

Oracle Fusion Cloud Talent Management

How do I create and manage role guides?



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1 Introduction

About this Playbook

Use this playbook to learn how to create a role guide for a career role and display it in Grow and Opportunity Marketplace. You can also learn how to search for and view role guides.

Role Guides

Role guides enable organizational leaders to clearly define role expectations for a segment of employees and help guide those employees to attain the needed skills.

As organizational leaders, you might want to extend the canonical job requirements defined by the Human Resources department to drive upskilling of strategic resource pools to drive market competitiveness. To address this need, you can now create role guides to define the skills that employees must have in order to meet the requirements for their role. In a role guide, you can also include development resources that will help them attain those skills.

Using role guides, you can drive the development of your employees in specific ways that your business requires, without having to push for job architecture changes or changes to job or position definitions shared by other businesses within your company. For example, for a Software Development Manager career role, you can have these role guides:

- Software Development Manager for Business Analytics: Lists the skill requirements for business model analysis capabilities.
- Software Development Manager for Banking Applications: Lists the skill requirements for building secure applications, financial domain knowledge, and risk management.
- Software Development Manager for Machine Learning Applications: Lists the skill requirements for building large scale models and machine learning tool sets.

The following features are provided by role guides:

- You can create the overall definition of a role guide. This includes its description, visibility (who can see the role guide on the Role Guides listing page), and users who are authorized to collaborate on its creation.
- You can define capability guides within a role guide. A capability guide helps you group related skills and add the development tasks that need to be completed to attain the skills required for the role. Skills are categorized as:
 - Required for Role Readiness – Employees need these to become ready for the role.
 - Required for Mastery – Employees need these to achieve mastery in the role.

You can also add supplemental development resources that could be helpful, but may not necessarily result in skill attainment.

- You can assign the role guide to a target list of workers, based on a predefined filtered list, which enables you to target specific jobs. Based on the worker security privilege of the role guide owner, a scheduled process can be run to assign the role guide to workers who meet the filtered list criteria. This process also reconciles the assignments when workers no longer meet the criteria of the filtered list.

- An assigned role guide will result in displaying a list of outstanding development tasks on an employee's Grow page, in the **Skills and tasks assigned by your leadership** swim lane. Employees can also see the entire role guide on their Know Your Role page on the **Skills Assigned by Your Leadership** tab.
- A role guide can also be associated with either a job or position. When an employee looks at a career role whose associated job or position profile is the same as the job or position the role guide is associated with, they can view this role guide as part of that career role. For example, when they view their career role details in Opportunity Marketplace, they can view the role guide on that page.

2 Before You Start

Prerequisites for Managing Role Guides

To view and manage role guides, a user role needs to have these aggregate privileges:

Action	Privilege Code	Privilege Name	Delivered Role That Has This Privilege
Manage role guides where the user is either the creator or collaborator	ORA_WLF_MANAGE_ROLE_GUIDE	Manage Role Guide	Career Growth Access by Manager Duty Role
Manage all role guides in the enterprise	ORA_WLF_MANAGE_ALL_ROLE_GUIDES	Manage All Role Guides	Career Growth Access by Administrator Duty Role
View those role guides where the user is either the creator or collaborator	ORA_WLF_VIEW_ROLE_GUIDE	View Role Guide	Career Growth Access by Manager Duty Role
View all role guides in the enterprise	ORA_WLF_VIEW_ALL_ROLE_GUIDES	View All Role Guides	Career Growth Access by Administrator Duty Role

If you're creating custom roles, you need to add the above privileges to those roles to view and manage role guides.

Note: Ensure that the scheduled process, **ESS job to create index definition and perform initial ingest to OSCS**, is run with the **fa-hcm-careerrole** parameter.

Workflow to Create a Role Guide

Here's the sequence of steps to create a role guide:

1. *Create and Activate a Role Guide*
2. *Add Capability Guides*
3. *Assign Role Guide to Workers*
4. *Associate a Role Guide to a Job or Position*

3 Create Role Guides

Create and Activate a Role Guide

The first step in creating a role guide is to provide a name and description for the guide, decide who can collaborate on its creation, and who can see it on the Role Guides listing page.

After you create the role guide, you must activate it for it to be published and used by workers. Until you activate it, it'll be in **Draft** status.

A few points about activating a role guide:

- You can activate it only if you add at least one capability guide.
- You can edit an active role guide. However, when you do so, you'll see a Reconcile banner message. Reconcile the guide if you want the changes to be available to employees who've already been assigned this role guide.
- While you can delete a draft version of the role guide, you can't delete an active version. If you don't want the role guide to be used, remove all assigned users and any associated jobs or positions.

1. Go to **My Team > Learning**.
2. Click the **Role Guides** tab.
3. Click **Add**.
4. In the **Basic Info** tab, enter a name and description for the role guide.

You can click **AI Assist** in the Description box to use generative AI to create a description for the role guide. GenAI will create a description based on the role guide name that you provide. Optionally, you can write a few lines of the description to enable GenAI to generate a description that suits your needs. After the text is generated, you can make further edits, as required. You can show or hide the **AI Assist** button using the **Show AI Assist Button** page property in Oracle Visual Builder Studio.

5. Include the names of the collaborators who might want to coauthor the role guide with you.
6. You can choose to make the role guide visible only to collaborators or to everyone on the Role Guides listing page.
 - Collaborators: Anyone with the WLF_MANAGE_ROLE_GUIDES privilege and identified as a collaborator can see this role guide on the role guides listing page.
 - Everyone: This includes collaborators and non collaborators. Anyone with the WLF_MANAGE_ROLE_GUIDES privilege and identified as a collaborator can see this role guide. Non collaborators can only see the listings and see the role guide in read-only mode.

What to do next

Add capability guides to the role guide.

Related Topics

- [How do I control the display of a UI element in Visual Builder Studio?](#)

Add Capability Guides

You can add capability guides to an existing role guide or while creating a new one. To do so, open the role guide from the Role Guides listing page and click the **Capability Guides** tab. You can either create a capability guide from scratch or reuse an existing capability guide.

You can reuse an existing capability guide in one of two ways:

- Reuse it only by reference, which means you can't edit it. Whenever the collaborators or the author of the source capability guide update it, those changes will be reflected in this reused capability guide.
- Make a copy of an existing capability guide and make changes to that copy. However, any changes that the author or collaborators make to the original capability guide won't reflect in your copy.

If you're creating a capability guide from scratch, these are the details you need to provide:

1. Enter a name and description for the capability guide.

You can click **AI Assist** in the Description box to use generative AI to create a description for the capability guide. GenAI will consider the role guide name, its description if available, and the capability guide name and its description if available, and generate a relevant description based on these. After the text is generated, you can make further edits, as required.

2. Specify how others can reuse the guide. You can also choose not to allow reuse.

3. In the **Days to complete tasks** field, enter how many days an employee (who's assigned the role guide) can take to complete the tasks that are listed in the capability guide to attain the skills in that guide.

4. In the **Required skills** section, add the skills that an employee must attain to fulfill the requirements of the capability guide.

Note: If you don't see any skills in this section, check whether you've added Skills Center section to the content section of the Guide Requirements profile type. To check this, go to **My Client Groups > Profiles > Profile Types**.

5. After adding a skill, edit the skill to add or change skill attributes, such as whether the skill is required for achieving readiness, mastery, or both in the role, the level required for readiness and/or mastery, minimum years of experience required in the skill, importance of the skill, and skill type.

Note: You must select a value from the **Required For** list. If it's not selected, employees can't see the skill listed on the **Skills Assigned by Your Leadership** tab on their Know Your Role page in Grow.

6. In the **Task to attain required skills** section, search for and add learning courses that will help the employee attain those skills. When you click inside the search box, you'll see a list of suggested learning items that have outcomes that are the same as one or more of the required skills you added. When the employee completes a learning item, their talent profile is updated with these skill outcomes.

You might also see learning tasks that don't have the same skill outcomes as the ones you added. However, when the role guide is assigned to employees, these tasks won't be assigned to them. The intent of adding these tasks is to allow role guide authors to continue creating the role guide, and later go back to their learning application to add these outcomes to those learning items, or request the learning administrator to add them. In the interim, you'll see a warning that reads **Task doesn't help attain skill**.

7. In the **Resources for required skills** section, search for and add other learning resources that will supplement the learning tasks. The learning items suggested in this search box don't update an employee's talent profile on completion.

What to do next

Assign the role guide to workers.

Related Topics

- [Where can employees see role guides?](#)

Assign Role Guide to Workers

Assign a role guide to workers so that they can view the role guide when they see their career role page in Grow.

The assigned role guide will be visible on the **Skills Assigned by Your Leadership** tab of their career details page on clicking the **Know Your Role** button in Grow. Also, workers can see the tasks they still need to complete on their Grow page, on the **Skills and tasks assigned by your leadership** swim lane.

When a role guide is assigned to a worker, the associated skills are also assigned to the worker, but the learning tasks aren't assigned. The user must self-enroll into them. This is because there are often many different resources that can be used to attain the same skill.

1. Click the **Assign Workers** tab.
2. Use a filtered list to define the target audience for the role guide:
 - Click **Add** to select from existing filtered lists.
 - Click the **Manage Worker Lists** button to create a new filtered list. For role guide assignments, select the Object as **Workers** and Subscriber as **Grow** when creating a filtered list.
3. In the **When to process assignments** section, schedule a process to assign the role guide to workers on a specific date.

If changes are made to the role guide, changes to assigned skills or tasks won't take effect until this process has been run. Therefore, schedule it accordingly. This process will also take care of adding and removing workers when they no longer meet the criteria of the filtered list.

What to do next

Associate the role guide to a job or position.

Associate a Role Guide to a Job or Position

Associate the role guide to a job or position, so it can be accessed through the career role details page in Opportunity Marketplace.

When you view a career role from Opportunity Marketplace, the role guide details appear in the **Role Guide** tab of the career role details page, for the job project or position profile that's associated with the same job or position this role guide is associated with.

To associate the role guide to a job or position:

1. Click the **Associate to Career Role** button.
2. From the **Associate to** field, select **Job** or **Position**.
3. Select the job name or position name to associate the role guide to.

What to do next

Activate the role guide. A few points about activating a role guide:

- You can activate it only if you add at least one capability guide.
- You can make changes to an active role guide. However, when you do so, you'll see a Reconcile banner message. Reconcile the guide if you want the changes to be available to employees who've already been assigned this role guide.
- While you can delete a draft version of the role guide, you can't delete an active version. If you don't want the role guide to be used, remove all assigned users and any associated jobs or positions.

Ensure that you run the scheduled process, **ESS job to create index definition and perform initial ingest to OSCS**, with the Index Name to Reingest parameter as **fa-hcm-careerrole**.

Related Topics

- [Why should I reconcile a role guide?](#)

4 Manage Role Guides

To view, add, edit, or remove role guides, go to **My Team > Learning**, and click the **Role Guides** tab. Here you'll see a list of role guides, depending on their visibility settings and your access privilege.

From this page, you can search for role guides based on their title or description. You can also filter role guides based on the names of capability guides, or the skills and qualifications that are included in the capability guides.

You can also sort the role guides based on their last updated date or role name.

Clicking the role guide name takes you to the role guide details page. Clicking the capability guide number takes you the list of capability guides included in the role guide.

