

Oracle Fusion Cloud HCM

**How do I use the HCM
Personalization Helper tool?**



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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.

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

Thanks for helping us improve our user assistance!

1 How do I get started with the HCM Personalization Helper tool?

Use the HCM Personalization Helper tool to assess which of your responsive page personalizations done using HCM Experience Design Studio and Page Composer can be converted and migrated to the Redwood user experience.

Many pages and flows have been recreated in the Visual Builder Studio (VBS) to improve the user experience by creating cohesiveness throughout Oracle Fusion applications. Before you get started with the HCM Personalization Helper tool, you must first understand Visual Builder Studio.

Use these resources to get started:

- [What Can You Do with Visual Builder Studio in Express Mode?](#)
- [Overview of Redwood Application Extension](#)
- See [Extending Oracle Cloud Applications with Visual Builder Studio](#) for the steps to access Visual Builder Studio from a Redwood page and what to do if you don't see the Edit Page in Visual Builder option in your Oracle Cloud Application.

Note: Support for the HCM Redwood Personalization Helper tool is provided on Cloud Customer Connect and not on the Oracle Support site. Post your queries and concerns only to [HCM Redwood Personalization Helper Tool](#).

2 Download the HCM Personalization Helper tool

Follow these steps to download the tool:

1. Create a working directory where you want the tool to run. For example:
 - Windows–C:\Users\John Doe\hcm_redwood_helper
 - Mac or Linux–/home/johndoe/hcm_redwood_helper
2. Go to [Oracle Cloud CoE Central](#) to download the HCM Redwood Personalization Helper tool corresponding to your release and platform and move it to the working directory you created.

3 Install the HCM Personalization Helper tool

The HCM Personalization Helper tool works on Windows and MacOS machines.

1. To install the app on Windows:
 - a. Extract the downloaded file **HCMRedwoodHelper_Windows_<version>.exe.zip**.
 - b. Double-click the .exe file.
 - c. Follow the instructions to install the app.
 - d. After the app is installed, open **HCM Redwood Personalization Helper - 25C**.
2. To install the app on MacOS:
 - a. Extract the downloaded file **HCMRedwoodHelper_MacOS_<version>.dmg.zip**.
 - b. Double-click the DMG file.
 - c. Drag the app to Applications.
 - d. Open **HCM Redwood Personalization Helper - 25C**.
 - If an error message displays, click **Done**.
 - Go to **Settings > Privacy and Security > Security** and click **Open Anyway**.
3. To install the Generic version:
 - a. Copy the **HCMRedwoodHelper_Generic_<version>.jar.zip** file to a working directory.
 - b. Extract the file and verify that HCMRedwoodHelper_Generic_<version>.jar.zip is listed in the working directory.

Note: The downloaded file name format is YYYYMMDD where YYYY is the HCM release such as 2507 and MMDD is the date the tool was last updated such as 0801 for August 01. For example, 25070801 represents the HCM 25C release updated on August 01.

What to do next

To run the HCM Redwood Personalization tool using the Jar file, you'll need JRE 8 on your machine.

- Check if Java 1.8 is installed. For example, run command `java -version` from the command line to find out the java runtime version.
- If JRE 8 isn't installed, download and install Java SE Runtime 1.8 for your platform. See <https://www.oracle.com/java/technologies/downloads/#jre8>. After installation, you can verify that Java is available by running the command `java -version`.

4 Create a user account

An HCM user account is required for the HCM Personalization tool to connect to your HCM environment and access Flex Fields related metadata, and other configuration data. Use this account to sign in to the HCM environment and not through your corporate SSO. This account invokes REST APIs. The tool doesn't access any application data, it only accesses Flex Fields setup data and configuration data such as lookups.

1. Go to Security Console and either edit an existing account or create a new one.
2. Assign the `ORA_PER_EMPLOYEE_ABSTRACT` role and save your changes.
3. Go to your Oracle Fusion HCM environment and sign in with the updated or new user account.

5 Export your existing personalizations for HCM Redwood Personalization Helper tool to process

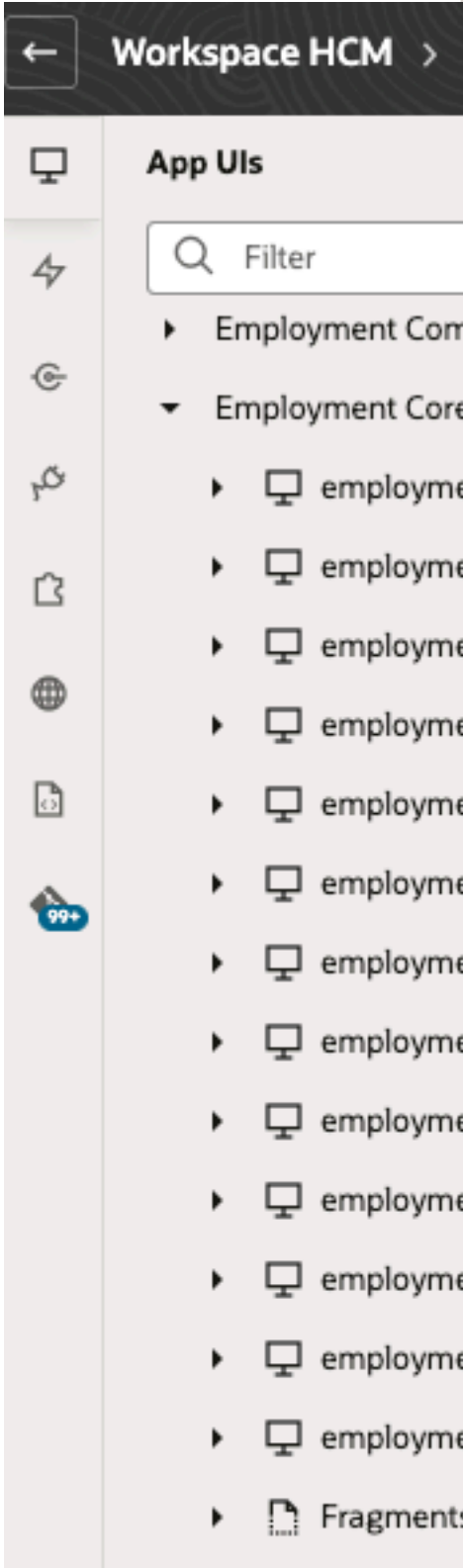
You'll need to set up your working directory by exporting your ADF Personalization files.

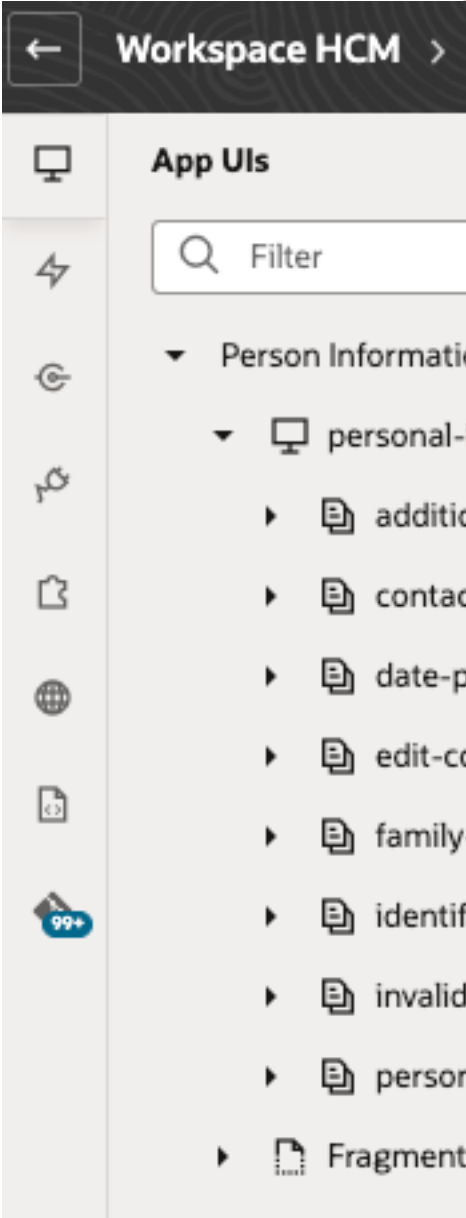
To export your existing personalizations, see Create Migration Set in *Migrate Your Configurations*. Only the default migration set content is needed.

6 Overview of Visual Builder Studio extensions

Each Redwood page is delivered within a given Visual Builder Studio extension. Multiple dependent Redwood pages that belong to the same product area are grouped in the same extension.

As an example, we've listed some HCM Visual Builder extensions from Global Human Resources area and the pages within it. You can view various extensions and pages within each extension in Advanced mode, although it's not recommended to use Visual Builder Studio in Advanced mode. This is for information only.

Visual Builder extension name	Pages	Visual Builder Studio View
Employment Common Processes	<ul style="list-style-type: none">• Hire an Employee• Change Assignment• Add Pending Worker• Add a Contingent Worker• Promote• Correct Employment• Create Work Relationship• Edit Pending Worker• Manage Directs• Change Location and so on	

Visual Builder extension name	Pages	Visual Builder Studio View
People Personal Information	<ul style="list-style-type: none">• Personal Details• Additional Person Info• Contact Info• Edit Contact• Family and Emergency Contacts• Identification Info and so on	

It's important to understand the relationship between the Visual Builder extensions and the corresponding pages because of how personalizations are migrated to Visual Builder Studio workspaces in the output directory. You can only select modules from the Visual Builder extensions that you've initialized to the workspace exported from Visual Builder Studio.

7 Create a Visual Builder Studio workspace

If you're using the HCM Personalization Helper tool in report only mode, a Visual Builder Studio workspace isn't required. However, if you're using the tool to migrate personalizations, a Visual Builder Studio workspace is required.

1. Prepare the workspace

1. Go to the Redwood page that you want to personalize, such as Hire an Employee.
2. Click **Settings and Actions** > **Edit Page in Visual Builder Studio**.
3. Select a project from the list or create a new one. Visual Builder Studio opens the page in Express Mode by default.
4. In the Business Rules section of the page, click **Configure Fields and Regions** and create a test business rule. This initializes required dependencies for this page in the Visual Builder Studio workspace.
The workspace now has Employment Core Visual Builder extension initialized so you can use this workspace to migrate personalizations for any page within the extension.
5. To migrate personalizations from other Visual Builder page extensions, do the following:
 - a. Search for the page (for example, Personal Details) and open it.
 - b. Click **Configure Fields and Regions** and create a test business rule. This initializes required dependencies for this page in the Visual Builder workspace.


The workspace now has Person Information Visual Builder extension initialized. You can now use this workspace to migrate personalizations for any page within this extension.

Now the Visual Builder studio workspace is initialized with required Visual Builder extensions so you can migrate personalizations for the Redwood pages that belong to those extensions.

2. Export the workspace

6. Click **Advanced** to move into Visual Builder Studio Advanced mode.

Note: HCM supports Visual Builder Studio Express mode to personalize Redwood pages. Use Advanced mode only when importing or exporting a workspace.

7. Click the Git icon on the navigator to open the Git menu.
 - a. To save the current changes in the workspace, click **Commit**.
 - b. If you don't want to save the current changes to the workspace, click **Stash**.
8. Click  > **Export**.
9. Copy the downloaded .zip file to the same working directory where the HCM Redwood Personalization Helper .jar file is. You'll use this file as the Input workspace.

Results:

The Visual Builder Studio extension details are included in the workspace and are based on the Redwood page you exported. The HCM Personalization Helper tool uses the extension information from the workspace to show the list of modules you can select to migrate personalizations from. So, if you export a workspace with the Hire an Employee page, then you'll see all the pages from the same Visual Builder extension. For example, the Employment Common Processes extension will include the Change Assignment and Promote pages.

If you need to migrate personalizations for pages belonging to more than one Visual Builder extension, you must repeat steps 1 through 3 for at least one Redwood page from each Visual Builder extension and add them to the same

workspace. When using the workspace with the HCM Personalization tool, you can select all the pages within each Visual Builder extension.

8 Parameters required for running the tool

The following table lists the parameters required for the HCM Redwood Personalization Helper tool.

Parameter	Description	Usage in InputParams.txt
Working Directory	Directory created to keep migration related files.	
Mode	Generate reports in HTML and Excel of the Responsive UI personalizations or Migrate the applicable Responsive UI personalizations to VBS workspace	Y or N
ADF Personalization File	ADF Personalization File downloaded from HCM Env that contains personalizations done using TDS and Page Composer	Name of the ADF Personalization JAR file placed in Working Directory
VBS Studio Workspace	VB Studio workspace file exported from VB studio of your HCM environment. For ReportOnly=Y this isn't required.	Name of the exported VBS workspace .zip file placed in Working Directory.
Module Names	<ol style="list-style-type: none"> 1. Modules are listed in the tool grouped by VB extensions. See the previous table for more information. 2. You can select one or more modules from different extensions 3. Based on the mode selected, the modules are listed <ol style="list-style-type: none"> a. Report Only—All modules from table 6.1 and 6.2 b. Migrate and Report—Only modules from table 6.1 that supports migration 	Comma separated list of module names. List of valid module names are given in Table 6.1 and 6.2 in <i>HCM Redwood Personalization Helper Tool</i> (MOS Document 2999756.1).
Connect to HCM Env	Connect to HCM environment to fetch setup data to process flexfields personalization and show display names for rule condition attributes such as business unit name, country name, and so on. If this option is selected, EnvironmentURL, User name and Password are required.	Y or N
Environment URL	If Connect to HCM Env is enabled, URL to HCM environment on which migration is being performed. For example, https://ejxx-test.fa.us6.oraclecloud.com	Enter the URL

Parameter	Description	Usage in InputParams.txt
User name	If Connect to HCM Env is enabled, User name to be used in basic auth for REST calls against above HCM environment.	If Connect to HCM Env is enabled, and this parameter isn't set, the tool will prompt for it.
Password	If Connect to HCM Env is enabled, Password to be used in basic auth for REST calls against above HCM environment.	If Connect to HCM Env is enabled, and this parameter isn't set, the tool will prompt for it.
Settings → Proxy Host	If Connect to HCM Env is enabled, and if accessing HCM cloud environment from your computer requires a HTTP proxy	Enter the host
Settings → Proxy Port	If Connect to HCM Env is enabled, and if accessing HCM cloud environment from your computer requires a HTTP proxy	Enter the port
Settings → Proxy User name	If the HTTP proxy server requires authentication, provide the user name here	Enter the HTTP proxy user name
Settings → Proxy Password	If the HTTP proxy server requires authentication, provide the password here	Enter the HTTP proxy password
Settings → Enable Detailed Logs	By default, the tool writes only minimal logs. Check this option to write detailed logs to share with Oracle.	
Settings → Advanced → Allowed Domains	By default, the tool accepts HCM environment URL that ends with .com, .uk, .eu, .gov. You can add other domains here.	

9 Configure the HCM Redwood Personalization Helper tool settings

You'll want to configure your HCM Redwood Personalization Helper tool settings before you run the tool.

You can access and configure settings including adding certificate files, adding proxy information, enabling logging, and defining allowed domains. Open the current installed version of the HCM Redwood Personalization Helper tool and click Settings.

Certificates

The Certificate Authority (CA) is responsible for issuing certificates that are installed on the server you connect to (in this case Fusion HCM environment). The certificates encrypt communication between the client and the server.

The tool can identify most common certificate authorities such as DigiCert, GeoTrust, Entrust, and so on. Sometimes, your Fusion HCM environment might be protected using certificates issued by a different authority (such as a certificate authority set by your company). The tool doesn't have the identity of such custom certificate authorities. In such cases, you need to import the custom certificate authority's certificate to the tool so the tool can connect to the HCM environment.

By default, your HCM environment uses certificates issued by a known issuer such as DigiCert Inc. After signing into your HCM environment from a browser, if you see the issuer is different, then you must import the custom CA's certificate.

1. To view the certificate details from Firefox, sign in to your HCM environment.
 - a. Click the Verified by icon next to the HCM environment URL.
 - b. Select **Connection Secure > More Information > Details**.
2. To view the certificate details from Chrome, sign in to your HCM environment.
 - a. Click the View site information icon next to the HCM environment URL.
 - b. Select **Connection is Secure > Certificate is valid > Details**.

Note: We recommend that you check with your network administrator to get the required custom CA certificates. For steps to export or import the custom CA certificates, see section 3.2.2.1 and section 3.2.2.2 in *HCM Redwood Personalization Helper Tool* (MOS Document 2999756.1).

Proxy

If your network uses a HTTP proxy through which all HTTP requests from your computer are routed (such as accessing web pages in the internet, REST APIs in Fusion HCM environment), then enter the proxy details in the tool. Go to Settings and add your Proxy Host, Proxy Port, Proxy User name, and Proxy Password.

Allowed Domains

By default HCM Environment URLs in domain extensions .com, .gov, .uk, .eu are supported. If other domain extensions require to be supported, it can be configured in Settings.

10 Run the HCM Redwood Personalization Helper tool in Report mode

You'll use Report mode to generate a report of the personalizations to review existing responsive UI pages for the modules you select and decide if they can be migrated to the Redwood user experience. To run the tool, you must have exported your personalizations from your test environment to your working directory.

1. Launch the HCM Redwood Personalization Helper tool that you downloaded and installed.
2. Select your working directory.
3. Select **Report Only Mode**.
4. Select the ADF Personalization File that you exported.
5. Search for and select the modules you want to evaluate. They're grouped by VB Studio extensions.

Tip: To see a list of pages that can't be migrated and are only available in report mode, see Table 6.2 in *HCM Redwood Personalization Helper Tool* (MOS Document 2999756.1).

6. If flexfields are used in your personalized pages, select **Connect to HCM Env** and enter the environment URL and user credentials. The tool uses a REST API to retrieve flexfield metadata.

Personalization Helper tool report

You'll find an output folder in the working directory with these files:

- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer.
- XLSX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

The report provides details on any personalizations that weren't migrated and what to do next.

11 Run the HCM Redwood Personalization Helper tool in Migrate and Report mode

You'll use Migrate and Report mode to migrate existing responsive UI personalizations to a Visual Builder Studio workspace.

Before you start, be sure you're running the version of the HCM Personalization Helper tool that matches your Oracle Fusion HCM version.

Note: The HCM Personalization Helper tool lets you select only modules from the Visual Builder Studio extensions that you initialized to the workspace exported from Visual Builder Studio.

1. Launch the Personalization Helper tool.
2. Select your working directory.
3. Select the **Migrate and Report** mode.
4. Select the ADF Personalization File that you exported.
5. Select the Visual Builder Studio Workspace if you exported one to your working directory.
6. Search for and select the modules you want to convert. They're grouped by VB Studio extensions.

Tip: To see a list of pages that are available for migration to the Redwood user experience and support business rules in Visual Builder Studio for personalizations, see Table 6.1 in *HCM Redwood Personalization Helper Tool* (MOS Document 2999756.1).

7. If flexfields are used in your personalized pages, select **Connect to HCM Env** and enter the environment URL and user credentials.

The tool uses a REST API to retrieve flexfield metadata.

8. Submit the process.

You'll find an output folder in the working directory with these files:

- Visual Builder Studio workspace: Includes converted personalizations to import into Visual Builder Studio. If you exported an existing workspace, the file will be called <original name of the VBS workspace>-updated.zip.
- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer. See the HTML report results for more details.
- XLSX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

12 Import and validate your migrated personalizations

After you've migrated your personalizations, you'll import the updated workspace to Visual Builder Studio to apply the migrated personalizations to the corresponding Redwood pages.

1. In your test environment, go to Visual Builder Studio and open the workspace you exported earlier to run the tool.
2. Select **Advanced** mode.
3. Click the Git icon in the navigator to open the Git menu, and then commit or stash any changes before importing the workspace. There should be no pending changes in a workspace when you import.
4. Select **Import** from the menu.
5. Import the workspace <original name of the VBS workspace>-updated.zip updated by the tool.

Note: After import, open the Git menu to confirm only metadata-rules-x.json files are listed for each page you chose to migrate. When personalizations are migrated by the HCM Personalization Helper tool, only this file is updated for each page.

6. Select **Express** mode to view the imported personalizations in the Redwood pages. Remember, use Advanced mode only to import the workspace.

In Express mode, you can do the following:

- Review migrated business rules:
 - TDS configurations are migrated to business rules with the name **TDS_**
 - Page Composer personalizations are migrated to business rules with the name **PageComposer_**
- Open each migrated business rule in Visual Builder Studio to verify it.
- Make additional personalizations as necessary from Business Rules.
- Test the personalizations to confirm they work as expected. This is an important step that must be completed before you publish the workspace.
- Preview the personalizations.
- Publish the workspace.

13 HCM Experience Design Studio Rules supported for migration

This table provides a list of Design Studio personalizations that you can migrate.

HCM Experience Design Studio Rules supported for migration

Configuration	Parameter	Migrate
Fields	Visible/Required	Yes
Regions	Visible/Required	Yes
Show questionnaire page	Global Rule (without rule conditions)	Yes
	Specific Rule (with rule conditions)	No
Descriptive Flexfields		Yes
Extensible Flexfields		Yes
Rule Condition	Role	Yes
	Country	Yes
	Record type	Yes
	Legal employer	Yes
	Business unit	Yes
	Action	Yes
	Worker type	Yes
Guided Journeys	Global Rule (without rule conditions)	Yes
	Specific Rule (with rule conditions)	No
Comments and Attachments		Yes
Change Region Header		No

14 Page Composer Personalizations supported for migration

There are certain Page Composer personalizations that you can migrate. These properties are supported in Visual Builder Studio: Rendered, Visible, Read Only, Disabled, Required, and Editable. Properties not relevant in the Redwood user experience will be ignored.

Page Composer Personalizations supported for migration

Personalization	Parameter	Migrate	Comments
Fields	Rendered	Yes	rendered=false is equal to hidden=true in VBS
	Visible	Yes	visible=false is equal to hidden=true in VBS
	Read Only	Yes	
	Disabled	Yes	disabled=true is equal to readOnly=true in VBS
	Required	Yes	
	Editable	Yes	editable=false is equal to readOnly=true in VBS
Regions		Yes	
Flexfields		Yes	
Country		Yes	EL expressions with country condition aren't migrated. Only country level personalizations are migrated.
EL expression	Role	Yes	Only personalizations using the EL expression <code>#{securityContext.userInRole['role']}</code> are migrated. Personalizations using the EL expression <code>#{securityContext.userInAllRoles['roleList']}</code> are migrated.
	ADF page binding	Yes	EL expressions based on ADF page bindings are migrated, for example: <code>#{row.bindings.CountryOfBirth.inputValue != 'AL'}</code> <code>#{row.bindings.AttachmentId.inputValue == '12345' &&</code>

Personalization	Parameter	Migrate	Comments
			row.bindings.AttachmentCreatedBy.inputValue == 'admin_user' #{row.bindings.CountryName.inputValue == 'US' row.bindings.AddressType.inputValue == 'HOME'}
	Other Conditions	Yes	Ternary conditions, for example, #{securityContext.userInRole['MY_HR_ROLE']} ? true : false #{1==1}, #{2==2} #{true}, #{false}