Oracle Fusion Cloud Human Resources

Global Human Resources Questions and Answers

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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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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.

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Thanks for helping us improve our user assistance!

1 Global Human Resources Questions and Answers

What's the Not Managed by HR system person type?

Not Managed by HR (NMBHR) is a system person type that's used for nonworkers who are neither employees nor contingent workers, and they're primarily managed in a system or process other than Oracle Fusion HCM.

These persons are brought into Oracle Fusion for limited purposes. For example, to feed a user access or badging system, or to allow them to use Fusion Learning. Because these persons aren't managed by Oracle Fusion HCM for HR purposes, most of the functionality isn't available for them. If you're using Oracle Fusion HCM as your primary system to track employees, contract workers, or contingent workers, you need to create an Employee or Contingent work relationship instead of using NMBHR.

Oracle Fusion HCM Base (Core HR) and certain other Oracle Fusion products are subscribed based on the number of persons such as employee, contingent worker, or certain nonworkers that are tracked by the system. Oracle provides you regular commercial usage reporting to facilitate awareness and management of persons in the system. Persons with the NMBHR work relationship aren't counted for subscription usage purposes. Accordingly, you must only use this person type consistently with your contract terms. For example, you can use it to include external persons who aren't managed by the Oracle Fusion HCM system or your organization's HR team.

Examples of such external persons are janitors, groundskeepers, or catering workers working for external firms, or hospital volunteers who are present in Fusion to feed a badging or access system.

Note:

- To provide clarity for all parties, we recommend that you work with your sales team wherever possible, to add a note to your Ordering Document or Contract identifying any populations of NMBHR persons. These persons are maintained in the system but aren't included in subscription usage counts. Such persons can be entered into the Oracle Fusion HCM system as a worker type of nonworker with the user person type Not Managed by HR (NMBHR).
- If you have existing workers that fall into 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 Person Type with a Nonworker work relationship. You can use HCM Data Loader (HDL), HCM Spreadsheet Data Loader (HSDL), or update worker records in the UI as needed.

Key Restrictions

Most of the Oracle Fusion HCM functionality isn't available for such external persons, including:

- Managing assignment transactions such as working hours, grades, and promotions.
- Managing workforce compensation, individual compensation, or salary.
- Managing absences.
- Managing talent management records: performance, goals, talent profiles, succession plans, and so on.
- Payroll processing or payments.

- Considering nonworkers as candidates in Oracle Recruiting.
- Most HR transactions.
- Serving as the system of record for workers.
- No self-service is done by the person themselves. Data must either be fed back using read-only integration, or entered by HR or a Manager.

Valid Use Cases

Here are some valid use cases for NMBHR:

- A read-only integration feed from another system such as a Vendor Management System for contract workers, where all transactions are managed in the Vendor Management System, and no transactions are initiated or duplicated in Oracle Fusion HCM.
- NMBHR may also be appropriate to feed a badging or access system for janitors, groundskeepers, and perhaps catering workers who work at your worksite through a third-party contractor who manages them, and who are doing work that's ancillary and not central to your business.
- Oracle Fusion Learning.

What's the Person Number used for?

The Person Number is used to store a unique identifier for every person, excluding candidates, in the application.

The data model is designed such that you can associate multiple work relationships with each global person record. The Person Number isn't intended to convey the type of relationship between the person and the enterprise.

A person can have multiple concurrent relationship types with the enterprise. For example, a person can be an employee, contingent worker, and a contact to another employee, all at the same time. Or a person can have multiple concurrent employee relationships with different legal employers.

Trying to use the Person Number to convey the relationship can cause confusion for a user, because the relationships may change over time or there may be various concurrent relationships.

How can I enter a custom Person Number?

If you need a custom Person Number, then you can set the HCM Enterprise setting called Person Number Generation Method to Manual.

When you use the Manual Person Number Generation Method, the user must enter the unique Person Number while adding the person to the application.

When a family or emergency contact is added, the Automatic Person Number Generation Method will always be used. That's because employees can enter family and emergency contacts, and they wouldn't know a unique Person Number value when creating the contact. When you use the Automatic Person Number Generation Method, a unique numeric Person Number will be assigned to all people.

Can I load legacy Person Numbers when the Person Number Generation Method is set to Automatic?

When you use HDL to load legacy Person Numbers for new employees, you don't need to switch the Person Number Generation Method from Automatic to Manual.

The Person Number Generation Method can be set to Automatic and a legacy Person Number value can be included in the HCM data file. Doing this will allow those legacy Person Numbers to be used in the application.

When future people are added, they will start based on the Initial Person Number setting, which should be at least 1 number higher than the highest legacy Person Number to prevent overlapping in future. If no value is included in the HCM data file, then a unique numeric Person Number will be assigned to them based on the next available number in the sequence.

What happens when the person number is generated upon final save and approvals are enabled in Redwood?

When the **Person Number Generation Method** is set to **Automatic Upon Final Save** and approvals are enabled for the Redwood add person pages, the generated Person Number is the same as the Assignment Number, Payroll Relationship Number, and Contract Number.

When a new person is added, a temporary random person number is assigned to the person until the final approvals are received. After the final approval, the final person number is assigned appropriately. The temporary random person number has the format TEMP123456790123, and it’s displayed in the approval notification.

If the user enters an Assignment Number or Contract Number during the add person process, the numbers entered will be honored.

How do I configure the access to the Additional Person Info page for a role?

You can configure the Additional Person Info page so that employees, contingent workers, or line managers can view and manage it.

The Additional Person Info page isn't displayed by default because some users may have configured person Extensible Flexfields (EFFs) that may be sensitive in nature and should be visible only to an HR professional. Separate privileges are included in the Oracle-delivered employee and contingent worker roles to control the viewing and managing of person EFF. If you want your employee or contingent workers to only view the data, you need to remove the Manage Person Extra Information by Worker privilege from the role.

In the rare cases where you want the line manager to access a subordinate's Additional Person Info page, you need to assign the Access Person Extra Information by HR privilege. If you want the line manager to manage the data, you need to assign the Manage Person Extra Information by HR privilege and regenerate the grants. If the roles are granted additional privileges, the page will also be displayed in the person spotlight as well as a separate quick action under the **Me** category.

You can also create a rule to determine the person EFF contexts to be displayed for a role. Depending on whether you are using the responsive or Redwood versions of the page, you can create a rule in the Transaction Design Studio (TDS) or VB Studio Business Rules respectively. Because an employee or contingent worker can access this page, the 'When is this rule applied?' parameter is available when creating a rule. This parameter allows you to create a rule that will present the page differently, depending on whether the user is looking at their own record or another person's record.

The Additional Person Info page is also enabled for the checklists functionality.

The global search and smart navigation actions have been updated so that if you have the necessary privileges, you will be able to see the Additional Person Info action. A deep link is included for the **Me** category action.

Here are some key points to note:

- You need to review existing data in the Additional Person Info page for all employees and contingent workers before you grant access because you may have entered sensitive data in the Oracle-delivered person EFF or created your own person EFF that shouldn't be visible or managed by others.
- The Oracle-delivered employee and contingent worker roles are granted the **Manage Person Extra Information by Worker** privilege. By removing this privilege, the role won’t be able to manage any of the person EFF on the page. There’s no way to selectively manage specific person EFF contexts.

How You Provide Access

Make the feature accessible by assigning or updating privileges and job roles as required.

To display the quick action in the **Me** category:

1. Use the **Structure** work area and edit the **Me** category quick actions.
2. In the **Personal Info** group, edit the **Additional Person Info** and set the **Visible** property to **Yes**.

To display the quick action in the **My Team** category:

1. Use the **Structure** work area and edit the **My Team** category quick actions.
2. In the **Employment** group, edit the **Additional Person Info** and set the **Visible** property to **Yes**.

Note:

- If you want your line manager role to access the Additional Person Info page, you must assign the **Access Person Extra Information by HR** privilege to the role and regenerate the grants. If you want the line manager to be able to manage the data, you need to assign the **Manage Person Extra Information by HR** privilege and regenerate the grants.
- You also need to assign the **Manage Person Extra Information by Worker** and **Access Person Extra Information by Worker** privileges to the employee and contingent worker roles.

How do I configure the access to Person Identifiers for External Applications for a role?

You can configure the Person Identifiers for External Applications page so that employees and contingent workers can access it and specify person identifiers for themselves. Separate privileges are included for viewing and managing the data.

You can add either one or both of these privileges as required, and regenerate the grants. These privileges aren't granted to the Oracle-delivered roles, so you need to add them manually:

- **View Person Identifiers for External Applications** (ORA_VIEW_PERSON_IDENTIFIERS_FOR_EXTERNAL_APPLICATIONS): If you want the employee or contingent worker to only view the data, add only this privilege.
- **Manage Person Identifiers for External Applications** (ORA_PER_MANAGE_PERSON_IDENTIFIERS_FOR_EXTERNAL_APPLICATIONS): If you want the employee or contingent worker to view and manage the data, add this privilege.

Once the privileges are granted, the page will be displayed as a separate option from the Personal Information launch page. This page will also be available as a separate quick action in the Me category and as a page within the person spotlight.

The global search and smart navigation actions are also updated. If you have the necessary privileges, you will be able to see the Person Identifiers for External Applications action.

A deep link is also included for the **Me** category action.

To display the quick action in the **Me** category:

1. Use the **Structure** work area and edit the **Me** category quick actions.
2. In the **Personal Info** group, edit the **Person Identifiers for External Applications** and set the **Visible** property to **Yes**.

How do I unmask the person fields that are masked on the read-only Redwood pages?

The masking of the **Religion**, **Ethnicity**, **Do you have a Disability**, and **Disability Reason** fields on the read-only Redwood pages is controlled by individual profile options.

These fields are masked by default to prevent unwanted people from viewing the sensitive info stored in them. So these profile options are delivered as enabled by default. If you want to unmask these fields, you need to disable these profile options.

This table lists the profile options for masking person fields, along with their descriptions and default values.

Profile Options for Masking Person Fields

Profile Option	Description	Default Profile Value at Site Level
ORA_PER_MASK_PERSON_RELIGION	Enables the masking of the person **Religion** field on the read-only Redwood pages.	**Yes**
ORA_PER_MASK_PERSON_ETHNICITY	Enables the masking of the person **Ethnicity** field on the read-only Redwood pages.	**Yes**
ORA_PER_MASK_PERSON_DISABILITY_SELF_DISCLOSED	Enables the masking of the person **Disability Self Disclosed** field on the read-only Redwood pages. This field is also known as **Do you have a Disability?**	**Yes**
ORA_PER_MASK_PERSON_DISABILITY_REASON	Enables the masking of the person **Disability Reason** field on the read-only Redwood pages.	**Yes**

To unmask these fields, you need to disable the profile options:

1. Navigate to the **Setup and Maintenance** work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for and select the profile option for each of the fields from the table that you want to unmask.
4. Select the **Level** as **Site**.
5. In the **Profile Value** field, enter **No**.
6. Click **Save and Close**.

How do I change the display of the HCM Redwood address attribute LOVs with the Postal address format?

You can change the display of the HCM Redwood address attribute LOVs with the Postal address format by updating the value of the **ORA_PER_REDWOOD_ADDRESS_LOV** profile option.

This profile option applies only to the HCM Redwood pages that use the Postal address formats. The default value of the profile option is **Null**.

This table describes the different values of this profile option.

Profile Option Value	Description
Null	The Primary and Alternate Names for both the geography attribute and the parent geography will be displayed. This is the default Redwood behavior.
Display Primary and Alternate Names	The Primary and Alternate Names for the geography attribute and only and the primary parent geography will be displayed. This is the Responsive behavior. The user can search on alternate names but can select only the primary name.
Display Primary Names	The Primary Name for both the geography attribute and the parent geography will be displayed. The user can search on alternate names but can see and select only the primary name.

To change the display of the HCM Redwood address attribute LOVs with the Postal address format:

1. Navigate to the **Setup and Maintenance** work area.

2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for and select the **ORA_PER_REDWOOD_ADDRESS_LOV** profile option.
4. Select the **Level** as **Site**.
5. In the **Profile Value** field, enter the value that you want from the table.
6. Click **Save and Close**.

How do I display additional person fields in the Redwood page headers?

You can use page properties to display additional person fields in the page headers for these Redwood pages:

- Personal Details
- Contact Info
- Identification Info
- Family and Emergency Contacts (My Contacts only)
- Person Identifiers for External Applications
- Additional Person Info
- Share Data Access
- Seniority Dates
- Employment Contracts
- Additional Assignment Info
- Employment Info
- View Employment Details
- Eligible Jobs
- Document Records
- Employment Guided Processes
- Assigned Areas of Responsibility

You can select a maximum of four fields from this list to be displayed in the header region:

- Person Number
- Work Email
- Business Title
- Assignment Number
- Job Name
- Position Name
- Position Code

This table lists the page properties to display additional person fields in the Redwood page headers, along with their descriptions.

Page Property Name	Page Property Description
Person Header Slot - 1	First slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 2	Second slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 3	Third slot in the contextual header section of the page that displays person attributes.
Person Header Slot - 4	Fourth slot in the contextual header section of the page that displays person attributes.
Show Labels in the Contextual Header Section	Show or hide all the field labels in the contextual header section. The default value is to hide the labels.

Here are some key points to note:

- If the page doesn't have an assignment context, then the data displayed will be based on the primary work relationship and primary assignment fields.
- By default, the field label won't be displayed in the header region. A page property controls the display of all or none of the labels.
- If a field has no data, then that field and the associated label won't be displayed, and the other fields will be shifted so that there's no gap between the fields.

Key Differences Between the Contextual Headers for Guided Processes and Single Pages in Redwood

This table explains the key differences between the contextual headers for guided processes and single pages in Redwood after you set the page properties.

Fields/Options	Single Redwood Pages	Employment Guided Processes (Redwood)
Business Title Display in Default View	Not displayed with the name	Displayed with the name
Option to Display Business Title	Can be displayed in the contextual header (with or without labels)	Displayed automatically, but without a label
Additional Fields	Can be displayed in the contextual header (with or without labels)	Up to three additional fields can be displayed in the page subtitle. Labels can't be displayed.

Contextual Header for Document Records Redwood Pages

For Document Records, the List page and Add page have separate page properties. So, you need to enable the Person Header attributes separately for both these pages to see the Person Header. Note that the customizations done for the List page won't be passed automatically to the Add page.

How do I configure the Workers LOV in the Share Data Access task in Redwood?

On the Redwood Share Data Access page, the **Recipient** attribute reflects the central configuration for the Workers LOV. You can configure the columns, add and remove columns, and also change the order.

The same configuration will be used for mobile devices. For mobile displays, the attributes are laid out in a list. In this layout, the first two attributes are shown in a different style (larger size, darker font) than the other attributes. By default, the first two attributes are **Name** and **Business Title**. If you change the order of the attributes, the special style will apply to whichever attributes you set as the first two.

> **Note:** If you've already configured the Workers LOV search for your responsive pages, the same configuration applies to the Redwood Share Data Access task in 25C.

To add or modify your configuration for the Workers LOV:

1. Click **My Client Groups > HCM Experience Design Studio**
2. Open the **Search Configuration** page.
3. If you enabled Oracle Search for the **Workers** LOV, use the **Workers - Oracle Search** option. Otherwise, use the **Workers** option.

   The option you select will be displayed in the **Preview** section of the Workers - Oracle Search List of Values page or the Workers List of Values page respectively.
4. In the **Search and Display Fields** section, click **Add** to add an attribute.
5. In the row that's added, select the attribute from the drop-down list. For example, **Name**, **Business Title**, **Person Number**, **User Name**, or **Legal Employer**.
6. Add all the attributes that you want in this section one by one.
7. In the next column, select **Search and display** or **Display only** from the drop-down list as required.

   If you select **Search and display**, the attribute will be displayed in the LOV and will also be used for searching. If you select **Display only**, the attribute will only be displayed and won't be used for searching.
8. In the **Search Only Fields** section, click **Add** to add attributes that you want to be identified as search-only fields.

   These fields will be used for searching only and won't be displayed in the **Workers** LOV.
9. Click **Save and Close**.

> **Note:** If your configuration changes don't display immediately in the **Workers** LOV, try clearing your browser cache.

What are the business rules that apply to person name attributes included in Redwood pages?

Person name attributes have been added to VB Studio Business Rules for these Redwood pages. You can create business rules with conditions for these attributes.

- Personal Details
- Hire an Employee
- Add a Nonworker
- Add a Contingent Worker
- Add a Pending Worker
- Create Work Relationship
- Edit Pending Worker
- Create a Family and Emergency Contact
- Edit a Family and Emergency Contact
- Local and Global Transfer

To have more control over the display and editing of the person name and address attributes, some of you may have created a Page Composer personalization on the responsive page. This personalization would make a few name attributes as read-only for your employees when they view their own name records, but allow your HR professionals to be able to edit all their name attributes. You can now achieve this same functionality in the Redwood version of these pages by using VB Studio Business Rules.

This table lists the rules that apply to the person name attributes, along with examples:

Rule	Example
If a name attribute isn't included in the person name styles definition, then even if it's set to be **Visible** or editable in Business Rules, the attribute won't be displayed or editable.	If the Indian person name style includes the **Title**, **First Name**, **Last Name**, and **Middle Names** attributes, and the attribute **Prefix** is set to **Visible** or editable in the business rules, it won't be displayed or editable.
If a name attribute is included in the person name styles definition and it's marked as Required, then even if it's set to **Hidden** in Business Rules, the attribute will still be displayed.	If the Indian person name style includes the **First Name** and is marked as Required, and the attribute **First Name** is set to **Hidden** in the business rule, it will remain as displayed.
If a name attribute is included in the person name styles and it's marked as Required, then if it's set to **Read-only** in Business Rules, it will become read-only even if the attribute doesn't have any data.	If the Indian person name style includes the **First Name** and is marked as Required, and the First Name attribute is set to **Read-only** in the business rule, it will become read-only. In the case where a required attribute is null and is set to **Read-only**, an error message will be displayed if the name record is edited.

VB Studio Business Rules has two sections for date-effective objects other than person name:

- **List:** This applies to the read-only form.

- **Create and Edit:** This applies to the create and edit form.

The name region doesn't have the same model. Rather, it has separate sections for **Global Name** and **Local Name**. The Business Rule for these two sections will apply to both the read-only and create and edit forms.

- In the read-only use case, only the **Hidden** property will be applicable.
- In the edit use case, all other enabled properties will be applicable.
- If a validation Business Rule is written, the **Target** field condition will result in a banner message displayed at the page level. The message won't be displayed next to the specific **Target** field.
- Business Rule validations, such as restricting special characters being entered or specifying the maximum number of characters that are entered, are also supported.

How many direct reports can I reassign at a time using the responsive or Redwood pages?

You can reassign a maximum of 50 direct reports at a time using the responsive or Redwood pages.

To avoid performance issues, it's recommended not to use the following if you're reassigning more than 50 direct reports at a time:

- **Reassign Directs** section in the responsive page.
- **Existing reports** step of the Direct Reports guided process in Redwood.

> **Note:** If you need to reassign more than 50 direct reports, it's recommended to use HCM Data Loader.

Can I view the address details of the location on the Redwood pages for organizations?

Yes, you can view the address details of the location on the Redwood pages for organizations such as department, disability organization, division, reporting establishment, worker union, and the Enterprise HCM Information page.

Can I view the Other Classifications section on the Redwood pages for organizations?

In Redwood, you can't view the Other Classifications section on the pages for organizations such as department, disability organization, division, reporting establishment, and worker union.

Can I select an existing organization when I'm creating a new organization in Redwood?

In Redwood, you can't select an existing organization to classify as a department, disability organization, division, reporting establishment, or worker union.

How do I display the descriptive flexfields on the Redwood workforce structures pages?

Use business rules in VB Studio to display only those descriptive flexfields that you want to show on your Redwood workforce structures pages.

Because some of you may not be using descriptive flexfields for your enterprise, they're hidden by default to reduce the clutter on your pages. You can select only the ones that you need for your enterprise and make them visible.

For more information about using business rules in VB Studio, refer to the Extending Redwood Applications for HCM and SCM Using Visual Builder Studio guide.

Related Topics

- Hide or Show a Developer Descriptive Flexfield Segment

Do contextual headers display differently in guided processes and single pages in Redwood?

There are differences in how contextual headers display in guided processes and single pages in Redwood.

This table explains the key differences with examples:

Fields/Options	Single Redwood Pages	Employment Guided Processes (Redwood)
Business Title Display in Default View	Not displayed with the name	Displayed with the name
Option to Display Business Title	Can be displayed in the contextual header (with or without labels)	Displayed automatically, but without a label
Additional Fields	Can be displayed in the contextual header (with or without labels)	Up to three additional fields can be displayed in the page subtitle. Labels can't be displayed.

For the Additional Assignment Info page, where do the read-only values in the approval details come from?

When an approval is in progress, the read-only values on the page come from different sources.

- For EFF contexts that use Lists of Values (LOVs), the values are pulled from the database and show the last approved state.
- For other fields, the values reflect the most recent changes entered by the user that are still waiting for approval.

The initiator can't edit a transaction that's currently under approval.

How do I specify a default set to be used on Redwood workforce structures pages?

You can specify a default set to be used on the create and duplicate pages for departments, grades, jobs, and locations in Redwood.

When you're creating a job, location, department, or grade, the set is defaulted to Common Set. You can override this default value by updating the Default Set field on the Enterprise HCM Information page. When you specify a default set, the pages listed above inherit that default set from the enterprise configuration.

To update the default set on the Enterprise HCM Information page:

1. On the Home page, navigate to **Workforce Structures > My Client Groups > Enterprise HCM Information** page.
2. Click **Update**.
3. In the Additional info section, go to the **Workforce Structures Configuration** segment, and update the **Default Set** field with the set name that you want.
4. Click **Submit**.

> **Note:** Though the set is defaulted from the value specified in the enterprise configuration, you can override this value in the create and duplicate flows.

How do I default a country when creating locations?

You can default the country when specifying the address in the location pages. You need to specify the default country on the **Enterprise HCM Information** page.

You can save time by setting a default country when creating locations instead of always selecting a value from the **Country** list. If you don't configure any default country, then the country is automatically defaulted to United States in the location address.

Here are some key points to note:

- This defaulting doesn't apply when you create records using HCM Data Loader (HDL), HCM Spreadsheet Data Loader (HSDL), or REST.
- When duplicating a location, the country is defaulted from the country specified in the original location and not in the enterprise configuration.
- The default location country isn't date-effective and will be the same for all date-effective records of the enterprise configuration.

To configure the default country on the Enterprise HCM Information page:

1. On the Home page, navigate to **My Client Groups > Workforce Structures > Enterprise HCM Information** page.
2. Click **Update**.
3. In the Additional info section, go to the **Workforce Structures Configuration** segment, and update the **Default Location Country** field with the country that you want.
4. Click **Submit**.

How do I default the effective start date on Redwood workforce structures pages?

You can control the defaulting of the effective start date in the create flows when using Redwood pages for workforce structures objects such as job families.

You can do this by configuring the Default Effective Start Date on the Enterprise HCM Information page. The configured date appears as the default effective start date in the create flows. Your users can override this value by specifying a date of their choice.

If you choose not to configure the **Default Effective Start Date** on the Enterprise HCM Information page, the **Effective Start Date** appears blank in the create flows. You can also configure a future date as the **Effective Start Date**.

> **Note:** The **Default Effective Start Date** field on the Enterprise isn't date effective. Any changes to this value will be reflected in all the date-effective records. This defaulting doesn't apply when you create records using HCM Data Loader (HDL), HCM Spreadsheet Data Loader (HSDL), or REST.

This table describes how the effective start date is defaulted on the Redwood workforce structures pages.

Default Effective Start Date configured on Enterprise	Type of Flow	What's defaulted as effective date?	Impacted Redwood Pages
Yes	Create	Value from enterprise configuration	• Departments • Divisions • Disability Organizations • Job Families • Jobs • Legislative Data Groups • Locations

Default Effective Start Date configured on Enterprise	Type of Flow	What's defaulted as effective date?	Impacted Redwood Pages
			• Positions • Reporting Establishments • Worker Unions
No	Create	Blank value	• Departments • Divisions • Disability Organizations • Job Families • Jobs • Legislative Data Groups • Locations • Positions • Reporting Establishments • Worker Unions
Yes	Update	Blank value	• Departments • Divisions • Disability Organizations • Enterprise HCM Information • Job Families • Jobs • Legal Entity HCM Information • Legal Reporting Unit HCM Information • Legislative Data Groups • Locations • Positions • Reporting Establishments • Worker Unions
No	Update	Blank value	• Departments • Divisions • Disability Organizations • Enterprise HCM Information • Job Families • Jobs • Legal Entity HCM Information • Legal Reporting Unit HCM Information • Legislative Data Groups

Default Effective Start Date configured on Enterprise	Type of Flow	What's defaulted as effective date?	Impacted Redwood Pages
			• Locations • Positions • Reporting Establishments • Worker Unions

To configure the **Default Effective Start Date** on the Enterprise HCM Information page:

1. On the Home page, navigate to **My Client Groups > Workforce Structures > Enterprise HCM Information** page.
2. Click **Update**.
3. In the Additional info section, go to the **Workforce Structures Configuration** segment, and update the **Effective Start Date** field with the date that you want.
4. Click **Submit**.

> **Note:** Though the date is defaulted from the value specified in the enterprise configuration, you can override this value in the create flows.

How do I change the Allocate By options in the position budgeting configuration#on the enterprise?

You can change the **Allocate By** options in the position budgeting configuration#on the enterprise. However, before you do that, you need to delete your existing budget data.

From release 25D onward, the **Business Unit** will no longer be available as an **Allocate By** option in the **Position Budgeting Configuration** section on the Enterprise HCM Information page. It's recommended that you review and remove **Business Unit** from the **Allocate By** options in the position budgeting configuration#on the enterprise to ensure a smooth transition.

To remove **Business Unit** from the **Allocate By** options in the position budgeting configuration#on the enterprise:

1. Delete your existing budget data using HDL. You can use this sample HDL template as a reference:
```
METADATA|PositionBudget|Name|Code|BusinessUnitId|BusinessUnitName|DepartmentId|DepartmentName|
LocationId|LocationSetCode|LocationCode|AllocatedFTE|AllocatedHeadcount|AllocatedAmount|
BudgetPeriodStartYear|SourceSystemOwner|SourceSystemId|GUID

DELETE|PositionBudget|CARDIO BUDGET|VISCARDBUDGET||||||||||2023|HCMQA-001|MB_0090|
```
2. On the Home page, go to **My Client Groups > Workforce Structures > Enterprise HCM Information**.
3. On the Enterprise HCM Information page, click the **Correct** option in the **Actions** menu.
4. Navigate to the **Position Budgeting Configuration** section.
5. In the **Allocate By** drop-down list, remove the **Business Unit** option for the current record.
6. In the **Allocate By** drop-down list, select one of the following options:
    - **Department**
    - **Location**
    - **Department and Location**
7. Click **Submit**.

8. Repeat steps 3 to 7 for all other records of the enterprise where this configuration exists.

Which Redwood workforce structures pages have approvals enabled?

Approvals are enabled only for these Redwood workforce structures pages:

- Positions
- Jobs
- Locations
- Departments
- Grade Ladders
- Grades
- Grade Rates

How do I create a business rule for only the Create flows of Redwood workforce structures pages?

To determine whether a flow is a Create flow, you need to verify whether the identifier (ID) is null. For example, in the Create Job flow, the **Job ID** is null.

For all other flows such as View Job, Update Job, and Correct Job, the **Job ID** won't be null, and will have a value instead. It's not possible to distinguish between the view, update, and correct flows.

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.

How do I pass parameters from Redwood workforce structures pages to a guided journey?

You can add context-sensitive content to your Business Intelligence (BI) reports or URLs using a section-level or page-level guided journey for these Redwood workforce structures pages:

- Departments
- Divisions
- Disability Organizations

- Enterprise
- Grades
- Grade Rates
- Grade Ladders
- Jobs
- Job Families
- Legislative Data Groups
- Locations
- Positions
- Reporting Establishments
- Worker Unions

Use the parameters listed in this table to include context-sensitive content:

Redwood Page	Guided Journey Parameter
Update Job	JOB_ID (JobId)
View Job	JOB_ID (JobId)
Update Job Family	JOB_FAMILY_ID (JobFamilyId)
View Job Family	JOB_FAMILY_ID (JobFamilyId
Update Location	LOCATION_ID (LocationId)
View Location	LOCATION_ID (LocationId)
Update Department	DEPARTMENT_ID (OrganizationId)
View Department	DEPARTMENT_ID (OrganizationId)
Update Disability Organization	DISABILITY_ORGANIZATION_ID (OrganizationId)
View Disability Organization	DISABILITY_ORGANIZATION_ID (OrganizationId)
Update Division	DIVISION_ID (OrganizationId)
View Division	DIVISION_ID (OrganizationId)
Update Enterprise HCM Information	ENTERPRISE_ID (OrganizationId)
View Enterprise HCM Information	ENTERPRISE_ID (OrganizationId)
Update Legislative Data Group	LEGISLATIVE_DATA_GROUP_ID (OrganizationId)
View Legislative Data Group	LEGISLATIVE_DATA_GROUP_ID (OrganizationId)
Update Reporting Establishment	REPORTING_ESTABLISHMENT _ID (OrganizationId)
View Reporting Establishment	REPORTING_ESTABLISHMENT _ID (OrganizationId)
Update Worker Union	WORKER_UNION _ID (OrganizationId)
View Worker Union	WORKER_UNION _ID (OrganizationId)

Redwood Page	Guided Journey Parameter
Update Grade	GRADE_ID (GradeId)
View Grade	GRADE_ID (GradeId)
Update Grade Ladder	GRADE_LADDER_ID (GradeLadderId)
View Grade Ladder	GRADE_LADDER_ID (GradeLadderId)
View Grade Rate	RATE_ID (RateId)
Update Grade Rate	RATE_ID (RateId)
View Position	POSITION_ID (PositionId) PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)
Update Position	POSITION_ID (PositionId) PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)
Create Position	PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)
Duplicate Position	PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)
Request a New Position	PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)
Request a Position Change	POSITION_ID (PositionId) PARENT_POSITION_ID (ParentPositionId) DEPARTMENT_ID(DepartmentId) JOB_ID(JobId)

Example: Define Context-Sensitive Content in a Guided Journey

This example shows how to define a Report task type for a guided journey.

1. Go to **My Client Groups > Journeys Setup > Guided Journey**.
2. Click **Create** and enter the required details such as the journey name and code.
3. Under the **Tasks** section, click **Add**, enter the **Task Name**, and **Code** defaults.
4. Select the **Task Type** as **Analytics** and **Type of Analytics** as **OTBI Analysis** from the drop-down list. Enter the OTBI Analysis Path:
   ```
   /shared/Custom/Human Capital Management/Global HR/Jobs for a position&col1="Workforce Management - Position Real Time"."Position Identifiers"."Position Id"&val1={PositionId}
   ```
5. Click **Activate**.
6. Navigate to the Redwood Positions page. Search for a position and click **Update**.
7. From the **Settings and Actions** menu, click **Edit Page in Visual Builder Studio**.
8. Enable the guided journey in the **Basic details** section using the journey code you defined earlier.
9. Click the guided journey hyperlink, and the report results will be displayed in the panel drawer.

How do managers view the incumbents in the Request a Position Change process in Redwood?

The **Incumbents** section is a read-only section in the Request a Position Change guided process in Redwood. It helps managers identify the assignments that may be impacted when some changes are made for the position.

This section is similar to the read-only section for professional users, where you can see which incumbents are assigned for the position. This section shows the incumbents for the position even if the changes that you make for the position don't impact the assignment.

You need to first enable the Incumbents section from VB Studio business rules to see it in the **Position details** step of the Request a Position Change guided process.

To view the **Incumbents** section in the Request a Position Change guided process in Redwood:

1. Go to **My Client Groups > Show More**.
2. In the **Workforce Structures** area, click **Request a Position Change**.
3. On the **Positions** search page, search for and click the position for which you made the changes.

   You will be taken to the Request a Position Change guided process.
4. In the **Settings and Actions** menu, under **Administration**, click **Edit Page in Visual Builder Studio**.
5. In VB Studio Business Rules, enable the **Incumbents** section by setting it to **Visible**. It's set to **Hidden** by default.

   For more details, see *How do I make a section visible in Visual Builder Studio?*
6. In the **Request a Position Change** guided process, specify the required details in the **Info to include** and **When and why** steps.
7. In the **Position details** step, you will now be able to see the **Incumbents** section as read-only, showing a list of incumbents as on the current date.

How do managers duplicate a position in Redwood?

Managers can duplicate an existing position in Redwood using the Request a Duplicate Position guided process. The values in the existing position are copied and defaulted in the new position they're creating.

To duplicate a position in Redwood:

1. In the **My Team** tab, click the **Request a Duplicate Position** quick action.
2. In the **Positions** search page, search for and click the position that you want to duplicate.

   The Request a Duplicate Position guided process opens.
3. In the **Info to include** step of the process, select the steps that you want to include.

   You can see two optional steps by default: **Additional info** and **Legislative info**. After you select the steps, they're displayed in the navigation pane.

   > **Note:** You can also add these additional steps using VB Studio business rules: **Associated profiles**, **Evaluation criteria**, **Position costing**, and **Requisition details**. The data won't be copied for these steps. Also, attachments and funding position won't be copied.

4. Click **Continue**.
5. In the **When and why** step, select the values in the **Effective Start Date** and **Action Reason** fields and click **Continue**.

   Neither of these values are copied from the position that you're duplicating.

   > **Note:** When you move from one step to another, the data persists. Only if you move back again to the **When and why** step and modify the date, the data you've entered so far is lost. It's as if you're starting a new flow. The **Position details** step is required. The other steps following it are optional.

6. In the **Position details** step, update the position name and specify a code.

   You will notice that all the data except the code has been copied from the position you're duplicating.
7. Update any other fields as required and click **Continue**.
8. In the **Additional info** step, all the data is copied from the position you're duplicating. Make any required changes and click **Continue**.
9. In the **Legislative info** step, all the data is copied from the position you're duplicating. Make any required changes and click **Submit**.

You will be redirected to the **Positions** search page. The new position that you added by duplicating an existing position will now be displayed in the list of positions on the page. If approvals are enabled, then the new position will only show after all the approvals are completed.

To view the changes made to the duplicate position:

1. On the Home page, go to **My Team > Show More > Workforce Structures > Request a Position Change**.
2. On the **Positions** search page, click the duplicate position you created.
3. In the **Info to include** step of the Request a Position Change process, select all the steps and click **Continue**.
4. Specify the date in the **When and why** step and click **Continue**.
5. Navigate through the remaining steps of the process to see all the changes made for the duplicate position.

Key Points

Here are some key points to note:

- Guided journeys and nudges are available for this guided process.
- You can personalize this Redwood process in Visual Builder Studio.
- If you have personalized any of the existing responsive pages, you need to personalize them again in Redwood.
- The Request a Duplicate Position quick action is available only under **My Team** because it's meant only for managers. It's not available under **My Client Groups** because in Position details for the position, the duplicate action meant for professional users is already available.
- If you want to enable the position budget attributes on this process, you must enable the ORA_PER_POSITION_BUDGETING_ENABLED profile option, and also show these attributes using VB Studio. Set the profile value to **Yes** at the **Site** level.

Can employees view their unpublished document records?

By design, employees can't view their document records before the publish date because the records are dated in future. This is the case even if they are granted the View Unpublished Document Records security privilege.

The privilege only allows a user to view unpublished document records for others.

The behavior is similar to other areas, such as Employment and Salary where a user can't view their future changes. For example, a user can't view their future promotion or future salary change.

Can I hide specific fields in the Summary of Changes section on a Redwood page?

No, you can't. The fields shown in the Summary of Changes section are generated dynamically at display time.

The system compares the current and prior date-effective records and automatically includes any fields where a change in value is detected. Since this list is not static, you can’t manually select or exclude specific fields from being shown.

There’s no option in Business Rules (for Redwood pages) or Transaction Design Studio (for Responsive pages) to hide or show individual fields in the Summary of Changes. This behaviour is the same for both Redwood and Responsive pages.

If there are concerns about displaying certain fields, you can choose to hide the entire Summary of Changes section using Business Rules. For example, for the Redwood View Employment Details page, you can use these two page properties:

- hideSummaryOfEmploymentChanges
- hideSummaryOfSalaryChanges

What's the difference between Promote and Promote and Change Position processes?

Promote and Promote and Change Position are two employment processes with a slightly different flavour.

Process	When to Use
Promote	You want to change only the assignment, salary, and payroll details without changing the position configuration.
Promote and Change Position	You want to change the position configuration, assignment, salary, and payroll details in a single promotion transaction. Position configuration includes position details, customer-defined extensible flexfields, legislative extensible flexfields, evaluation criteria, associated profiles, and costing.

Earlier, line managers had to change the position details using Request a Position Change and wait for the changes to be approved. Line managers had to initiate the promotion after the position is synchronized in the assignment with the changes, update a few attributes (if needed) and change the salary. With the Promote and Change Position flow, they can update position, assignment, and compensation in a single transaction.

Benefits of Promote and Change Position Flow

- Managers aren't forced to make upfront decision on the flow to use - Request a Position Change or Change Assignment.
- Allow managers and HR to make changes to a worker's position, assignment, salary, and payroll, all in a single transaction.
- Eliminate the need for multiple approvals when using multiple flows.
- Currently you have to wait until the position change is approved and only then you can initiate the assignment and compensation change. The new flow does it in a much more intuitive way and saves a lot of time.
- No waiting time for assignment changes to synchronize from position changes.
- Prevent having to update salary, compensation, and payroll, separately after the assignment synchronization.
- Reduce overall business process completion time.

Which additional Redwood employment pages support business rules in 25C?

Defaulting and validation capabilities are supported for these pages and regions:

1. Change Manager

You can now configure defaulting and validation business rules for the Change Manager page. Here are a few examples of business rules you may come across:

- Default the "When" field with the 1st of the current month.
- In the "When and Why" section of Change Manager, default the Effective Start Date to the same date.
- Restrict retroactive changes; When creating a new manager change record, the Effective Start Date must be today or a future date.
- Display an error message if the secondary assignment of the manager is selected.

2. Edit Work Relationship

You can now configure defaulting and validation business rules for the Edit Work Relationship page. Here are a few examples of business rules you may come across:

- If the employee's nationality is Saudi Arabia and their experience is more than 3 years, default the New Hire Status to "Done" and show an error if the user tries to change the value.
- When the employee's last working date is earlier than the probation end date, default the value to "Yes" in the DFF segment created under Work Relationship Attributes. Otherwise, default it to "No".
- For employees from a specific country, if they select "Yes" in the DFF1 flexfield, then DFF 2 and DFF 3 flex fields must be filled in.
- A DFF date must be selected only for employees who are in Pending or Active status.

3. Employment Contracts

You can now configure defaulting and validation business rules for the Employment Contracts page. Here are a few examples of business rules you may come across:

- Based on the value selected in the contracts DFF1 default another DFF2.
- Default contract type as "Unlimited contract".
- Contract end date must be mandatory when entering a fixed term contract type.
- Make contract duration mandatory based on the selected contract type Definite or Freelancer.

4. Contract Section on Employment Pages

You can now use defaulting and validation business rules in the contract section on these pages.

- Add a Contingent Worker
- Add a Nonworker
- Add a Pending Worker
- Add Assignment
- Change Assignment
- Convert Pending Worker
- Create Work Relationship
- Hire an Employee
- Local and Global Transfer including Global Temporary Assignment

5. Individual Compensation Fragment Support in Employment Flows

Here are some newly added Individual Compensation Plan attributes you can now use to set up defaulting and validation business rules.

- Component ID

- Currency Switcher
- Current Allocations
- Display Currency
- Effective End Date
- Effective Start Date
- Excluded Options
- Excluded Plans
- Legal Entity ID
- Plan ID
- Plan, Option and Dates
- Prior Allocations

You can find the individual compensation attributes on these employment pages.

- Change Assignment
- Change Location
- Change Working Hours
- Correct Employment Details
- Edit Pending Worker
- Promote
- Promote And Change Position
- Transfer

6. All employment flows now support defaulting and validating transaction dates based on the payroll period.

What's the impact on other areas when I change the employment start date?

When you change the employment start date, there's an impact on the following areas within HCM:

- Salary – The start date in salary records will be updated to reflect the new start date.
- Compensation – The start date for compensation plans will be adjusted to the new start date.
- Payroll – The payroll relationship start date will be changed to align with the new start date.
- Benefits – The benefit enrolment start date will be updated to the new start date.

What's the impact of canceling a work relationship on other areas?

When a work relationship is canceled, data only from the following areas is deleted and can't be recovered:

- Absences
- Compensation
- Document Records
- Eligible Jobs
- Employment
- Payroll
- Salary
- Seniority Dates

For data in other areas such as Profiles, Goals, Performance Management, and so on. you need to manually delete the appropriate data.

How can I assign journeys for employment events?

You can configure nudges automatically that assigns a journey for specific employment events. You configure nudges for the Human Resources module in the Nudge Configuration work area.

This table lists the employment events for which you can configure nudges.

Reason	Input Parameters	Channel Type	Recipient Type	Alert Details
Employee's anniversary is approaching	Days Before Work Anniversary	Email Touchpoints Card	Line Manager	Code: ORA_NUDGE_PER_EMPLOYEE_WORK_ANNIVERSARY Title: Nudge when an employee's employment anniversary approaches Description: Nudge when an employee's employment anniversary is approaching Note that anniversary date is based on the hire or rehire date of the employee. If the employee
		Journey	Employee	

Reason	Input Parameters	Channel Type	Recipient Type	Alert Details
				has two work relationships, then the nudge will be sent only for the work relationship with the primary assignment.
Employee's birthday is approaching	Days Before Birthday	Email Touchpoints Card	Line Manager	Code: ORA_NUDGE_PER_EMPLOYEE_BIRTHDAY Title: Nudge when an employee's birthday approaches Description: Nudge when an employee's birthday is approaching
Employee's contract period end date is approaching	Days Before Contract Ends	Journey	Employee	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys
Employee's probation period end date is approaching	Days Before Probation Period Ends	Journey	Employee	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys
Employee's retirement date is approaching	Days Before Retirement Date	Journey	Employee	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys

Reason	Input Parameters	Channel Type	Recipient Type	Alert Details
Expiry date of a document record is approaching	Days Before Expiry	Email	Employee Line Manager	Code: ORA_NUDGE_PER_DOR_EXPIRY Title: Nudge when an employee's document record is expiring Description: Nudge when an employee's document record expiry date is approaching
		Journey	Employee	
Expiry date of an I9 document is approaching	Days Before Expiry	Email	Employee Line Manager	Code: ORA_NUDGE_PER_EMPLOYEE_I9_EXPIRY Title: Nudge when an employee's I9 document is expiring Description: Nudge when expiry date of an I9 document is approaching
		Journey	Employee	
Projected assignment end date is approaching	Days Before Assignment End Date	Email	Employee Line Manager	Code: ORA_NUDGE_PER_EMPLOYEE_ASSIGNMENT_END Title: Nudge when an employee's assignment end date is approaching Description: Nudge when an employee's projected assignment end date is approaching
		Journey	Employee	
Projected termination date is approaching	Days Before Termination Date	Email	Employee Line Manager	Code: ORA_NUDGE_PER_EMPLOYEE_TERMINATION Title: Nudge when an employee's termination date is approaching Description: Nudge when an employee's projected termination date is approaching
		Journey	Employee	

Reason	Input Parameters	Channel Type	Recipient Type	Alert Details

Here are some points to note about the Human Resources nudges:

- Nudges for the predefined employment actions are evaluated only for the primary assignment of a worker.
- When a nudge is processed, the effective date in the application is considered and not the scheduled job run date. The following dates are considered for the events:
  - Contract end date
  - Probation end date
  - Retirement date
  - Document Record expiry date
  - I9 document expiry date
  - Projected termination date
  - Projected assignment end date
- After a journey is assigned for an event and there's a change in the contract, probation, or retirement date, the journey assignment is reevaluated and reassigned. The already assigned journey isn't automatically removed.
- For Human Resource nudges, you can send reminders using the Reminders section and specify the number of reminders to be sent. Reminders can be sent based on:
  - Before and after action date (Days from Reminder Action)
  - From first nudge date (Days from Nudge Date)
  - After action date (Days from Reminder Action)
  - Before action date (Days from Reminder Action)

What are the runtime parameters in notes for employment processes?

The runtime parameters in notes for employment processes are as follows:

Process Name	Runtime Parameters
Add Assignment	Name, Action, Action Reason, New Job, New Department, New Position
Add Contingent Worker	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Location, New Position
Add Nonworker	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Location, New Position
Add Pending Worker	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Location, New Position

Process Name	Runtime Parameters
Add Temporary Assignment	Name, Action, Action Reason, New Job, New Department, New Position
Change Assignment	Name, Action, Action Reason, New Job, New Department, New Position
Change Location	Name, Action, Action Reason, New Location
Change Manager	Name, Action, Action Reason
Change Working Hours	Name, Action, Action Reason
Convert Pending Worker	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Position
Correct Employment Details	Name, Action, Action Reason, New Job, New Department, New Location, New Position
Correct Termination	Name, Action, Action Reason
Create Work Relationship	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Location, New Position
Delete Employment Details	Name, Action, Action Reason
Edit Pending Worker	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Position
Employment Start Dates	Name
Global Temporary Assignment	Name, Action, Action Reason, Legal Employer, New Job, New Department, New Position
Global Transfer	Name, Action, Action Reason, Legal Employer, New Job, New Department, New Position
Hire an Employee	Name, Action, Action Reason, Legal Employer, Worker Type, New Job, New Department, New Location, New Position
Promote	Name, Action, Action Reason, New Job, New Department, New Position
Promote and Change Position	Name, Action, Action Reason, New Job, New Department, New Position
Terminate Employment	Name, Action, Action Reason
Transfer	Name, Action, Action Reason, New Job, New Department, New Location, New Position

In addition to the above parameters, the application also considers any user input provided in the Notes field before you click the **Generate** button.

- When you enter some text in the Notes field and click **Generate**, the application combines the structured runtime parameters and the free-text notes to generate the output.
- If the user clicks **Generate again**, the system doesn't reuse the original Notes input from the first attempt. Instead, it re-evaluates only the current content of the Notes field along with the runtime parameters.
- Missing inputs handling: If any runtime parameter or Notes field input is missing, the application will still generate the output using whatever values are available.

How are contract numbers generated?

Contract numbers are automatically generated by prefixing the person number with 'CONT'. For example, if the person number is 17040, the contract number would be CONT17040. Subsequent contracts of the assignment would have suffix numbers, for example, CONT17040-2, CONT17040-3.

A point to note is that in the Redwood add person flows (Hire an Employee, Add a Contingent Worker, Add a Pending Worker, Add a Nonworker) and Local and Global Transfer processes, the contract number is blank initially, but will be automatically generated once the transaction is submitted.

You can override these generated numbers and assign contract numbers manually.

> **Note:** If you don't enter the contract number manually in add person flows (Hire an Employee, Add a Contingent Worker, Add a Pending Worker, Add a Nonworker, or Local and Global Transfer), then the contract number is generated at the time of submit. Therefore, you can't view the auto generated contract number while performing the transaction. This behavior occurs irrespective of the person number generation method.

How do I translate attributes on the Redwood Document Types page?

Here's an example of how you can translate attributes of the Passport document type to Korean language.

1. Go to **My Client Groups > Document Types**.
2. Search for the Passport document type.
3. Select the row where the type is Passport and click **Translation Editor**.
4. In the Language column, select **Korean** and click **Edit**.
5. Enter the Korean translations for the attributes and click **Update**.
6. Click **Apply** to save your changes.

How do I translate attributes on the Redwood Extended Lookup Codes page?

Here's an example of how you can translate the Extended Name attribute to Korean language.

1. Go to **My Client Groups > Extended Lookup Codes**.
2. Filter by the **Document Category** lookup type and search for **Termination**.
3. Click the **Translate** action for the row where the extended name is **Termination** and extended code is **EMPMNT_TERMIN**.
4. In the Language column, select **Korean** and click **Edit**.
5. Enter the Korean translation for the Extended Name attribute and click **Update**.

6. Click **Apply** to save your changes.

How do I override the existing configuration on Redwood Document Records pages using business rules?

Here's an example of how you can override the display of the From Date and To Date fields for the Employment Agreement document type on the Redwood Document Types page.

1. Go to **My Client Groups > Document Types**.
2. Click **Add**.
3. Click **Edit Page in Visual Builder Studio** from the Settings and Actions menu.
4. Select an existing project or create a new one.
5. Ensure you're in **Express** mode.
6. Click **Configure Fields and Regions**.
7. Click the + icon next to the Form Rules area to create a business rule.
8. Enter the business rule details and click **Create**. You can also edit an existing rule, if any.
9. In the Condition section, click **Edit**.
10. Enter this condition by selecting the appropriate values and click **Done**.

```
if User Roles equals "Employee" and
When is the rule applied? equals "Viewing own info" and
Document Type equals "Employment Agreement"
```

11. Select the **Show only fields with overridden properties** check box.
12. In the Regions and Fields section, go to the From Date and To Date fields and set the **Hidden** property to **Hidden**.
13. Preview and publish your changes.

The From Date and To Date fields will be hidden when an employee creates a document record of Employment Agreement document type for themselves, based on the condition.

What happens if I make the Attachments region read-only on Redwood Document Records page?

Here's what happens:

- When a user adds a document record, the Attachments region won't be displayed, if the Attachments property is read-only.
- When a user edits a document record that has no attachments, the Attachments region won't be displayed.
- When a user edits a document record that has attachments, they will be displayed in read-only mode.
- The Preview option for attachments isn't available. In this case, attachments can only be downloaded.
- When Minimum Attachments is set to a value greater than 0, an error occurs when you add or edit a document record.

Why don't I see my custom document record labels in the notifications?

Here's why:

- If you have customized the notifications, the label changes won't be available by default.
- If you have changed the labels using Page Composer, the label changes won't be available in the notifications.
- Label changes won't be reflected by default in custom reports.
- The label changes are reflected in pending transaction notifications when accessed from bell notifications.

How do I use the AI Generate options on Document Records and Document Type pages?

Here's how:

- Artificial Intelligence generated (AI-generated) comments and descriptions are always created in the English language. Additional language support is planned for the future.
- The issuing comments and description that you generate using Generative AI (Gen AI) may contain inaccuracies. You need to review them before saving it.

This table specifies the criteria used to generate issuing comments for a document record:

Criteria	Details
Country	Issuing comments are generated based on Issuing Country. However, if no value is entered for Issuing Country, then the generation is based on Document Type Country. If Issuing Country or Document Type Country isn't available, then the generation is based on Global or All Countries.
Tone	• Engaging • Formal (default)
Summarize	Issuing comments generated are 1250 characters in length. For document records that have renewal and retention sections, issuing comments generated are 400 and 350 characters respectively.
Expand	This is the default setting. Issuing comments generated are 2500 characters. For document records that have renewal and retention sections, issuing comments generated are 800 and 400 characters respectively.

Criteria	Details
Rewrite	When you select this option, the earlier inputs entered in the field aren't considered. Issuing comments generated are 2500 characters in length.

While creating or updating a document type, in the Description field, click **Generate**. Based on the document type, AI generates an appropriate description. To regenerate the description, click **Generate** again. You can use the AI generated description as is, or modify it.

This table specifies the criteria used to generate the description for a document type:

Criteria	Details
Country	Description is generated based on Country. However, if no value is entered for Country, then the description is generated based on Global or All Countries.
Tone	• Engaging • Formal (default)
Summarize	Description generated is 1250 characters in length. For document types that have renewal and retention sections, description generated is 400 and 350 characters respectively.
Expand	This is the default setting. Description generated is 2500 characters. For document types that have renewal and retention sections, description generated is 800 and 400 characters respectively.
Rewrite	When you select this option, the earlier inputs entered in the field aren't considered. Description generated is 2500 characters in length.