

Oracle Fusion Cloud Project Management

How do I set up roles and responsibilities for Labor Distribution?

24D



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1 How do I set up roles and responsibilities for Labor Distribution?

Setting Up Roles and Responsibilities for Labor Distribution: Overview

This playbook offers conceptual and procedural guidance that enables administrators to set up security for *Labor Distribution*. You can extend these setups depending on how your organization manages labor schedules.

When you set up users and roles for labor distribution, you must first set up the required roles first and related data security. These roles also secure data security on HR objects, which is a relatively unique approach within Projects.

In Labor Distribution, we leverage the HR security model for persons and pay elements. For the Labor Distribution Administrator, for example, we use the Projects framework as well as the Human Capital Management framework, because we're enabling customers to define labor schedules by business unit, and Projects secures the business unit object using the Manage Data Access task.

Therefore, when you set up users and roles for Labor Distribution:

1. You set up the required roles.
2. You assign these roles to users.
3. You then provide a security context for each user, restricting their access to data from specific business units (areas of responsibility).

This playbook offers the following information:

- *Understanding Labor Distribution Roles*: Describes labor distribution related roles and lists out key pages associated with their tasks.
- *Creating Labor Distribution Roles*: Offers guidance on creating custom roles for labor distribution.
- *Preparing Labor Distribution Roles for Use*: Explains how you can provide appropriate data security and functionality access to labor distribution roles.
- *Labor Distribution User Setup*: Provides detailed information on how you can set up users for working with Labor Distribution.

Understanding Labor Distribution Roles

There are three major roles associated with labor distribution. Here's a table that describes these roles and lists out key pages associated with their tasks.

Key Labor Distribution Related Roles

Role	Description	Associated Labor Distribution Pages and Processes
Labor Distribution Administrator	<ul style="list-style-type: none">Manages labor schedules.Reviews and analyzes real-time information on labor schedules using Projects - Labor Schedules Analysis Real Time and labor costs using Projects - Labor Distribution Cost Analysis Real Time in Oracle Transactional Business Intelligence (OTBI).	<p>Associated Pages</p> <ul style="list-style-type: none">Find Assignment or ElementCreate and Maintain Labor Schedules
Labor Distribution Accountant	<ul style="list-style-type: none">Manages imported and distributed costs.Imports payroll costs from payroll systems and distributes these costs based on defined labor schedules.Evaluates and resolves errors in payroll costs distribution.Reviews and analyzes real-time information on labor schedules using Projects - Labor Schedules Analysis Real Time and labor costs using Projects - Labor Distribution Cost Analysis Real Time in Oracle Transactional Business Intelligence (OTBI).	<p>Associated Pages</p> <ul style="list-style-type: none">Manage Labor Costs <p>Associated Processes</p> <ul style="list-style-type: none">Load Interface File for ImportImport Payroll Costs
Labor Distribution Manager	<ul style="list-style-type: none">Manages the pay elements that will be imported from Oracle Fusion Payroll. This is not applicable to third-party payroll costs imported.Manages pay element to expenditure type derivations. These allow assignment based labor schedules to have default expenditure types on the version distribution rules, but different expenditure types for each payroll cost and pay element combination that matches these rules. These are applicable to assignment based labor schedules only. Pay Element based labor schedules use the expenditure type defined on that distribution rule.	<p>Associated Pages</p> <ul style="list-style-type: none">Manage Project Payroll Pay ElementsManage Pay Element Expenditure Type Derivation

Creating Labor Distribution Roles

Both Labor Distribution Administrator and Labor Distribution Accountant roles are seeded and available for use by default, but you may want to create custom roles to control labor data access across your organization.

This is especially useful if your organization is spread across countries, for example, or if you have multiple business units and it's important to manage their payroll details separately.

See the [Creating Custom Roles for Projects](#) topic in the [Securing ERP](#) guide for more information. Also, review the [Overview of Enterprise Structures](#) topic in the [Implementing Global Human Resources](#) guide to learn more about how enterprises can be modeled in Oracle Cloud.

Preparing Labor Distribution Roles for Use

Before you assign labor distribution related roles to users, ensure that you've applied the appropriate data security and functionality access.

These roles leverage payroll data objects that have separate security requirements from the projects data objects.

Preparing labor distribution roles involves the following tasks. Click on each to learn more.

1. [Preparing labor distribution accountant roles](#)
 - a. Granting required data access to labor distribution accountants
 - b. Enabling access to view person names in OTBI
2. [Preparing Labor Distribution Administrator and Labor Distribution Manager roles](#)
 - a. [Granting required data access](#)
 - b. [Setting up the Human Capital Management \(HCM\) security framework to allow for appropriate access to persons and pay elements across an enterprise](#)
 - c. [Removing element-level labor schedule maintenance privilege](#)

Preparing Labor Distribution Accountant Roles

Preparing labor distribution accountant roles involves the following tasks:

1. Granting required data access to labor distribution accountants
2. Enabling access to view person names in OTBI

Granting Required Data Access to Labor Distribution Accountants

To grant required data access to labor distribution accountants:

1. Create labor distribution accountant users and assign them the appropriate (seeded or custom) role.
See [Creating Custom Roles for Projects](#) in the [Securing ERP](#) guide for more information.
2. Use the **Setup and Maintenance > Users and Security > Manage Data Access for Users** page to assign the required data access to labor distribution accountant users, depending on your requirement. See [Assign Data Access to Users](#) in the [Securing ERP](#) guide for more information.

Enabling Access to View Person Names in OTBI

To enable labor distribution accountants to view person names in OTBI, you must assign a Person security profile to their role, enabling them to view details associated with public persons. To do so:

1. Navigate to **Setup and Maintenance**, click the chevron adjacent to **Setup: Project Financial Management**, and select **Workforce Deployment**. In the list of functional areas that appears, click **Users and Security**. In the list of Users and Security tasks, search for and click on the **Assign Security Profiles to Role** task. The Data Roles and Security Profiles page appears.

2. Search for the appropriate labor distribution accountant role and click **Edit**.
3. Click **Next** in the Edit Data Role: Role Details page.
4. In the Edit Data Role: Security Criteria page that appears, select **View All People** in the Public Person > Person Security Profile option to allow users with the role you chose to see person names in OTBI when viewing reports associated with labor costs.
5. Click **Review**, and then click **Submit**. The security profile is now assigned. Click **Done**.

Preparing Labor Distribution Administrator and Labor Distribution Manager Roles

To prepare labor distribution administrator and labor distribution manager roles, you must perform the following tasks:

1. *Grant the required data access* to the user.
2. *Set up the Human Capital Management (HCM) security framework* to allow for appropriate access to persons and pay elements across your enterprise.

Note: While the actual tasks associated with the Labor Distribution Administrator and Labor Distribution Manager roles are different, the methodology of configuring these roles is the same.

Granting Required Data Access to Labor Distribution Administrator or Labor Distribution Manager Users

To grant the required data access to Labor Distribution Administrator or Labor Distribution Manager users:

1. Create the user and assign them the appropriate (seeded or custom) role.
2. Use the **Setup and Maintenance > Users and Security > Manage Data Access for Users** page to assign the required data access to the user. See Assign Data Access to Users in the Securing ERP guide for more information.

Now that you've created the labor distribution administrator or labor distribution manager user, you must assign them appropriate access to persons and pay elements across your enterprise.

Setting Up the HCM Security Framework for Appropriate Access to Persons and Pay Elements Across an Enterprise

This section describes how to set up Labor Distribution Administrator or Labor Distribution Manager roles for use with the Person area of responsibility in HCM.

Note: The (seeded or custom) roles can be assigned any one of the person security profiles available in the **Setup and Maintenance > Assign Security Profiles to Role** task. Based on the profile assigned, other steps may or may not be needed. For example, assigning the **View All People** security profile, which allows any user with this role to see all people in the Find Person page within Labor Distribution, doesn't require additional steps. To learn more, see the Securing HCM guide, specifically the Secure Person Records by Area of Responsibility topic.

Setting up the HCM security framework to allow user access to person and pay element information involves the following tasks:

1. *Create appropriate responsibility types.*
2. *Create the required Person security profile.*

3. *Assign the created Person security profile* to appropriate roles.
4. *Assign the appropriate area of responsibility* to users.

Creating a Responsibility Type

To create a responsibility type:

1. Navigate to **Setup and Maintenance > Manage Assignment Responsibility Lookups**.
2. Select the **PER_RESPONSIBILITY_TYPES** lookup type.
3. Add a new responsibility type lookup code under the PER_RESPONSIBILITY_TYPES lookup type.

For example:

- Lookup Code: LD_ADMIN
- Meaning: Labor Distribution Administrator

4. Click **Save and Close**.

Creating a Person Security Profile

Person security profiles define criteria that identify a set of person records. When the security profile is assigned to a role and the role is provisioned to a user, the user can access person records identified in the security profile.

To create a person security profile:

1. Navigate to **Setup and Maintenance > Manage Person Security Profile**.
2. Click **Create** to add a new person profile; add details as appropriate.

For example, consider the following settings that enable the administrator to use the organization hierarchy of departments to specify the area of responsibility on the user's person record to leverage the hierarchy to define access to people.

- a. Name: Labor Distribution Administration
- b. Status: Enabled
- c. Select **Secure by Area of Responsibility**.
 - i. Responsibility Type: Labor Distribution Administrator
 - ii. Scope of Responsibility: Organization hierarchy for department
 - iii. Employee Type
 - Employee
 - Contingent worker
 - Pending worker
 - Nonworker

3. Click **Save and Close**.

Assigning the Created Person Security Profile to the Labor Distribution Administrator Role

To assign the person security profile that you just created to the seeded or custom labor distribution administrator role:

1. Navigate to **Setup and Maintenance > Assign Security Profiles to Role**.
2. Search for and select the labor distribution administrator role to which you want to assign the security profile
3. Click **Edit**. The Edit Data Role page appears.
4. Click **Next** to navigate to the Security Criteria page.
5. In the Security Criteria page, use the **Person Security Profile** field to select the person security profile you created in the previous step.

6. Click **Next**. From the list of **Public Person Security Profile** options, select a value that secures access to publicly available person data.

Suggested: **View All People**. Enables the labor distribution administrator to see person names when required (for example, in OTBI).

Note: The labor distribution administrator and labor distribution manager roles require access to pay elements from the HCM Payroll area for Person Assignment Element and Element level labor schedules. Use the **View All Legislative Data Groups** option to define the required security profile, unless there are requirements for restricting access.

7. Click **Submit**.

Assigning the Appropriate Area of Responsibility to the Labor Distribution Administrator User

To assign the appropriate area of responsibility to the labor distribution administrator:

1. Navigate to the **Person Management** work area and search for the person to whom you want to assign the responsibility.
2. Click the **Actions** drop-down list and select **Personal and Employment > Areas of Responsibility**.
3. Click the **Create** icon to add a new responsibility to the person.
4. Enter a **Responsibility Name** and select the **Responsibility Type** you created earlier.
5. Use the **Scope of Responsibility** fields to restrict the user's access to data and tasks associated with a specific business unit, legal employer, and so on. For example, you could restrict a person's scope of responsibility to a particular business unit and hierarchy type. The area of responsibility you define and assign to the role defines the scope of that user's responsibilities. You can similarly configure a person's roles with different person security profiles and areas of responsibilities as required.
6. Click **Submit**.

Remove Element Level Labor Distribution Schedule Maintenance Privilege

Creating labor schedules at a business unit level using pay elements requires a specific privilege. The out-of-the-box Labor Distribution Administrator role has this privilege.

Use the following steps to remove this privilege from any custom labor distribution administrator roles you create, so you can control who has the ability to work with pay elements at the business unit level.

1. Create a copy of the Labor Distribution Administrator role.
2. Remove the **Manage Labor Schedules at Element Level** privilege from this new role.
3. Assign a security profile to the new role. See the **Assign Security Profiles to Role** page for more information.
4. Use the *role preparation* steps defined above and user setup steps listed below to further alter this new role if desired.

Setting up Users for Labor Distribution

Setting up users for labor distribution involves two key tasks:

1. User creation

2. Assigning appropriate roles to users

Note: You must perform these tasks only after you've set up the roles as described in the *Preparing Labor Distribution Roles for Use* page.

User Creation

1. Create users as described in the Create Application Users topic in the Securing ERP guide.
2. Assign them the Employee—or similar—abstract role.

Assigning Appropriate Roles to Users

Labor Distribution Accountant

After you've assigned the Labor Distribution Accountant role to a user, navigate to **Setup and Maintenance > Manage Data Access for Users** and assign a security context for the user and role.

For example, you could specify the following:

- Role: Labor Distribution Accountant - Custom
- Security Context: Business Unit
- Security Context Value: Vision City Operations

Labor Distribution Administrator

After you've assigned the Labor Distribution Administrator role to a user, you also need to assign the Projects based security since element-level labor schedules are defined for a business unit. Navigate to **Setup and Maintenance > Manage Data Access for Users** and assign a security context for the user and role.

For example, you could specify the following:

- Role: Labor Distribution Administrator - Custom
- Security Context: Business Unit
- Security Context Value: Vision City Operations

Now that you've specified the data access required for the labor distribution administrator user, you must assign the area of responsibility you created earlier to the person. To do so:

1. Navigate to the **Person Management** work area.
2. Find the person.
3. Open the panel drawer and click **Areas of Responsibility**.
4. Click **Create**.
5. Give the responsibility a **Name**.
6. Choose the **Responsibility Type: Lookup Code** you created earlier.
7. Setup the Scope of Responsibility to secure person access to the appropriate level in the organization.

For example, if this Person has both a business unit and hierarchy type assigned, you can specify multiple areas of responsibility within the same business unit, restricting access to data and tasks by business unit as well as by organization. Thus, the person could have many roles with different person security profiles and areas of responsibility.

