Oracle Fusion Cloud Human Resources

How do I export and import benefit plan configurations?

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Get Help

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Chapter 1
Benefits Configuration Exports and Imports

1 Benefits Configuration Exports and Imports

Benefit Plan Export

You can export a program, plan not in program, or eligibility profile from one environment. You can import it into other environments and to the same or different enterprises in the same environment.

Open the Export Plan Configuration task in either the Setup and Maintenance or Plan Configuration work area.

Key aspects of exporting plan configurations are:

- Items included in the export
- Items excluded from the export
- Export and log files

Prerequisites

Before exporting your plan configuration:

- In the relevant programs or plans Search Results section, validate the program or plan not in program that you want to export.
- In the Evaluation and Reporting work area, run the Evaluate Life Event Participation process for a sample participant in the program or plan that you intend to export.

You can compare the results of this validation and evaluation with the results for the same validation and evaluation in the destination environment.

Items Included in the Export

The export process includes the descendant objects associated with the top-level object that you select.

Exported Parent Object	Included Descendant Objects
Program configuration	Associated plan types, plans, options, year periods, legal entities, reporting groups, organizations, eligibility profiles, life events, action items, formulas, rate, coverage, coverage across plan type, enrollment authorization, and dependent and beneficiary designation
Plan not in program configuration	Associated plan types, options, year periods, legal entities, reporting groups, regulations, organizations, eligibility profiles, life events, action items, formulas, rate, coverage, enrollment authorization, and dependent and beneficiary designation
Eligibility profile	Associated derived factors, service areas, and formulas

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Items Excluded from the Export

Exports of standard rates exclude:

- Element input values

- Extra input values

Participant eligibility profile exports exclude the following eligibility criteria.

Eligibility Category	Criteria
Personal	Leave of absence, qualification, and competency
Employment	Performance rating
Other	Health coverage selected and participation in another plan All dependent eligibility profile exports exclude the Other - Covered in Another Plan eligibility criteria.
Related Coverage	All criteria

These eligibility criteria export exclusions apply to all exports, regardless of whether you're exporting a program, plan not in program, or eligibility profile.

Export and Log Files

You monitor the status of the Export Plan Configuration process on the Export Plan Configuration page. After the process finishes, click the corresponding **Download** button to open the File Downloaded dialog box.

In the File Downloaded dialog box, you can:

- Open or save the .zip file that contains the exported plan configuration.

- Open the log file. The log contains details:

  - About which parent or child process exported what plan configuration data, including the number of business object records
  - To help you resolve any errors encountered during the export

CAUTION: Don't edit the export file after you save it locally. The Import Plan Configuration process detects edits to an exported file and immediately ends, without importing the plan configuration in the edited file.

Related Topics
- Benefit Plan Import
- Program and Plan Validation Statuses

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Benefit Plan Import

You can import a program, plan not in program, or eligibility profile exported from one environment into other environments. You can also import them to different enterprises in the same environment.

Use the Import Plan Configuration task in either the Setup and Maintenance or Plan Configuration work area.

During the import, you can:

- Create objects or reuse objects that exist in both the source and destination environments.
- Map third-party objects, such as HR and payroll objects, between environments.

Importing plans from a source environment with a newer application version than that of the destination environment is unsupported.

The basic process for importing plan configurations is:

1. Set up the destination environment.
2. Import the plan configuration using one of these methods:

   - Creating all destination named objects
   - Reusing existing destination named objects

3. Map source and destination HR, payroll, and compensation objects.
4. Review imported plan configuration.
5. Finalize imported plan configuration.
6. Validate imported plan configuration.

Setting up the Destination Environment

Before you import a plan configuration, you must set up:

- All of the relevant HR, payroll, and compensation structures and objects:

  - HR objects include legal employer, locations, jobs, and organizations
  - Payroll objects include payroll definition and payroll elements
  - Compensation objects include salary basis

- Any criteria that you used in the eligibility profiles associated with the import object. You can still import any associated eligibility profiles without criteria set up. But if the underlying criteria for an eligibility profile aren't present in the environment, the eligibility profile doesn't work.

Importing by Creating All Named Destination Objects

You can create, rather than reuse, all named objects when importing a plan configuration.

- Enter a prefix, suffix, or both that the import process adds to the start or end of all source named objects during the import.
- Ensure that the **Reuse existing named objects** check box is clear.

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Importing by Reusing Existing Destination Objects

You can reuse destination named objects that match the source objects that you are importing, as long as the existing destination objects are available as of the import date.

The import process:

- Doesn't reuse existing named destination objects that match the source objects if they are available as of a future date
- Prompts you to enter a prefix or suffix if it finds future-dated destination objects

The following table identifies the existing named objects that the import process always reuses, and the condition for that reuse:

Condition	Reused Objects
When you select **Reuse existing named objects**	Plan, plan type, options, reporting groups, regulations, eligibility profiles, and user-defined life events
Regardless of whether you select **Reuse existing named objects**	Year periods, predefined life events, action items, and formulas

Mapping HR, Payroll, and Compensation Objects

You must map any source workforce structure (HR), payroll, and compensation setup objects that you are importing to corresponding destination objects.

Source objects that you must map include:

- Legal employer, organization, location, department, person type, job, assignment status, grade, position, performance rating, qualification, and competency
- Formulas, payroll definition, and salary basis

To perform mapping during the import process, you must have data access privileges for the destination objects.

Importing Only Rates

If you frequently update just the rates, you can choose to import only those changes. When you import the zip file in the Plan Configuration work area, you need to select **Rates** from the list named **Import Specific Objects** to import only the rate data. This drop-down list is visible only when you import programs and plans.

The import process fails if these dependent objects aren't present in the destination environment:

- Program
- Plan
- Option
- Compensation Level Factor
- User Value
- Formula

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- Flex Shell Plan

- Eligibility Profile

Reviewing Imported Objects

On the Review Imported Plan Configuration page, use the graph to identify visually any discrepancies between the number of source and destination objects. Click the relevant bar to:

- View details about the source and destination objects

- Identify which source objects were imported

Source and destination objects that are covered in this review are: age and service factor, age factor, benefit balances, benefit groups, compensation factor, coverage across plan types, coverage, eligibility profiles, full-time equivalent factor, hours worked factor, length of service factor, life events, options, plan types, plans, regulations, reporting groups, service areas, standard rates, user-defined criteria, and variable rate profiles.

Finalizing Imported Objects

Change the status for the imported program or plan not in program from Pending to Active in preparation for validating it. The import process:

- Always reuses fast formulas if they exist in the destination environment

- Creates fast formulas that don't already exist at the global level, even though the source formula is defined at LDG level

- Creates formulas using the same names as the source formulas, ignoring any entered prefix or suffix

You must validate the logic for the imported and created formulas, and then compile them individually or in bulk. Compile formulas by running the Compile Formula process on the Submit a Process or Report page.

Validating Imported Objects

You can compare the results of the following destination validation and evaluation with the results for those of the source environment.

- On the Import Benefits Plan Configuration page, search for your import request and click the name in the Search Results section. Open the Validate Imported Plan Configuration page to validate the imported program or plan not in program.

- On the Evaluation and Reporting work area, Processes tab, run the Evaluate Life Event Participation process for a sample person.

Related Topics
- Benefit Plan Export
- Formula Compilation Errors
- Program and Plan Validation Statuses
- When do I run the Compile Formula process?

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How You Can Avoid Duplication Issues During Import and Export

You can use the alternative names provided for the set-enabled objects during the import process to prevent duplication issues.

You can use these objects in export and import even if their names are duplicated:

Alternative Names

Object	Alternative Name
Job	Name, JobCode, Set
Location	Name, InternalLocationCode, Set
Position	Name, PositionCode, Business Unit
Job Family	Name, JobFamilyCode
Collective Agreement	Name, IdentificationCode

Export and Import Supporting Benefits Objects Using FSM

Use the Setup and Maintenance work area to import and export the following benefits objects: collapsing rules, default benefits relationships, and rate and coverage user values.

At a high level, you perform the following steps to export and import benefits objects:

1. In the source environment, create a configuration package using an implementation project and include the setup task related to any of the following benefit objects:

    o   Manage Benefit Life Events - for collapsing life events

    o   Configure Default Benefits Relationships - for benefits relationships

    o   Manage Rate and Coverage User Values - for user values related to sale of vacation or sick time

2. Export the configuration package and download the ZIP file.
3. In the destination environment, you can select the configuration package and import the ZIP file.

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Steps to Perform in the Source Environment

Complete these steps:

1. Create an Implementation project in the Setup and Maintenance work area.
2. Add a benefits task, for example, **Manage Benefit Life Events,** to the implementation project.
3. In the Setup and Maintenance work area, use the **Manage Configuration Packages** task to create a configuration package for the implementation project you created.
4. Export the setup data.
5. When the export is complete, download the ZIP file that contains the exported benefits objects.

Steps to Perform in the Destination Environment

Complete these steps:

1. In the destination environment, open the Manage Configuration Packages task in the Setup and Maintenance work area.
2. Search for the configuration package you created in the source environment. You might want to clear the default value that appears in the field that indicates the user who created the package. You do this to retrieve the correct configuration package.
3. Upload the configuration package using the ZIP file you downloaded. The application replaces the existing implementation project with the details in the ZIP file.
4. Import the setup data.
5. When the import is complete, check the configuration page of the benefits object. For example, open the Manage Rate and Coverage User Values page to see if the data appears as expected.

You can update imported **eligibility profiles** in the target environment. If the data is already present in the target environment, then the update will take place if there is any change in non-key attributes. If a key attribute is changed in the source, then a new object will be created in the target environment.

Related Topics
- Key Information About Setup Data Export and Import Processes
- Export Setup Data Using Implementation Project
- Import Setup Data Using Implementation Project

Export and Import Benefits Plan Configuration

You can use the export and import functionality to export programs, plans, and eligibility profiles in XML format from one environment and import it into another environment, such as development, test, or production, as well as into the same environment.

Also, you can migrate updated configurations across environments including date effective updates, error handling, and validations and use the log files to troubleshoot any import issues. You can compare each row from source and target after the import.

Here's an overview of how the export and import process works:

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Source Environment

Destination Environment

Run the export and download the ZIP file

Use the ZIP file to import the configurations
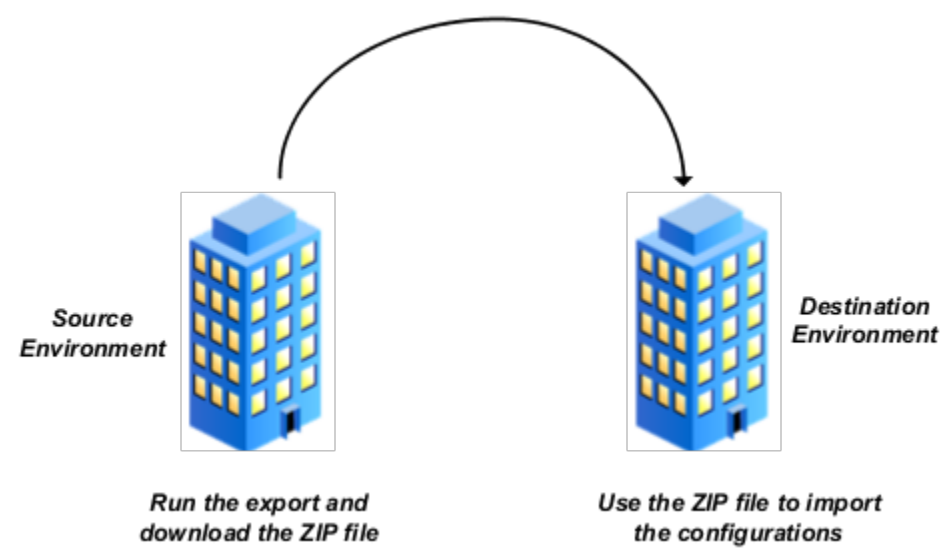
You access these the export and import tasks from both the Plan Configuration work area and the Setup and Maintenance work area.

How You Export Benefits Plan Configuration

Depending on the benefit object that you're exporting, here are the details of each related benefit object that the application includes in the export:

Benefit Object	Related Objects
Program	• Associated plan types • Plans, options • Year periods • Legal entities • Reporting groups • Organizations • Eligibility profiles • Life events • Action items • Formulas • Rate • Coverage • Coverage across plan type • Enrollment authorization • Dependent and beneficiary designation
Plan not in program	• Associated plan types • Options • Year periods

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Benefit Object	Related Objects
	• Legal entities
	• Reporting groups
	• Regulations
	• Organizations
	• Eligibility profiles
	• Life events
	• Action items
	• Formulas
	• Rate
	• Coverage
	• Enrollment authorization
	• Dependent and beneficiary designation
Eligibility Profile	• Associated derived factors
	• Service areas, and formulas

Here are the steps to export and download the plan configuration data as a ZIP file:

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. In the Actions panel, click **Export Benefits Plan Configuration**.
3. Click **Create**.
4. Enter the required fields, and click **Submit**.
5. Back in the Search Results section, wait for the task to complete. Click **Refresh** to see the latest status.
6. When the task is complete, click the **Download** link. You can download a ZIP file and a log file. You need the ZIP file to import the configuration into your destination environment. The log file contains the results of each benefit object that was exported.

How You Import Benefits Plan Configuration

You use the ZIP that you downloaded as part of the export process to import the plan configuration into your destination environment.

Here's a list of eligibility profile criteria that you can't import:

Eligibility Profile Category	Criteria that the Import Doesn't Support
Personal	• Leave of absence
	• Qualification
	• Competency
Employment	• Performance rating info
Other	• Health coverage selected
	• Participation in another plan

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Eligibility Profile Category	Criteria that the Import Doesn't Support
	• Covered in another plan
Related Coverage	• All criteria

When the import creates a new plan or program in the destination environment, they're in the **Pending** status. When the import updates an existing plan, the status is updated on the basis of the export file.

Here's a list of aspects related to how the import works with programs and plans:

Aspect	How the Import Works
User Values and Reporting Groups	The import doesn't add prefixes and suffixes to user values. If the name of the user value is the same in both the export ZIP file and the destination environment, it will be reused in the destination environment. If the user value name is changed at source, and you export the configuration subsequently, the import creates an object in the destination environment. Likewise, if you change the name of a reporting group at source, the import creates a new object in the destination environment.
Standard Rates and Payroll Elements	Proration details aren't included in the import. All payroll elements and input values that are exported from the source should exist in the destination.
Flex Shell Plans	The import doesn't add prefixes and suffixes to the flex shell plan and the plan type associated with it.

Here are the steps to import the plan configuration ZIP file that you exported:

1. In the Plan Configuration work area, click **Import Benefits Plan Configuration**.
2. Click **Create**.
3. In the Import Type list, select the type of benefit object to import.
4. Click **Browse** to locate the ZIP file that you exported.
5. Click **Submit**.
6. In the Task List section, wait for the process to complete. Click **Refresh** to see the latest status.
7. When the process finishes, click the **Go to Task** link in the Import Plan Configuration Data task row. Depending on the benefit object that you're importing, you can see the related mapping section on the Import Benefits Plan Configuration page. Review the mappings and make changes, if any.
8. Click **Submit** when you're done. In the Task List section, wait for the task to complete. You can click **Refresh** to see the latest status.
9. When the task is complete, click Back.
10. In the Search Results section, click the **Download** link for the import that you created to download the log file. The log file contains the results of each benefit object that was imported. See the How You Can Use the Log File to Review Imported Objects section for more information.
11. Check the configuration page of the benefits object. For example, open the Manage Rate and Coverage User Values page to see if the data appears as expected.

How You Can Use the Log File to Review Imported Objects

The import process generates a log file that provides a list of benefit objects that were imported. The log file also tells you any differences between the source and destination objects. For example, if both the source and destination objects have the same configuration, the log file says so.

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If there are source objects missing in the destination, the log file will list those objects in the **Source objects missing in destination** section. This typically happens when you use prefixes and suffixes to distinguish the imported objects. The application creates these objects.

```
----------------------------------------------
Source objects missing in destination
----------------------------------------------
Object          -              key
----------------------------------------------

AgeFactor      -         Age factor 1
AgeFactor      -         Age factor 2
```

If additional objects were found in the destination, but don't exist in the source, the **Additional objects in Destination** section contains a list of such objects. This happens if you made any updates to these objects in the destination after an import, and you subsequently import another file.

```
----------------------------------------------
Additional objects in Destination
----------------------------------------------
Object          -              key
----------------------------------------------

AgeFactor      -         Age factor 3
AgeFactor      -         Age factor 4
```

You can update imported **eligibility profiles** in the target environment. If the data is already present in the target environment, then the update will take place if there is any change in non-key attributes. If a key attribute is changed in the source, then a new object will be created in the target environment.

Related Topics
- List of Key Attributes for the FSM Import

List of Key Attributes for the FSM Import

Here's the list of the key attributes for the criteria for the FSM import.

You can't change the key attribute named Name. You can change the other non-key attributes.

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Eligibility Category	BUSINESS_OBJECT_NAME	DISPLAY_SEQUENCE	ATTRIBUTE_NAME
	Eligibility Profile		Name
PERSONAL	Benefit Eligibility Profile	2	Name
	Benefit Eligibility Gender Criteria	20	Sequence
		40	Gender
	Benefit Eligibility Person Type Criteria	20	Sequence
		40	Person Type
	Benefit Eligibility Disability	20	Sequence
		40	Disability Type
	Benefit Eligibility Tobacco	20	Sequence
		40	Tobacco Use
	Benefit Eligibility Religion	20	Sequence
	Benefit Eligibility Religion	40	Religion
	Benefit Eligibility Geography	20	Sequence
		40	Country
		50	State
		60	City
	Benefit Eligibility Geography No City	20	Sequence
		40	Country
		50	State
		60	City
	Benefit Eligibility Leave Of Absence	20	Sequence
	Benefit Eligibility Leave Of Absence No Reason	20	Sequence
	Benefit Eligibility Leaving Reason	20	Sequence
		40	Leaving Reason
	Benefit Eligibility Competency	20	Sequence
		40	Competency

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Eligibility Category	BUSINESS_OBJECT_NAME	DISPLAY_SEQUENCE	ATTRIBUTE_NAME
	Benefit Eligibility Postal Code	20	Sequence
		40	Postal Range
	Benefit Eligibility Performance Rating	20	Sequence
		40	Template Name
		50	Most Recent
	Benefit Eligibility Qualification	20	Sequence
		40	Qualification Type
		60	Qualification Title
EMPLOYMENT	Benefit Eligibility Assignment Category	20	Sequence
		40	Full Time or Part Time
	Benefit Eligibility Assignment Status	20	Sequence
		30	Assignment Status Code
	Benefit Eligibility Grade	20	Sequence
		40	Grade Name
		50	Grade Code
	Benefit Eligibility Hire Date	20	Sequence
		40	Date Determination Rule
		50	Operator
		60	Criteria 3
	Benefit Eligibility Hourly or Salaried	20	Sequence
		40	Hourly or Salaried Code
	Benefit Eligibility Job Family	20	Sequence
		40	Eligibility Criteria Code
		50	Job Family Name
	Benefit Eligibility Job Function	20	Sequence
		40	Eligibility Criteria Code

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Eligibility Category	BUSINESS_OBJECT_NAME	DISPLAY_SEQUENCE	ATTRIBUTE_NAME
		50	Criteria Character
	Benefit Eligibility Job	20	Sequence
		40	Job Name
		50	Job Code
	Benefit Eligibility Quartile in Grade	20	Sequence
		40	Quartile In Grade Code
	Benefit Eligibility Range Of Scheduled Hours	20	Sequence
		40	Determination Code
		50	Rounding Code
		60	Frequency Code
	Benefit Eligibility Organization/ Department	20	Sequence
		40	Department Name
	Benefit Eligibility Payroll	20	Sequence
		40	Payroll Name
	Benefit Eligibility Pay Basis	20	Sequence
		40	SalaryBasisName
	Benefit Eligibility People Manager	20	Sequence
		40	Criteria Character
	Benefit Eligibility Position	20	Sequence
		40	Position Code
		40	Postal Range
	Benefit Eligibility Probation Period	20	Sequence
		40	Operator
	Benefit Eligibility Work Location	20	Sequence
		40	Location Name
		50	Location Code

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Eligibility Category	BUSINESS_OBJECT_NAME	DISPLAY_SEQUENCE	ATTRIBUTE_NAME
Labor Relations	Benefit Eligibility Labor Union Member	20	Sequence
		40	Labor member
	Benefit Eligibility Bargaining Unit Criteria	20	Sequence
		40	Bargaining Unit Code
	Benefit Eligibility Collective Agreement	20	Sequence
		40	Collective Agreement Name
	Benefit Eligibility Union	20	Sequence
		40	Union Name
Other	Benefit Eligibility Formula	20	Sequence
		40	Formula Name
		50	Legislative Data Group
	Benefit Eligibility Benefit Group	20	Sequence
		40	Benefit Group
	Benefit Eligibility User Defined	20	Sequence
		40	User Defined Criteria

Related Topics
- Export and Import Benefits Plan Configuration

FAQs for Benefits Export and Import

How can I resolve my plan configuration export errors?

If your export plan configuration request has a status of Completed with errors, click the Download button for that request. In the File Download dialog box, click the item that ends in .log to view the log file.

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How can I fix duplicate sequencing errors during an import?

When you import a benefit object, differences in the way you map the source and destination objects during the import might result in errors. You can fix such duplicate sequencing errors.

For example, if you're importing an eligibility profile with the Employee eligibility criteria, you need to map the destination criteria to Employee in the mapping section, and not any other value. This is similar to the error you see when you create two different eligibility criteria with the same sequence number on the Create Eligibility Profile page.

How can I fix absence plan errors during an import?

Before you import a benefit object configuration that contain vacation sale absence plans or sick-time sale plans, you need to make sure that these plans exist in the destination environment. Also, you can't specify prefixes or suffixes to these plans during the import.

How can I fix payroll element errors during an import?

If the benefit object configuration you're importing contains standard rates that link to elements and input values, you need to make sure that these exist in the destination environment.

How can I fix effective date errors during an import?

You need to make sure that the effective dates for the child benefit objects fall within the effective dates of the parent object. This applies to objects in both the source and destination environments.

For example, suppose you import this configuration:

Benefit Object	Effective Start Date	Effective End Date
Program A	January 1, 2020	December 31, 2025
Plan A	January 1, 2020	December 31, 2025
Plan B	January 1, 2020	December 31, 2025

Subsequently, in the source environment, if you change the effective end date of Plan A to April 2026, the import won't succeed because the program in the destination environment ends earlier, on December 31, 2025. To resolve this,

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you need to change the effective date of the plan in the destination environment to the same date as of the source environment.

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