Oracle Talent Management Cloud
Getting Started with Your Talent Implementation
# Data Upload

Uploading Data for Oracle Talent Management Cloud Service: Explained
Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ? to access help in the application. 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. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td><strong>&gt;</strong></td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Oracle Talent Management Cloud Introduction

About This Guide

This document provides a high-level introduction to some best practices for implementations of Oracle Talent Management Cloud Service.

Note: This guide covers the basic requirements needed to create an implementation project. The tasks presented in this document are intended for a quick introduction or pilot implementation. This document does not include all setup and security tasks that are appropriate for a complete implementation.

References to related help accompany each of the steps. The help is available from Oracle Fusion Applications Help or from the Oracle Cloud Documentation Library, unless specified otherwise.
Talent Management Deployment Options: Overview

The following deployment options are offered:

- **Public Cloud** - Services are available to the general public and offered on a subscription basis, with no requirements to buy additional licenses or support. The services are hosted over the Internet by Oracle or Oracle business partners that offer business process outsourcing solutions.

- **Private Cloud** - Application- and technology-managed services that are offered for Oracle software and hardware and are available internally, behind a firewall and are hosted over the Internet by Oracle or Oracle business partners that offer BPO solutions. Oracle provides management, monitoring, patching, security, and upgrade services.
• On Premises - Hardware, software licenses, and support that you buy and host at one or more of your sites. You are responsible for monitoring, security, patching, and upgrades.

• Hybrid - You can choose to maintain your existing legacy applications on premise and buy products that are hosted in private or public cloud, or any combination of these options.

Oracle Talent Management Cloud Service: Overview

Oracle Talent Management Cloud Service delivers a complete Talent Management solution that includes profile management, performance management, goal management, career development, talent review, succession management, recruiting.
and onboarding, and learning. This solution helps drive improved workforce production, development, and retention with integrated enterprise social networking tools, business intelligence, and mobile data access.

Application Page Components and Analytics: Overview

Application pages contain some or all of the following standard sections:

- Navigation tools in the global area at the top of the page
- Content and task panel drawers on the left side of the page that reveal pages with additional tasks and content
- Task and search panel drawers on the right side of the page
- Reports panel drawer on the right side of the page
In addition to embedded analytics, you may have access to dashboards with additional analytics as well as the Reports and Analytics work area where you can access or create additional analyses.

Embedded Analytics

Embedded analytics enable actionable insight by providing access to information or data which will help complete a transaction.

Real-Time Reporting

Real-time reporting accesses relevant reports and analytics for each individual work area. Predefined analyses are available, but you can also create and edit analyses from the Reports panel drawer or the Reports and Analytics work area. Optionally, access the Oracle Business Intelligence (BI) Enterprise Edition through the Reports panel drawer. New objects and changes to existing objects that you make in Oracle BI Enterprise Edition are reflected and available from Oracle HCM Cloud Service.

Interactive Dashboards

Interactive dashboards provide:

- Information summaries that show a view of the big picture as well as prioritization
- Information monitoring that offers quick action and further exploration

The main dashboard within Oracle HCM Cloud Service is My Dashboard, which contains the springboard from which you can open work areas and dashboards. Two other types of dashboards are also available:

- Transaction dashboards which contain content that is core to one or more business processes
- Business intelligence (BI) dashboards which contain content that is complementary to one or more business processes

Working with Your System Integrator: Overview

After you determine the offerings you want to implement, you should implement Oracle Fusion Global Human Resources first to ensure dependencies with other offerings are met.

Your system integrator uses his or her implementation expertise to help you with a smooth transition to the Oracle HCM Cloud Service, and can use Rapid Start procedures to help you achieve a successful implementation in the fastest time possible.

Note: If you plan to continue using an Oracle Applications Unlimited HR application in coexistence with Oracle HCM Cloud Service, you will not follow this order of implementation. Contact your system integrator to determine the order to implement your offerings.
2 Oracle Cloud: Get Started

Purchasing and Activating Oracle Cloud Application Services: Highlights


The whole process involves:

- Requesting and activating trial subscriptions.
- Purchasing and activating your services.
- Verifying that the services are activated, monitoring the services, and performing other administrative tasks.

Purchasing and activating any Oracle Cloud service is described in the Oracle Cloud: Getting Started with Oracle Cloud guide. Many administrative tasks are covered in the Oracle Cloud: Managing and Monitoring Oracle Cloud guide. All of the following references in this section point to one of these guides.

> **Note:** Not everything in these guides is relevant to Oracle Cloud Application Services, for example details about Oracle Java Cloud Service and Oracle Database Cloud Service.

Terminology and User Roles

- Before you proceed, you should understand terms that are used in documentation about Oracle Cloud. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Oracle Cloud Terminology

- You should also be familiar with roles for users of the Oracle Cloud web site or of the actual service. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Oracle Cloud User Roles and Privileges

Requesting and Activating Trial Subscriptions

- Oracle Cloud Application Services are available through free trial subscriptions. After you request trial subscriptions, you activate, monitor, and manage the services for use before purchase. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Overview of Subscribing to an Oracle Cloud Service Trial

Purchasing and Activating Services

- Your buyer or an Oracle sales representative orders a cloud service and specifies information about the account administrator during the ordering process. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

  See: Buy an Oracle Cloud Subscription
• The account administrator receives an e-mail with a link to activate the service. As part of activation, the account administrator provides information about the administrator who performs the functions of both the service administrator and the identity domain administrator. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

See: Activate Your Order from Your Welcome Email

Next Steps
• The administrator who was identified during the activation process:
  ◦ Verifies that the service is activated. Refer to the Oracle Cloud: Getting Started with Oracle Cloud guide.

    See: Verifying That Your Services Are Ready
  ◦ Manages and monitors the service. Refer to the Oracle Cloud: Managing and Monitoring Oracle Cloud guide.

    See: My Account Administration
    See: Performing Service-Specific Tasks
  ◦ Optionally create initial administrator and implementation users before enterprise structures setup.
    • Alternatively, the administrator sets up enterprise structures and then creates service users, including functional implementors.
  ◦ Functional implementors perform configuration and setup steps.
  ◦ Developers can add features to extend the application.

Security in Oracle Talent Management Cloud: Overview

Users of Oracle Human Capital Management Cloud (Oracle HCM Cloud) have roles through which they gain access to functions and data. Security implementation is largely the management of:

• Roles
• Application users
• The provisioning of roles to application users

Application users typically have:

• HCM data roles, which combine a job role, such as Payroll Manager, with the data instances that users who have the job role must access. The data instances are identified in a security profile.
• Abstract roles, such as Employee and Line Manager.

This topic introduces the key security-related tasks that you perform during implementation. For more information about any of these tasks or Oracle HCM Cloud security in general, see the Securing Oracle HCM Cloud guide.
Define Implementation Users

The Oracle HCM Cloud service administrator creates one or more implementation users, who perform the implementation tasks. To create implementation users and the data roles that they need, the service administrator performs these tasks:

- Run Users and Roles Synchronization Process
  This task copies data from the LDAP directory to the Oracle Fusion Applications Security tables, so that existing roles are available for implementation users.
- Create Implementation Users
- Create Data Role for Implementation Users

At least one implementation user must have the IT Security Manager job role or privileges. That implementation user performs security-related implementation tasks.

Define Security Synchronization Processes and Preferences

Many security-related tasks are performed on the Security Console. The tasks in the Define Security Synchronization Processes and Preferences task list initialize the Security Console. This table introduces those tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Application Security Preferences</td>
<td>Opens the Security Console, where you perform setup tasks such as setting the enterprise password policy and defining the default format of user names.</td>
</tr>
<tr>
<td>Import Users and Roles into Application Security</td>
<td>Runs a process that initializes and maintains the Oracle Fusion Applications Security tables.</td>
</tr>
<tr>
<td>Import User Login History</td>
<td>Runs a process that imports the history of user access to Oracle Fusion Applications. This information is required by the Inactive Users Report.</td>
</tr>
</tbody>
</table>

A user with the IT security manager job role or privileges performs these tasks.

Define Security

Oracle HCM Cloud is secure as delivered. To enable application users to access Oracle HCM Cloud functions and data, you perform the tasks in these task lists, as appropriate:

- Define Security for Human Capital Management
- Define Security for Compensation Management
- Define Security for Workforce Development

You can perform most of these tasks both during implementation and later as requirements emerge. The tasks are:

- Revoke Data Role from Implementation Users
Implementation users need unrestricted access to large amounts of data. After implementation, you must remove HCM implementation data roles from implementation users. A user with the IT Security Manager job role or privileges performs this task.

- **Manage Job Roles**
  
  The Oracle HCM Cloud security reference implementation provides many predefined job and abstract roles. You can perform the Manage Job Roles task to:
  
  - Review the role hierarchy of a job or abstract role.
  - Create job and abstract roles.
  - View the roles assigned to a user and identify the users who have a specific role.
  
  Manage Job Roles opens the Security Console. A user with the IT Security Manager job role or privileges performs this task.

- **Manage Duties**
  
  You can perform the Manage Duties task to:
  
  - Review the duties of a job or abstract role.
  - Manage the duties of a job or abstract role that you created.
  - Create duty roles.
  
  Manage Duties opens the Security Console. A user with the IT security manager job role or privileges performs this task.

### Define Data Security

Tasks for the management of HCM data roles and security profiles appear in these task lists:

- Define Data Security for Human Capital Management
- Define Data Security for Compensation Management
- Define Data Security for Workforce Development

To create an HCM data role, use the Assign Security Profiles to Role task. To identify the data instances for an HCM data role, you create HCM security profiles. For example, to identify a set of person records, you use the Manage Person Security Profile task. A user with the IT security manager job role or privileges performs these tasks.

> **Note:** These task lists also include the Manage Data Security Policies task. It appears here primarily to enable the migration of data security policies associated with duty roles that you created. You can ignore this task.

### Manage Role Provisioning Rules

You create role mappings to control the provisioning of all types of roles to application users. For example, you can create a role mapping to provision the Employee abstract role automatically to all employees. A user with the IT Security Manager job role performs this task, which opens the Manage Role Mappings page.
Signing In and Accessing Setup Tasks: Procedure

When your test environment is ready, Oracle sends an email to the person designated as the administrator when you signed up for the service. This email includes the link to your service, a temporary password, and instructions on how to access an offering-specific Welcome Note on My Oracle Support (support.oracle.com). You must read this note and follow the instructions before signing in.

Implementation users perform the key setup tasks to start your implementation. As part of your initial setup, add an implementation user, and give them their login credentials and the url for your Oracle Applications. Before you generate task lists, implementors and application users can access setup tasks by searching for the task in the Setup and Maintenance Overview page. After task lists have been generated, users can access their assigned tasks or the task lists for the offerings included in their project. For example, the Define Common Applications Configuration task list for each offering includes the Define Implementation Users tasks.

The following procedure assumes that the administrator has not yet configured an offering and set up task lists.

1. Access your Oracle Cloud Application Services from the link provided by Oracle.
2. Sign in using the administrator user account and password provided by Oracle based on your activation request. Initial sign-in prompts you to reset your password.
3. Access tasks as follows:
   a. Click the Navigator Setup and Maintenance work area.
   b. In the Setup page, select the offering you want to implement.

For detailed instructions, refer to the topic Managing Setup Using Offering Functional Areas: Procedure.

Related Topics

- Define Implementation Users Tasks: Points to Consider
- Creating Data Roles for Implementation Users: Procedure
- Accessing Tasks to Update Existing Setup Data: Procedure

Generating the Setup Task List for HCM: Procedure

To start an implementation of Oracle HCM Cloud Service, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.
About the HCM Feature Offerings

This figure illustrates the offering in which each HCM feature is located.

<table>
<thead>
<tr>
<th>Workforce Deployment</th>
<th>Workforce Development</th>
<th>Compensation Management</th>
<th>Span Business Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Human Resources</td>
<td>Talent Review</td>
<td>Compensation</td>
<td>Fast Formula</td>
</tr>
<tr>
<td>Global Payroll and Localizations</td>
<td>Performance Management</td>
<td>Incentive Compensation</td>
<td>Profile Management</td>
</tr>
<tr>
<td>Global Payroll Interface</td>
<td>Goal Management</td>
<td>Benefits</td>
<td>Workforce Directory Management</td>
</tr>
<tr>
<td>Workforce Reputation Management</td>
<td>Succession Management</td>
<td>Total Compensation Statement</td>
<td></td>
</tr>
<tr>
<td>Workforce Predictions</td>
<td>Time and Labor</td>
<td>Absence Management</td>
<td></td>
</tr>
<tr>
<td>Workforce Management</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following procedure identifies how to access the setup tasks. The documentation in this list is in the Oracle Applications Cloud Using Functional Setup Manager guide.

1. Sign in to Oracle Cloud Services.
   - Using the Oracle Cloud Services URL, sign in to Oracle Cloud Services as a user with the application implementation consultant role.
     - The Welcome page appears.
2. Go to the Setup and Maintenance work area.
   - Select Setup and Maintenance in the Navigator to go to the Setup and Maintenance work area.
   - See: Overview chapter - Manage Application Implementation: Overview
3. In the Setup page, select the offering you want to implement.
   - You can enable only the functional areas you are implementing now and add more later, if required. The primary functional areas of this offering are:
     - Workforce Deployment
     - Workforce Development
     - Compensation Management
     - Recruiting and Candidate Experience
See: Managing Setup Using Offering Functional Areas: Procedure

For more information, see:

- See: Gathering Your Implementation Requirements chapter
- See: Gathering Your Implementation Requirements chapter - Offerings Explained
- See: Managing an Application Implementation chapter - Implementation Project Task Lists: Explained
- Entering Setup Data Using Assigned Tasks: Procedure

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure
- Configuring Offerings: Procedure
- Entering Setup Data Using Assigned Tasks: Procedure
Implementing Human Resources for Talent Management Cloud: Procedure

The workforce development business process enables organizations to maximize employee value, manage individual and team contributions, and adhere to statutory, union, and organization labor requirements.

The enterprise structures interview process guides you through a series of questions and prompts you for information about how your business is organized. This interview enables you to create the divisions, legal entities, departments, business units
and reference data sets within the scope of your enterprise. The actual organization entities are not created until you load the configuration.

### Setting Up Basic Enterprise Structures with the Enterprise Structures Configurator

The tasks in the following list relate to setup of the basic enterprise structures; these are the structures that need to exist before you can create application users. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can create application users.

For setting up Human Resources, each task is performed by the Application Implementation Consultant, unless specified differently. All documentation references are from the Oracle Talent Management Cloud Implementing Talent Management Base guide unless specified differently.

1. Assign implementation tasks to users.
   - Performer: Application Implementation Manager
On the Manage Implementation Projects page, assign tasks related to the setup of enterprise structures to implementation users who have the Application Implementation Consultant job role.

See Managing an Application Implementation chapter, Oracle Applications Cloud Using Functional Setup Manager guide

2. Sign in as the assigned user and find your assigned tasks.

   - Sign in using the Oracle Fusion Applications URL and the user account and password associated with your implementation user role.
   
   Navigate to the Assigned Implementation Tasks tab to find assigned tasks.

3. Load geographies.

   - Geography information is used in Oracle Fusion Applications for address entry and geography-based business processes, for example, territory management and shipping.
   
   You may have been given a geographies file to load. Alternatively, Vertex files may be available.

   - See Geographies for HCM chapter

4. Manage geographies.

   - Perform the task Manage Geographies to enable the list of values for address fields in user interfaces.

   - See Geographies for HCM chapter

5. Establish enterprise structures.

   - Perform the task Establish Enterprise Structures to determine the high-level structures of the enterprise using an interview style process.

   - See Enterprise Structures: Initial Configuration chapter

6. Establish job and position structures.

   - Perform the task Establish Job and Position Structures to determine an approach for jobs or jobs and positions that match your operational needs for workforce development, management reporting, and approvals.

   - See Enterprise Structures: Initial Configuration chapter

7. Review enterprise configuration.

   - Perform the task Review Enterprise Configuration to review a high-level functional summary, as well as a detailed technical inventory of all objects that will be created. There is an additional option to print a hard copy of the information.

   - See Enterprise Structures: Initial Configuration chapter

8. Load enterprise configuration.

   - Perform the task Load Enterprise Configuration to generate the structures for your enterprise and workforce deployment. This process creates the physical entities you define in the enterprise, and jobs and positions interviews.

   - See Enterprise Structures: Initial Configuration chapter
Implementing Profile Management: Procedure

An additional feature within the Human Resources implementation is Oracle Fusion Profile Management. Profile Management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements.

Setting Up Profile Management

The tasks in the following list relate to the setup of profile management. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use profile management.

For setting up Profile Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Global Human Resources Cloud Implementing Global Human Resources guide, Workforce
Profiles chapter. You can also view the Workforce Profiles chapter in the Oracle Talent Management Cloud Implementing Talent Management Base guide.

1. Manage content subscribers.
   - Perform the task Manage Content Subscribers to review subscriber codes for functional areas that use the content library and the specified content types for each functional area.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together
     - Content Subscribers: Explained

2. Manage profile rating models.
   - Perform the task Manage Profile Rating Models to create and update models for rating the performance, potential, and proficiency level of workers.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together
     - Rating Models: Explained

3. Manage educational establishments.
   - Perform the task Manage Educational Establishments to create and update a list of educational establishments that your workers have attended.
   - See:
     - Oracle Fusion Profile Management Components: How They Work Together

4. Manage profile content types.
   - Perform the task Manage Profile Content Types to create and update the different types of information to track in profiles.
   - See:
     - Content Types: Explained
     - Content Type Properties: Explained
     - Creating Content Types and Content Items: Worked Example

5. Manage profile content items.
   - Perform the task Manage Profile Content Items to create and update items for content types.
   - See:
     - Content Items: Explained
     - Creating Content Types and Content Items: Worked Example

6. Manage instance qualifiers.
   - Perform the task Manage Instance Qualifiers to create and update the qualifiers that identify unique occurrences of the same profile item.
   - See:
     - Instance Qualifier Sets: Explained

7. Manage profile types.
   - Perform the task Manage Profile Types to create and update templates for creating person and job profiles.
Implementing Goal Management: Procedure

In Goal Management, you can transform business objectives into goals across various organization levels, providing a clear line of sight from managers to employees. As a business leader, you can communicate high-level initiatives that managers can translate into goals for their subordinates.
Setting Up Goal Management

The tasks in the following list relate to the setup of goal management. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use goal management.

For setting up Goal Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Goal Management guide.

1. Manage worker goal setting profile option values.
   - Perform the task Manage Worker Goal Setting Profile Option Values to define profile option settings and values to control behavior for goal management.
   - See Profile Options chapter
     - Goal Management Profile Options

2. Manage goal library.
   - Perform the task Manage Goal Library to create and update performance goals in a central library so that they are available for use in goal plans, performance documents, and talent reviews.
   - See Overview and Integrations and Goal Library chapters
     - Goals: How They Work with Profiles
     - Goal Library: Explained

3. Manage review periods.
   - Perform the task Manage Review Periods to create and manage review periods so that you can use them to organize your processes around goal management and performance evaluations into time bound business cycles.
   - See Review Periods chapter
     - Review Periods in Talent Management: Explained

4. Manage goal plans.
   - Perform the task Manage Goal Plans to manage and update goal plans.
   - See Goal Plans chapter
     - Goal Management: Explained
     - Goal Plans: Explained
     - Creating Goal Plans: Points to Consider

5. Manage goal eligibility profiles.
   - Perform the task Manage Eligibility Profiles to restrict goals to individuals.
   - See Eligibility Profiles chapter
     - Using Eligibility Profiles for Performance Goals Assignment: Explained
   - Manage goal management notifications.
     - Perform the task Manage Talent Notifications to enable or disable goal management notifications.
Implementing Career Development: Procedure

Workers and managers can use the Career Development work area to gain a comprehensive view of workers' career information. They can see the workers' career information and the detailed development plans they've established for achieving those targets. Both the worker and manager can view the worker's career preferences and development plan in a single view.

Setting Up Career Development

The tasks in the following list relate to the setup of career development. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use career development.

For setting up Career Development, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Using Career Development guide.

1. Select feature choices
   - Select feature choices for Career Development under the Workforce Development offering to determine the behavior of career development as a product.
   - See Career Development Setup Overview chapter

2. Manage goal library.
   - Perform the task Manage Goal Library to create and update development goals in a central library so that they are available for use in development plans, talent reviews, and talent pools.
   - See Goal Library and Development Goal Integrations chapters
     - Goal Library: Explained
     - Career Development: How It Works with Profiles
Implementing Performance Management: Procedure

In Performance Management, you create performance documents to evaluate workers on their competencies and performance goals.
Setting Up Performance Management

The tasks in the following list relate to the setup of the performance management offering. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can use Performance Management.

For setting up Performance Management, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Performance Management guide.

1. Manage worker performance profile option values.
   - Perform the task Manage Worker Performance Profile Option Values to set profile options for Oracle Fusion Performance Management to define the rating model used in analytics and worker comparisons, the range of years of performance documents to display, and autosave interval.
   - See Profile Options chapter:
     - Oracle Fusion Performance Management Profile Options: Critical Choices
     - What happens when I enter the default rating model profile option?

   - Perform the task Manage Talent Performance Notifications to enable or disable Performance Management notifications.

3. Manage performance roles.
   - Perform the task Manage Performance Roles to define roles to expand the scope of the performance evaluations to include feedback from participants other than the worker and the worker’s manager.
   - See Performance Roles chapter:
     - Participant Feedback: Explained
     - Performance Roles: Explained

4. Manage eligibility profiles.
   - Perform the task Manage Eligibility Profiles to create and update combinations of criteria to determine eligibility for performance documents.
   - See Eligibility Profiles chapter:
     - Using Eligibility Profiles with Performance Documents: Explained
     - Using Eligibility Profiles with Performance Documents: Examples

5. Manage process flow definitions.
   - Perform the task Manage Process Flow Definitions to create process flows for performance evaluations to determine which tasks to include, and the order the tasks are performed.
   - See Performance Process Flows chapter:
     - Performance Process Flow Setup: Points to Consider
     - Performance Process Flows: Examples

6. Manage sections.
   - Perform the task Manage Sections to create the sections to include in the performance document template.
- See Performance Template Sections chapter:
  - Performance Template Section: Critical Choices

   - Perform the task Manage Performance Document Types to create performance document types to differentiate types of performance evaluations, such as annual or project-specific.
   - See Performance Document Types and Overview and Integrations chapters:
     - Performance Document Types: Explained
     - Performance Document Components: How They Work Together

8. Manage questions.
   - Perform the task Manage Questions to create questions and format question types to use in questionnaires.
   - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
     - Questionnaire Question and Response Types: Explained
     - Participant Feedback: Explained
     - Performance Process Flow Setup: Points to Consider

9. Manage questionnaire templates.
   - Perform the task Manage Questionnaire Templates to define questionnaire templates from which to create questionnaires to use to solicit feedback.
   - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
     - Questionnaire Templates: Explained
     - Participant Feedback: Explained
     - Performance Process Flow Setup: Points to Consider

10. Manage questionnaires.
    - Perform the task Manage Questionnaires to define questionnaires to determine the layout, and add questions and sections to use to solicit performance feedback.
    - See Questionnaires, Performance Roles, and Performance Process Flows chapters:
      - Questionnaires: Explained
      - Creating a Questionnaire: Procedure
      - Participant Feedback: Explained
      - Performance Process Flow Setup: Points to Consider

11. Manage performance templates.
    - Perform the task Manage Performance Templates to create templates for performance documents, including the structure, processing rules, content, and periods.
    - See Performance Templates chapter:
      - Setting Up the Performance Template: Critical Choices
      - Defining Processing Roles for Performance Template Sections: Points to Consider
      - Associating Eligibility Profiles with Performance Templates: Points to Consider
      - Creating a Performance Template: Worked Example
12. Manage target ratings distribution.
   - Perform the task Manage Target Ratings Distribution to define the target distribution of performance ratings to compare the desired and actual ratings distributions.
   - See Target Ratings Distribution and Performance and Potential Box Chart Labels chapters
     - Rating Model Distributions: Explained
     - Performance and Potential Box Chart: Explained

13. Manage eligibility batch process.
   - Perform the task Manage Eligibility Batch Process to determine which performance documents a population of workers is eligible to use for their performance evaluation.
   - See Eligibility Batch Process chapter
     - Performance Document Eligibility Batch Process: Explained
Implementing Talent Review: Procedure

Talent Review is centered on one or more talent review meetings intended to evaluate organizational trends, assess strengths, and address areas of risk for an entire organization.

Setting Up Talent Review

The tasks in the following list relate to the setup of the talent review offering. These are the basic steps for setup. Most of these tasks appear in the setup task list that was generated in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can create a talent review.
For setting up Talent Review, each task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Talent Review and Succession Management guide.

1. Manage talent review profile option values.
   - Perform the task Manage Talent Review Profile Option Values to specify the folder to store analyses from which to select the review population for a meeting.
   - See Talent Review Profile Options and Descriptive Flexfields chapter:
     - Oracle Fusion Talent Review Profile Options

2. Manage talent review notifications.
   - Perform the task Manage Talent Review Notifications to enable or disable talent review notifications.

3. Configure talent review dashboard options.
   - Perform the task Configure Talent Review Dashboard Options to configure the options for the talent review meeting component, including the dimensions and visual attributes of the box chart analytic.
   - See Talent Review Templates chapter:
     - Talent Review Template: Explained
     - Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices
     - Talent Review Data Options: Points to Consider

4. Manage talent review note types.
   - Perform the task Manage Talent Review Lookups for HRT_NOTES_TYPE to categorize review notes for future reference.
   - See Talent Review Tasks and Notes chapter:
     - Talent Review Notes: Explained

5. Manage potential assessment.
   - Perform the task Manage Potential Assessment to configure a questionnaire that talent review meeting reviewers can use to rate the potential of workers prior to the meeting.
   - See Potential Assessment chapter

Implementing Succession Management: Procedure

In Succession Management, you create succession plans to determine who will eventually replace personnel currently in key positions, and create talent pools to track and manage employee development.

Setting Up Succession Management

The task in the following list relates to the setup of the succession management offering. This is the basic step for setup. The task appears in the setup task list that was generated in the Setup and Maintenance work area; however, this task does not need to be performed before you can use succession management.
For setting up Succession Management, the task is performed by the Application Implementation Consultant. All documentation references are from the Oracle Talent Management Cloud Implementing Talent Review and Succession Management guide.

1. Manage succession management lookups.
   - Perform the task Manage Succession Management Lookups to review and maintain HRM_READINESS_CATEGORY lookup values that are assigned to succession plan incumbents and succession plan candidates to categorize their readiness to succeed to positions.
   - See:
     - Succession Management: Explained
     - What happens if I remove a readiness category lookup?

Implementing Recruiting and Onboarding: Overview

Using Oracle Taleo Recruiting Cloud Service and Oracle Taleo Onboarding Cloud Service you can find, assess, and hire the best candidates using automated recruiting processes. Sourcing tools allow you to reach hard-to-find talent. Screening, assessment, and innovative quick-filter technologies ensure that you find and select the best talent available, including students, experienced professionals, and hourly workers. Interview, offer management, and onboarding tools complete the process by engaging new employees early and making sure they have everything they need to become productive immediately.

For more information about implementing Oracle Taleo Recruiting Cloud Service and Oracle Taleo Onboarding Cloud Service, see the configuration guides on the Oracle Help Center.

Implementing Learn: Overview

Oracle Taleo Learn Cloud Service allows you to create learning plans to support onboarding, certification requirements, compliance mandates, job-related training, and continued career development. Your subject matter experts can quickly create online learning courses or reuse existing content.

For more information about implementing Oracle Taleo Learn Cloud Service, see the configuration guides on the Oracle Help Center.
4 Application Users

Defining Application Users for Oracle Talent Management Cloud Service: Explained

Application users are the intended users of the Oracle Talent Management Cloud service. They inherit appropriate abstract roles, such as Employee and Line Manager. They also inherit job roles from locally defined data roles. These abstract and job roles enable application users to perform their tasks.

This table identifies the main predefined job roles for major components and options of Oracle Talent Management Cloud.

<table>
<thead>
<tr>
<th>Cloud Service or Option</th>
<th>Predefined Job Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Management</td>
<td>Human Resource Manager, Human Resource Specialist</td>
</tr>
<tr>
<td>Compensation Cloud</td>
<td>Compensation Administrator, Compensation Analyst,</td>
</tr>
<tr>
<td></td>
<td>Compensation Manager, Compensation Specialist</td>
</tr>
</tbody>
</table>

For information about the roles and privileges inherited by each of these roles, see the Oracle Human Capital Management Cloud Security Reference guide.

Preparing for Application Users

Many implementation tasks concern preparing your Oracle Talent Management Cloud service for application users. Decisions made during this phase determine how you manage users by default. You perform these tasks:

- Manage Application Security Preferences
  - Defines the default format of user names for the enterprise
  - Sets the enterprise password policy
  - Manages the notification of user and password events, such as password expiration, to application users.

- Manage Enterprise HCM Information

  Sets these options for the enterprise:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Account Creation</td>
<td>Controls whether user accounts are created automatically when a person</td>
</tr>
<tr>
<td></td>
<td>record is created using the New Person task flows</td>
</tr>
<tr>
<td>User Account Role Provisioning</td>
<td>Controls whether role provisioning and deprovisioning requests are processed</td>
</tr>
<tr>
<td>User Account Maintenance</td>
<td>Controls whether requests to suspend and reactivate user accounts are</td>
</tr>
<tr>
<td></td>
<td>processed by default</td>
</tr>
</tbody>
</table>
Tip: Some enterprises use applications other than Oracle HCM Cloud to manage user and role provisioning. In this case, you set the User and Role Provisioning options to prevent automatic creation and management of user accounts.

Setting Up Default Role Provisioning

Role provisioning rules, also known as role mappings, determine which data and abstract roles users can have and how they acquire them. During implementation, you create role mappings to provision standard roles, such as Employee and Line Manager, automatically to application users. You may also create some HCM data roles and create appropriate role mappings for them. Perform the Manage Role Provisioning Rules task to create role mappings.

Creating Application Users

During implementation, you can create test application users:

- Using the Create User task
- On the Security Console, if you have the IT Security Manager job role or privileges

Once the implementation is complete, application users can be created automatically:

- When a person record is created using a New Person task flow, such as Hire an Employee or Add a Contingent Worker. By default, human resource specialists and line managers can perform the New Person tasks. Whether user accounts are created for new person records is controlled by the User Account Creation enterprise option.
- When person records are loaded in bulk using HCM Data Loader. For these person records, you set the GenerateUserAccount attribute to Y to request a user account.

When user accounts are created, roles are provisioned to them automatically, as specified by current role mappings.

For more information about application users, roles, and role mappings, see the Securing Oracle HCM Cloud guide. For more information about loading person records in bulk using HCM Data Loader, see the Integrating with Oracle HCM Cloud guide.
5 Talent Management Work Areas and User Roles

Talent Management Work Areas: Explained

Talent Management includes the following work areas:

- **Goals**: includes tasks such as managing the goal library and goal plans, assigning goals, and managing your own performance goals and those of your organization and your direct reports.
- **Career Development**: includes tasks to manage worker development goals, establish targets for achieving the goals and career growth, and view comprehensive worker career information.
- **Performance**: includes tasks that facilitate setting up, monitoring, and administering performance documents.
- **Talent Review**: includes access to the Overview pages for talent review meetings, where you can access meetings, prepare review content, and so on.
- **Profiles**: includes tasks for searching model and person profiles, and for managing model profiles.
- **Succession Plans**: includes tasks to create and manage succession plans and talent pools.
- **Learning**: includes tasks to manage your own learning and learning for your team, including publishing or recommending videos, and assembling tutorials.
6 Data Upload

Uploading Data for Oracle Talent Management Cloud
Service: Explained

You can upload business-object data in bulk to Oracle Talent Management Cloud using a variety of tools. This topic introduces the main ways of uploading data. For more information about any of these data-loading tools, see the Integrating with Oracle HCM Cloud guide.

HCM Data Loader

Use HCM Data Loader to load data in bulk from any source to Oracle Talent Management Cloud. HCM Data Loader loads:

- Complex, hierarchical data
- Large volumes of data, such as complete system extracts
- Object history

You can use HCM Data Loader for both data migration and ongoing data maintenance. Major benefits of HCM Data Loader include support for:

- Most HCM business objects
- Incremental or partial data loading
- Four types of keys to identify records uniquely
- Configured descriptive flexfields and extensible flexfields, translation data, tree hierarchies, person images, and document-record attachments

HCM Data Loader provides:

- A comprehensive user interface for initiating data upload, monitoring progress, and reviewing errors
- Support for loading data from delimited data files (.dat files)
- A template file for each supported business-object hierarchy, which you can use as the basis for your own data files
- A user interface for reviewing the structure and attributes of every supported business-object hierarchy
- A web service that you can use to automate data upload

You access HCM Data Loader tasks in the Data Exchange work area. You must have the Human Capital Management Integration Specialist job role or privileges.

HCM Spreadsheet Data Loader

Use HCM Spreadsheet Data Loader to import data to the HCM Data Loader stage tables from spreadsheets. HCM Spreadsheet Data Loader supports most of the business objects that HCM Data Loader supports. Spreadsheets offer many advantages. For example:

- Spreadsheets are easy to use.
- You can create custom spreadsheet templates and generate spreadsheets tailored to your business case. For example, you can omit attributes, change attribute order, change attribute labels, and add help text.
• You can save data periodically from a spreadsheet to the stage tables. Therefore, you can load large volumes of records without being prevented by limits on spreadsheet size.

• Errors are reported in the spreadsheet and you can correct them there.

• You can mix your use of spreadsheets with use of HCM Data Loader .dat files. For example, you can load data from a spreadsheet but maintain it using .dat files.

You can use HCM Spreadsheet Data Loader as described here only if the HCM Data Loader Scope parameter is set to Full. This parameter has been set to Full by default for all new customers since Release 10 and can’t be changed.

All users must set up desktop integration for Microsoft Excel to use any spreadsheet loader, including HCM Spreadsheet Data Loader.

You access HCM Spreadsheet Data Loader tasks in the Data Exchange work area. You must have the Human Capital Management Application Administrator job role or privileges.

Object-Specific Spreadsheet Loaders
Oracle Talent Management Cloud provides many spreadsheet loaders for specific object types. For example:

• On the Manage Jobs page, you can select the Create in Spreadsheet option.

• On the Manage Goal Library page, you can click Upload to generate a spreadsheet to upload goals.

• On the Plans subtab in the Plan Configuration work area, you can click Prepare in Workbook to generate a spreadsheet to upload benefit plans.

Object-specific spreadsheet loaders are available for many global HR, talent, compensation, and benefits objects. In most cases, you:

• Create the spreadsheet on the page where you manage the object.

• Load the objects directly to the application tables.

• Correct any errors in the spreadsheet and load the corrected objects again.

In many cases, you can both create and update the object in a spreadsheet.

Single-object spreadsheets are most useful for users, such as human resource specialists and benefits specialists, who are creating objects of a specific type in bulk. For example, they may be loading such objects from third-party suppliers. You’re less likely to use these types of spreadsheet loaders for ongoing integrations. Users with access to tasks such as Manage Jobs or Manage Goal Library can also load objects from relevant spreadsheets.
Glossary

descriptive flexfield
Expandable fields used for capturing additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

development plan
Plan that contains a worker’s active development goals including goal details such as their due date, completion percentage, and development intent.

extensible flexfield
Expandable fields that you can use to capture multiple sets of information in a context or in multiple contexts. Some extensible flexfields let you group contexts into categories.

job role
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

stage table
An intermediate table to which records are loaded from a spreadsheet or file and where some validation occurs.