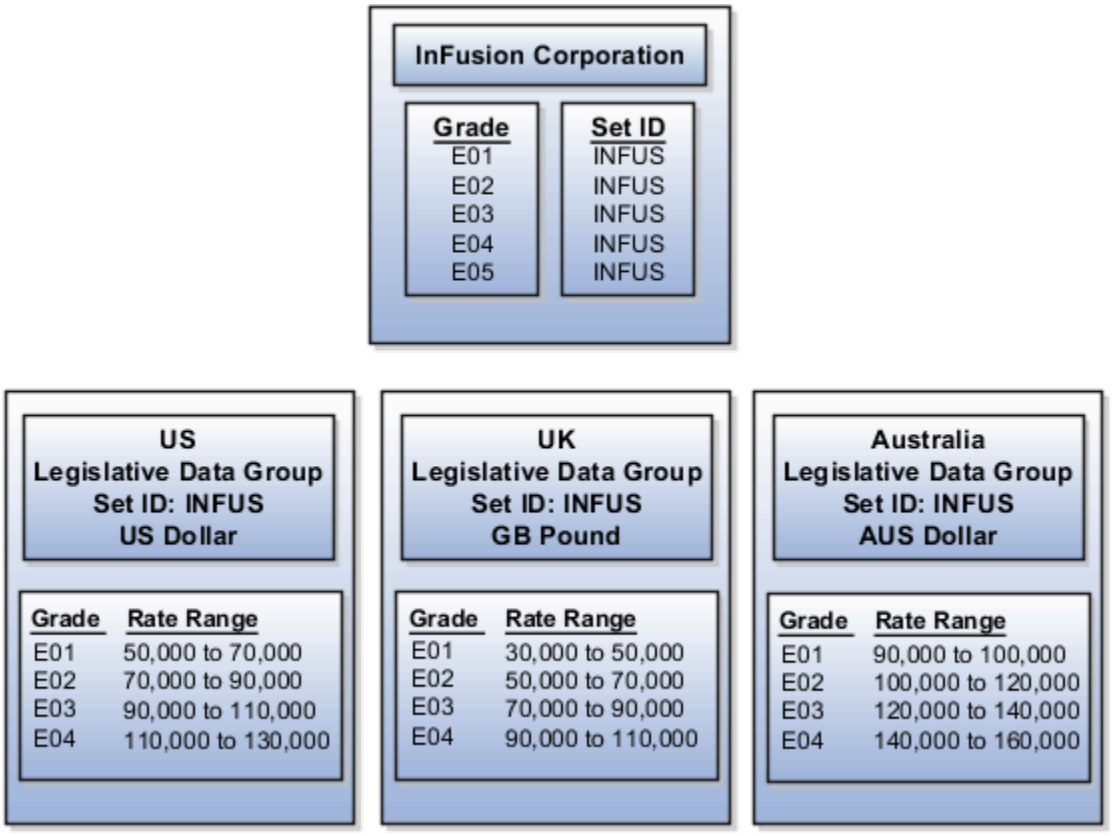
How Grades, Grade Rates, and Sets Work with Legislative Data Groups

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	If you set this site-level profile option to Yes: • Users can select a grade only from the list that you defined for the job or position. o If users select both job and position for the assignment, they can select grades that are valid for the position only. o If valid grades are defined for neither job nor position, then users can select from all grades. If you set this site-level profile option to No: • User can select from all the grades • This is also the default value

Profile Option	Description
PER_DEFAULT_GRADE_FROM_JOB_POSITION	If you set this site-level profile option to Yes and there is only one valid grade for a job or position: • The grade is used by default in the assignment. o If an entry grade is defined for a position, then that grade is used by default when the user creates a new assignment. If you set this site-level profile option to No: • 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

1. Under My Client Groups, In the Workforce Structures work area, click **Manage Grades** to open the Manage Grades page.
2. On the Manage Grades page, click **Create** to open the Create Grade: Grade Details page.
3. 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

4. Click **Next** to access the Create Grade: Grade Steps page.
5. In the Grade Steps region of the Create Grade: Grade Steps page, click **Add Row**.
6. 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

7. Verify that Year 4 is the ceiling step.
8. Click **Submit**. You will add the grade rates when you create the grade ladder.
9. In the Warning dialog, click **Yes**.
10. In the Confirmation dialog, click **OK.**
11. 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	• Spine Point 1 • Spine Point 2	Spine Point 5

Grade Name	Steps	Ceiling Step
	• Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6	
Grade 2	• 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	• 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	• Spine Point 1 • Spine Point 2 • Spine Point 3 • Spine Point 4 • Spine Point 5 • Spine Point 6	• 25, 674 • 26, 631 • 27, 068 • 27, 796 • 30, 394 • 31, 778
Grade 2	• Spine Point 6 • Spine Point 7 • Spine Point 8 • Spine Point 9 • Spine Point 10 • Spine Point 11 • Spine Point 12	• 31, 778 • 32, 648 • 33, 542 • 34, 466 • 35, 425 • 38, 441 • 39, 510
Grade 3	• Spine Point 12 • Spine Point 13	• 39, 510 • 40, 634

Grade Name	Steps	Rates
	• Spine Point 14 • Spine Point 15 • Spine Point 16 • Spine Point 17	• 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
• Viewed in Manage Progression Grade Ladders page in Compensation work area	• Viewed in Manage Grade Ladders page in Workforce Structures work area

Progression Grade Ladders	Grade Ladder
• 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.

9 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: • 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	You can specify the initial position 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 code setting and increments the number by one for subsequent records. By default, the initial code is 1.	1
Initial Job Code	You can specify the initial job for your enterprise when you generate the code automatically. 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.	1
Job Code Generation Method	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. You can generate the job code in one of these 3 ways: • Manually • Automatically prior to submission • Automatically upon final save	None
Position Code Generation Method	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. You can generate the position code in one of these 3 ways: • 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

10 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
- What's the Person Number used for?
- How can I enter a custom Person Number?
- Can I load legacy Person Numbers when the Person Number Generation Method is set to Automatic?

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 issuing badges 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.
- 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?
- Candidate Duplicate Check and Merge After Job Offers

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 mark a predefined component as inactive, unless it's a required component. But you can't delete predefined components and make required components optional. You can delete only those components that were added to a predefined name style. You can't delete a predefined name style.

You can mark Oracle-delivered non-required name attributes as inactive by deselecting the Mark as Active check box. But you can't mark the Last Name attribute and the Oracle-delivered required name attributes as inactive. When you mark a name attribute as inactive, the attribute won't be displayed on the pages where a name can be managed, such as Hire an Employee, Family and Emergency Contacts, and Personal Details.

> **Note:** You can create, edit, and delete a 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

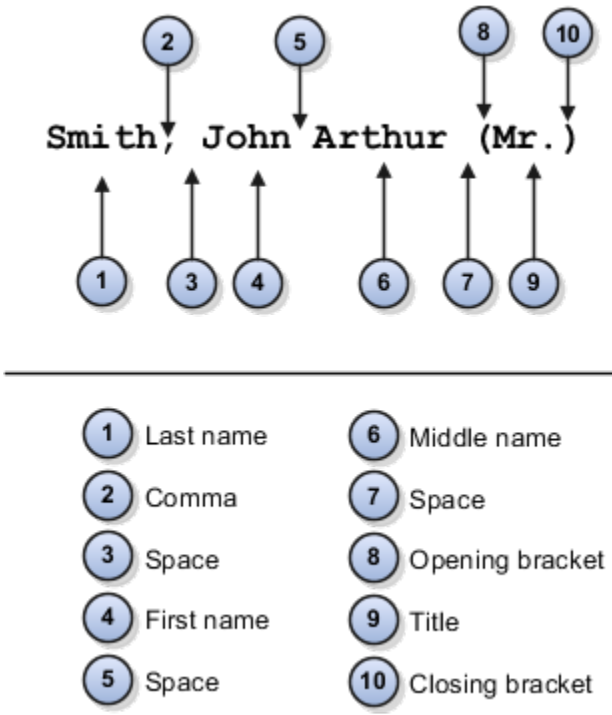
- What's the difference between person name formats and person name styles?
- Person Names and Languages
- Person Name Formats

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.



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]

Format Type	Usage	Default Structure
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 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	• Jenner, Chris • Harper, Smith • Chris, Ray • Harper, Liam • Harper, Chris • Harper, Christopher
Chris Harper	• Jenner, Chris • Harper, Smith • Chris, Ray • Harper, Liam • Harper, Chris • Harper, Christopher
Chris%	• Jenner, Chris • Black, Chris • Blake, Christopher • Simpson, Christy • Harper, Chris • Harper, Christopher • Christ Johnson
Chris	• Jenner, Chris • Black, Chris • Harper, Chris

You enter...	Search Results
"Chris Harper"	• Harper, Chris
Chris and Harper	• Harper, Chris
"Chris" "Harper"	• 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 cant 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.

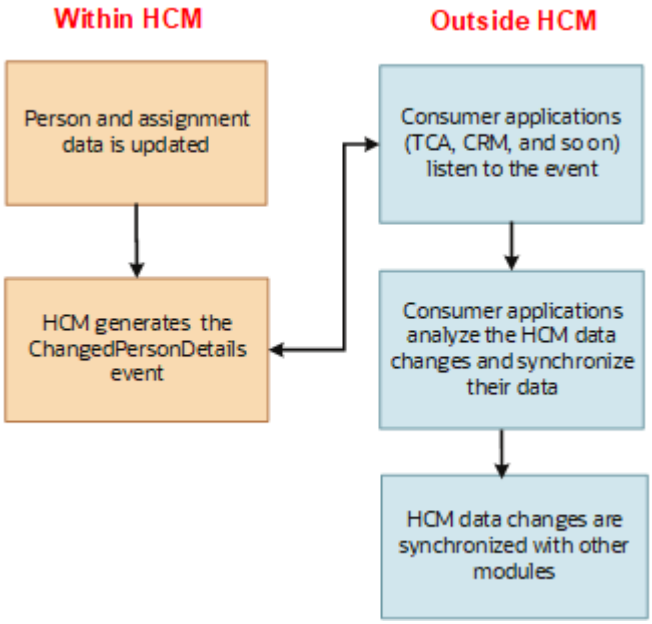
Don'ts

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. • 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)	• 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	• From Date: Date when the data load started • To Date: Date when the data load completed	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,

Use Case	Execution Type	Parameter Values	Guidelines
		• After Batch Load: Yes	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.
    - ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER to Yes
    - 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.
    - ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER to No
    - 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.**.
   - This option controls whether to suspend user accounts if the user has no roles provisioned.
   - 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?	Enabled using a profile option and checks uniqueness of national identifier. 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.	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.

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
`pod-name`	Identifies the host name.	`pod.oraclecloud.com`
`objType`	Identifies the object type, such as work areas.	`DIRECTORY_ORG_CHART`
`objKey`	Identifies the specific object ID.	`personId`

`action`	Identifies the specific action that you want the users to do on the UI.
	Here are a few points to keep in mind:
	• 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.
		`NONE`
		`VIEW`
		`CREATE`
		`EDIT`

`returnAppURL`	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.	`MyOracle`
`returnAppParams`	If required, you can add parameters to your returnAppURL.	`type=photo`

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: • Access FUSE Directory Page Data Security: • 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: • Access FUSE Directory Page Data Security: • 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: • Access FUSE Directory Page Data Security: • 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: • Access Person Spotlight Data Security: • 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: • Access Person Spotlight Data Security: • 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 he 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.

11 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.

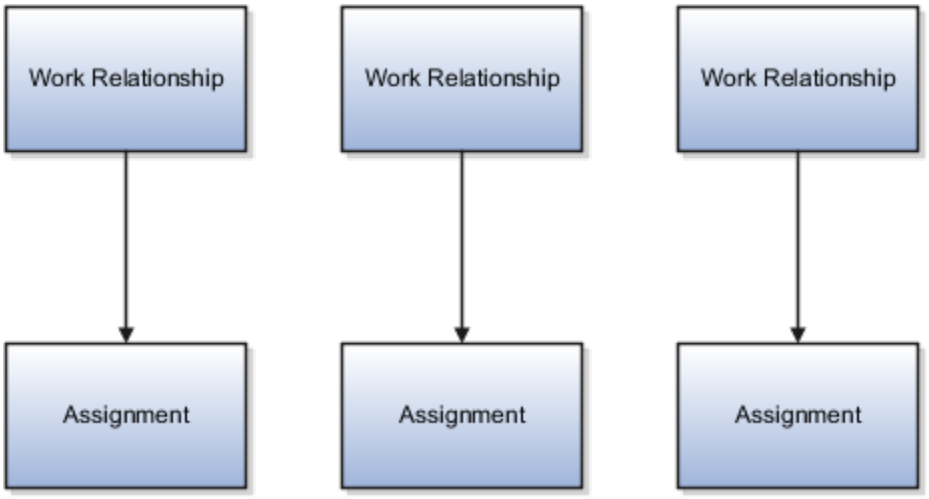
When you configure the employment model for the enterprise or legal employer (when you create or update the enterprise or legal employer), you can select from four options:

- 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.

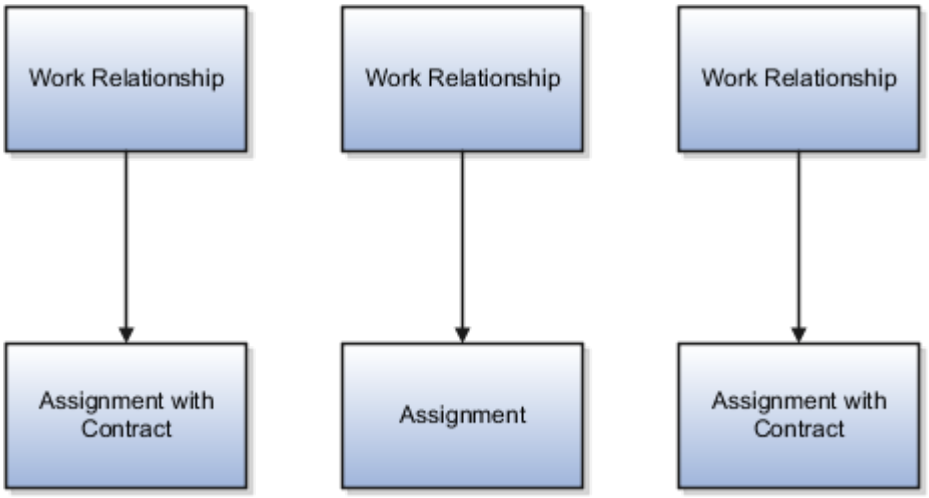
The assignment is created automatically when the work relationship is created.



Single Assignment with Contract

If you select Single Assignment with Contract, users can include contract information in the single assignment.

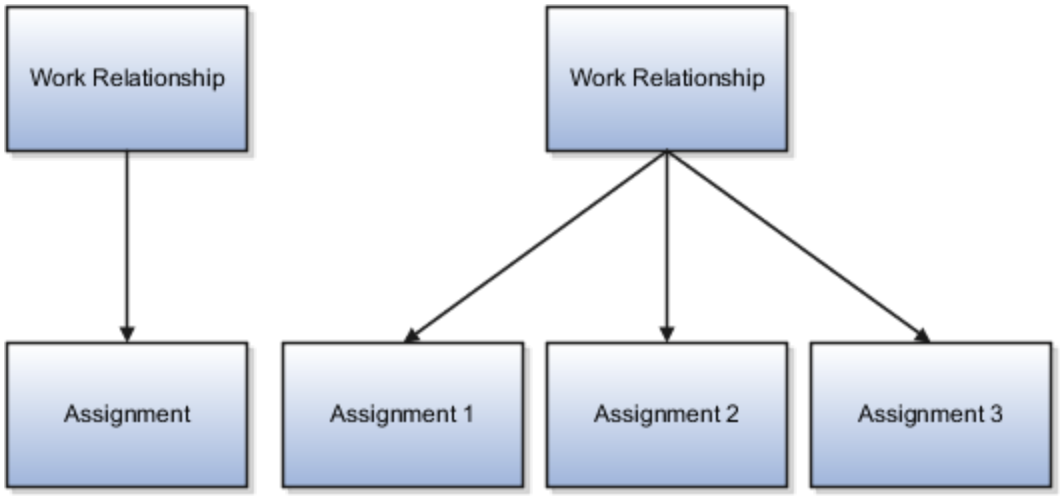
Creating the work relationship automatically creates the assignment. Including contract information in the assignment is optional.



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.



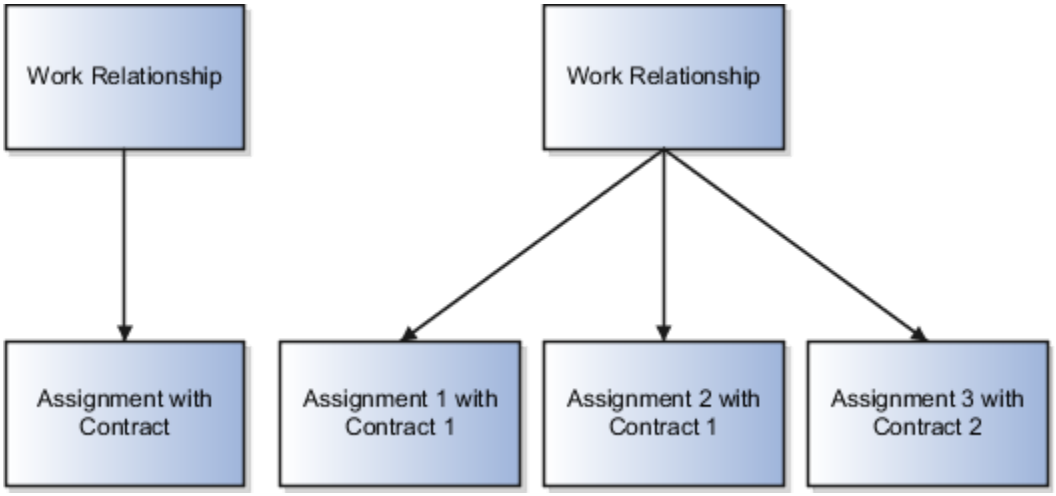
Multiple Contracts with Single Assignment

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.

If you're creating a new assignment for a worker in a legal employer that supports contracts and don't enter the contract details, a default contract record is still created in the application.



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
	Error: An error message is displayed indicating that the assignment has a future-dated record and the user is prevented from updating the assignment. 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.	
Validation For Existing Subordinates Termination	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: None: No validation is displayed. Error: An error message is displayed indicating that the worker has direct reports and the user is prevented from terminating the worker. 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.	Warning
Employment: Approver Region Collapsed	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: Y: The Approvers region appears collapsed. N: The Approvers region appears expanded.	Y
Automatically Convert Pending Workers	You can use this option to apply the setting to all new pending worker records. You can select from these values: 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. 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. Null or Blank: The behavior is similar to N.	Null or Blank
Default Enterprise Seniority Date	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:	Null or Blank

Option	Description	Default Value
	Y: The enterprise seniority date will be defaulted to first hire date. N: The enterprise seniority date will be blank. Null or Blank: The behavior is similar to N. **Note:** This configuration option is applicable only for version 1 (V1) seniority dates.	
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:

HDL, Redwood, Responsive, and REST

This table lists the employment profile options that are applicable for HDL, Redwood, Responsive and REST.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_EMPL_DEFAULT_BUSINESS_TITLE_FROM	Business Title Defaulting Option	Retain User Changes	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. If you set the profile option to Automatically Update 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. If you set the profile option to Automatically Update Based on Position Change, the application defaults the business title to

Profile Option Code	Profile Display Name	Default Profile Value	Description
			the position if there is a change in position on the worker's assignment.
ORA_PER_EMPL_DISABLE_TIME_CARD_CHK_CANCEL_WR	Time Card Check Disabled for Cancel Work Relationship and Delete Assignment	N	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.

HDL, Redwood, and Responsive

This table lists the employment profile options that are applicable only for HDL, Redwood, and responsive pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
PER_ENFORCE_VALID_GRADES	PER_ENFORCE_V	N	If you set this site-level profile option to Y, users can do these actions: • Select a grade only from the list of valid grades that are defined for the assignment set in the selected job or position. Note: You can add grades belonging to multiple sets as valid grades for the job or position. • 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. If you set this site-level profile option to N, users can select grades from the grade ladder. If the grade ladder doesn't have any grades, then the user can select

Profile Option Code	Profile Display Name	Default Profile Value	Description
			from all grades defined for the assignment set.

Redwood and Responsive

This table lists the employment profile options that are applicable only for Redwood and responsive pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_CLE_COPY_FUT_ASG	Future Assignment Changes Copy Enabled	N	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. If you set the profile option to Y, these things happen: • Future assignment updates are copied. • Future updates for these Payroll objects are copied: o Overtime Period o Time card Required o Element entries not linked to Calculation Cards, including future non-recurring entries. • 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_ASSIGNMENT_LEVEL_DATA_SECURITY_ENABLED	PER: assignment level security enabled	N	Enables assignment-level security.
ORA_PER_DOR_ASG_LVL_DELETE_ON_CANCEL_WR	Delete Assignment Level Document Records During Cancel Work Relationship Enabled	No	Enables you to delete assignment-based document records during the cancel work relationship process.
ORA_PER_DOR_ASG_LVL_DELETE_ON_DELETE_ASG	Delete Assignment Level Document Records During Delete Assignment Enabled	No	Enable you to delete assignment-based document records during the assignment deletion process.
ORA_PER_EMPL_DFLT_LOGGED_USER_AS_LINE_MGR_ENABLED	Default Logged in User as Line Manager Enabled	Yes	Defaults the logged in user as the line manager in Add Person and Create Work Relationship flows.
ORA_PER_EMPL_GTA_POP_DIRECTS	Defaulting of Direct Reports in Selected Section	Reassign Existing Reports	By default, the existing direct reports of the manager will be

Profile Option Code	Profile Display Name	Default Profile Value	Description
			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. 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. If you set the profile option to Add Direct Reports, these things happen: • 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. 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.
PER_DEPARTMENT_TREE_FOR_MANAGER	PER_DEPARTMENT_TREE_FOR_MANAGER	Null	If you set this profile option to the department tree value,

Profile Option Code	Profile Display Name	Default Profile Value	Description
			the application defaults the line manager from the selected department tree. If no department manager is defined, the application searches higher levels in the department tree and fetches the manager from the defined department. If the transaction is performed on the department manager assignment, the application defaults the line manager from a higher level in the department tree. If the department tree has an active tree version, then the line manager is defaulted from the active tree version. 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.

Enterprise Scheduler Service (ESS) and Responsive

This table lists the employment profile options that are applicable only for ESS and responsive pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_POS_INCUMBENT_TENURE_ASG_SUP	Identifies the tenure to aid in defaulting the manager during position synchronization	Shortest Tenure in Enterprise	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.

Redwood

This table lists the employment profile options that are applicable only for Redwood pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_EMPL_ADD_ASG_COPY_FRM_SRC_ENABLED	Copy Data from Source Assignment While Adding a New Assignment Enabled	Yes	Enables you to copy data from source assignment while adding a new assignment. If the profile

Profile Option Code	Profile Display Name	Default Profile Value	Description
			option is set to No, then data from the source assignment won't be copied.
ORA_PER_EMPL_ADD_ASG_DFLT_TEMP_ENABLED	Default Add Assignment to Temporary Enabled	Yes	Enables you to default the assignment to temporary while adding a new assignment. If the profile option is set to No, then the assignment is defaulted as permanent.
ORA_PER_EMPL_DEFAULT_EFFECTIVE_DATE	Employment Transaction Date Set by Default	Y	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. In Redwood processes, the transaction date is never set by default, irrespective of this profile option setting.
ORA_PER_EMPL_ELIG_JOBS_RELIEF_TYPE_ENABLED	Employment eligible jobs relief type selection enabled	N	Enables you to select eligible jobs relief type as derived or manual. If this isn't enabled then the eligible jobs will be added with the relief type as derived.
ORA_PER_EMPL_REV_TERM_PWK_WHEN_CANCEL_WR	Reverse Terminate Pending Worker When Employee or Contingent work relationship is canceled	No	Reverses the pending worker termination transaction when the employee or contingent worker work relationship is canceled.

Responsive

This table lists the employment profile options that are applicable only for responsive pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_CLE_COPY_FUT_TERMINATION	Future Termination Copy Enabled	Y	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. If you set the profile option to Y, these things happen: • Future termination will be copied even if future assignment updates are set to not copy. • Future termination will be copied even if future

Profile Option Code	Profile Display Name	Default Profile Value	Description
			assignment updates fail to copy successfully.
ORA_PER_DOR_ASG_LVL_MOVE_ON_CHANGE_LE	Move Assignment Level Document Records During Change Legal Employer Enabled	No	Enables moving of assignment-based document records during the change legal employer process.
ORA_PER_DOR_DELETE_ON_DELETE_ASG_DATE_EFFECTIVE_CHG	Delete All Document Records Associated with the Deleted Assignment Record	No	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.
ORA_PER_EMP_RETAIN_CHANGES	Retain employment changes	N	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. 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. 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. 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. When you enter a value that's not valid as of the newly changed date, the value will be reverted to the old value.
ORA_PER_EMPL_ADD_ASG_DEL_INFO	Add Additional Information While Deleting an Assignment Update	N	Specify additional information when deleting an assignment update. In the Redwood Delete Employment Details process, additional information is enabled during deletion, irrespective of this profile option setting.
ORA_PER_EMPL_COMBINED_CORRECTION_DELETION	Combined Correction and Deletion Enabled for Employment Records	No	By default, the combined correction and deletion feature isn't enabled for employment

Profile Option Code	Profile Display Name	Default Profile Value	Description
			records. To enable the feature, you must set the profile option to Yes. In the Redwood Employment Info page, the salary details are displayed in the Historical Changes and Future Changes sections irrespective of this profile option setting.
ORA_PER_EMPL_DISPLAY_GT_HISTORY	Display assignment history across global transfers	No	If you set the profile option to Yes, the assignment history across legal employer changes is displayed on the Employment Info responsive page. To view the worker's assignment history across legal employer changes, their source and destination assignments must be linked. **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. In the Redwood Employment Info page, the assignment history across global transfers is always displayed irrespective of this profile option setting.
ORA_PER_EMPL_ENABLE_WRK_ASG_REST_LOV	Enable Worker Assignment REST LOV	N	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.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.
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.

Profile Option Code	Profile Display Name	Default Profile Value	Description
PER_DEFAULT_GRADE_FROM_JOB_POSITION	PER_DEFAULT_GRADE_FROM_JOB_POSITION	N	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: • Hire and Add Assignment o If the selected position has an entry grade, then the entry grade is defaulted. o If the selected position doesn't have an entry grade and has a single valid grade, then the single valid grade is defaulted. o If the selected position doesn't have any valid grades (entry grade is also a valid grade), then no grade is defaulted. o If no position is selected and the job has a single valid grade, then the single valid grade is defaulted. • Employment, Promote, and Transfer o The grade isn't overridden except when the PER_ENFORCE_VALID_GRADES and PER_DEFAULT_GRADE_FROM_JOB_POSITION profile options are set to Yes and the single valid grade is defined at the position or job. 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.
PER_EMP_MANAGER_NAME_LOV	PER_EMP_MANAGER_NAME_LOV	PER_EMP_MANAGER_NAME_LOV	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.
PER_MANAGE_CONTRACTS_RESPONSIVE_ENABLED	PER_MANAGE_CONTRACTS_RESPONSIVE_ENABLED	Y	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.

Profile Option Code	Profile Display Name	Default Profile Value	Description
			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.

HDL

This tables lists the employment profile options that are applicable only for HDL.

Profile Option Code	Profile Display Name	Default Profile Value	Description
HR_DISABLE_PENDING_APPROVALS_CHECK_IN _HCM_DATA_LOADER	HR: Disable pending approvals check in HCM Data Loader	N	If you set the profile option to Y, the pending approval check is disabled when loading data using HCM Data Loader.

Not Used

This tables lists the employment profile options that aren't used in the application.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_EMPL_FLOW_REPLACED	Banner to Display Replaced Employment Flow	N	This profile option is no longer being used by the application. 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.
ORA_PER_ENABLE_BUSINESS_TITLE_IN_UNIVERSAL_PANEL	Enable Business Title in Universal Panel		This profile option is no longer being used by the application. Enable the business title to be displayed along with the person's name in the universal panel.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_ENABLE_PERSON_NUMBER_IN_UNIVERSAL_PANEL	Enable Person Number in Universal Panel	N	This profile option is no longer being used by the application. Enable the person number to be displayed along with the person name in the universal panel.

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

Lookup Type	Description	Configuration Level
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

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

Note: For Lookups in general, a relatively small number of lookup codes are created. Responsibility types lookups are to support your typical responsibility classifications. The lookup codes must not exceed 500 values, or you'll run into errors where the responsibility type is referenced.

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.
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_INFORMATON_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
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

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
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
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	Legislation code	Varchar2	Yes	No
LEGISLATION_CODE_VALUE	Legislation code value	Varchar2	No	Yes

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
			Note: This parameter works in the application but isn't supported in notifications.	
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
PRIMARY_WORK_RELATION_FLAG	Primary work relationship indicator	Varchar2	Yes	Yes
PROJECTED_START_DATE	Projected start date	Date	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

Parameter Code	Parameter Description	Data Type	Supported in DFF	Supported in EFF
SOURCE_ASSIGNMENT_ID	Source assignment identifier	Number	Yes	Yes
SysEffectiveDate	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
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:
    - **Name**: Job Specialty
    - **Type**: Multi-Row EFF
    - **Data Type**: Character
    - **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	N/A	PER_PERIODS_OF_SERVICE

Employment Flow	Security Privilege Securing BIP Notification	Security Privilege Securing Edit by Approver	Securing Business Object
	Manage Work Relationship View Work Relationship		
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 View Employment Information Summary	N/A	PER_ALL_ASSIGNMENTS_M
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 Flow	Security Privilege Securing BIP Notification	Security Privilege Securing Edit by Approver	Securing Business Object
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 View Terminate Work Relationship	Terminate Work Relationship	PER_PERIODS_OF_SERVICE
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
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

Field	Value
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 in Journeys
- 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	#{bindings.DisplayName.inputValue}
Person Number	#{bindings.PersonNumber.inputValue}
Assignment Number	#{bindings.AssignmentNumber.inputValue}
Assignment Name (Business Title)	#{bindings.AssignmentName.inputValue}

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.

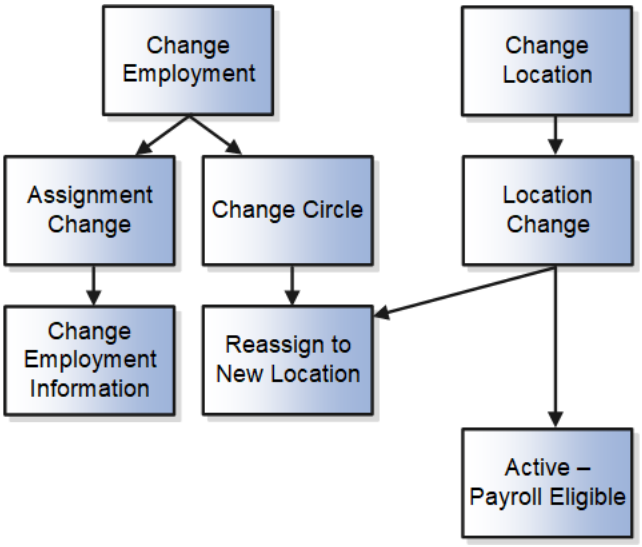
The action type identifies the business process associated with the action and can have one or more predefined actions.

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	• Add Employee Work Relationship • Add Contingent Worker Relationship • Add Nonworker Relationship • Add Pending Worker Relationship • Renew Placement **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. • Rehire an Employee **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.
Add Assignment (Permanent)	Add Assignment
Add Assignment (Temporary)	Temporary Assignment
Change Assignment	• Change Employment • Start Probation Period • End Probation Period • Demote Employment • Suspend Assignment • 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.

Employment Flow	Action Type
	• 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 **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.
Terminate Employment	Terminate Work Relationship End Global Temporary Assignment **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. End Assignment **Note:** The action based on this action type is displayed only if the selected worker has more than one active assignment.

Employment Flow	Action Type
Create Mass Assignment Change	• 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
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

Action Type Code	Action Type
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
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

Action Type Code	Action Type
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
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

Action Type Code	Action Type	Action Code	Action Name	Description
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
ORA_PER_EMPL_TERMINATE_OFFER	Terminate Offer Work Relationship	ORA_PER_EMPL_TERMINATE_OFFER	Terminate Offer	Terminate Offer Work Relationship
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
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

Action Type Code	Action Type	Action Code	Action Name	Description
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) 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.

Flow	Entity Type - Entity ID	Parent Entity Type - Parent Entity Key ID
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 list of values (sorted alphabetically by action name) is defaulted.
2	Yes	Yes	When the actions match the requester's role and worker's legal employer country, the first action in the Action list of values (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 list of values (sorted alphabetically by action name) is defaulted.
4	No	Yes	When the actions match the requester's role, the first action in the Action list of values (sorted alphabetically by action name) is defaulted.

The application will default the first action in the Action list of values (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
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
Devon Smith	United States	HR Specialist United States	Leave of Absence
Stefan Anderson	Sweden	HR Administrator	Absconding

User	Worker Country	User Role	Defaulted Action
Dennis Peattie	France	HR Specialist France	Absconding

For Dennis Peattie, even though the Absconding action is defaulted, the action value won't be displayed in the Action list of values. If the user changes the value in the list of values, 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.
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	The start and end date of the retained grade entered by the user. **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.	Not applicable.
Pay Table ID	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.	These are the SQL code clauses used by the Pay Table ID field: FROM Clause : PER_GRADE_LADDERS_F_VL GradeLadder, FND_SETID_SETS_VL SetId Value Column Name: SUBSTR(NAME,1,100) WHERE Clause : GradeLadder.GRADE_SET_ID = SetId.SET_ID(+) AND :{SEGMENT.ORA_PER_RETGRD_START_DATE_S} <= EFFECTIVE_END_DATE and :{SEGMENT.ORA_PER_RETGRD_END_DATE_S} >= EFFECTIVE_START_DATE
Grade	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. **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.	These are the SQL code clauses used by the Grade field: FROM Clause : per_grades_f_vl grades left outer join PER_GRADES_IN_LADDERS_F gradeinladder ON grades.grade_id = gradeinladder.grade_id Value Column Name: SUBSTR(grades.NAME,1,100) 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}))

Grade Field	Related Lookup and Usage	SQL Clause
Step	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. **Note:** If the grade isn't selected, the Step field doesn't display any value.	These are the SQL code clauses used by the Step field: FROM Clause : per_grade_steps_f_vl Value Column Name: SUBSTR(NAME,1,100) 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
Pay Basis	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.	These are the SQL code clauses used by the Pay Basis field: FROM Clause : (SELECT DISTINCT AEI_ATTRIBUTE6 FROM PER_ASSIGNMENT_EXTRA_INFO_M_V) Value Column Name: SUBSTR(AEI_ATTRIBUTE6,1,100) WHERE Clause : AEI_ATTRIBUTE6 IS NOT NULL
Pay Plan	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.	These are the SQL code clauses used by the Pay Plan field: FROM Clause : (SELECT DISTINCT AEI_ATTRIBUTE7 FROM PER_ASSIGNMENT_EXTRA_INFO_M_V) 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** checkbox for the **Page Composer** option.
5. Click **Create and Enter**.

Edit Panel Header Properties

1. Click **Home** > **My Client Groups** > **Show More**.
2. In the Employment group, click **Areas of Responsibility**.
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** 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	`#{bindings.PersonNumber.inputValue}`

To add	Expression
Assignment Number	`#{bindings.AssignmentNumber.inputValue}`
Assignment Name	`#{bindings.AssignmentName.inputValue}`

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 or Redwood Experience

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.

Migrate to Redwood from Version 2

To use the Redwood user experience, you need to migrate to V3 first. Here's how you can do that:

1. Complete all pending transactions before you migrate to Version 3.
2. Enable the profile options for Redwood Terminate Employment and Resign from Employment pages. For more information, see *Redwood Experience for Terminate Employment and Resign from Employment pages*.
3. Configure Approval Rules for Resign From Employment & Terminate Employment.
4. 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)

Migrate to Redwood from Version 3

Here's how you can use the Redwood user experience if you're on Version 3:

1. Complete all pending transactions before you migrate to Redwood.
2. Enable the profile options for Redwood Terminate Employment and Resign from Employment pages. For more information, see *Redwood Experience for Terminate Employment and Resign from Employment pages*.

Note:

- If the quick actions for navigating to Responsive Termination & Resignation still appear after the migration, you need to turn them off.
- If you're a new user, you need to enable the profile options for Redwood and run the Migrate Employment Data process.

Related Topics

- What are scheduled processes?
- Submit Scheduled Processes and Process Sets
- Redwood Experience for Terminate Employment and Resign from Employment pages

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

12 Seniority Dates

Overview of Seniority Dates

You can define, manage and use the seniority of workers using version 3 or version 1 of the seniority dates functionality.

You can configure V3 seniority dates using the Configure Seniority Dates task and a fast formula. You can manage them using the Seniority Dates task under Quick Actions.

This table describes the differences based on the decision points:

Decision	V1 Version of Seniority Dates	V3 Version of Seniority Dates
Available from	Release 1	Release 13.17.11 (17D)
Steps required to enable seniority dates	None	Run the Enterprise Scheduler Service (ESS) job: Migrate to Version 3 of Seniority Dates
Which seniority dates can be managed?	Only the following seniority dates: • Enterprise Seniority Date • Legal Employer Seniority Date	Customers can configure the seniority dates at different levels, such as Person, Work Relationship, and Assignment for the following attributes: • Business Unit • Bargaining Unit • Collective Agreement • Country • Department • Enterprise • Grade • Grade Step • Job • Legal Employer • Location • Position • Union
From where are the seniority dates managed?	Work Relationship UI	Seniority Dates UI
Can the seniority dates be entered during Hire flows?	Yes	No. However, refer to this MOS document for an alternate solution:
How are seniority dates calculated?	Manually entered or Manually updated	Automatically calculated when the following ESS job is run: Calculate Seniority Dates

Decision	V1 Version of Seniority Dates	V3 Version of Seniority Dates
Is the seniority calculated in real time?	N/A	No, the following ESS job must be run regularly to recalculate the seniority dates: Calculate Seniority Dates
How are the seniority dates updated or adjusted?	Manually on the Work Relationship UI	Automatically based on Employment actions. Additionally, manual adjustments can be entered for the seniority dates on the Seniority Dates UI.
The Legal Employer Seniority Date is 1-May-2018 and needs to be updated to 1-Apr-2018. How is the seniority date updated in this case?	The Legal Employer Seniority Date is corrected to 1-Apr-2018.	Provide an adjustment of 30 days for the configured Legal Employer Seniority Date. This will update the seniority date to 1-Apr-2018 when the ESS job is run.
Do you need to configure seniority dates?	No configuration is required. **Note:** If you want to default the enterprise seniority date as the first hire date, you must set the Default Enterprise Seniority Date employment configuration option to Yes at the enterprise level.	Seniority rules configuration is required. Use the Configure Seniority Dates task.
Can Fast Formula be used to calculate seniority dates?	No	Yes These formula types are supported: • Employment Seniority Date Adjustment • Employment Seniority Hours to Days Conversion
Do you need to update any worker assignment before the data migration?	No	Yes 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.
Do you need to run any process post data migration?	No	Run the following ESS job to calculate the seniority dates for workers: Calculate Seniority Dates This ESS job needs to be run regularly or scheduled to recalculate the seniority dates for workers.
What are the considerations when uploading worker assignments?	None	You must provide a value of ORA_PER_SNDT_DAYS for the Seniority Basis attribute. File Name: worker.dat File Discriminator: Assignment Attribute: SeniorityBasis

Decision	V1 Version of Seniority Dates	V3 Version of Seniority Dates
How can I update seniority dates using HCM Data Loader?	The Enterprise and Legal Employer seniority dates can be updated using the following parameters: File Name: worker.dat File Discriminator: WorkRelationship Attributes: EnterpriseSeniorityDate, LegalEmployerSeniorityDate	Not Supported
How can I load seniority date adjustments using HCM Data Loader?	N/A	Adjustment for each configured seniority rule can be uploaded using the following parameters: File Name: worker.dat File Discriminator: SeniorityDate Attributes: ManualAdjustmentDays, ManualAdjustmentComments
Are Database Items (DBIs) available for seniority dates?	Yes	Yes
Which is the table storing the seniority dates configuration?	N/A	PER_SENIORITY_DATES_SETUP
Which is the table storing the seniority dates of workers?	PER_PERIODS_OF_SERVICE	PER_SENIORITY_DATES_F
Can seniority dates be reported using Oracle Transactional Business Intelligence (OTBI)?	Yes	Yes
Can seniority dates be used in Eligibility Profiles?	Yes	Yes

For more information, see these documents on Customer Connect:

- 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)

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	• Termination • Absence entitlements • Benefits • Payments • Team schedules and availability • Awards and recognition	• 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	• Promotion • Key additional assignments • Mentorship opportunities • Travel opportunities • Preference for public speaking and presentations	• 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.

Attribute	Where You Use it	Example
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	• Global temporary assignments • Visas and permits renewals • Payments	• 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.
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	• 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 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.
V3	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. **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.

Version	Description

If you have a new environment, there's no seniority date version activated.

- If you want to use seniority dates V1, you need to create a new rule using the Configure Seniority Dates task and deactivate or delete the rule.
- If you want to use seniority dates V3, you need to create a new rule using the Configure Seniority Dates task and run the Migrate to Version 3 of Seniority Dates process.

For more information, see the document Seniority Dates - Comparison between Different Seniority Dates Versions (https://community.oracle.com/customerconnect/discussion/631037) on Customer Connect.

Considerations for Migrating to V3 Seniority Dates

Here are some points to consider before you migrate to the new version (V3) from the earlier V1 version.

- Migrate from V1 to V3
  - Select the **Migrate Seniority Data from V1 version of Seniority** process parameter.
  - After the migration, you can't view or modify V1 seniority dates.

> **Note:** Even though you can see V2 seniority dates related process parameters, they are no longer supported. V2 seniority dates have been deprecated from release 23B.

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 an earlier version (V1). Use the Scheduled Processes work area to schedule and run the process.

> **Note:** Before you migrate from V1 to V3, you need to review all reports, extracts, fast formulas, and derived factors, which are using V1 seniority dates and make necessary changes so that after migration these point to V3 seniority dates instead of V1.

You can run the process only once to migrate seniority data from V1 to V3.

If you want to roll back to V1 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).

Note: Even though you can see V2 seniority dates related process parameters, they are no longer supported. V2 seniority dates have been deprecated from release 23B.

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 seniority data are retained in the PER_PERIODS_OF_SERVICE table.

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. All existing V1 seniority data are retained in the PER_PERIODS_OF_SERVICE table.

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.

Parameter	Process Results
V1 Seniority to Non-Cumulative V3 Seniority	• V1 seniority dates are moved to V3. • V3 seniority rules corresponding to V1 seniority are created as non-cumulative.

Note: Even though you can see V2 seniority dates related process parameters, they are no longer supported. V2 seniority dates have been deprecated from release 23B.

Related Topics

- Seniority Date Versions
- Considerations for Migrating to V3 Seniority Dates
- What are 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 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

Action	Start Date	End Date	Legal Employer	Legal Employer Seniority	Enterprise Seniority	Comments
						be cumulative. Therefore, the seniority for the Vision US legal employer is the sum of 2 years in the current 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	• EFFECTIVE_START_DATE (DATE)	• EFF_DATE (DATE)	• HR_RELATIONSHIP_ID

Fast Formula Type	Input Parameters	Return Variables	Context
	• 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)	• SENIORITY_ADJUST_COMMENT (TEXT) • SENIORITY_ADJUST_IN_DAYS (NUMBER) • SENIORITY_ADJUST_IN_HOURS (NUMBER)	• 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
	• 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	• EFFECTIVE_START_DATE (DATE) • EFFECTIVE_END_DATE (DATE) • DIRECTION (TEXT) • HOURS (NUMBER) • YEARS (NUMBER) • MONTHS (NUMBER) • DAYS (NUMBER)	• RETURN_HOURS (NUMBER) • RETURN_YEARS (NUMBER) • RETURN_MONTHS (NUMBER) • RETURN_DAYS (NUMBER)	• 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: • 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: • 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: • 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 does the seniority dates version show V2 even though I'm using V1 seniority dates?

Earlier seniority dates V1 and V2 could co-exist but now that V2 is deprecated, even though the application tables show V2, it implies you're using V1.

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) 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 was 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.

13 Document Records

Overview of Document Records

Document Records is a generic and extensible transaction within HCM. It can be used in various ways as it supports granular levels of security, approvals, auditing, custom fields, attachments and so on.

The basic usage of Document Records is to capture documents records related to an employee's personnel file that are required by the various business processes of the organization. For example, birth and marriage certificates required for benefits processing, passport and visa documents required for business travel arrangements.

There's a difference between Document Records and attachments. Document Records is a combination of metadata and attachments. It enables you to capture key metadata information about the attachment that they upload. For example, Issue Date, Expiry Date, and Document Number.

Differences between Document Records and Person Identification Info

Document Records	Person Identification Info
Built after the initial release of HCM Cloud and designed to be a generic solution for capturing details of various document types across various roles.	Built to support easy migration from PeopleSoft to HCM Cloud. Also, these objects have some specific fields and potential localization validations applied to them and are intended for HR professionals and employees, not Line Managers.
There's no limit on the number of document types that can be configured.	Only these types are available: Citizenship, Driver's Licenses, Passports, Visa and Permits.
Additional document types can be added using the Document Types setup task.	Can't add additional types.
Stores all information in a single HR document records table.	Separate tables to store specific information such as passports, visas, and so on.
Supports Attachments.	Attachments aren’t supported.
Follows approval rule of Manage Document Records.	Follows approval rule of Change Personal Information: Citizenship, Change Personal Information: Driver's Licenses, Change Personal Information: Passports, Change Personal Information: Visa and Permits.
Access to document records can be managed through document type security profiles.	Access to objects in person identification info can be managed through specific aggregate privileges. For more information, see *Securing HCM guide*.

Document Types and Categories

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	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. **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.
Expiration Notification Period	Specify an expiration period for this document type. This is an information-only field and doesn't determine any automatic notification. **Note:** This field must be populated in the Document Type Setup page to display the document records in the Document Expiry report.
Minimum Attachments	Specify the number of attachments users should include for the document record. 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. Here are a few points to consider about the feature: • It's only applicable for transactions done using the UI. • It's not applicable when you use HCM Data Loader and REST API. • 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.

Field	What You Use it For
	• Even if you set the value of the Minimum Attachments attribute to -1: o You can still use the Add from Attachment feature to prefill Document Record attributes by scanning an attachment. o 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	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. For example, **`/Custom/Human Capital Management/Document Records/Visa Application.xdo`**
Country	Indicate the country the document type applies to. Default is All Countries. 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.
Category	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 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.
Subcategory	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. 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. 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. **Note:** It's recommended that you select a value for the Subcategory attribute when configuring a document type to further classify document records.
Tags	Classify and group document types during creation and editing. These tags are used as a starting point: • Employment • Identification • Legal However, you can add additional values to the ORA_PER_DOC_TYPE_TAGS lookup type. 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.
Status	Indicate whether new document records can be created for this document type.

Field	What You Use it For
	Note: Document records of this type can be viewed, edited, and deleted even if the status of the document type is inactive.
Approval Required	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.
Allow Multiple Occurrences	Indicate whether multiple records of this document type can be created for the person. **Note:** This check is performed against the individual assignments of the person and not against the person. This lets you create a document record per assignment instead of one document record per person. For example, if you have the following configuration in the **Document Type Information page**: • Document Type: Employment Agreement • Document Type Level: Assignment • Allow Multiple Occurrences: No 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**.
Publish Required	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. **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. See the topic, Make Document Records Available from a Specific Date
Enable Document Delivery Preferences	Indicate delivery preferences for the document.

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 required 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 required 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 required if you set it as **Hide** or **Read only**. Otherwise, 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 it is 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.

- If you're adding a URL as an attachment on the Redwood document type page, you can use only lower case.

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	Impact on Page When Creating and Viewing Document Records
No	No	No	-

Restrict Create	Restrict Update	Restrict Delete	Impact on Page When Creating and Viewing Document Records
No	No	Yes	Delete button isn't visible when viewing the document record.
No	Yes	Yes	Edit and Delete buttons aren't visible when viewing the document record.
Yes	Yes	Yes	Document Type LOV won't display the document type when adding a new document record. Edit and Delete buttons aren't visible when viewing the document record.
Yes	No	No	Document Type LOV won't display the document type when adding a new document record.
Yes	Yes	No	Document Type LOV won't display the document type when adding a new document record. Edit button isn't visible when viewing the document record.
No	Yes	No	Edit button isn't visible when viewing a document record.
Yes	No	Yes	Document Type LOV won't display the document type when adding a new document record. Delete button isn't visible when viewing the document record.

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 select 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 might 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've 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've 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've 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.
- You've enabled the Restrict Delete, Create, and Update options for a Document Type and excluded certain roles from the Delete and Update restrictions. In this case, the user role with most access will take precedence. Here's an example to understand this better:
    - Sandra has only the employee role. You've 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.
    - John has two roles, employee and HR specialist. With the Restrict Update option enabled to Yes for the Visa document type, John can edit the Visa document record for Sandra, since he has the HR specialist role which is excluded from the Restrict Update option. Also, since John has both HR specialist and Employee roles, the role with the most access takes precedence which means that John is permitted to update his own Visa document record, as long as he has the appropriate data security privileges.

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).
- By default, the value for the field is null.
- The field will be enabled only when the restrict setting is set to Yes.
- You can select one or more role names from a list of values in the field. If there's more than one role, they'll be automatically separated by commas.
- If a role is deleted after it's added to the exclusion list, it'll not be displayed in the dropdown list of the **Roles Excluded from Restriction** field and will not be available for future selection in the list of values.
- 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 isn't 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've changed the add, edit, and delete buttons using page composer, it's 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
From Date	Passport Start Date
To Date	Passport End Date
Issued On	Passport Issued Date
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.

When you're configuring labels for standard attributes in the Redwood user interface, use the **New Label** field in the Basic details section. These labels are displayed when you view, add, or edit a document record for the document type. The translation support in the Redwood UI is available by logging in with the specific language and modifying the labels in the required language.

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
ORA_PER_DOC_TYPE_TAGS	Tags for Grouping Document Types.	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.

Profile Option Code	Profile Display Name	Default Profile Value	Description
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: • 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: • 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: • Global Transfer o 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 using HDL, HSDL or REST, post approval. o Only document records from the source assignment are moved. o 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 o When document records are moved from destination to source assignment, document records pending approval

Profile Option Code	Profile Display Name	Default Profile Value	Description
			aren't moved. The pending transactions are discarded from the approval process. o 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. o 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	This is what you can specify: • 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.

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
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's 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:
    - Functional Area: Workforce Information
    - 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:
    - Name: Contact
    - Description: Displays the list of contacts for an employee.
    - 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:
    - **Value Set Code**: EMP_CONTACT
    - **Description**: Value set containing the contacts of the employee.
    - **Module**: Search and select Global Human Resources
    - **Validation Type**: Table
    - **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**.
    Sign 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's 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:
    - Functional Area: Workforce Information
    - Task: Document Types
2. In the Search Results area, click the **Create** icon.
3. In the Document Type Information page, enter these values:
    - **Type**: Loan Request
    - **Description**: Loan request for employees.
    - **Country**: Search and select India
    - **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:
    - **Functional Area**: Workforce Information
    - **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
    - **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

Name	Data Type	Display Type	Value Set Code	Value Data Type

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 changed
API Name	Auto-populated but can be changed
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 **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 runtime. 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 6 months from the date of travel.
Country	All Countries

Field	Value
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: - 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**.

Here are some points to consider:

- 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.
- Workers need to enter all the required 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.
4. In the **Generate Letter** column, select the **Yes** or **No** value.
5. Click **Done**.

Here are some points to consider about generating letters from document records:

- 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.
- 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.
- For document records created using the Redwood Document Records page, if the Document Record Source is **REST API**, the letter will be generated even if the Generate Letter field is **No**.

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.
• Document Name • Document Number • From Date • To Date	• Not Relevant (N) to Required (R) • Required (R) to Not Relevant (N)	There should be no existing document records corresponding to the document type.

Attribute	Update Value	Condition for Update
• Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments		
• Document Name • Document Number • From Date • To Date • Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments	• 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.
• Document Name • Document Number • From Date • To Date • Issuing Country • Issuing Location • Issuing Authority • Issued On • Issuing Comments	• Relevant (Y) to Required (R)	There should be no existing document records corresponding to the document type. If any 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.
Category	Edit	This option is available on the Redwood page only.
Sub-category	Edit	This option is available on the Redwood page only.

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.

Attribute	Description
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. **Note:** • 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	Y	pPersonId: unique identifier of the person.	pPersonId: PERSON_ID column in PER_PERSONS or PER_ALL_PEOPLE_F tables

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
	Note: This is same for both HR specialists and managers.		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. pSystemDocType: unique identifier of system document type of a specific document record **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. pMode: mode of document records page It can have three values. CREATE: To open Add Document Records page VIEW: To open the document record of the specified type, if it exists. Else, opens 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	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 pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table pDocumentsOfRecordId: DOCUMENTS_OF_RECORD_ID column in HR_DOCUMENTS_OF_RECORD table

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			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. pDocumentsOfRecordId: unique identifier of the document record. **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.	
Document Records (MANAGER_DOCUMENT_RECORDS,NONE)	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.	Y	pDocumentTypeId: unique identifier of the document type of a specific document record. pSystemDocType: unique identifier of system document type of a specific document record **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. pMode: Mode of Document Records page.	pDocumentTypeId: DOCUMENT_TYPE_ID column in HR_DOCUMENT_TYPES_VL pSystemDocType :SYSTEM_DOCUMENT_TYPE column in HR_DOCUMENT_TYPES_VL pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
			It can have three values: CREATE: To open Add Document Records page VIEW: To open the document record of the 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 (HR_DOCUMENT_RECORDS, NONE)	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.	Y	pDocumentTypeId: unique identifier of the document type of a specific document record. pSystemDocType: unique identifier of system document type of a specific document record	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
			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. pMode: mode of Document Records page. It can have three values: CREATE: To open Add Document Records page VIEW: To open the document record of the 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.	pCategory: CATEGORY_CODE column in HR_DOCUMENT_TYPES_VL table
Document Records (DOCUMENT_RECORDS, NONE)	Opens the Document Records page of the signed-in user.	Y	NA	NA

Deep Link	Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
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.				
Create Document Record (EMP_CREATE_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.	Displays the Create Document Records page of the signed-in user.	N	NA	NA
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	Functional Security:
		• Manage Person Documentation by Worker
		• Manage Person Documentation by Manager
		• Manage Person Documentation
		• View Person Documentation
		Data Security:
		• Manage Person Documentation
		• View Person Documentation
			List mode with person number
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonNumbe`
			1. List mode with person ID
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonI`
			2. List mode with person number and document type ID
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonN`
			3. List mode with person number and system document type
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonN BIRTH`
			4. List mode with person ID and system document type
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonI ADOPTION`
			5. List mode with person ID and category
			`https://pod.oraclecloud.com/`

Deep Link	Audience	Security Requirements	Examples
			`fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pPersonI DOC`

Document Records (MANAGER_DOCUMENT_RECORDS,NONE)	Manager	Functional Security:
		• Manage Person Documentation by Worker
		• Manage Person Documentation by Manager
		• Manage Person Documentation
		• View Person Documentation
		Data Security:
		• Manage Person Documentation
		• View Person Documentation
			Without Parameters
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE`
			With Parameters
			1. List mode with system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH`
			2. View mode with system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH;pMode=VIEW`
			3. View mode with system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pSys PASSPORT;pMode=VIEW`
			4. Create mode `pMode` (equal to CREATE) system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pMod`

Deep Link	Audience	Security Requirements	Examples
			5. Create mode **pMode** (equal to CREATE) with system document type **https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&bjKey=pSyst BIRTH;pMode=CREATE** 6. Create mode **pMode** (equal to CREATE) with system document type **(pSystemDocType)** and **pDocTypeReadOnly** parameter **https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MANAGER_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH;pMode=CREATE;pDocTypeRead** 7. List mode with category (pCategory) **https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pCategor DOC**
Document Records (HR_DOCUMENT_RECORDS,NONE)	HR	Functional Security: • Manage Person Documentation by Worker • Manage Person Documentation by Manager • Manage Person Documentation • View Person Documentation Data Security: • Manage Person Documentation • View Person Documentation	Without Parameters **https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE** With Parameters 1. List mode with system document type **(pSystemDocType)** **https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH** 2. View mode with system document type **(pSystemDocType)** **https://pod.oraclecloud.com/**

Deep Link	Audience	Security Requirements	Examples

			`fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH;pMODE=VIEW`
			3. View mode with system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSys PASSPORT;pMode=VIEW`
			4. Create mode `pMode` equal to (CREATE)
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE;pMode=CREAT`
			5. Create mode `pMode` equal to (CREATE) with system document type `(pSystemDocType)`
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objKey=pSys BIRTH;pMode=CREATE`
			6. Create mode `pMode` equal to (CREATE) with system document type `(pSystemDocType)` and (Doc Type Read Only)`pDocTypeReadOnly` parameter
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOCUMENT_RECORDS&action=NONE&objkey=pSys BIRTH;pMode=CREATE;pDocTypeRead`
			7. List mode with category (pCategory)
			`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=DOCUMENT_RECORDS_ANY&action=NONE&objKey=pCategor DOC`

Document Records (DOCUMENT_RECORDS,NONE)	Employee, Manager, HR	Functional Security:	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?`

Deep Link	Audience	Security Requirements	Examples
		• Manage Person Documentation by Worker • Manage Person Documentation by Manager • Manage Person Documentation • View Person Documentation Data Security: • Manage Person Documentation • View Person Documentation	`objType=DOCUMENT_RECORDS&action=NONE`
Create Document Record (EMP_CREATE_DOCUMENT_RECORDS, NONE)	Employee, Manager, HR	Functional Security: • Manage Person Documentation by Worker • Manage Person Documentation by Manager • Manage Person Documentation • View Person Documentation Data Security: • Manage Person Documentation • View Person Documentation	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_CREATE_DOCUMENT_RECORDS&action=NONE`
Document Delivery Preferences (EMP_DOC_DELIVERY_PREF, NONE)	Employee, Manager, HR	Functional Security: • Manage Person Document Delivery Preferences • View Person Document Delivery Preferences Data Security: • Manage Person Document Delivery Preferences • View Person Document Delivery Preferences	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=EMP_DOC_DELIVERY_PREF&action=NONE`
Document Delivery Preferences (MGR_DOC_DELIVERY_PREF, NONE)	Manager, HR	Functional Security: • Manage Person Document Delivery Preferences • View Person Document Delivery Preferences Data Security: • Manage Person Document Delivery Preferences	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MGR_DOC_DELIVERY_PREF&action=NONE`

Deep Link	Audience	Security Requirements	Examples
		• View Person Document Delivery Preferences	
Document Delivery Preferences (HR_DOC_DELIVERY_PREF,NONE)	Employee, Manager, HR	Functional Security: • Manage Person Document Delivery Preferences • View Person Document Delivery Preferences Data Security: • Manage Person Document Delivery Preferences • View Person Document Delivery Preferences	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=HR_DOC_DELIVERY_PREF&action=NONE`
Mass Download of Document Records (MASS_DOWNLOAD_DOCUMENT_RECORDS,NONE)	HR	Functional Security: • Mass Download Document Records Data Security: • Manage Person Documentation • View Person Documentation	`https://pod.oraclecloud.com/fscmUI/faces/deeplink?objType=MASS_DOWNLOAD_DOCUMENT_RECORDS&action=NONE`

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.

Attribute	Description
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: • Document Type (lowest precedence) • 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.

How to resolve the REST error I see when I access the Redwood Document Records page?

If the Redwood Document Records landing page doesn't load, run the scheduled processes in this table to regenerate the security profiles and grants. If you're using custom roles, make sure that the **Use REST Service - Worker Assignments List of Values** privilege is available and regenerate the grants.

Scheduled Process	Parameters
Regenerate Data Security Profiles	In the Security Profile Type field, select **Document type security profiles**.
Regenerate Data Security Grants	In the Mode field, select **All roles**.

14 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

Overview of Scheduling Options for Your Workforce

You can define schedules for workers using a base scheduling solution. Or you can dynamically schedule workers based on workload or staffing needs and let workers self-schedule and trade shifts.

The base solution is part of Oracle Fusion Cloud Human Capital Management and uses enterprise shifts and work patterns. The advanced solution is Oracle Fusion Cloud Workforce Management and was developed entirely in the Redwood user experience. It also uses these shifts and work patterns, and schedule generation profiles, workload management, and worker self-scheduling.

If the basic and advance solutions don’t support your scheduling needs, you can also define work schedules and exceptions. This scheduling approach is covered in the remaining topics of this Work Schedules section.

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.
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.

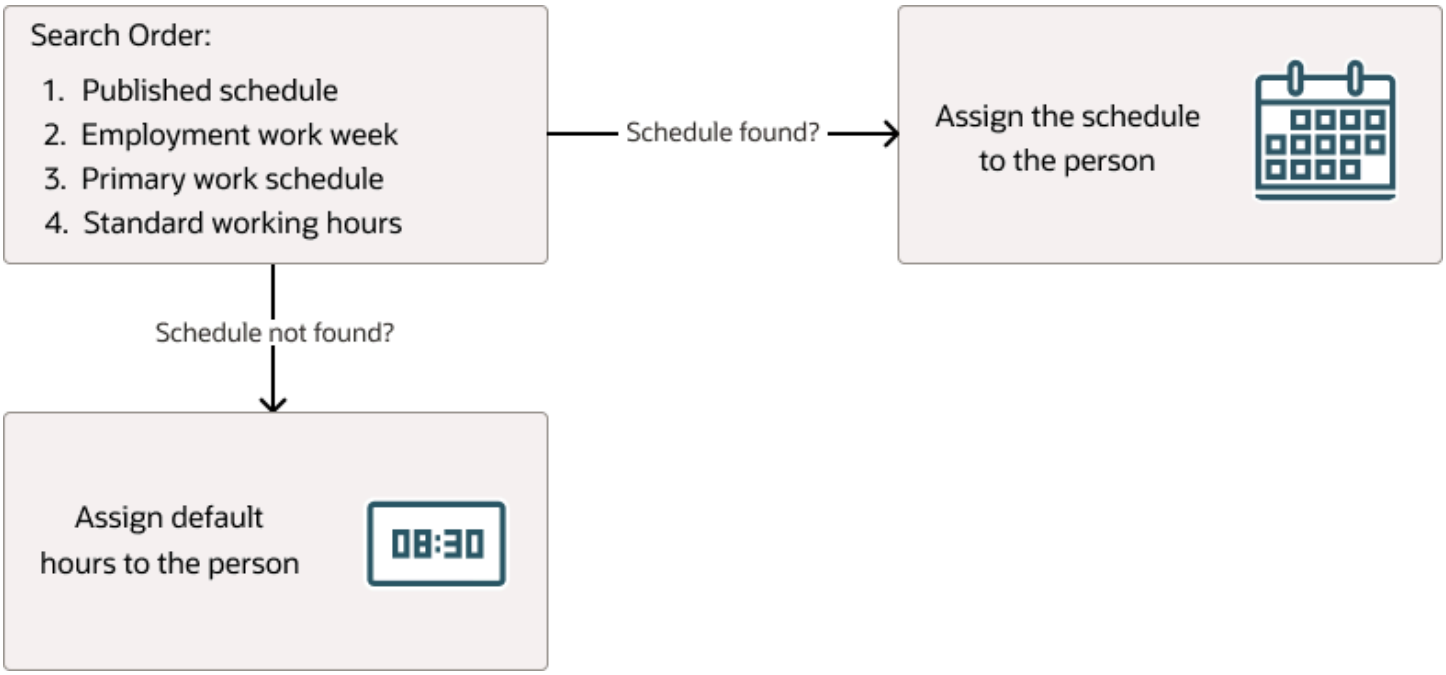
Search Order

The process searches for someone's schedule in this order, before applying the result to the assignment:

1. Published schedule
2. Employment work week
3. Primary work schedule

4. Standard working hours

If the process doesn't find a schedule, it uses the default hours 8:30a to 5:00p.



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 apps. 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.

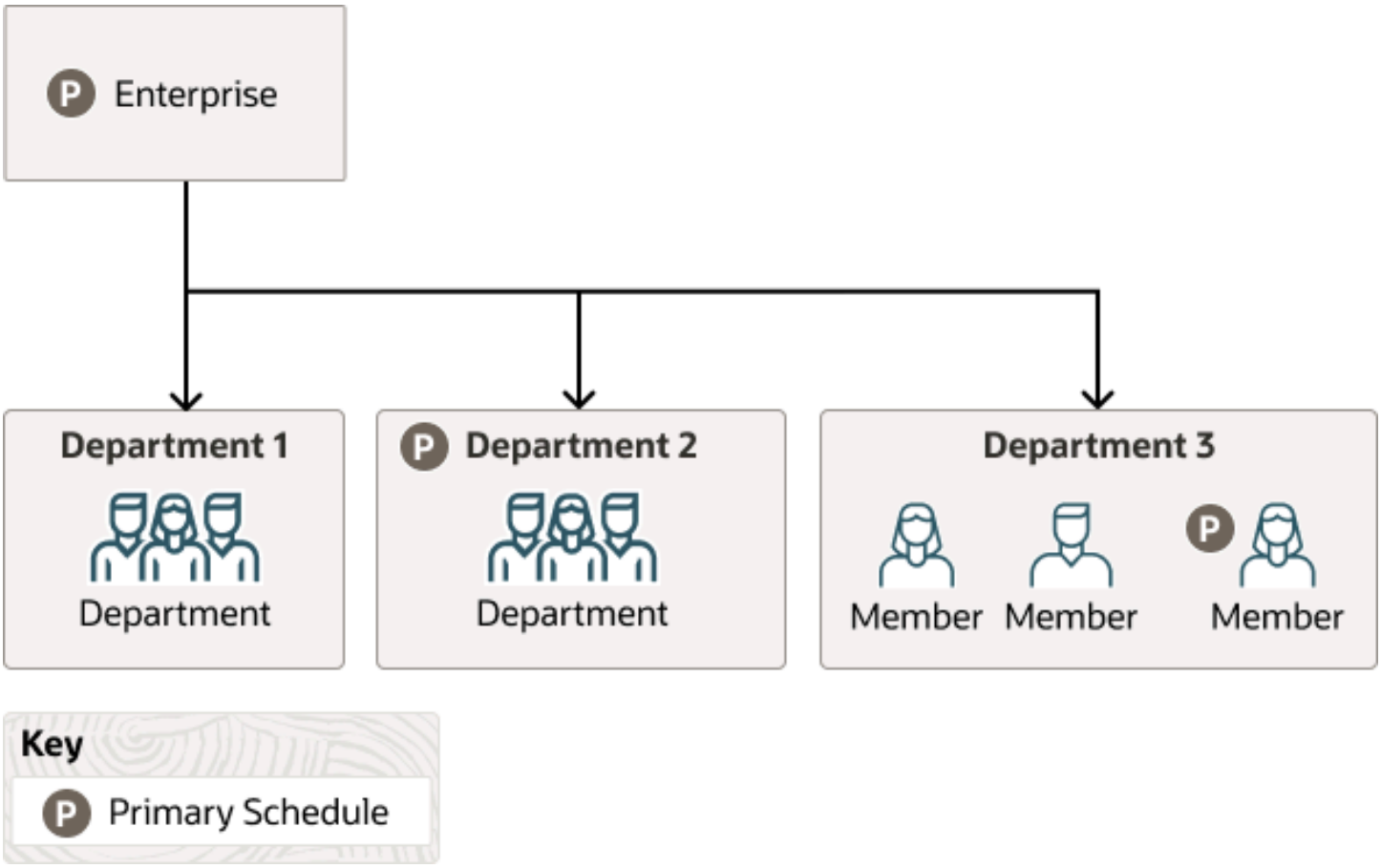
Primary Work Schedule

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.

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 Scopes 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 Crate 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?

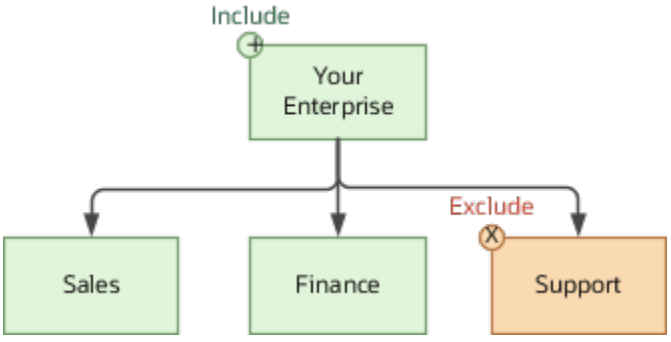
Sign in with credentials for someone who would have the calendar event. Then, open their calendar in the Time and Absences work area and go to the appropriate month, week, or day.

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.

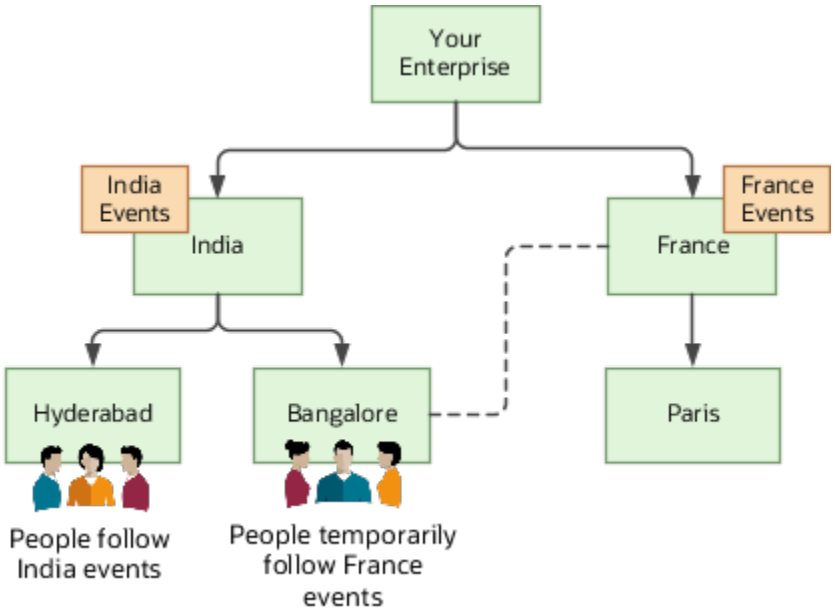
Examples of Overriding Calendar Event Coverage for Specific Geographic Locations, Levels, and Individuals

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.

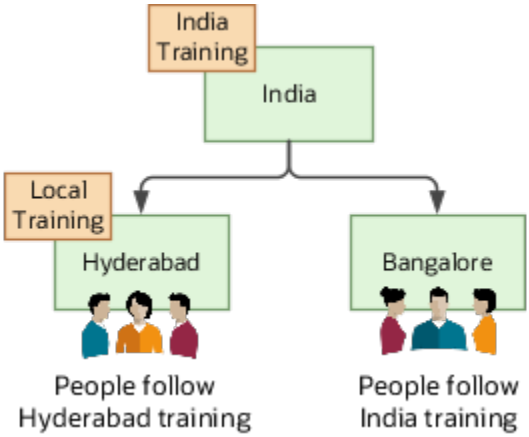
Specific Geographic Locations

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

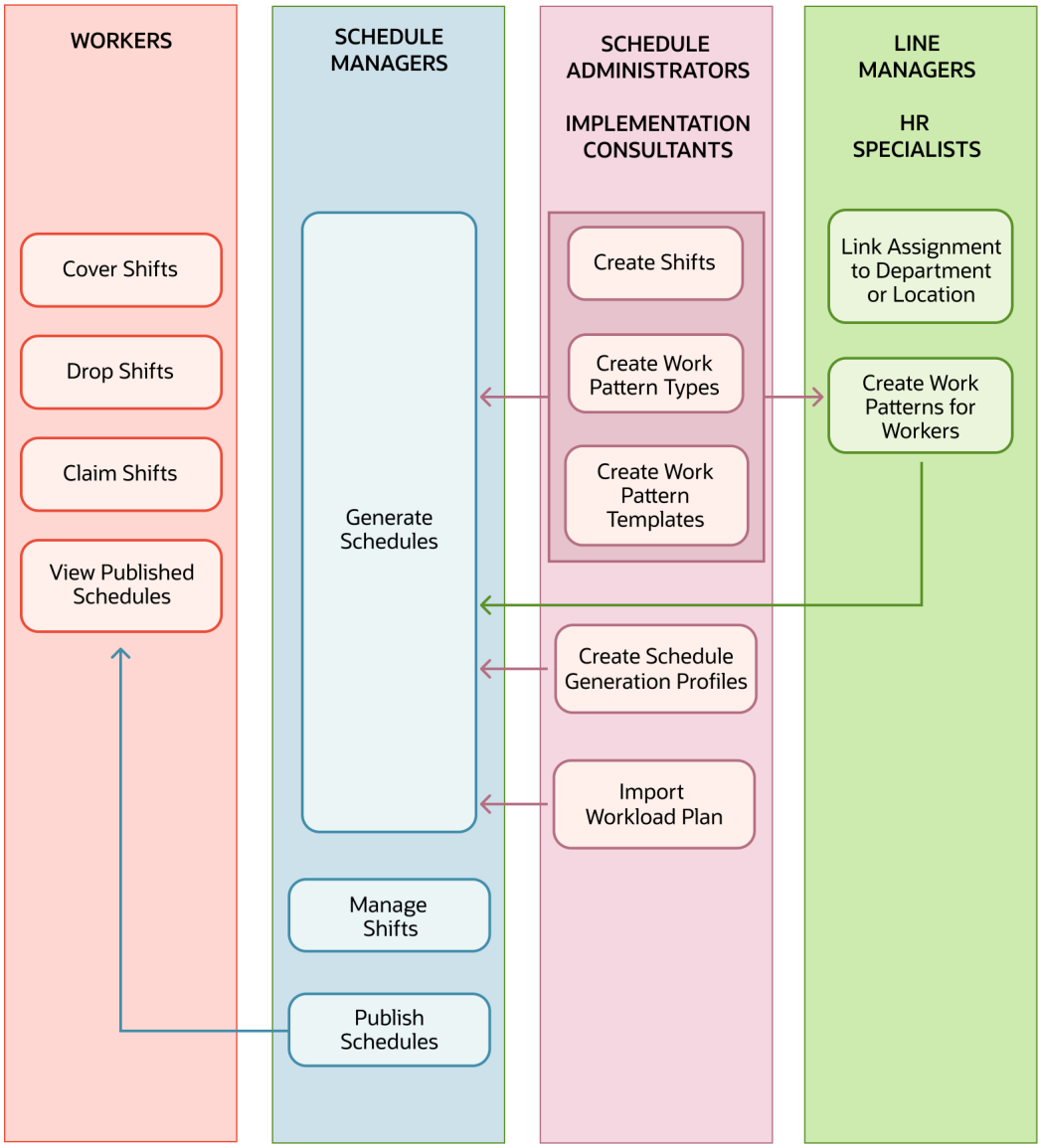
- People Covered by a Calendar Event
- Organization Hierarchy Decides Calendar Event Coverage

Workforce Scheduling

Overview of Workforce Scheduling

Schedule the appropriate quantity of qualified workers where you need them.

- Implementation consultants and schedule administrators can create a library of shifts, work pattern types, and work pattern templates. They can also create rules to assign the work pattern templates as work patterns to worker assignments. They create schedule generation profiles that link schedule managers to staffing departments and schedule periods. And they can import workload plans.
- Line managers link worker assignments to departments or locations so that they can be assigned work patterns and schedule managers can generate appropriate workforce schedules. The line managers can also manually add work patterns to worker assignments.
- Schedule managers generate and publish workforce schedules, and manage schedule shifts to optimize worker resources.
- Workers can use their calendars to view their published schedules, claim open shifts, and submit requests to cover, and drop shifts.



Here's the workforce scheduling cycle:

1. Import your workload.
2. Generate draft and planned schedules.
3. Self-schedule shifts.
4. Balance the schedules.
5. Create more shift opportunities.
6. Publish the final schedules.
7. Fill opportunities and shift swaps.
8. Approve or deny submitted shift requests, such as cover, drop, and withdraw claim.

Shifts in Workforce Scheduling

A shift is a defined block of work used to create work patterns. You also use them to identify operating shifts for schedule generation profiles, and when managing workforce schedules.

Create shifts using the Shifts quick action for **My Client Groups** > **Workforce Scheduling**. You can also use the Enterprise Shifts task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

A shift includes a name, work duration, and start time. It can include a total break duration. The work and break durations decide the total duration. For example, you create the Union Day shift with these settings:

- The start time is 8:00 am.
- The work duration is 8 hours.
- The total break duration is 60 minutes.
- 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.

CAUTION: Be sure to enter times and durations that are in 15-minute intervals, such as 15, 30, and 45.

When appropriate you can let workers exceed their FTE without any validation warnings for the worker or scheduler by configuring shifts that allow overtime. Exceeding FTE without validation warnings happens when workers accept open shifts or requests to cover shifts that allow overtime. It also applies when they claim shifts that allow overtime during self-scheduling.

You can encourage workers to work certain shifts by including an incentive amount when configuring or assigning the shift. And to help people more quickly find appropriate shifts, include a category, such as Day, Evening, or Night.

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 pages include calculations to convert stored minutes over 59 into hours and minutes.

Related Topics

- Add Shift Types for Workforce Scheduling
- Configure Key Lookups for Workforce Scheduling

Work Pattern Types in Workforce Scheduling

You can use duration, start and end times, flexible days, and flexible days and times work pattern types to identify the shift period type to use in work patterns.

You create these work pattern types using the Work Pattern Type task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

Type	Description	Typical Use
Duration	These patterns define the work period using a duration, such as 8 hours on fixed workdays.	Hourly administrative and support workers where the duration and days are required, but the time is flexible
Start and end times	These patterns define the work period using start and end times, such as 8:00 am and 5:00 pm on fixed workdays.	Workers in fixed department roles that don't correspond to patient volume variability, such as management roles
Flexible days	These patterns define the work period using start and end times, such as 8:00 am and 5:00 pm and support flexible working days over a multiweek cycle.	Workers using only self-scheduling periods or open shifts
Flexible days and times	These patterns define the work period using a duration, such as a maximum daily duration of 8 hours, and support flexible working days over a multiweek cycle.	Workers using only self-scheduling periods or open shifts

Flexible working days are the days when the worker needs to be available to work. To derive time totals and absence information, you need to use duration and start and end time shifts and work patterns. That information can't be derived from flexible shifts and patterns.

Work pattern types 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.

CAUTION: Be sure to break durations are in 15-minute intervals, such as 15, 30, 45, or 60 minutes.

Work Pattern Templates in Workforce Scheduling

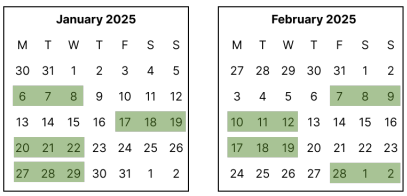
To identify the shifts framework for groups of workers during a specific cycle, create work pattern templates. The shifts can have specific start and end times or durations for specific days. Or they can be flexible.

You can use work pattern templates to create work patterns for individual users, or assign them to workers who meet specific criteria. Create work pattern templates using the Work Pattern Templates quick action for **My Client Groups** > **Workforce Scheduling**. You can also use the Work Pattern Templates task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

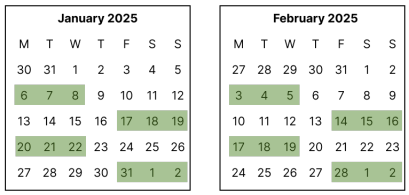
After creating templates, you can assign them using assignment rules. You need to schedule the Process Events process to generate the configured assignments, if the process isn't already scheduled.

You can configure a cycle for work pattern templates that use a duration or start and end times work type. You need to consider the schedule period when setting the template cycle. For example, you have a schedule period of 6 weeks. For the templates that correspond to those schedules, it would seem that you can set up templates with a 2, 3, or 6 week cycle depending on the pattern. But a set of workers needs to work Friday through Sunday of their middle week, in a 3-week cycle. You can achieve this pattern in your 6-week schedule period by entering a template cycle of either 3 or 6 weeks as shown in the first calendar set, but not 2 weeks, as shown in the second calendar set.

3-week or 6-week cycle



2-week cycle



For multiweek templates, you can also set a shift to be a nonworking week. This framework is used to decide the workers' default contractual schedules.

Assigned work pattern templates don't show on worker Work Patterns pages. After assigning a template, you need to generate the workforce schedule that should include the assignees and confirm they're included appropriately.

Related Topics

- Work Patterns in Workforce Scheduling

Work Patterns in Workforce Scheduling

To identify the shifts 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.

For multiweek patterns, you can also set a shift to be a nonworking week. This framework is used to decide the worker's default contractual schedule. Here's an example of how the same assignment might vary depending on the work pattern type.

Cycle	Start and End Times	Flexible Days and Times
Week 1	Work Monday, Wednesday, and Friday from 8:00 am to noon Work Tuesday, Thursday, and Saturday from noon to 4:00 pm All the shifts include a 15-minute paid break that can be taken any time during the shift	Can work Monday, Wednesday, and Friday for a maximum of 4 hours Can also work Tuesday, Thursday, and Saturday for a maximum of 6 hours All the shifts include a 15-minute paid break that can be taken any time during the shift
Week 2	Work Tuesday, Wednesday, and Thursday from 2:00 pm to 8:00 pm. Includes a 15-minute paid coffee break at 4:00 pm, and a 30-minute unpaid meal break at 6:00 pm	Can work on Tuesday, Wednesday, and Thursday for a maximum of 6 hours Can take a 15-minute paid coffee break between noon and 3:00 pm and a 30-minute unpaid meal break between 5:00 pm and 7:00 pm

Nonflexible work patterns are validated to ensure the weekly hours total to the standard working hours defined for the worker assignment. For example, if a worker has an assignment-level FTE of 40 hours, then their work pattern needs to total to 40 hours for any week. Flexible work patterns aren’t validated.

To create a work pattern, use the Work Patterns quick action for **My Client Groups** > **Workforce Scheduling**. 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. Or you can load work patterns for worker assignments using HCM Data Loader.

Tips

As a line manager or HR specialist, you can assign work patterns to only the workers you've permissions to access.

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 need to schedule them to work on all the specified days and at all the specified times. For example, Kris's manager schedules Kris to work the week 1 pattern on Mondays and Fridays from 9:00 am to noon. They don't schedule Kris to work at all on Wednesdays.

Notify Workers and Managers About New, Updated, and Deleted Work Patterns

Workforce scheduling provides three alerts that you can configure using the Alerts Composer tool. By default, they notify a worker when they've a new, update, or deleted work pattern. You can change them to also notify the worker's manager.

Alert Template	Description
HTS Work Pattern Created	Notification to worker that they've a new work pattern assigned.
HTS Work Pattern Updated	Notification to worker that their work pattern was updated.
HTS Work Pattern Deleted	Notification to worker that their work pattern was deleted.

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
Shift Name	Day Office	Night Home

5. Click **Save and Close**.
6. 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

1. On the Work Schedules page, click **Create**.

2. 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

3. 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

Field	Value
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.

15 Set Up Connections

Set Up Connections

Before you start setting up Connections, here's what you need to do:

- Enable the Workforce Deployment offering to view the profile options for Connections. For more information, see *Overview of Global Human Resources*.
- Review your existing profile option settings and check if any of them might impact the Connections search. For more information, see *Profile Options Considerations for Connections Search*.

To set up Connections, you need to enable the profile options for Connections and configure Oracle Search.

Profile Options for Connections

Go to the Setup and Maintenance area, **Manage Administrator Profile Values** task and enable these 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. Go to the Setup and Maintenance area, **Manage Administrator Profile Values** task and enable these 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

2. In the **Tools** > **Scheduled Processes** work area, run this scheduled process for each of the listed indexes.

Job Name	Parameter Name	Parameter Value
Scheduled process to create index definition and perform initial ingest to OSCS	Index Name to Reingest	fa-hcm-person

Job Name	Parameter Name	Parameter Value
		fa-hcm-profile-tag

Note: Run the initial data ingestion process after each release version upgrade and after each P2T (production to test) process.

Profile Options Considerations for Connections Search

These profile options might impact the Connections search. Review these profile settings before you set 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

To use Connections, you need a custom employee or contingent role that has:

- HCM Connections REST Services privilege
- ORA_HRT_REST_SERVICE_ACCESS_TALENT_PERSON_PROFILES aggregate privilege You need this role to use the About Me panel. It's included in these duty roles, by default.
  - ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_INTEGRATION_SPECIALIST_JOB
  - ORA_HRT_ACCESS_SKILLS_CENTER
  - ORA_PER_CONNECTIONS_DUTY

    This role is included in these abstract roles, by default:
    - ORA_PER_CONTINGENT_WORKER_ABSTRACT
    - ORA_PER_EMPLOYEE_ABSTRACT
- Manage Scheduled Job Definition privilege, FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV

You need this privilege for running the Oracle Search initial data ingestion process. It's available in these job roles, by default.

- ORA_FND_APPLICATION_ADMINISTRATOR_JOB
- ORA_FND_APPLICATION_DEVELOPER_JOB

After adding the privileges, you must regenerate the grants for the data role.

16 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